Universal ContractManager
CONTRACTS AND COMPLIANCE - SIMPLIFIED
Powered by iContracts

UCM Administrator Manual

A Guide to Setting Up and Administering
Universal Contract Manager (UCM)

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iContracts
BETTER CONTRACTING SOLUTIONS

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.

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Introduction to Company Administration

In this manual, we provide instructions for all of the information located in **Company Administration**, with screen images, to explain the functions available and their purpose.

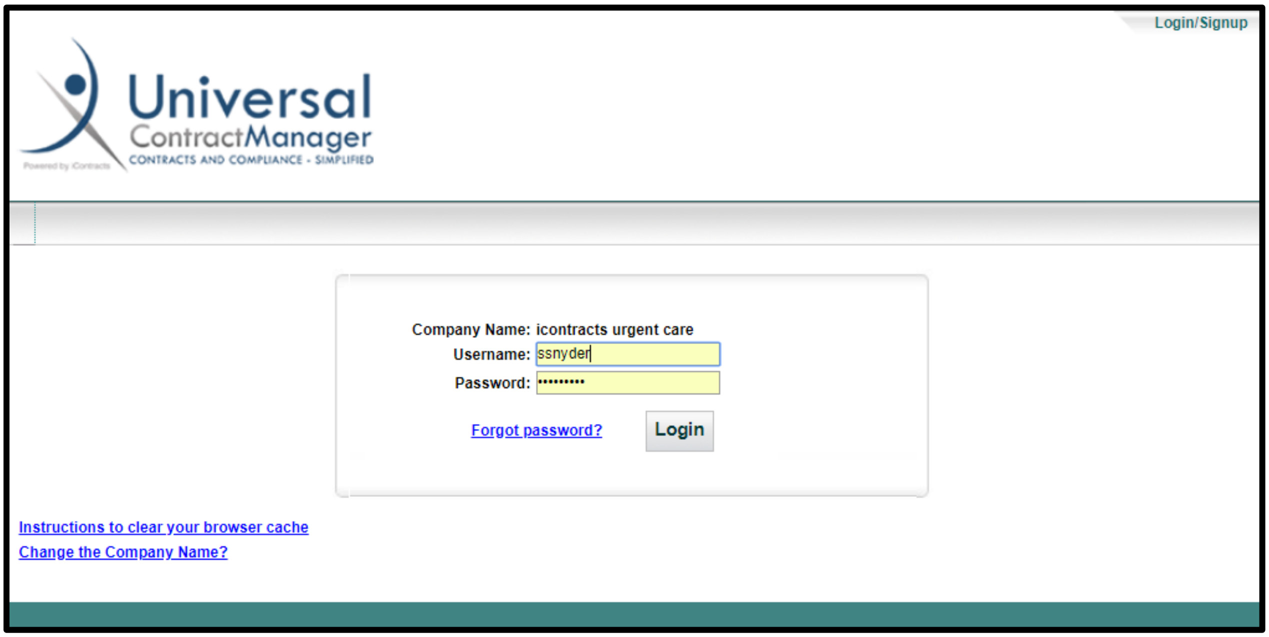
Refer to the ***Full-Access UCM Manual*** for all non-administration functions available to Administrators.

In this chapter, you will receive on overview of iContracts' **Universal Contract Manager** (UCM) interface, including the basic user interface and the Company Administration interface.

Logging into iContracts UCM

Upon setup, your company portal will be assigned, along with your Usernames, which generate emails with links for each active user to create their password. All major web browsers are supported.

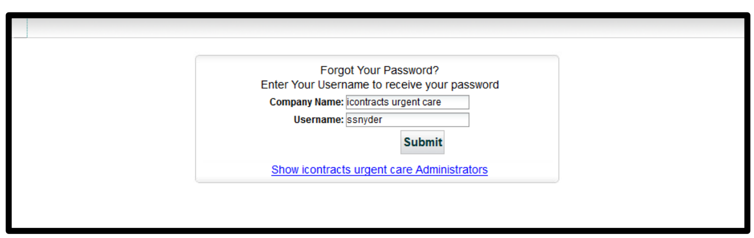
https://ucm.iContracts.com



The system administrator(s) sets up users and then confirmation emails are automatically sent out by UCM to Active Users only. Make sure your users bookmark the **UCM link** in their web browser.

Forgot Password?

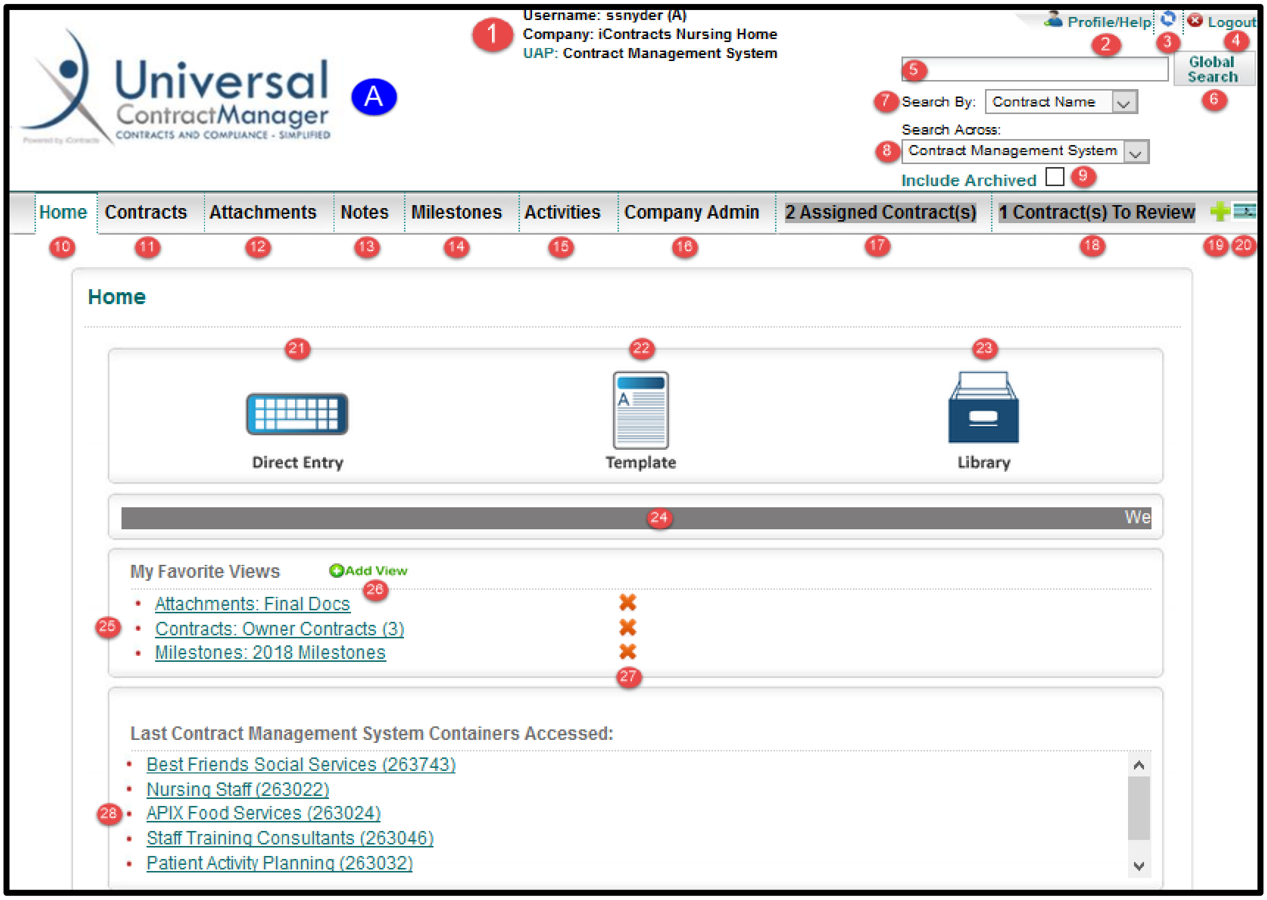
If at any time a user needs help retrieving a forgotten password, they simply click on *Forgot Password?* and follow the prompts. Users need to know their Company Name and Username. The link "*Show [Company] Administrators*" may also provide help for those users (if activated).



When the user clicks **Submit**, this generates an email to the User, which provides a one-time link to reset their password. Clicking on this link directs you to a screen similar to the one seen here, where they can provide a new password. There will be a second text field to confirm their new password. These two passwords must match in order to reset the password.

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

The Enterprise Ribbon: Home Screen Interface



1. Login Information (Username/Co/Object)
2. Profile/Help Link
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
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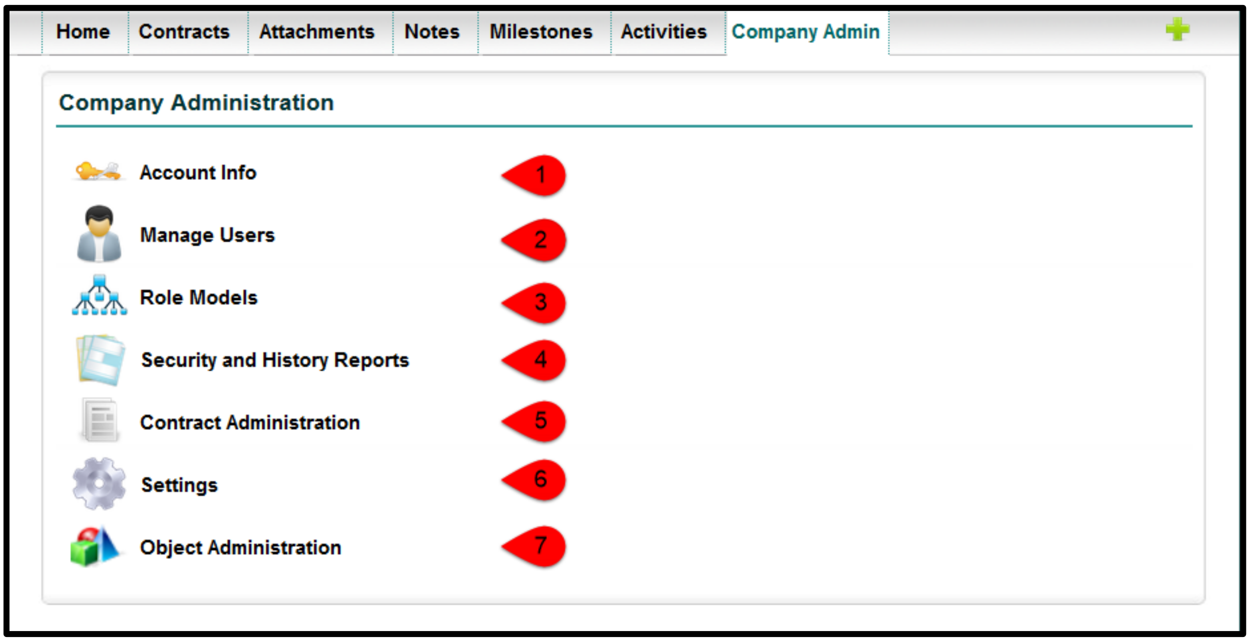
22. Template Button
23. Library Button
24. Announcement Text Bar
25. My Favorite Views area
26. Add View (to Favorites)
27. Delete View (from Favorites)
28. Last Contract Containers Accessed

A. UCM Logo – Can be replaced with your company's logo (submit a Support Ticket)

The Company Administration Interface

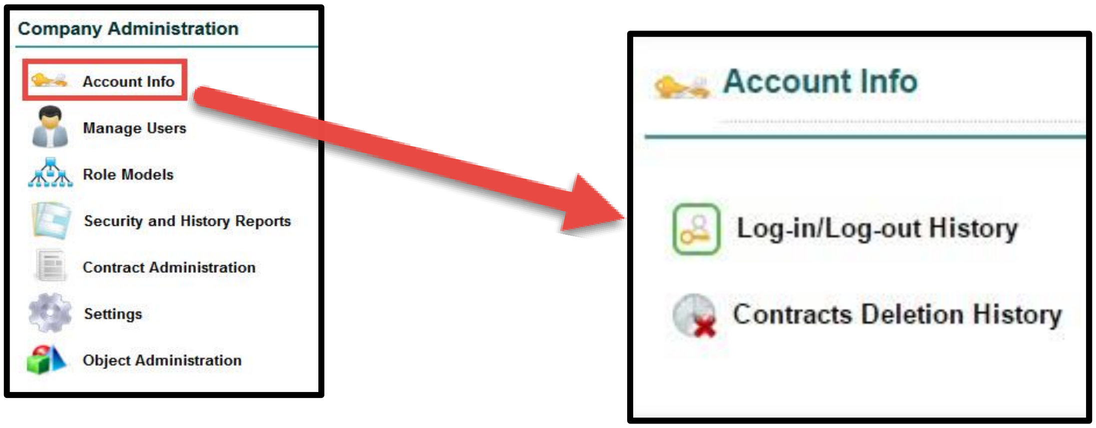
The *Company Admin* section (#16 on previous image) is designed for the **System Administrators** to set up the UCM System for other users and tasks required for their specific companies. Global setups are located here for users, permissions, milestones, security, and fields for tracking purposes, as well as reports to list folder security, or user history, to name just a few of the many tasks available. Knowing how the system is set up and implemented is a great key to success. That is why so much time is spent in this area for implementation and administrator training.

Remember, the *Full-Access User Manual* provides all of the "how-to" information for the daily non-admin functions within UCM.



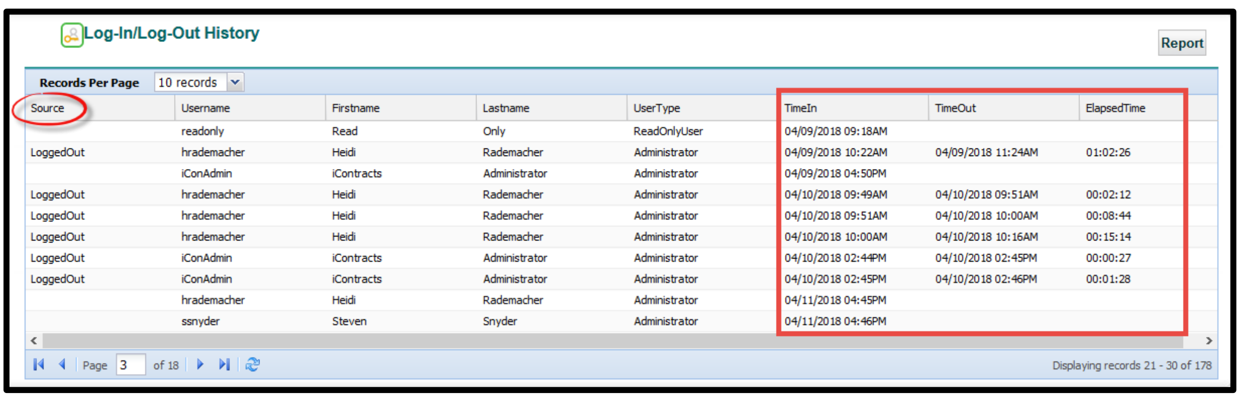
1. **Account Info -** Log-in/Log-out History and Contracts Deletion History.
2. **Manage Users -** User Setup and Permissions (new and current users), Message Users (via email), Copy Permissions, and run the Bulk Load Users application (using a pre-existing CSV file).
3. **Role Models -** Define and Save Permission Settings for Groups of Users (which overrides any individual user permissions).
4. **Security and History Reports –** User Security Settings, Folder Security Settings, Non-Inherited Rights Contract Security Settings, User History, Outstanding Reviewers, and Outstanding Stages.
5. **Contract Administration –** Full Company Setup (Contract Stages, Workflows, Fields, Groups, Types, Documents, Milestones, Templates, Libraries, Folders, Bulk Load download, and other setups, as future enhancements are added).
6. **Settings –** Global Company Options (Emails, Password Rules, Announcement Text, Document Administration, Home Page settings, Document settings, Collaboration, and others, as new features are added).
7. **UAP Administration -** Manage **U**niversal **A**pplication **P**latform Object Setup (Alerts, Date Field Countdown, Email Responses) and Object Mapping *(Additional UAP Objects may need to be purchased separately).*

Account Info



Log-in/Log-out History

This is where the system tracks user log-in and log-out data for the **past 90 days only**. This cannot be changed or deleted; however, users have the ability to change the visibility, width, and order of the columns.



Log-In/Log-Out History

Report

Records Per Page 10 records

Source	Username	Firstname	Lastname	UserType	TimeIn	TimeOut	ElapsedTime
	readonly	Read	Only	ReadOnlyUser	04/09/2018 09:18AM		
LoggedOut	hrademacher	Heidi	Rademacher	Administrator	04/09/2018 10:22AM	04/09/2018 11:24AM	01:02:26
	iConAdmin	iContracts	Administrator	Administrator	04/09/2018 04:50PM		
LoggedOut	hrademacher	Heidi	Rademacher	Administrator	04/10/2018 09:49AM	04/10/2018 09:51AM	00:02:12
LoggedOut	hrademacher	Heidi	Rademacher	Administrator	04/10/2018 09:51AM	04/10/2018 10:00AM	00:08:44
LoggedOut	hrademacher	Heidi	Rademacher	Administrator	04/10/2018 10:00AM	04/10/2018 10:16AM	00:15:14
LoggedOut	iConAdmin	iContracts	Administrator	Administrator	04/10/2018 02:44PM	04/10/2018 02:45PM	00:00:27
LoggedOut	iConAdmin	iContracts	Administrator	Administrator	04/10/2018 02:45PM	04/10/2018 02:46PM	00:01:28
	hrademacher	Heidi	Rademacher	Administrator	04/11/2018 04:45PM		
	ssnyder	Steven	Snyder	Administrator	04/11/2018 04:46PM		

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Displaying records 21 - 30 of 178

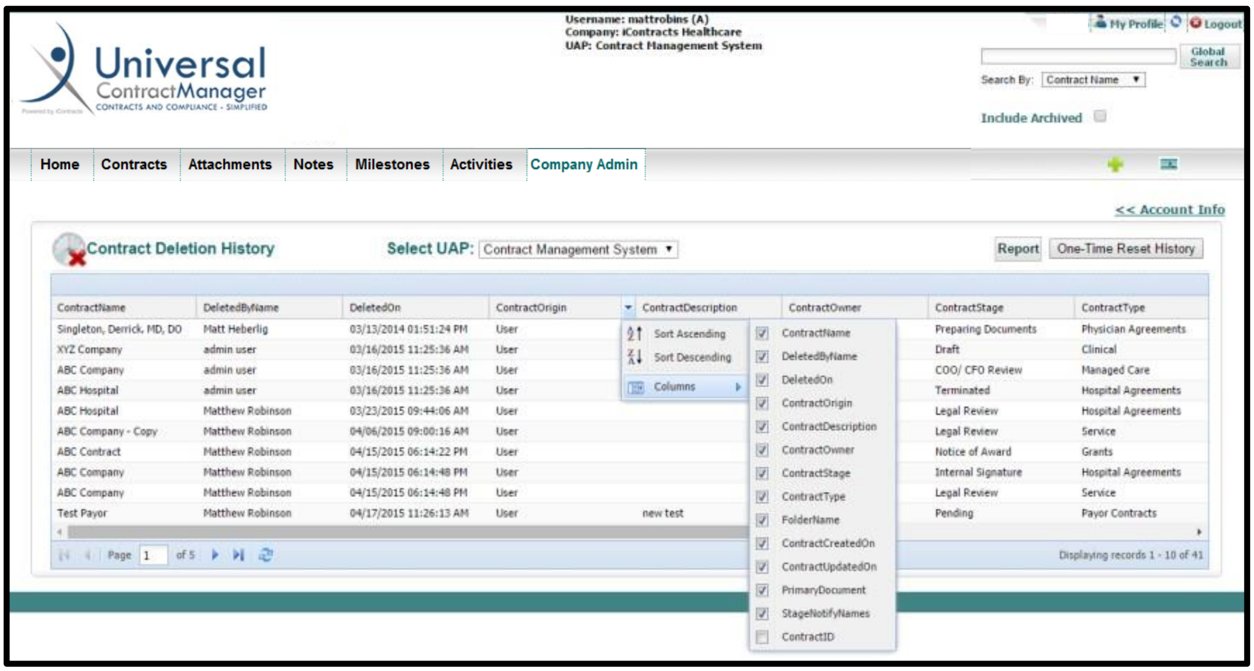
- **Source** shows whether or not the user manually logged out of UCM or forced off UCM by the *Timeout* settings (see "*Company Timeout Administration*" under Settings).

- **Time In/Time Out/Elapsed Time** show timestamps when the user logged in/out and for how long (hours:minutes:seconds). *Notice how blank Time Out fields also have blank Source fields?*

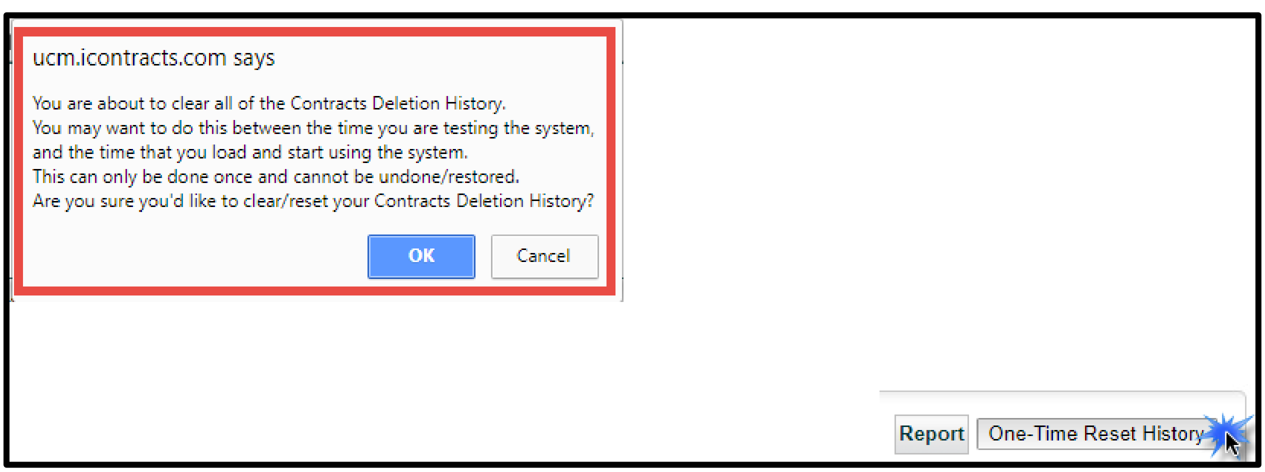
Contracts Deletion History

This is where the system tracks the deletion of any contracts (if any). The date, time, and user that deleted any contracts are displayed in the grid. As with all grids in UCM, users have the ability to change the order and width of the columns.

By scrolling to the right and/or clicking a drop-down arrow on any column, you display available options for column visibility. One example would be what was the Primary Document, the Contract Stage, and Contract Type. For audit purposes, you can run a Report to export this list to Excel (default application).



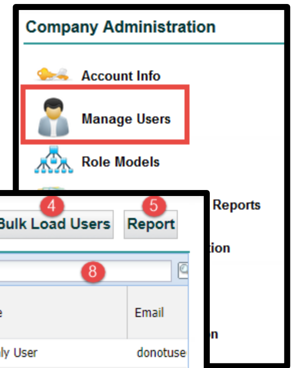
Using the **One-Time Reset History**: As the warning message below illustrates, this removes all deleted contracts from this list. We **do not** recommend any admin using this function without first contacting iContracts Support.

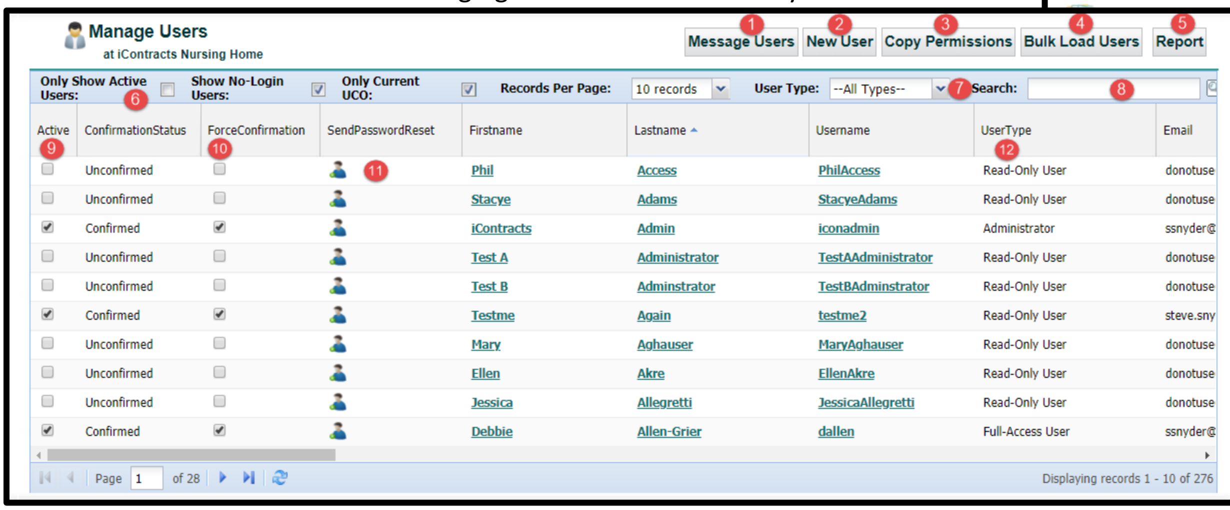


Manage Users

From **Manage Users**, you add and change User Profiles, such as names, email addresses, and types of access. You also give and remove permissions to Folders, Fields, Field Groups, Contract/Template/Library Types, and specific Contracts.

- UCM Administrators accessing this area for the first time should rearrange the grid to see the columns relevant to managing their users within the system.





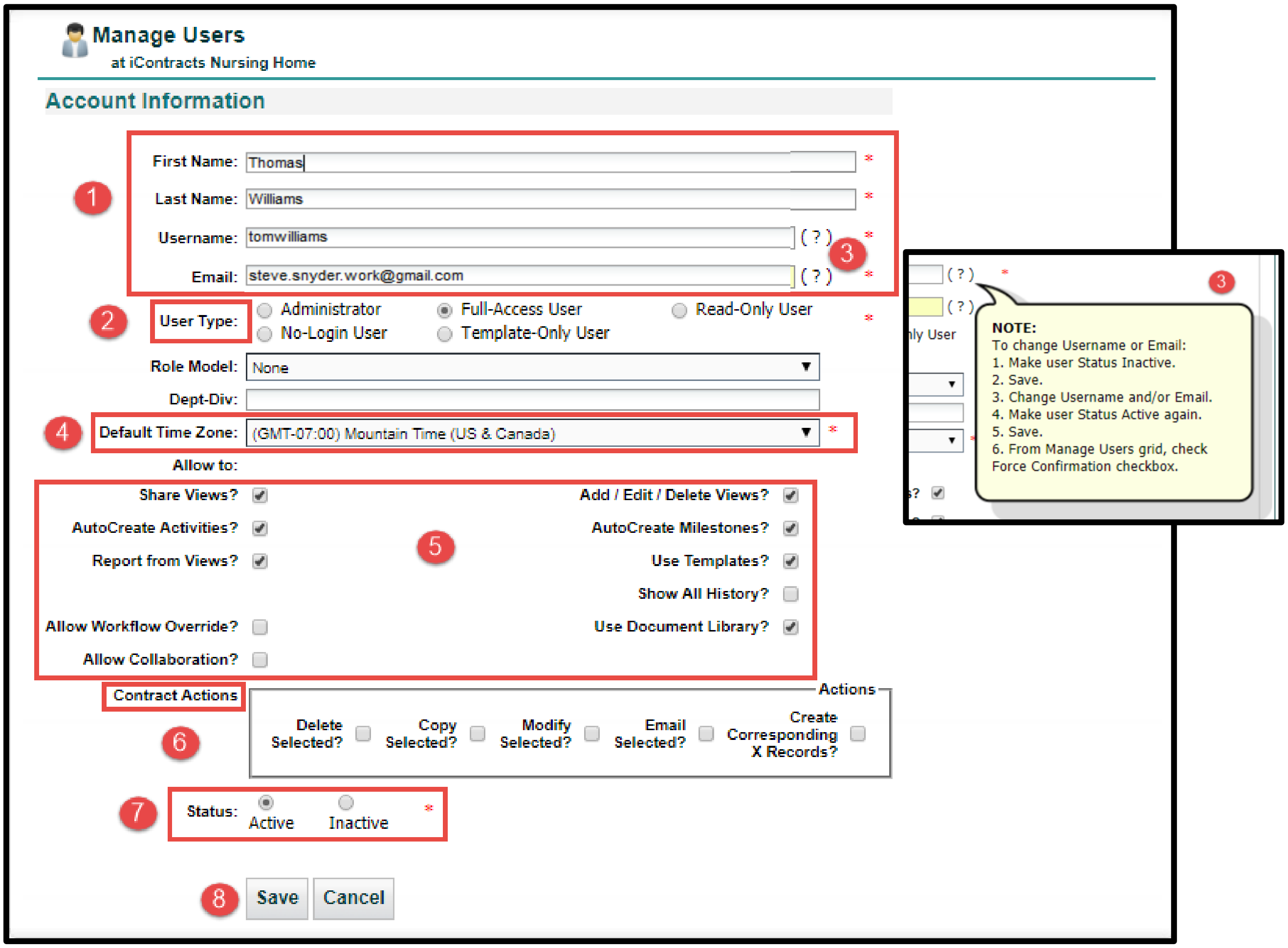
*Tip: Rearrange your grid so **Active** and **Force Confirmation** check boxes are readily available. In addition, column headings for User Type, Names (First, Last and Username), and Send Password Reset are very useful and should be rearranged accordingly. You will also see in the upper-left corner a checkbox for "**Only Show Active Users**".*

Special Functions

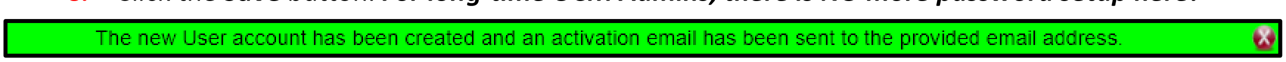
1. **Message Users** – Generate emails to active users for in-house communications unrelated to a Contract Container, Activity, or Milestone. For example, notifying users of UCM Enhancements.
2. **New User** – Setup a new UCM User with name, email address, and permissions. More on this later.
3. **Copy Permissions** – See **Copying Permissions from Another User or Role Model**.
4. **Bulk Load Users** – Import new users in bulk from an Excel CSV file with a very specific spreadsheet layout that can be explained in more detail by contacting Support for the latest worksheet.
5. **Report** – Export grid contents to Excel (as a CSV file) for further analysis.
6. **Only Show Active Users** – Check this box to list only the Active Users (Confirmed and Unconfirmed).
   Show No-Login Users – Check this box to include in the grid any User Type *No-Login*.
   Only Current UCO – Check this box to display just those users with access to this Object.
7. **User Type** – Filter the grid by user type (Admins, Full-Access, Read-Only, etc.).
8. **Search bar** – Quick lookup of users for editing purposes (by name, partial name, or username).
9. **Active/Inactive User** – Admins can make a user active or inactivate (for temporary leave, termination, etc.). This checkbox is also used to reactivate a user who is "locked out" of UCM for trying to log in with the wrong password too many times (currently after 5 attempts).
   - If a user becomes Inactive, views they've created and shared are still available to view and report.
10. **Force Confirmation** – Force user's access to UCM prior to a new user or formerly inactive user verifying their credentials from the email that is sent out to them from within the system.
11. **Send Password Reset** (by email) – A UCM web link is emailed to a user who needs to create or change their password. This is also called the "**Blue Man**".
12. **User Type** – Displays the user type assigned to the user.

Setting up a New User

Click on the New User button to add a New User to the System. All items with * are mandatory.



1. Fill out the **User Information**: First Name, Last Name, Username, and Email.
2. Select the **User Type**: Administrator, Full-Access, Read-Only, No-Login, or Template-Only.
3. Click on the **(?) icon** anytime to show these instructions for changing/updating a user email address and/or a username. *This isn't required, it's just a help screen that pops up when editing users – the only two edits that require these special instructions.*
4. Select the user's **Default Time Zone** (from a drop-down list).
5. Select the basic **Allow to: User Permissions**. *Tip: We typically leave these boxes checked and they will vary, based on the User Type selected in step 2. You can uncheck a box if necessary.*
6. **Contract Actions** (optional): Delete Contract(s), Copy Contract(s), Modify Contract(s), Email Contract(s), Create Corresponding X Records. *These actions are usually reserved for Admins but Full-Access Users can also have any of these actions assigned. Not available to Read-Only Users.*
7. Select **Status**: creating a user and making them Active will *automatically generate an Activation Email with a link to allow them to create their own password* to let them log into UCM.
8. Click the **Save** button. ***For long-time UCM Admins, there is NO more password setup here!***



- ***Optional:*** *If a Role Model is already setup, it can be applied to the new user from this area using the Drop-Down list next to "Role Model".*

User Types

Within UCM, there are currently five different types of Users. They are **Administrator**, **Full-Access**, **Read-Only**, **No-Login**, and **Template-Only** Users. Each of these options have different levels of security and system access to different functions.

When a User logs into the system, UCM recognizes the security profile and preferences of that User. They will only see what their Administrators give them access to see and personal settings will be remembered and displayed for them based on those security settings.

Administrators

Administrators are given full access to all areas of UCM. They have visibility to all of the contracts in the system, and all of the data and documents that go along with them. There is no way to remove an Administrator's access to a contract in the system. However, Administrators can define what contracts other Users have access to in the system and can take away any level of their access from the contracts they can see.

Administrators are also responsible for configuring the system and setting up other Users within the system.

Administrators are the contact point for Users of the system, as iContracts utilizes a Train-the-Trainer approach. Administrators also have the ability to log and follow up on a Support Ticket, using the link in their ***My Profile*** section.

Full-Access

Full-Access Users are given Read-Write Access to a specific folder, sub-folder, or contract. They do not have access to the Company Admin Tab, but they can add new contracts to the system and edit data in new or existing contracts. However, Administrators have the ability to restrict any level of access from any Full-Access User.

Read-Only

Read-Only Users have the ability to make and run reports, or Views. As with Full-Access Users, the results of a View respect security through Folder Permissions. They can also look inside the Contract Container at data and documents for the contracts that their Administrators gave them access to see. However, they cannot change data in the system. They also cannot enter new contracts into the system, except by way of a Template.

No-Login

No-Login Users will never actually log into the system. These users are setup to ONLY receive notifications (emails) from the system about approaching Activities, Milestones, or any other alert (such as a Workflow Stage was changed) that generates an email. They cannot login to see the contract. However, they could always request a copy from another User on the system, who could email a contract using the Email or Collaboration tabs within a Contract Container. For example, some companies have setup their Executives as a No-Login User. Anyone setup as this user type can be "upgraded" to another user type in the future, depending on your number of User Licenses, or whether a No-Login user would ever need to access or edit a Contract Container (such as a CFO or Legal Counsel).

Template-Only

Template-Only Users are true Contract Requestors. These users, upon login, will not have the ability to see any area of the system beyond the Templates. These users have access only to fill those Templates that their Administrators give them access to use, but they have the additional capability of attaching up to ten additional documents to their request.

Setting Up User Permissions

Allow User to:

Share Views

Gives the User the ability to share any Views in which they have created to other users.

AutoCreate Activities

Gives the Users the ability to create Activities when entering a date field into a contract.

Report from Views

Without this option selected, Users are locked out of saving data to an external spreadsheet file in CSV format. The Report button is removed from any grid display.

Allow Notes Edit

Gives the User the ability to update data on the Notes tab.
Read-Only Users only get this option. It is not displayed for other user types.

Allow Workflow Override

Gives the User the ability to update Stages, even if they are not an Assignee.
Read-Only Users do not get this option. The checkbox is hidden for this user type.

Allow Collaboration

If this service was activated for your company, gives the User the ability to access the Collaboration tab and all of the service's functionality.

Add / Edit / Delete Views

Without this option selected, Users will not be capable of using Views, unless one is shared with them.

AutoCreate Milestones

Gives the Users the ability to create Milestones when entering a date field into a contract.

Use Templates

Gives the User the ability to use the Templates.

Show All History

Gives the User the ability to view History from actions of other users.

Use Document Library

Gives the User the ability to use the Library.

Assigning Contract Actions

Delete Selected

Gives the User the ability to Delete a Contract or multiple Contracts at once. This action ***cannot*** be undone and is tracked in the History tab for future audits.

Copy Selected

Gives the User the ability to Copy the data and documents from a contract into a new Contract Container. Only one contract container can be copied at a time.

Modify Selected

Gives the User the ability to change data across multiple contracts, such as a new Owner or Fields.

Email Selected

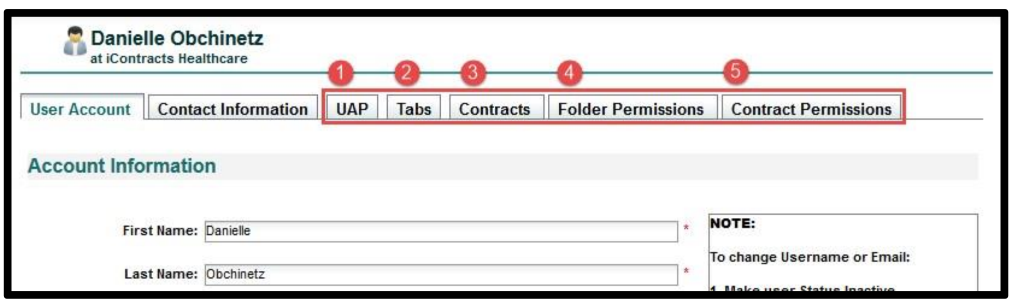
Gives the User the ability to send the same email based on an email field across multiple contracts.

Create Corresponding X Records

Gives the User the ability to add the same Document, Activity, Milestone, or Note to multiple contracts.

User Permissions Tabs

These five tabs control what a User has permission to use and/or see. These tabs appear once a new user is created in the system.

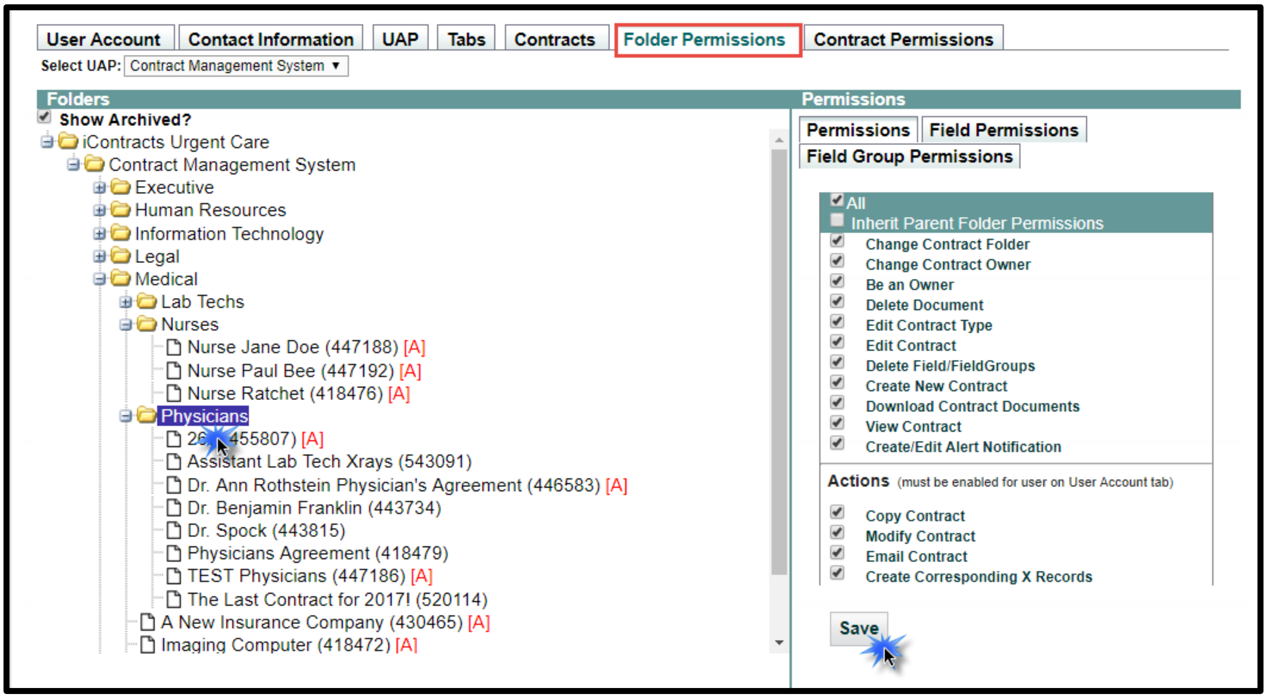


You will need to give each UCM User permission to see the contracts for which they should have access. This can be accomplished by either setting up a *Role Model* to give permissions to groups of Users, or by giving permissions to the User *individually*.

This section will cover the **INDIVIDUAL SETUP** for User Permissions.

1. **UAP** or Universal Application Platform Tab allows Admins to restrict access to different objects (if applicable). You can also define the **Default UAP**, and make the others "*Hidden*" from view.
2. The **Tabs** Tab allows Admins to restrict which tabs a User will be able to see on the Enterprise Ribbon, as well as on the Contract Ribbon.
3. The **Contracts** Tab displays a preview of the Contracts you, as an Administrator, have given this User access to see.
4. **Folder Permissions** Tab is where you will setup the Folders, individual contracts, Field Groups, and Fields that a User can access upon login (the most important step of this process!).
5. **Contract Permissions** Tab allows you to control the permissions a User has within a particular contract, such as the visibility to view an attachment.

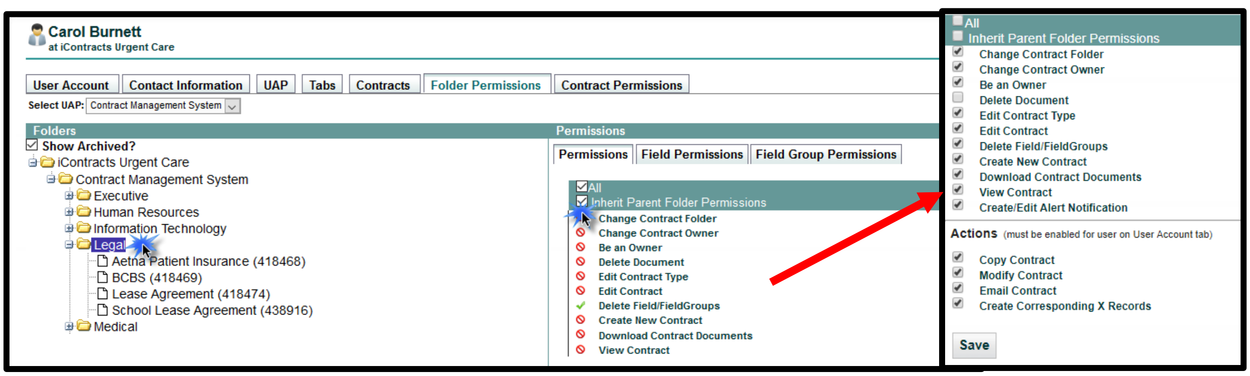
Defining Folder Permissions



The default for all folders when a new User (not applicable for admins) is added to the system is **no permissions** (except "Delete Field/Field Groups"). Most users should have folder access only to those below "Contract Management System".

To Provide/Decline User Access to an entire folder:

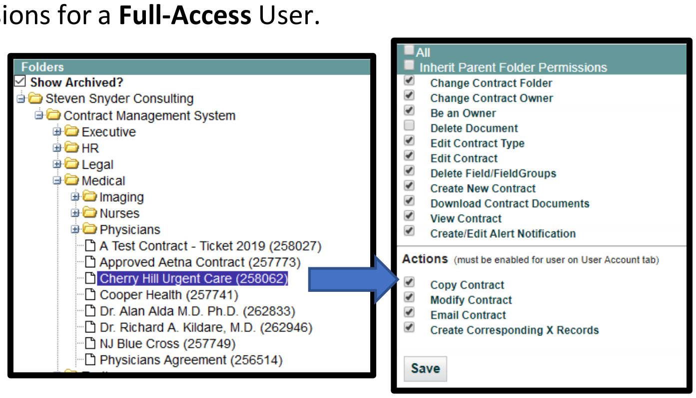
Select the Folder → Uncheck "Inherit Parent Folder Permissions" → Choose Permissions → Save



Different *User Types* will have different options for Folder Permissions. In the example above, the checkboxes correspond to the possible permissions for a **Full-Access** User.

Individual Contract Permissions

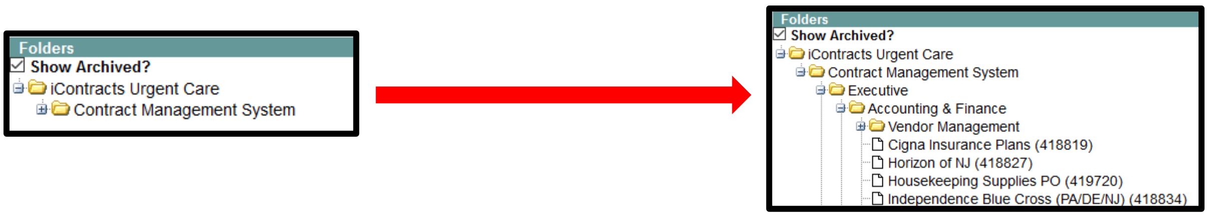
You can provide/decline contract access in the same way as an entire folder. Select the Contract Container, then follow the same steps as a Folder to Save contract permissions which are then different from the parent folder. This gives contracts in a folder unique permission if necessary.



A **Read-Only** User will have far fewer permissions (shown right). They can only Be an Owner of a contract, Download Documents, or View the data within a Contract container. However, with any Full-Access or Read-Only Users, any of their rights can be removed by Administrators.

Navigating the Folders within Folder Permissions

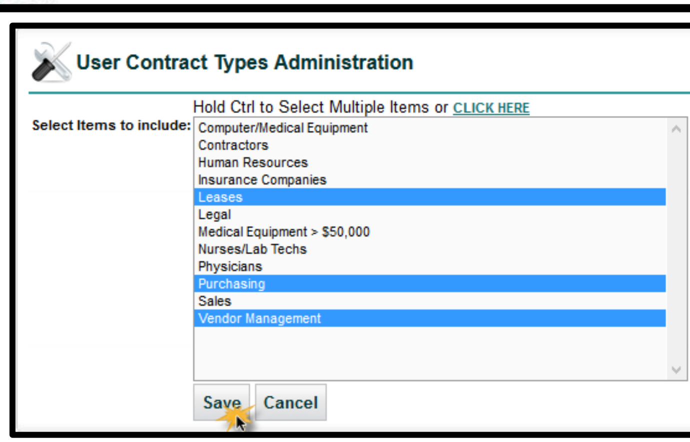
The **Folders** in this area start as completely collapsed. Clicking on the **+** next to the folder icon and name opens and reveals any contracts or sub folders within. The system will remember where you are the next time you access this area and open the same folders you had opened previously.



Contract Types Security

Administrators have the ability to limit visibility in UCM to only specific *Contract Types*. This allows you more flexibility for setting security permissions. For instance, if a User should have access to all Purchasing Agreements in the system, regardless of department or entity, then you could limit them in this area to only that type across All Folders.

Select which Contract Types the user will have permission to use from the list. CTRL + click will allow you to select multiple values; SHIFT + click to choose a range. Also use the CLICK HERE option to use the Item Selector Interface (side-by-side selections).



Template Security

Administrators have the ability to restrict access to *Templates* using the same interface detailed above. Users will only see the Templates they are given access to use when they navigate to Templates on the Home Screen.

Library Item Security

Administrators have the ability to restrict access to the *Library* using the same interface detailed above. Users will only see the Library items they are given access to use when they navigate to Library on the Home Screen.

New Contract Entry: Contract Types Allowed

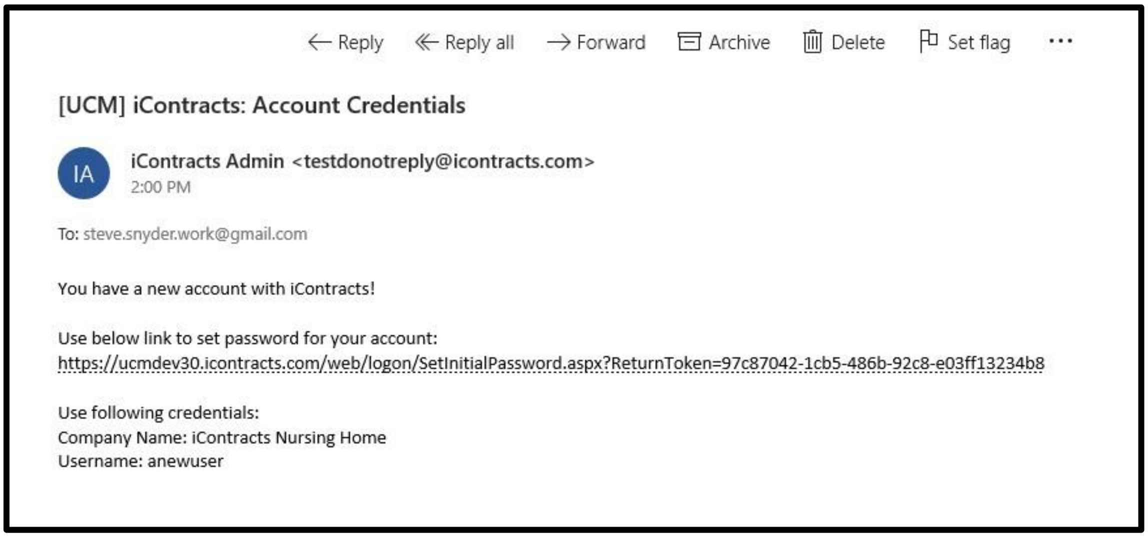
Administrators have the ability to restrict User access to Contract Types for **new** Contracts.

New Contract Entry: Workflows Allowed

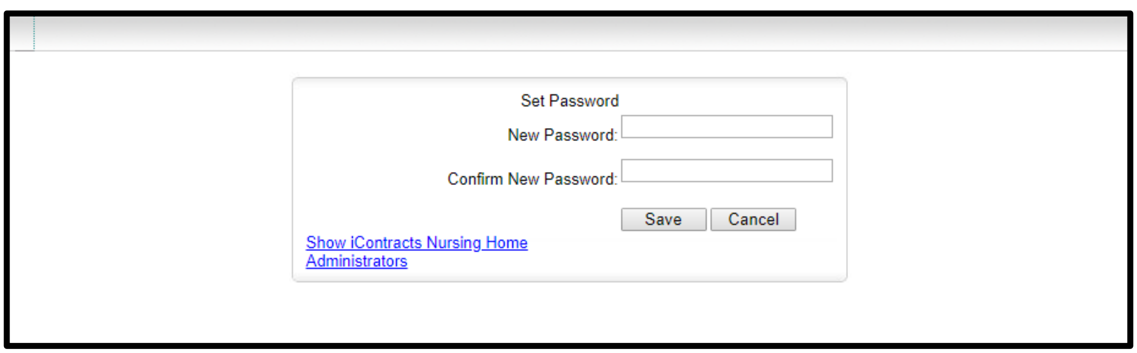
Administrators have the ability to restrict User access to specific Workflows for **new** Contracts.

A New User's "Welcome To iContracts" Email

When Administrators create new *Active* users, the system generates an email which appears similar to what is shown below.



Users click on the "Use below link" to set their password. Passwords are typed twice for confirmation. As with any password setup, both passwords must match exactly.



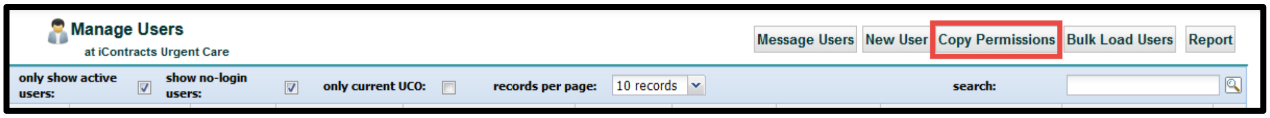
After setting their password, the new users are then redirected to the UCM Login Screen where they enter their newly-created password to sign into the system. Sending *Password Resets* (blue man) generate a different email to users. See **Forgot Password?** for additional information (click the underlined link).

The **Manage Users** grid will show new user's *Confirmation Status* as "**Unconfirmed**" until he or she logs into UCM by way of this email link. Admins can override this, of course, with the *Force Confirmation checkbox*, but this is not generally recommended under normal circumstances. Admins can also click on the "blue man" to resend the email if the user reports that they didn't receive the original "Welcome" email.

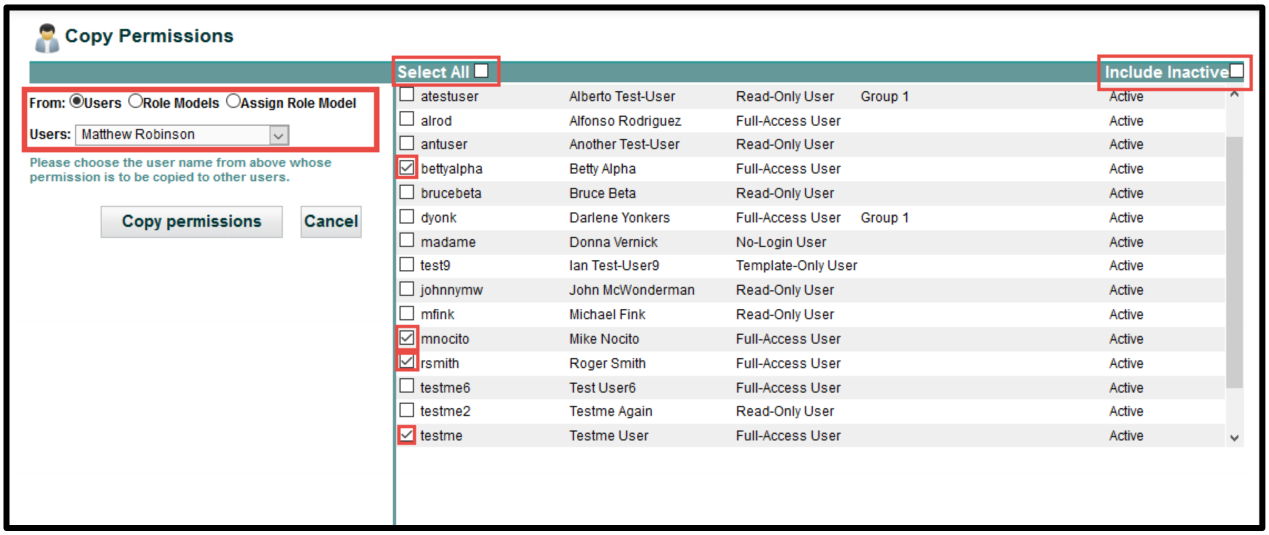
Copying Permissions from Another User or Role Model

Permissions can be copied from a **User** or **Role Models** and applied to as many other users within the system as you would like. Both *Active* and *Inactive* Users can be selected at the same time.

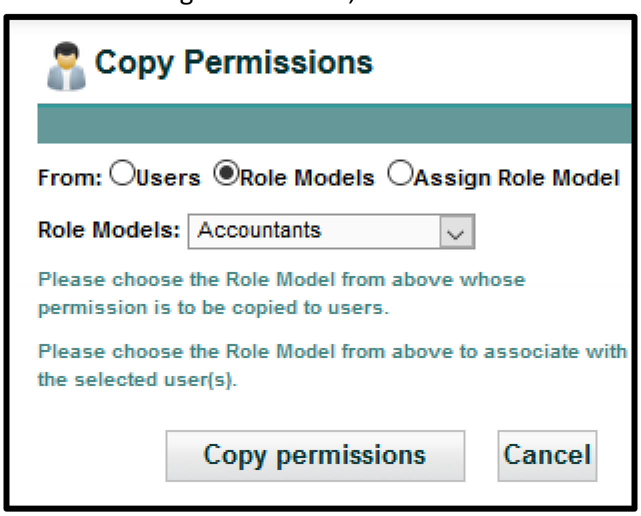
From the **Manage Users** main screen, choose the **Copy Permissions** button, and select **Users** or **Role Models** to copy permissions. Select an option from the drop-down list and apply to the User(s) checked on the right. You can still give users additional permissions as well.



When selecting Users, select the user whose permissions you are copying to other users.



When selecting Role Models, select the role model whose permissions you are copying to other users.



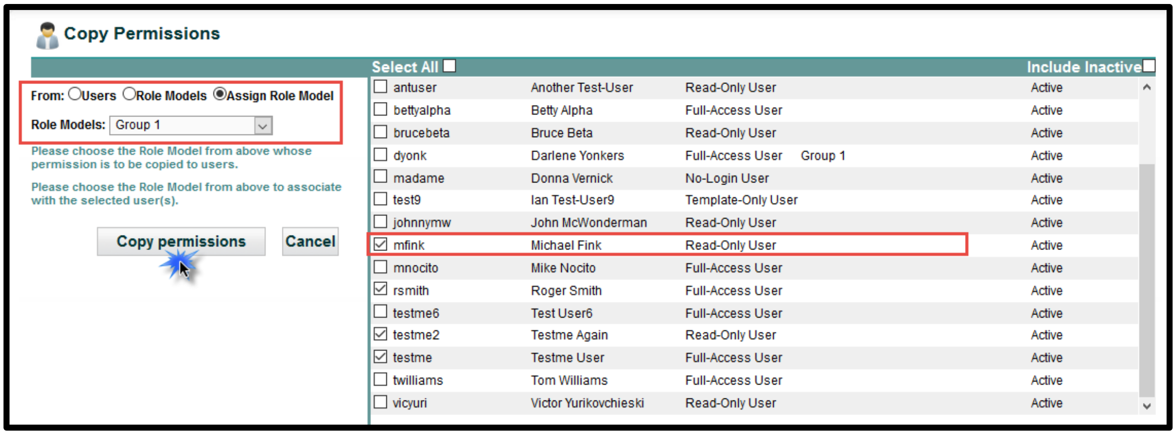
For more information on creating Role Models, see the next topic or click on this link **Role Models**.

To exit Copy Permissions, click on another Tab on the Enterprise Ribbon.

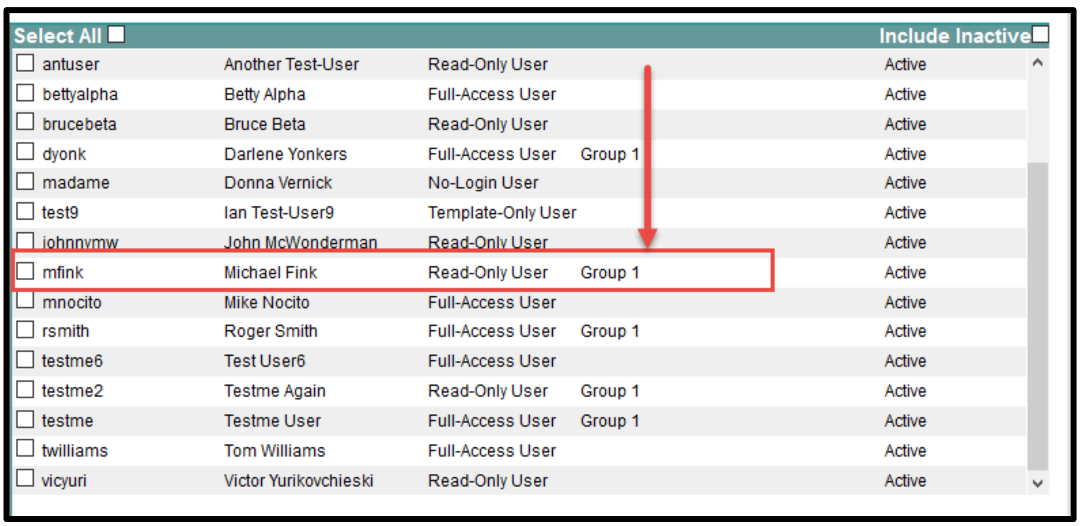
Assigning Role Models to a Group of Users.

Administrators also have the capability of selecting a Role Model that they would like to assign to one or more Full-Access, Read-Only, or Template-Only users.

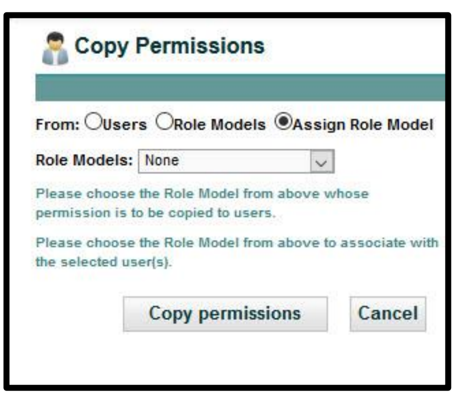
Select a pre-defined **Role Model** from the drop-down list. Next, select the user(s) from the grid who you want to add this Role Model.



When you click on **Copy permissions**, the Role Models are assigned to the selected User(s).



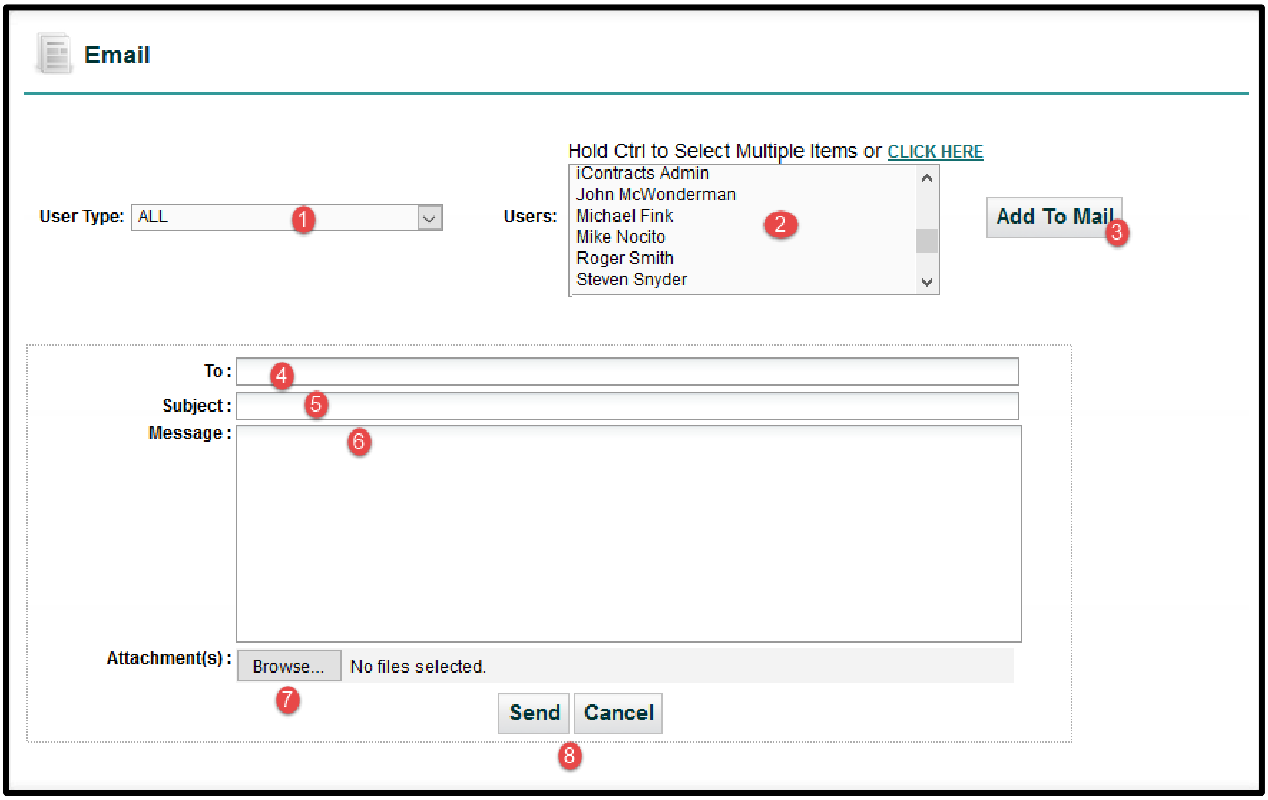
Another option is that you can choose "**None**" as a Role Model, which removes a Role Model from the selected User(s).



Sending Emails from within Manage Users

This function allows System Administrators to send an email to all or select active Users within UCM, separate from their Company Email System (such as Outlook) and separately from emailing within a Contract Container. This is a good way to notify UCM Users of an update or enhancement to UCM.

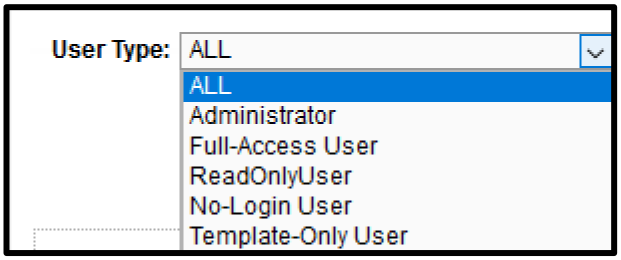
Click on "***Message Users***" to open the Email window. There are several parts to this screen as explained below:



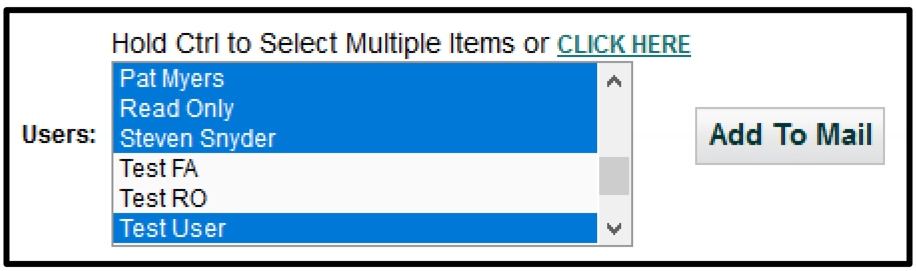
1. User Type	Filters the list of users available to email.
2. Users List	Users listed which are selected in one of two ways.
3. Add To Mail button	Inserts email addresses into the To: field.
4. To: line	Where you can type email addresses directly or have them inserted from the Users List.
5. Subject: line	Where you type the email subject.
6. Message Area	Where you type the email message.
7. Attachment(s) Browse button	Brings up a File Explorer window to select any attachments to include with the email.
8. Send/Cancel buttons	Send the email or cancel the email.

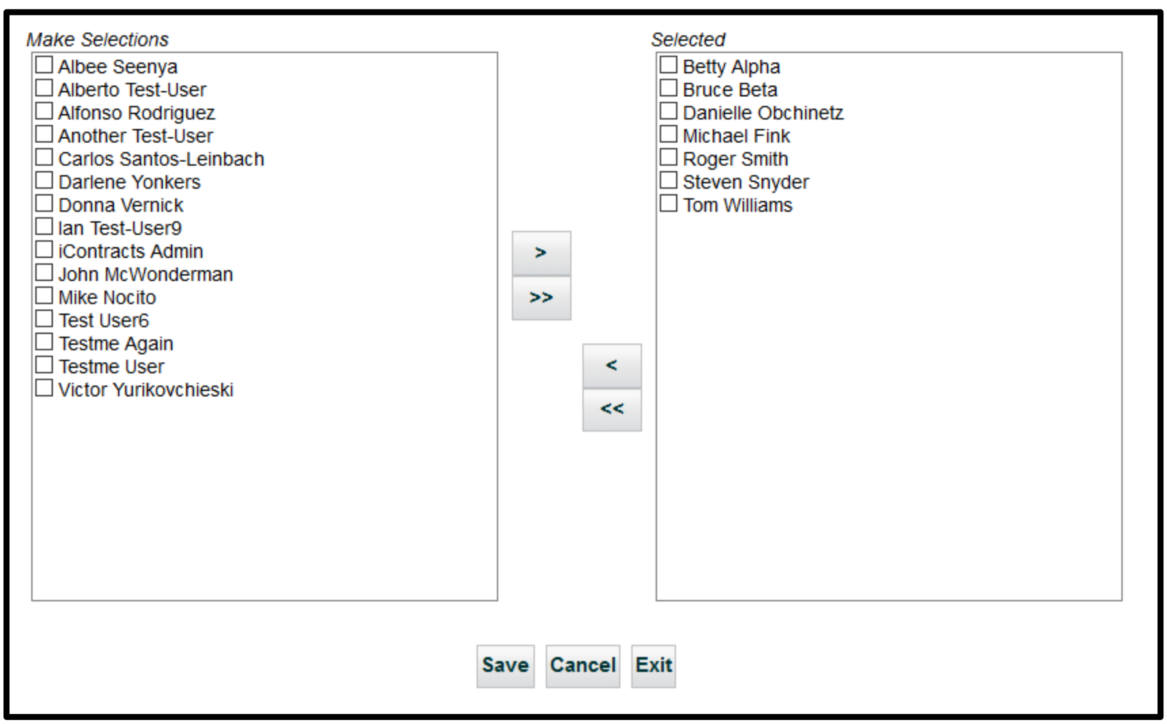
Sending an Email

User Type acts as a filter so you can select users by their UCM *Access Rights*. This makes it easier to choose which users should receive the email when sending to a large group.



Users are selected by either holding the [Ctrl] key while selecting multiple users, or by clicking on the CLICK HERE link to bring up the two-column *Selection Box*, which is similar to selecting Columns in the Contract Grid. *Remember, only Active Users are listed here.*





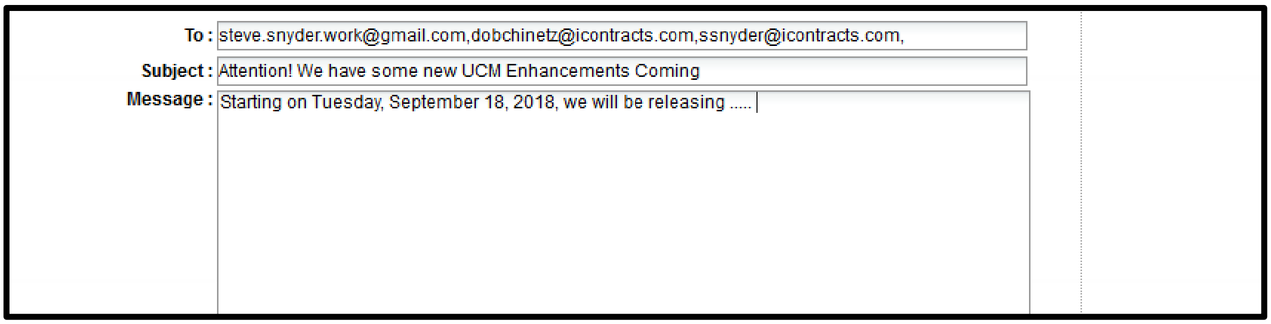
Use the **>** or **»** and **«** or **<** buttons to move user names across columns.
Click **Save** to accept your selections and return to the message window.

Add To Mail Button

This inserts the selected users' email addresses into the To: field.

You can also *manually* type email address directly into this box. Email addresses are separated by a **comma without spaces**.

Type your **Subject** and **Message** into their appropriate fields. This is done like you would for any email.

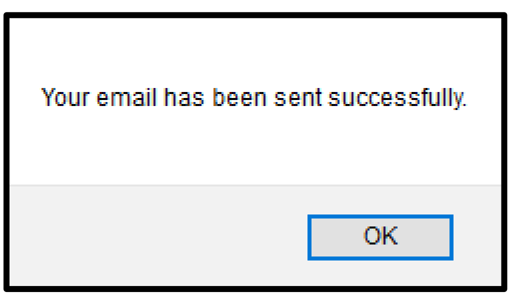


Attachments

If you want to add any attachments, click on the **Browse...** button and select your document(s) from the File Explorer window. Multiple files are selected by hold the [Ctrl] key while selecting multiple documents.

Sending the message.

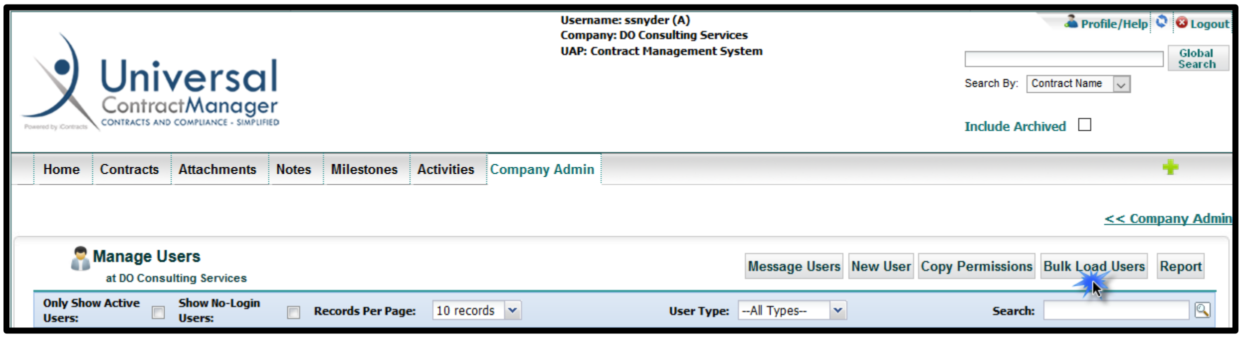
Click on the **Send** button to send your email message.



Click on the **OK** button to acknowledge this message and return to the *Manage Users* screen.

The Users see their email in the Company email application like any other email they would receive.

Bulk Loading New Users



It is recommended that you first contact iContracts to setup an **Excel CSV** file to list the New User data to be uploaded into UCM. Unlike the Bulk Loader, this program currently *cannot edit* existing user information.

In addition, you may need to purchase from iContracts additional *Users Licenses* to enable your system to accommodate the increase in the number of Concurrent Users with access to UCM. Therefore, the following spreadsheet is only an example of what is involved in this setup and we highly recommend that you contact your iContracts Support Specialist or Sales Representative for further assistance and pricing for adding additional users with access to UCM.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	User Bulk Load Template Sheet (need to eliminate ALL headings and get rid of blank lines that are bordered prior to Bulk Load, as well as Save As MS-DOS CSV forma												
2	FirstName	LastName	Username	E-mailaddress	UserType	RoleModel	Dept-Div	ShareViews	Add/Edit/DeleteViews	AutoCreateActivities	AutoCreateMilestones	ReportfromViews	DeleteContractA
3	*Hints*				*select from drop-down*			*Y/N*	*Y/N*	*Y/N*	*Y/N*	*Y/N*	*Y/N*
4	Sample	Line			Full-Access User			Y	Y	Y	Y	Y	N
5													
6													

N	O	P	Q	R	S	T	U	V	W	X	Y
	Careful!				If 'YES', then ALL Library Items are visible until changed by Admin	Examine These for Company Setup		These are all part of the Actions Usually only given to Admins at startup			
UseTemplates	Active	Password	PasswordChangeRequired	TimeZone	AllowDocumentLibraryUse	AllowEditNote	ShowAllHistory	CopyAction	ModifyAction	EmailAction	CreateCorrAct
Y/N	*Y/N*	*Y/N*	*Y/N*	*Select From Drop-Down*	*Y/N*	*Y/N*	*Y/N*	*Y/N*	*Y/N*	*Y/N*	*Y/N*
N	N	***Welcome01***	Y	Eastern Standard Time	Y	Y	N	N	N	N	N

	W	X	Y	Z	AA
1	art of the Actions Usually only given to Admins at startup			OBJECT(s) Allowed *ex: Contract Management System|Policies|Legal Claims*	Default Object
2	difyAction	EmailAction	CreateCorrAction	UCOlist	DefaultUCO
3	*Y/N*	*Y/N*	*Y/N*	Object Name as defined in system separated by pipe (|)	Object Name
4	N	N	N	Contract Management System	Contract Management System
5					
6					

Using 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 in the system to do so have rights to these actions. They can also send a blanket email using an email field, or upload/create the same document/Activity/Milestone/Note within multiple contracts. All contract actions are recorded in the History Tab for auditing purposes.

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 you should only give to a select few, as once you delete a contract from your system, it cannot be retrieved. However, by design, this action is not something that could easily happen accidentally.

To delete a contract, select the contracts 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 ***Execute*** the action.

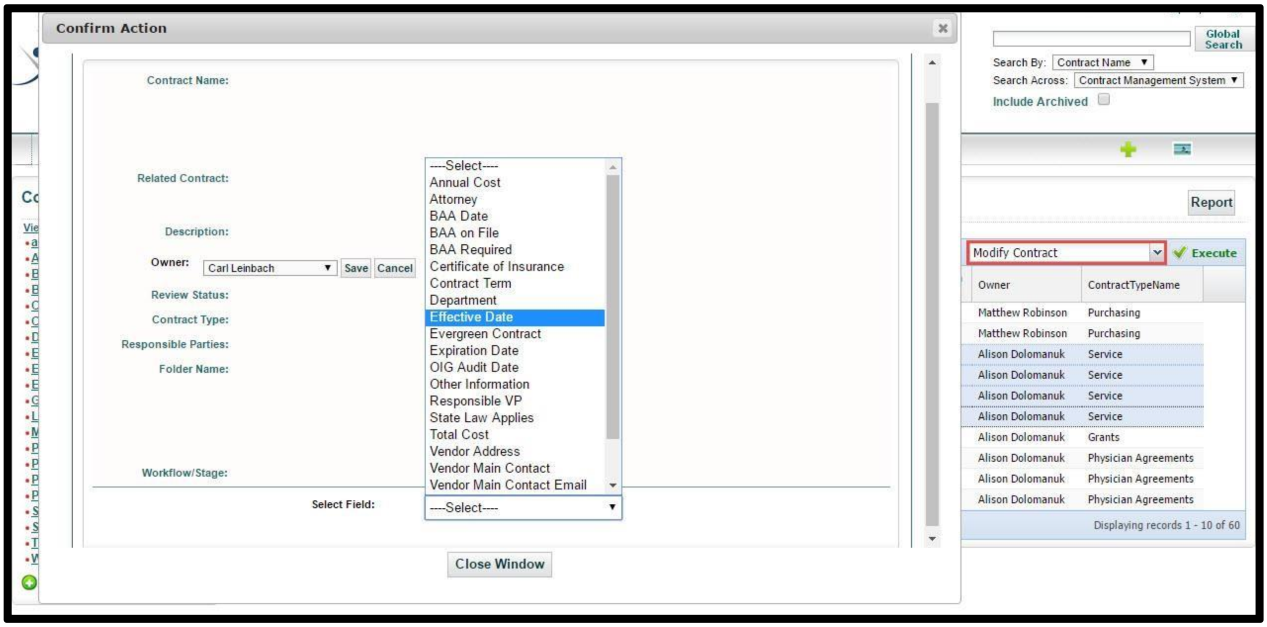
Once the Delete Contract Action has been Executed, you will receive a **Confirm Action** popup asking to confirm that the contracts selected should be deleted. Click **Ok** to remove those contracts permanently and the system will confirm, with another popup, the number of contracts affected.

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.

Modify Contract

The ***Modify Contract*** action allows you to change common data fields across multiple contracts without entering each one individually. Once you select contracts then execute Modify Contract, all of the fields that the contracts have in common will populate in the Modify Interface. From here, you change the data in those contracts to the same value at once.



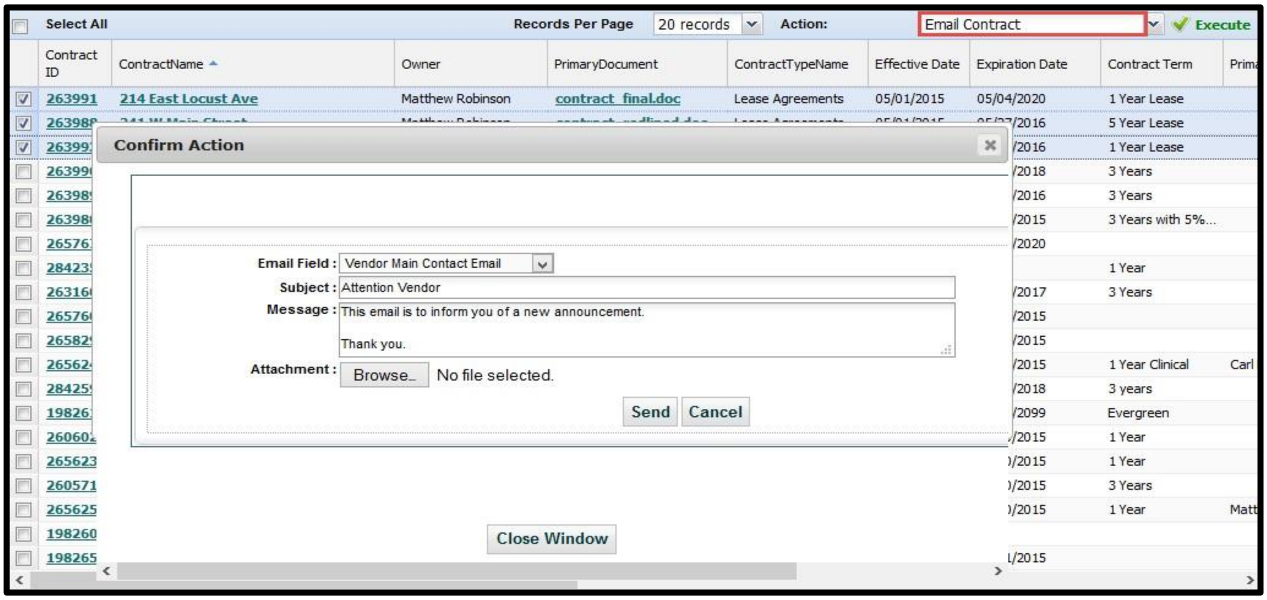
- ***Tip:*** This makes it easy to transfer ownership of a set of contracts, or change common dates, without needing to download and then run the Bulk Loader.
- ***Tip:*** The Bulk Loader is still the best tool for changing *multiple* data points <u>at the same time</u> and for changing different Workflows and different Stages (two options not available with this action).

From the Modify Contract interface, select the data you are going to change across all the contracts selected in your grid. There will be a ***Save*** button for each item. Once you save your work, you may move on to the next data point or leave this area with the X at the top right or the ***Close Window*** button at the bottom.

- ***Note:*** ***Full-Access Users*** can only select ***up to 25 contracts*** to modify at once. ***Admins*** can modify an unlimited number of contracts.

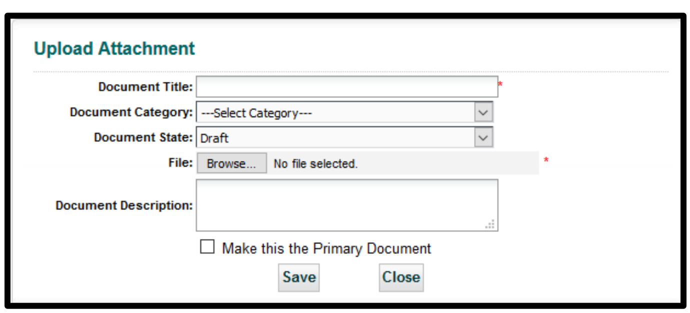
Email Contract

This action allows you to send the same email to multiple recipients using an *Email field* from within the contract Summary tab. In this example, an announcement to multiple vendors, using the field Vendor Main Contact Email, will be generated. In addition, an *Attachment* could be included as well. Click **Send** to create the emails, then click **Close Window** to exit.



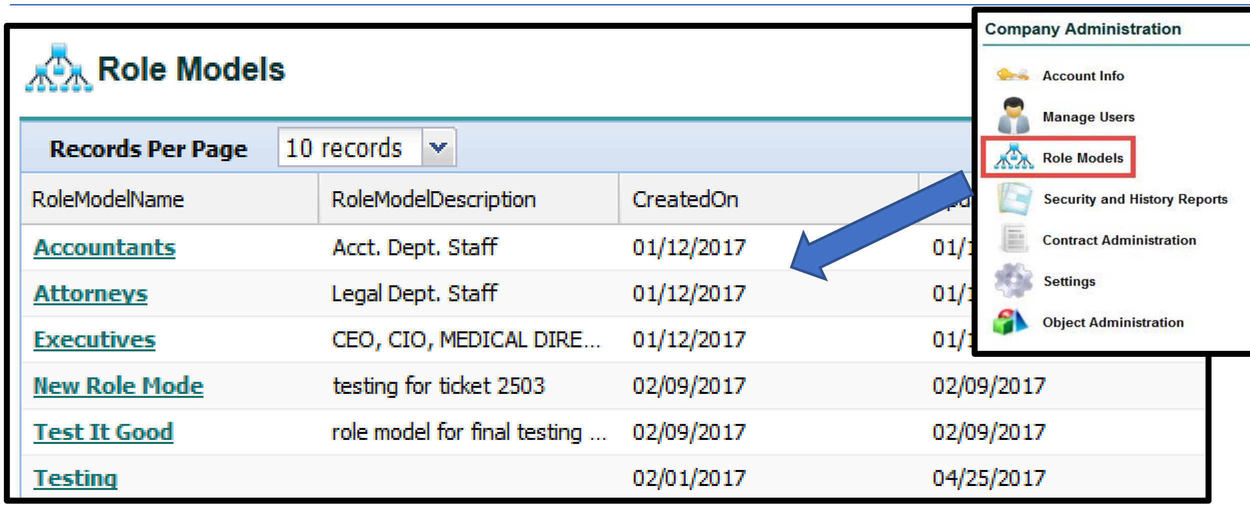
Create Corresponding X Records

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 and click OK, the corresponding interface will appear. You enter the information the same way as with any single Contract Container.



Adding the Same Attachment to Multiple Contracts at Once

Role Models



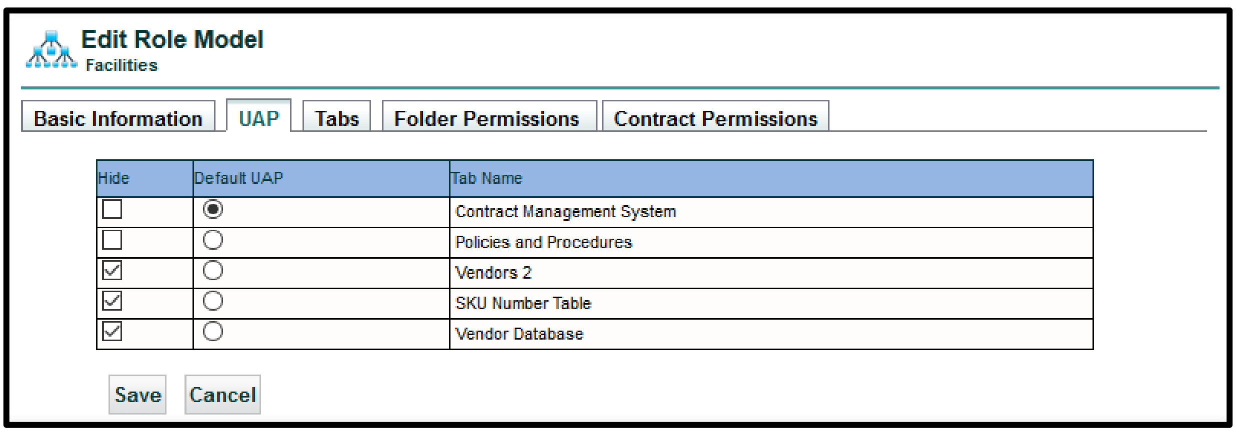
Role Models are a saved set of permissions that you can apply quickly to multiple users without having to set them up on an individual basis. These are used to set up a group of permissions and security settings on folders or groups of folders, as well as which functions in the system will be visible for the users assigned to that Role Model.

Setting up Role Models

Click on the New Role Model icon in the top right corner. In this example, admin ssnyder is creating a Role Model called *Facilities*, and will be using this “saved setting”, or Role Model, to limit anyone assigned to this Role Model to view only the contents of the Facilities folder, along with a few other settings on the Contract Ribbon. This example will show how detailed the security settings in both Role Models and User Permissions can be set.

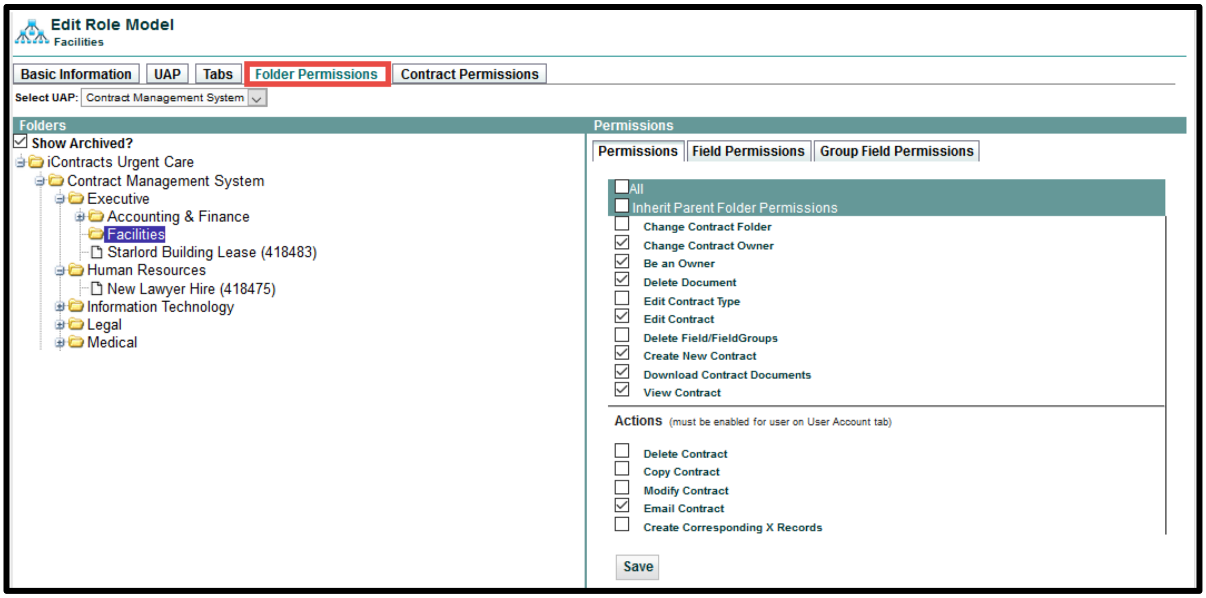
After clicking the **Add New Role Model** link, name and describe (Description is optional) the new Role Model you are creating.

After clicking the **Save** button, a new ribbon appears along with the buttons for **[Security/Visibility]** *Contract Types*, *Templates*, *Library Items*, **[New Contracts]** *Contract Types Allowed*, and *Workflows Allowed*, giving Users in the Role Model access to specific settings. Each section will have its own options, as shown on the following pages (very similar to setting individual User Permissions).



If Applicable: **UAP** or **U**niversal **A**pplication **P**latform sets the *Default UAP*. You can also restrict a User from accessing the contents of another Object if your company has purchased multiple modules.

Within the **Tabs** Tab, you can select which, if any, Ribbon Tabs the User will be *unable* to see. Click on either *Enterprise Ribbon Tabs* or *UAP Ribbon Tabs* to display which set of tabs you want to manage.



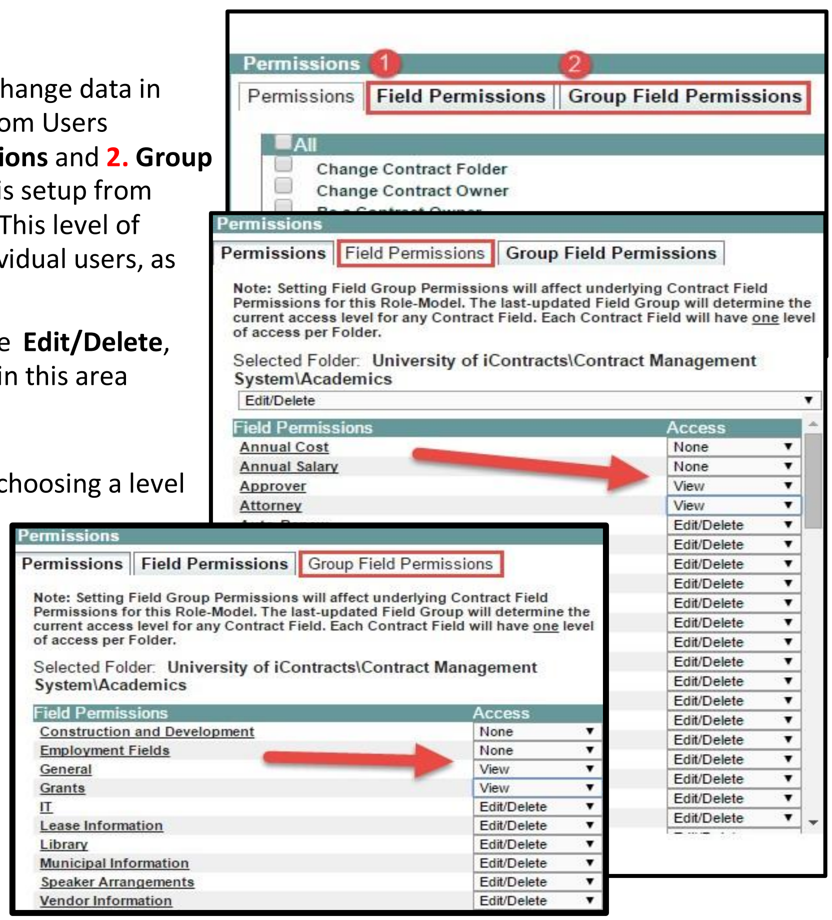
Folder Permissions are configured the same way as described in the New Users **Defining Folder** Permissions section.

Field and Field Group Permissions

Admins can restrict Users' ability to change data in specific fields or hide certain fields from Users entirely by using the **1. Field Permissions** and **2. Group Field Permissions** tabs. This security is setup from within the *Folder Permissions Area*. This level of permissions are configurable for individual users, as well as Role Models.

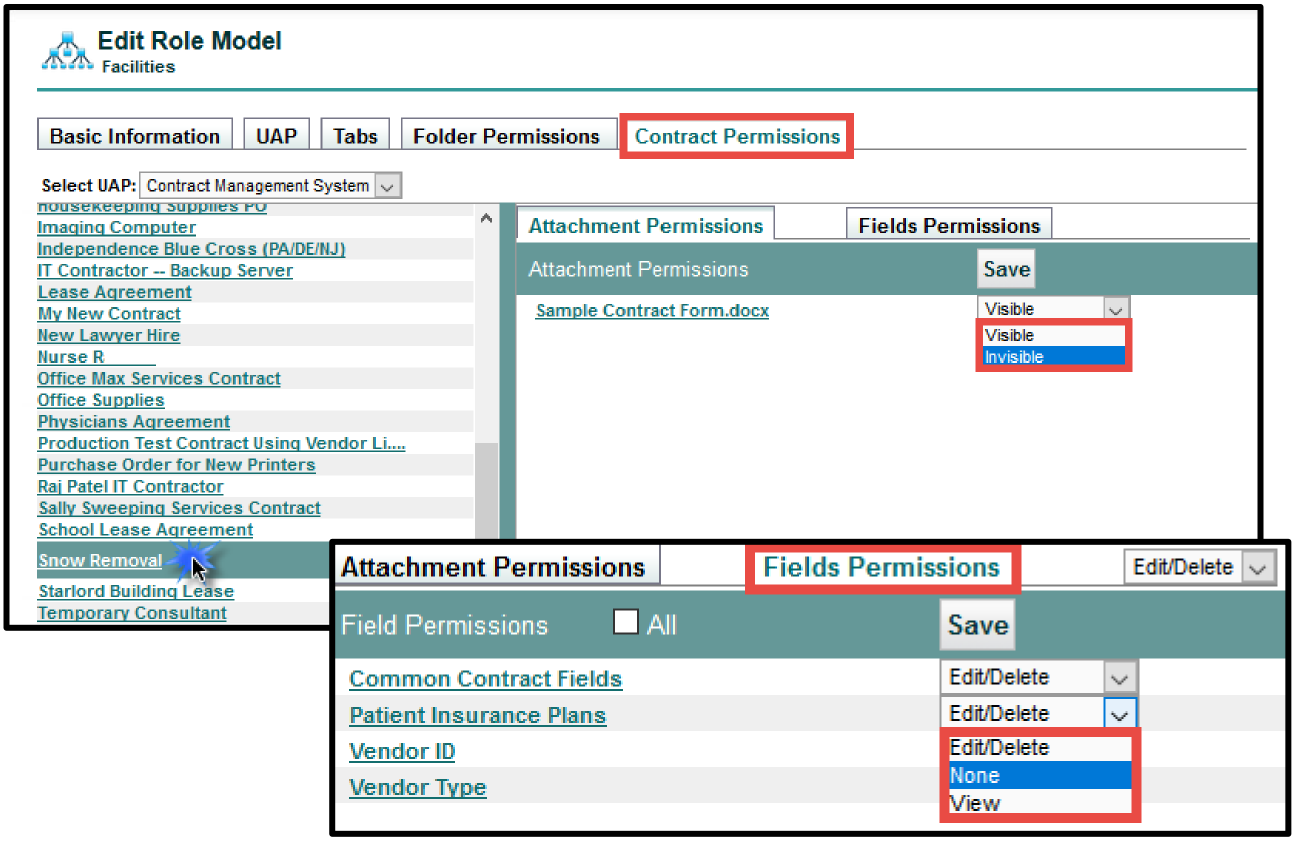
The options for access to this area are **Edit/Delete**, **View**, and **None**. Setting permissions in this area will apply only to the folder chosen.

In the Group Field Permissions area, choosing a level of permission will carry the value over to the individual fields within that field group in the Field Permissions Area.



Contract Permissions

The **Contract Permissions** tab allows you to hide documents and fields from a User(s) for a specific Contract. After selecting the specific Contract, choose whether you are hiding the *Attachment Permissions* or the *Fields Permissions*. See the two examples below.

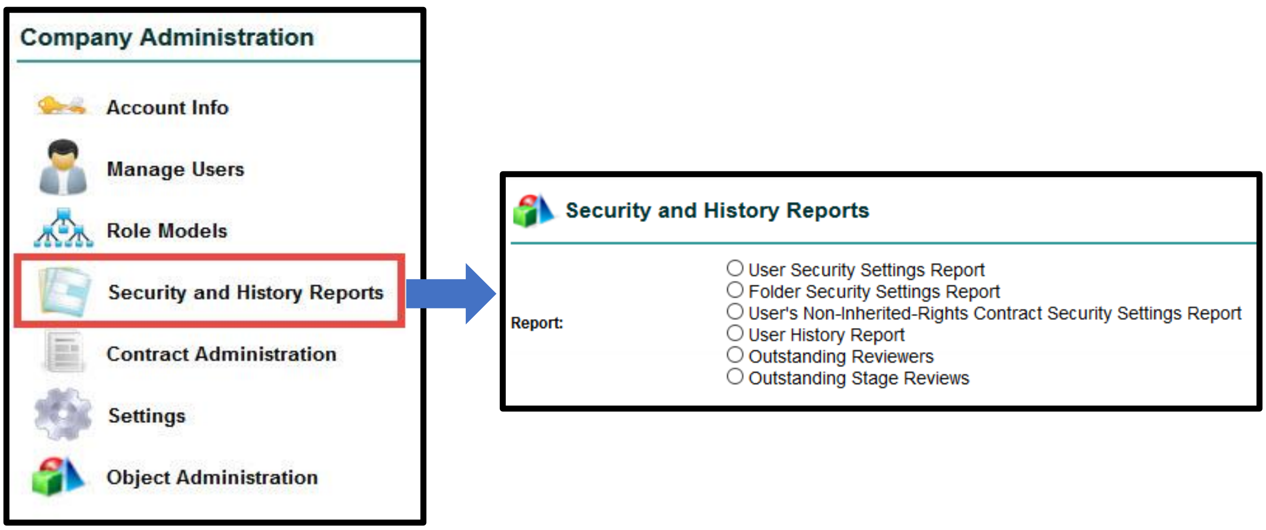


Security and History Reports

These Admin only reports will allow you to view different user-specific logs such as which users have access to a given folder or what is the history of a specific user(s) within a date range. These reports should make it easier for Admins to work with security and fix potential issues with user permissions.

To run one of these reports, navigate to the Company Admin → Click on the link for **User and Folder Security Reports** → then user the radio buttons to choose which type of report you would like to run

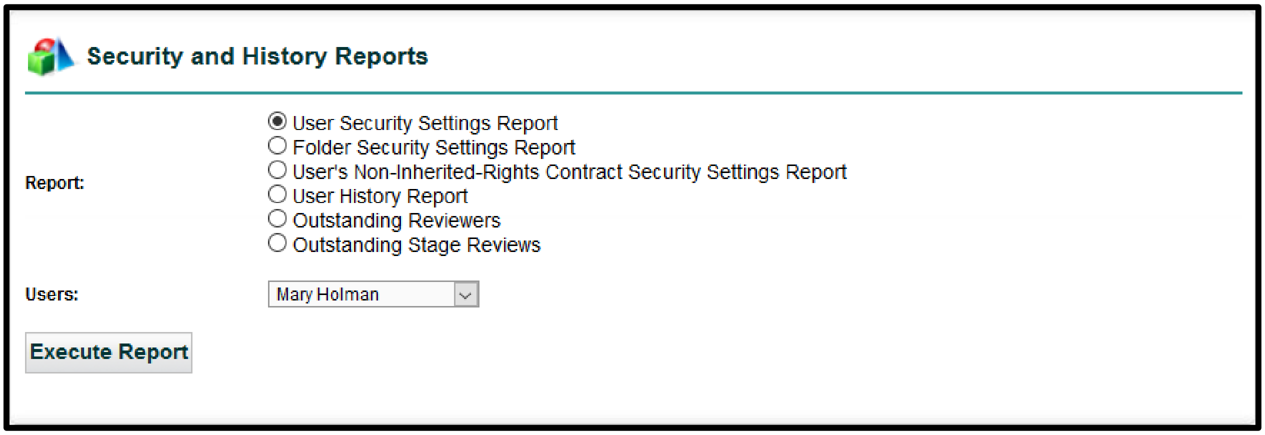
A dropdown list will appear for you to choose the User or the Folder (depending on which report you run) you would like to report on.



Once you select the type of report you would like to run and which User or Folder to run it on, click on the **Execute Report** button and this information will be downloaded to a CSV file you view in Excel.

User Security Settings Report

This **Security Settings Report** will generate a specific user's security settings as defined in Manage Users.



The X's indicate that this user is given the corresponding permissions in a folder. In this example, the report was run for Read-Only user, so only their permissions are checked. A Full-Access user would have more columns containing an X, an Administrator all columns checked with an X (in most cases).

	A	B	C	D	E	F	G	H	I	
1	User Security Report									
2	Company: iContracts Urgent Care									
3	Security Settings as of: 9/21/2018									
4										
5	FolderName	InheritParentFolderPermissions	ChangeContractFolder	ChangeContractOwner	BeaContractOwner	DeleteDocument	EditContractType	EditContract	CreateNewContract	DownloadCo
6										
7	User: Mary Holman									
8	User Type: ReadOnlyUser									
9	Role Model:									
10										
11	iContracts Urgent Care\Contract Management System									
12	..\Executive	X								
13	..\Executive\Accounting & Finance	X								
14	..\Executive\Accounting & Finance\Vendor Management	X								
15	..\Executive\Facilities	X								
16	..\Human Resources	X								
17	..\Information Technology				X					X
18	..\Legal	X								
19	..\Medical	X								
20	..\Medical\Lab Techs	X								
21	..\Medical\Nurses				X					X
22	..\Medical\Physician Assistants	X								
23	..\Medical\Physicians	X								
24	..\Testing				X					X
25	..\Testing\Special Forces	X			X					X
26	..\Testing\Special Forces\Test 1	X			X					X
27	..\Testing\Special Forces\Test 2	X			X					X
28	..\Testing\Special Forces\Test 3	X			X					X
29										

Attachment

- **Read Only Users assigned to a Role Model**: permissions are controlled by the Role Model so the columns showing an X may not apply to the actual user.

User Security Report
Please Note: Permissions for Users who have a Role Model show the rights as set up in the Role Model; therefore Read-Only Users may show more X's than their User Type actually allows.

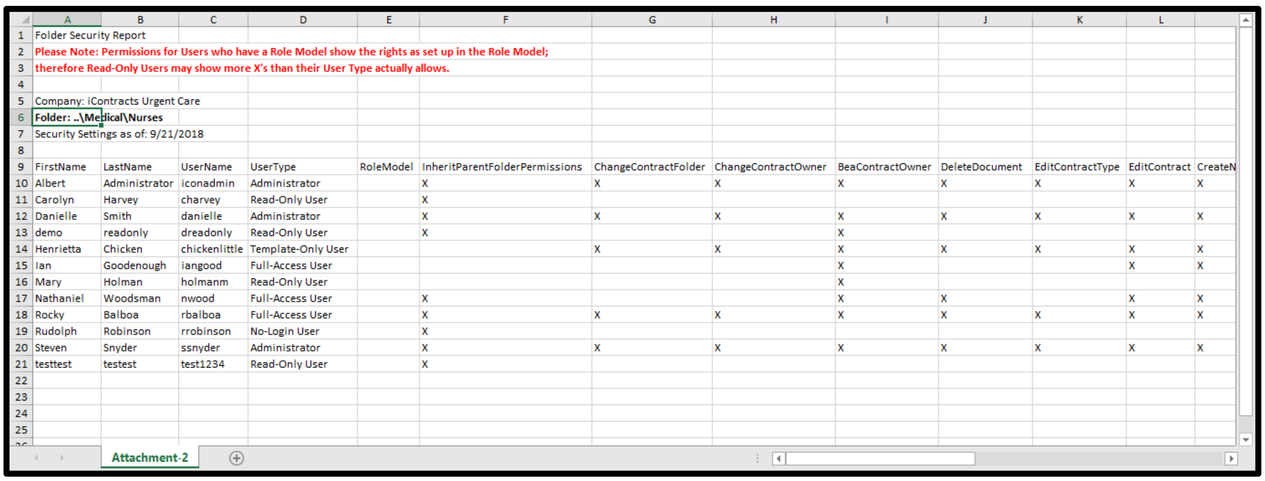
Company: iContracts Urgent Care
Security Settings as of: 10/3/2017

FolderName

User: Mary A-User
User Type: ReadOnlyUser
Role Model: Test It Good

Folder Security Settings Report

This **Security Settings Report** will generate a list of all users who have access to this selected Folder.



Folder Security Report

Please Note: Permissions for Users who have a Role Model show the rights as set up in the Role Model;
therefore Read-Only Users may show more X's than their User Type actually allows.

Company: iContracts Urgent Care

Folder: ..\Medical\Nurses

Security Settings as of: 9/21/2018

FirstName	LastName	UserName	UserType	RoleModel	InheritParentFolderPermissions	ChangeContractFolder	ChangeContractOwner	BeaContractOwner	DeleteDocument	EditContractType	EditContract	CreateN
Albert	Administrator	iconadmin	Administrator		X	X	X	X	X	X	X	X
Carolyn	Harvey	charvey	Read-Only User		X							
Danielle	Smith	danielle	Administrator		X	X	X	X	X	X	X	X
demo	readonly	dreadonly	Read-Only User		X			X				
Henrietta	Chicken	chickenlittle	Template-Only User			X	X	X	X	X	X	X
Ian	Goodenough	iangood	Full-Access User					X			X	X
Mary	Holman	holmanm	Read-Only User					X				
Nathaniel	Woodsman	nwood	Full-Access User		X			X	X		X	X
Rocky	Balboa	rbalboa	Full-Access User		X	X	X	X	X	X	X	X
Rudolph	Robinson	rrobinson	No-Login User		X							
Steven	Snyder	ssnyder	Administrator		X	X	X	X	X	X	X	X
testtest	testest	test1234	Read-Only User		X							

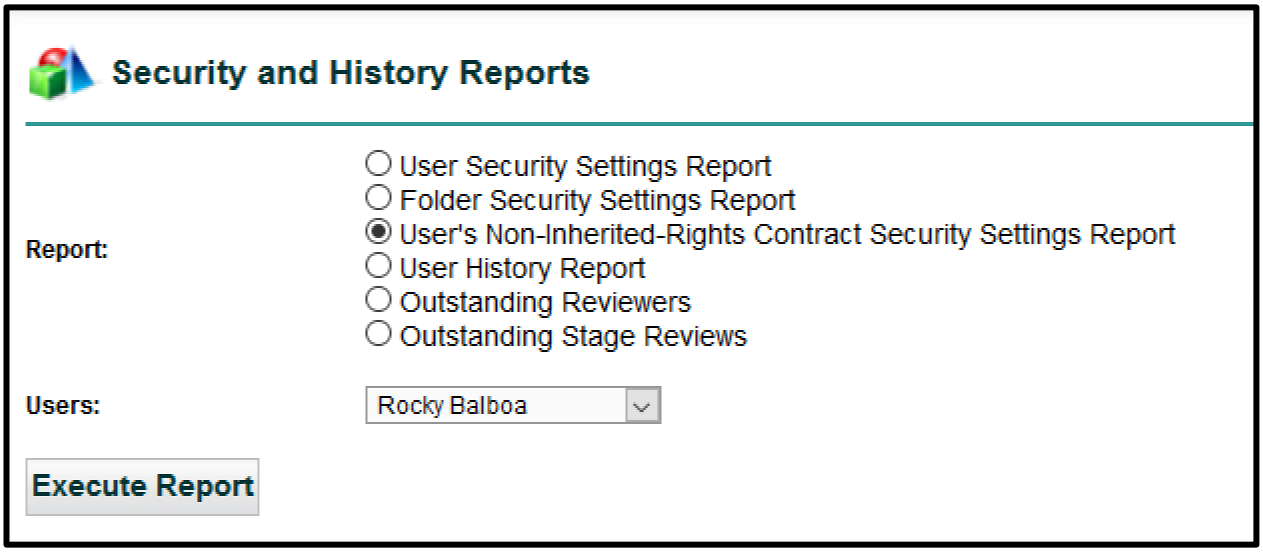
Attachment-2

Each X indicates what each user's permission have been granted for the selected folder *(cell formatting is shown for emphasis only)*.

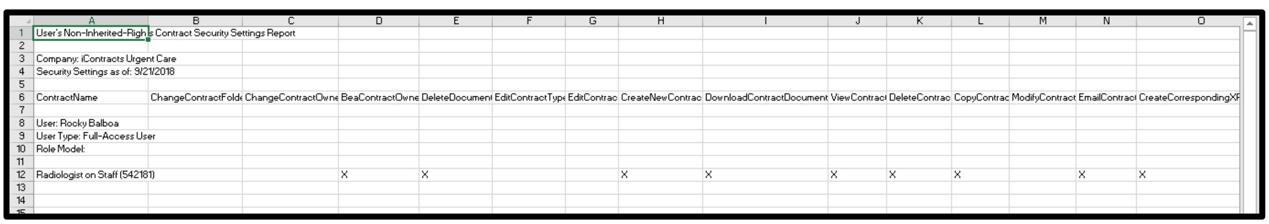
- **Read Only Users assigned to a Role Model**: permissions are controlled by the Role Model so the columns showing an X may not apply to the actual user.

User's Non-Inherited-Rights Contract Security Settings Report

This report shows a user's permission for a contract that was changed to NOT inherit the parent folder's permissions. Generally, if a folder is given permission based on whether it has **Inherited Parent Folder Permissions**, then all the contracts within that folder has been given the same permissions. If, however, you drill down into individual contracts and change a permission separately from the folder, then you can run this report to show which contracts were affected by this action.

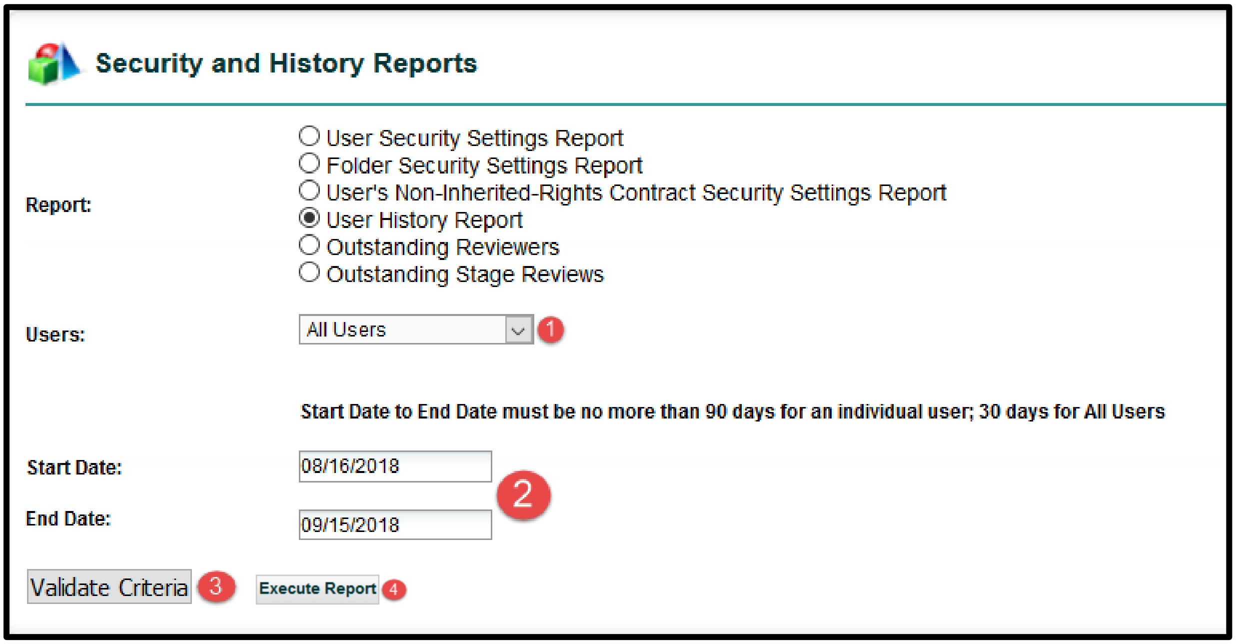


Each contract in this list shows an **X** for an active permission. You can format the Excel file to better suit your needs.



User History Report

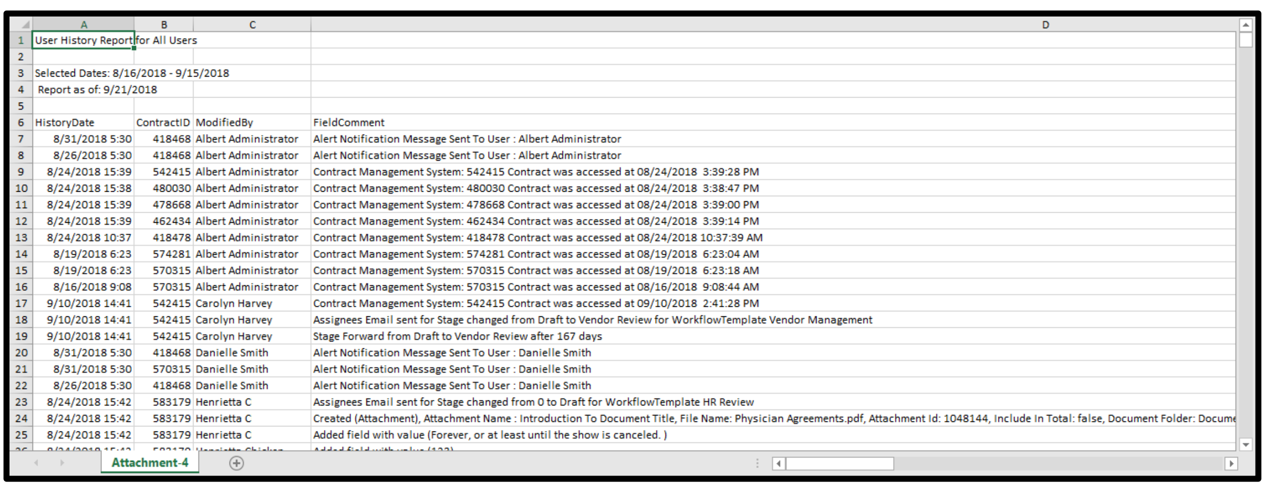
The **User History Report** shows a list all activities within a specific time period for either *All Users* or *one specific User* as selected from a drop-down list.



1. Select "All Users" or select just one User.
2. Select **Start Date** and **End Date** (30 days or 90 days maximum).
3. Click **Validate Criteria** button to verify correct date range.

Once the date range has been validated, the "*Validate Criteria*" button becomes the "**Execute Report**" button.

4. Click the Execute Report button to continue. The resulting report lists the selected user(s) in chronological order, by *History Date*, starting with the most recent event.



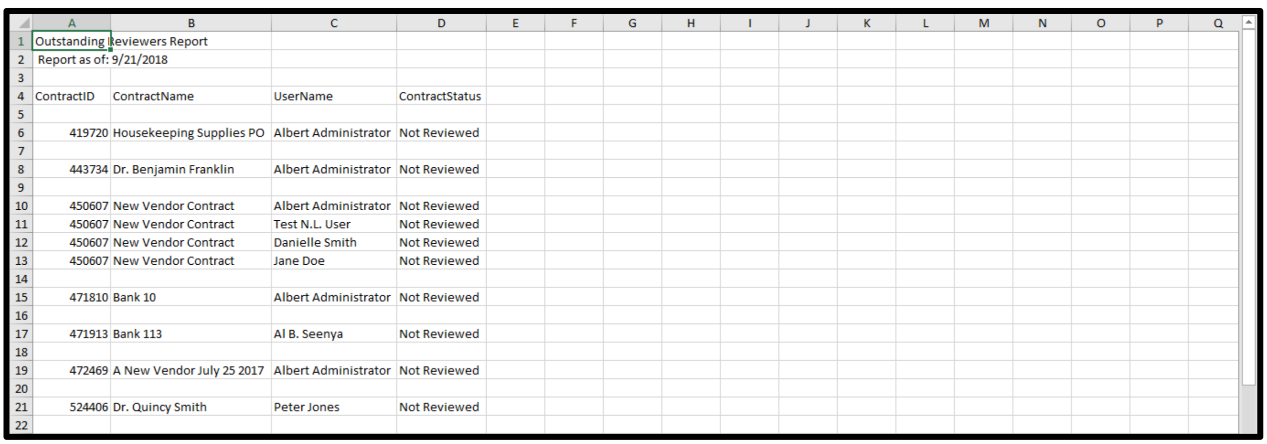
	A	B	C	D
1	User History Report for All Users			
2				
3	Selected Dates: 8/16/2018 - 9/15/2018			
4	Report as of: 9/21/2018			
5				
6	HistoryDate	ContractID	ModifiedBy	FieldComment
7	8/31/2018 5:30	418468	Albert Administrator	Alert Notification Message Sent To User : Albert Administrator
8	8/26/2018 5:30	418468	Albert Administrator	Alert Notification Message Sent To User : Albert Administrator
9	8/24/2018 15:39	542415	Albert Administrator	Contract Management System: 542415 Contract was accessed at 08/24/2018 3:39:28 PM
10	8/24/2018 15:38	480030	Albert Administrator	Contract Management System: 480030 Contract was accessed at 08/24/2018 3:38:47 PM
11	8/24/2018 15:39	478668	Albert Administrator	Contract Management System: 478668 Contract was accessed at 08/24/2018 3:39:00 PM
12	8/24/2018 15:39	462434	Albert Administrator	Contract Management System: 462434 Contract was accessed at 08/24/2018 3:39:14 PM
13	8/24/2018 10:37	418478	Albert Administrator	Contract Management System: 418478 Contract was accessed at 08/24/2018 10:37:39 AM
14	8/19/2018 6:23	574281	Albert Administrator	Contract Management System: 574281 Contract was accessed at 08/19/2018 6:23:04 AM
15	8/19/2018 6:23	570315	Albert Administrator	Contract Management System: 570315 Contract was accessed at 08/19/2018 6:23:18 AM
16	8/16/2018 9:08	570315	Albert Administrator	Contract Management System: 570315 Contract was accessed at 08/16/2018 9:08:44 AM
17	9/10/2018 14:41	542415	Carolyn Harvey	Contract Management System: 542415 Contract was accessed at 09/10/2018 2:41:28 PM
18	9/10/2018 14:41	542415	Carolyn Harvey	Assignees Email sent for Stage changed from Draft to Vendor Review for WorkflowTemplate Vendor Management
19	9/10/2018 14:41	542415	Carolyn Harvey	Stage Forward from Draft to Vendor Review after 167 days
20	8/31/2018 5:30	418468	Danielle Smith	Alert Notification Message Sent To User : Danielle Smith
21	8/31/2018 5:30	570315	Danielle Smith	Alert Notification Message Sent To User : Danielle Smith
22	8/26/2018 5:30	418468	Danielle Smith	Alert Notification Message Sent To User : Danielle Smith
23	8/24/2018 15:42	583179	Henrietta C	Assignees Email sent for Stage changed from 0 to Draft for WorkflowTemplate HR Review
24	8/24/2018 15:42	583179	Henrietta C	Created (Attachment), Attachment Name : Introduction To Document Title, File Name: Physician Agreements.pdf, Attachment Id: 1048144, Include In Total: false, Document Folder: Docume
25	8/24/2018 15:42	583179	Henrietta C	Added field with value (Forever, or at least until the show is canceled.)

Attachment-4

Outstanding Reviewers

This report is used to view all contracts that have reviewers set up and you want to find those reviewers who have not yet approved or rejected their assigned contracts.

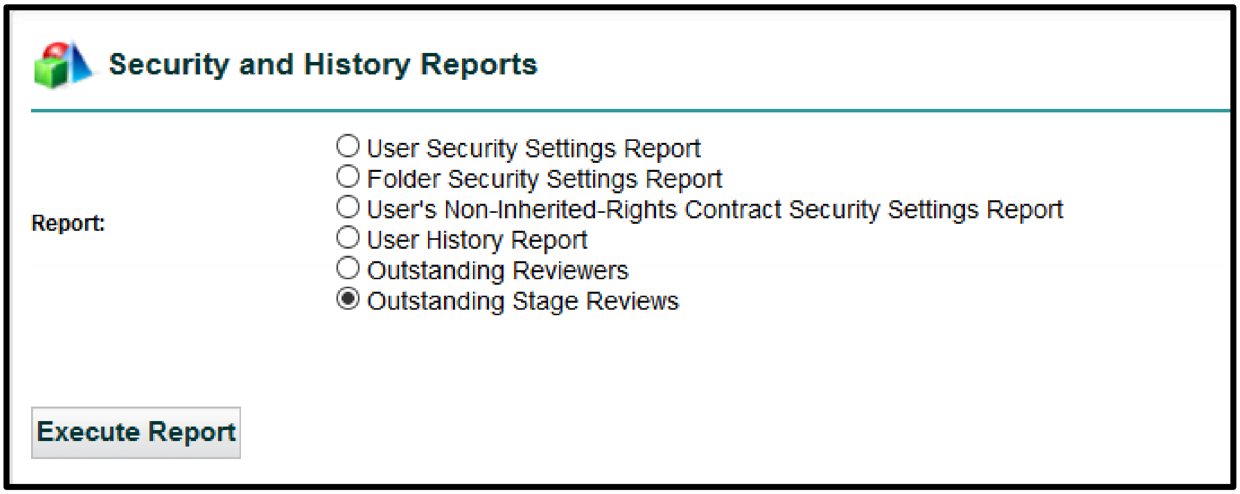
Click on the **Execute Report** button to generate the report to an Excel spreadsheet for further analysis.



Outstanding Reviewers Report			
Report as of: 9/21/2018			
ContractID	ContractName	UserName	ContractStatus
419720	Housekeeping Supplies PO	Albert Administrator	Not Reviewed
443734	Dr. Benjamin Franklin	Albert Administrator	Not Reviewed
450607	New Vendor Contract	Albert Administrator	Not Reviewed
450607	New Vendor Contract	Test N.L. User	Not Reviewed
450607	New Vendor Contract	Danielle Smith	Not Reviewed
450607	New Vendor Contract	Jane Doe	Not Reviewed
471810	Bank 10	Albert Administrator	Not Reviewed
471913	Bank 113	Al B. Seenya	Not Reviewed
472469	A New Vendor July 25 2017	Albert Administrator	Not Reviewed
524406	Dr. Quincy Smith	Peter Jones	Not Reviewed

Outstanding Stage Reviews

This report is used to view all contracts that have a **Stage Approval** still in a "*Pending*" status. These Stage Approvals were set up under the Stage Configuration for Workflow Template Administration.



Click on the **Execute Report** button to generate the report to an Excel spreadsheet for further analysis.

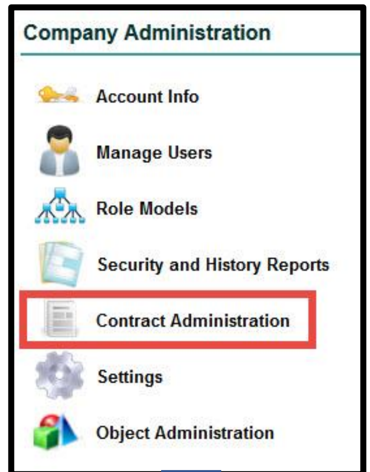
	A	B	C	D	E	F	G	H	I	J	K
1	Outstanding Stage Reviewers Report										
2	Report as of: 9/21/2018										
3											
4	ContractId	ContractName	UserName	EmailId	ApproverName	WorkflowName	StageName	DaysInCurrStage	ApprovalStatus	Notes	
5	418468	Aetna Patient Insurance	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Vendor Management	Department Review	357	PENDING		
6	418468	Aetna Patient Insurance	rrobinson	steve.snyder.work@gmail.com	Rudolph Robinson	Vendor Management	Department Review	357	PENDING		
7	418468	Aetna Patient Insurance	danielle	dobchinetz@icontracts.com	Danielle Smith	Vendor Management	Department Review	357	PENDING		
8	418477	Office Max Services Contract	ssnyder	ssnyder@icontracts.com	Steven Snyder	Vendor Management	Department Review	617	PENDING		
9	418477	Office Max Services Contract	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Vendor Management	Department Review	617	PENDING		
10	418477	Office Max Services Contract	rrobinson	steve.snyder.work@gmail.com	Rudolph Robinson	Vendor Management	Department Review	617	PENDING		
11	418477	Office Max Services Contract	danielle	dobchinetz@icontracts.com	Danielle Smith	Vendor Management	Department Review	617	PENDING		
12	418482	Snow Removal	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Vendor Management	Department Review	617	PENDING		
13	418482	Snow Removal	pmyers	ssnyder@icontracts.com	Pat Myers	Vendor Management	Department Review	617	PENDING		
14	418482	Snow Removal	rrobinson	steve.snyder.work@gmail.com	Rudolph Robinson	Vendor Management	Department Review	617	PENDING		
15	418482	Snow Removal	danielle	dobchinetz@icontracts.com	Danielle Smith	Vendor Management	Department Review	617	PENDING		
16	471809	Bank 9	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Standard WF	Department Review	3	PENDING		
17	471816	Bank 16	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Standard WF	Department Review	3	PENDING		
18	471839	Bank 39	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Standard WF	Department Review	3	PENDING		
19	471888	Bank 88	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Standard WF	Department Review	3	PENDING		
20	472469	A New Vendor July 25 2017	ssnyder	ssnyder@icontracts.com	Steven Snyder	Vendor Management	Department Review	423	PENDING		
21	524406	FLY EAGLES FLY!	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Standard WF	Department Review	2	PENDING		
22	526474	A Vendor 4 Testing on Jan. 25, 2018	ssnyder	ssnyder@icontracts.com	Steven Snyder	Vendor Management	Department Review	239	PENDING		
23	526474	A Vendor 4 Testing on Jan. 25, 2018	iangood	steve.snyder.work@gmail.com	Ian Goodenough	Vendor Management	Department Review	239	PENDING		

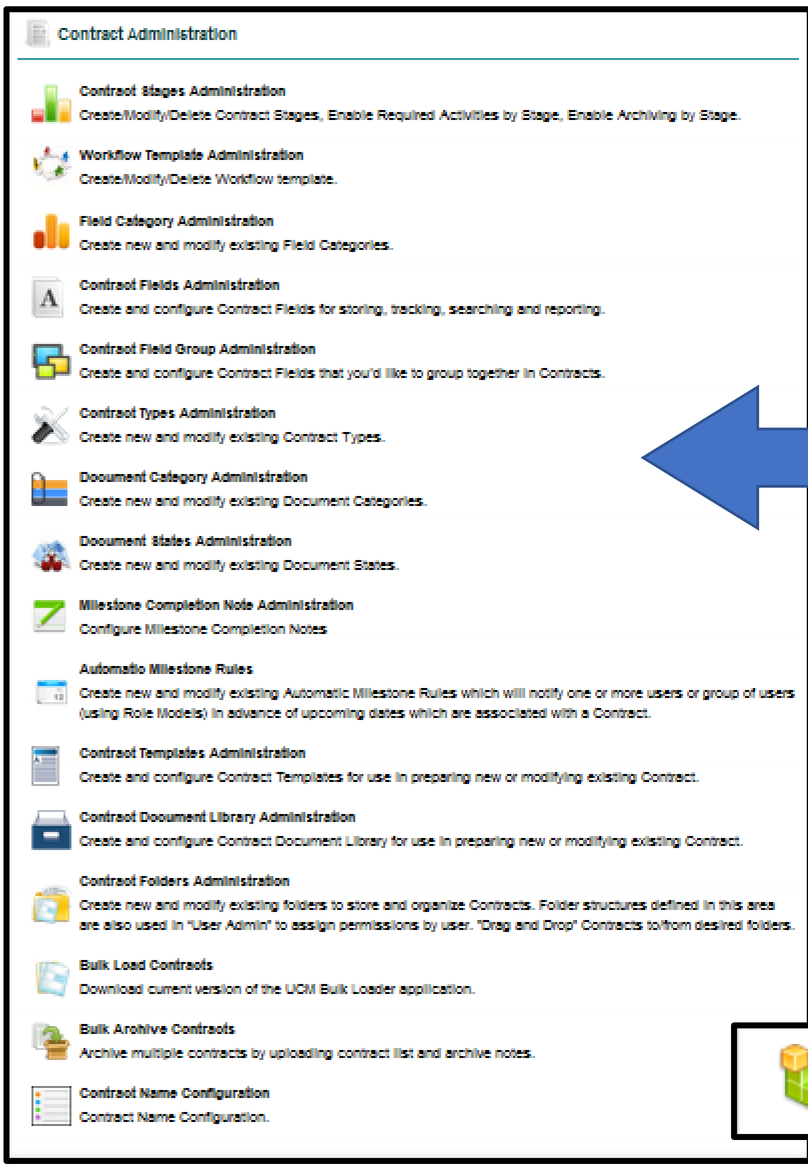
Contract Administration

Contract Administration is the largest area in the Company Admin. This is the "backbone" to the UCM System, where you set up the organization and structure for Contract Containers, such as Stages, Workflows, and Types. You create Fields and Field Groups. You identify Document Types and States, create Milestones, Templates, Libraries, and most importantly, the Folders.

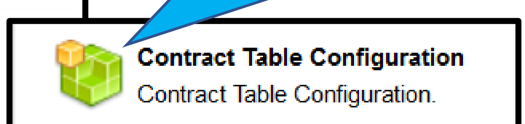
Upon implementation, the System Administrators are provided with training to help organize the system before diving in. Each section here will be discussed in detail on the following pages.

- The Contract Administration screen shows all the functions available at the time manuals released. As new enhancements are introduced, additional training tools are sent to Admins. These enhancements are then added to future UCM User Manuals.



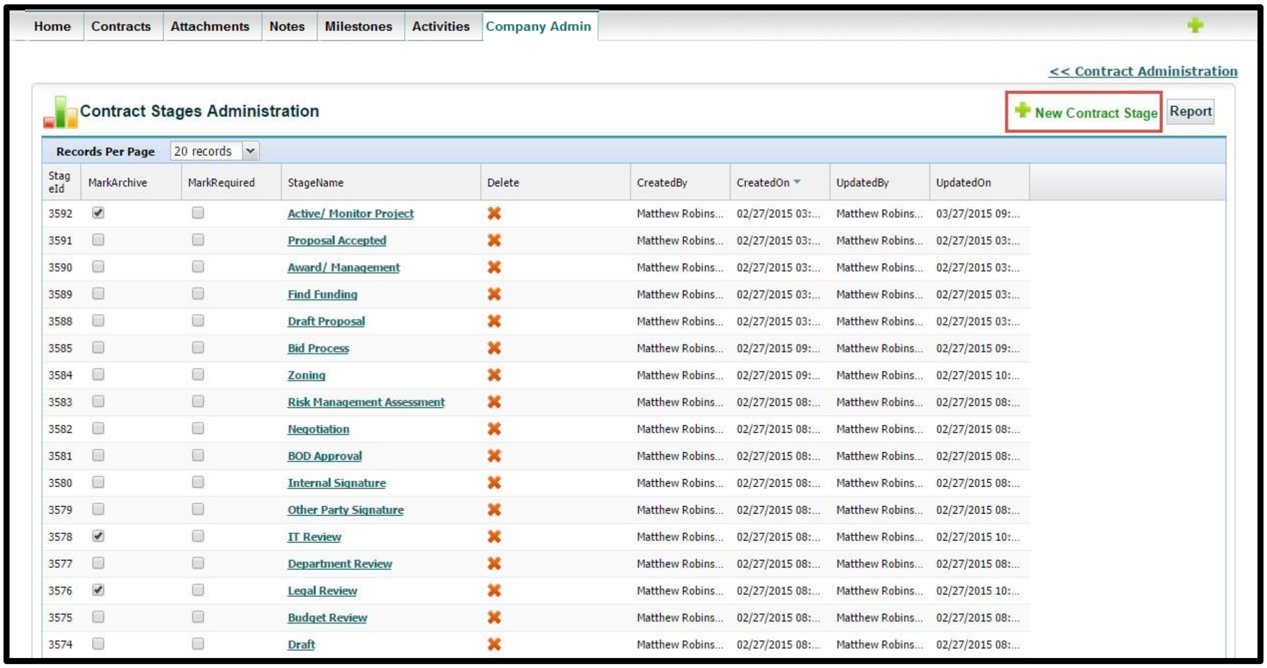


This is an optional feature (with an ***additional charge*** associated) that allows you to display different fields, as configured in the Contract Administration area, on a contract container within another tab of the Summary page. Contact your Sales Rep for further information.



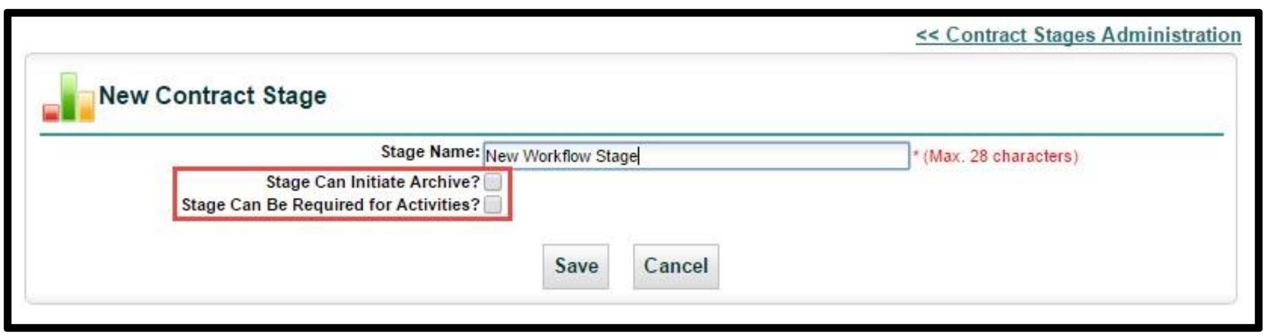
Contract Stages Administration

The **Contract Stages Administration** is the area where Workflow Stages in the system are defined. If you do not define the stage in this area first, then it will not be an option to use in a Workflow.

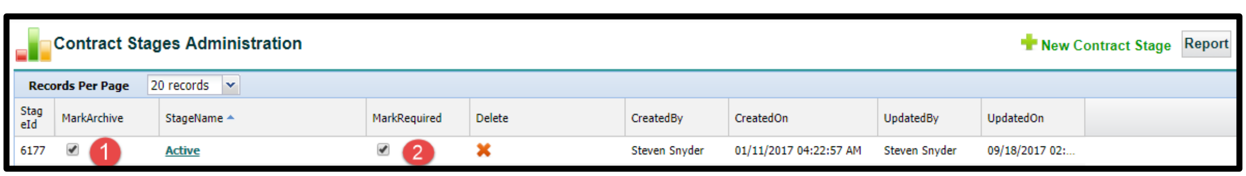


StageId	MarkArchive	MarkRequired	StageName	Delete	CreatedBy	CreatedOn	UpdatedBy	UpdatedOn
3592	✔		Active/ Monitor Project	✖	Matthew Robins...	02/27/2015 03:...	Matthew Robins...	03/27/2015 09:...
3591			Proposal Accepted	✖	Matthew Robins...	02/27/2015 03:...	Matthew Robins...	02/27/2015 03:...
3590			Award/ Management	✖	Matthew Robins...	02/27/2015 03:...	Matthew Robins...	02/27/2015 03:...
3589			Find Funding	✖	Matthew Robins...	02/27/2015 03:...	Matthew Robins...	02/27/2015 03:...
3588			Draft Proposal	✖	Matthew Robins...	02/27/2015 03:...	Matthew Robins...	02/27/2015 03:...
3585			Bid Process	✖	Matthew Robins...	02/27/2015 09:...	Matthew Robins...	02/27/2015 09:...
3584			Zoning	✖	Matthew Robins...	02/27/2015 09:...	Matthew Robins...	02/27/2015 10:...
3583			Risk Management Assessment	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...
3582			Negotiation	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...
3581			BOD Approval	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...
3580			Internal Signature	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...
3579			Other Party Signature	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...
3578	✔		IT Review	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 10:...
3577			Department Review	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...
3576	✔		Legal Review	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 10:...
3575			Budget Review	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...
3574			Draft	✖	Matthew Robins...	02/27/2015 08:...	Matthew Robins...	02/27/2015 08:...

Creating a new Contract Stage is easy. Click on **New Contract Stage** at the top right of the screen and define the Stage Name. The two optional check boxes allow you to **1)** mark that this Stage has the ability to move into an Archive state later, and **2)** make this Stage available for conditional Workflow advancement based on an Activity.



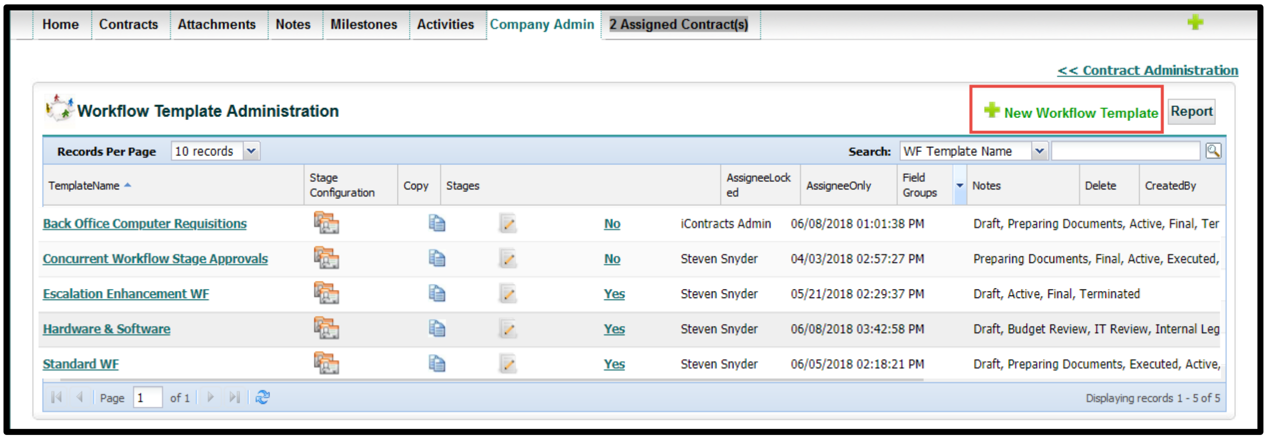
Check box **1)** triggers on the *Mark Archive* column; check box **2)** triggers the *Mark Required* column.



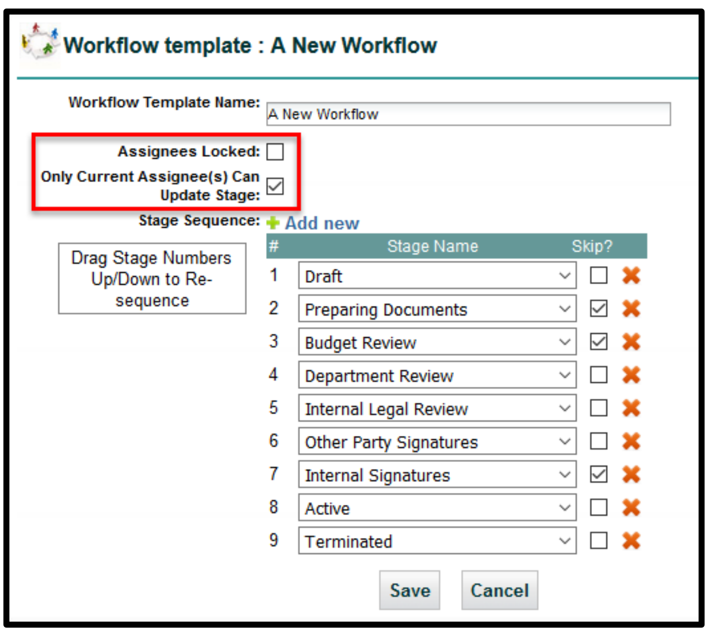
These two check box columns can be toggled on and off within the grid as well. Changes will update the *Updated By* and *Updated On* columns also.

Workflow Template Administration

The **Workflow Template Administration** area is where the sequence of steps, created in the Contract Stages, is assembled for the Workflow for a particular *Contract Type* for repeated use.



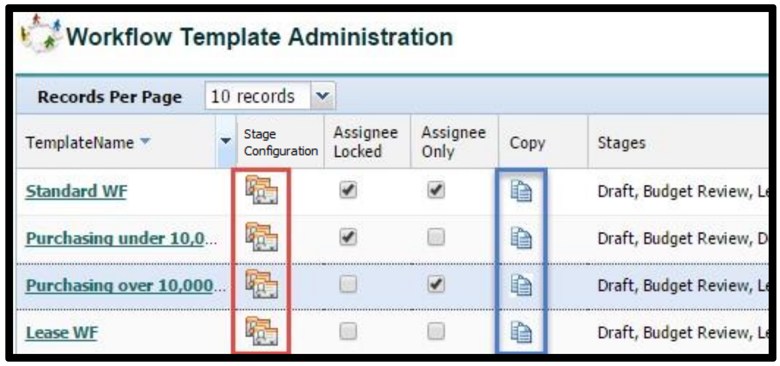
To create a Workflow Template, click the green **New Workflow Template** link, name the Workflow, and add your Stages from the drop-downs. You can add as many *Stage Sequences* as you need by clicking **Add new**. If you need to delete a Stage Sequence, click on the **X** to the right of the stage name (you must have at least two stages). If you need to reposition a Stage Sequence, drag the stage # to its new location. **Skipping Stages** will be explained in a later section. Click **Save** when finished.



These optional checkboxes beneath the *Workflow Template Name* allow you to do the following:

- **Assignees Locked:** If checked, non-admin users cannot change the Assignees previously assigned by an admin for any workflow stage *(as explained on the next page)*.
- **Only Current Assignee(s) Can Update Stage:** If checked, only a current Assignee (or Admin) can move the Workflow Stage (forward or backwards).

Workflow Templates Interfaces



In the Workflow Templates grid, there are two icons in addition to the button to create a Template. They are **Stage Configuration** and **Copy**.

Stage Configuration

From within the Workflow Template Administration grid, you can define stage settings such as the assignees to be notified (by email) when the Workflow moves to a certain stage, field groups to be added, notes included in emails, email reminders and escalations, whether to set approvals, or control the enterprise ribbon notifications.

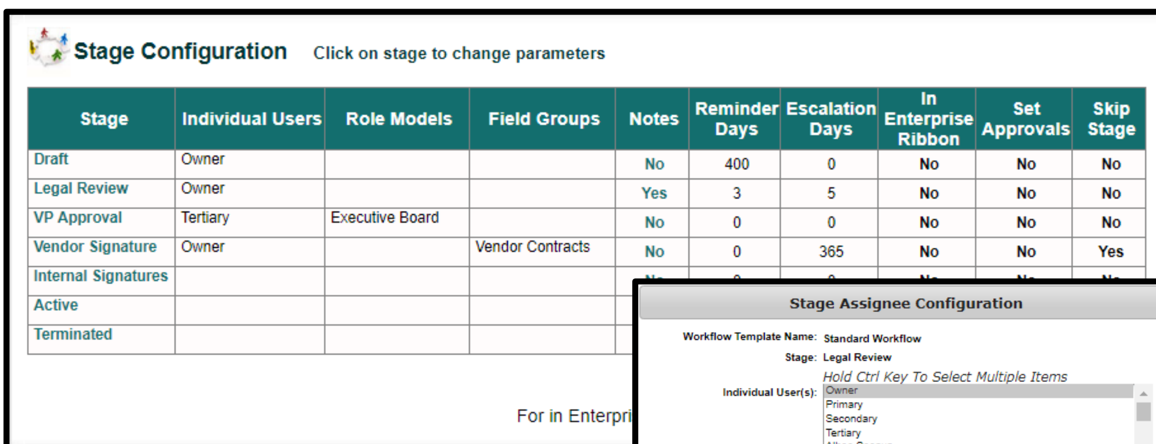
Copy

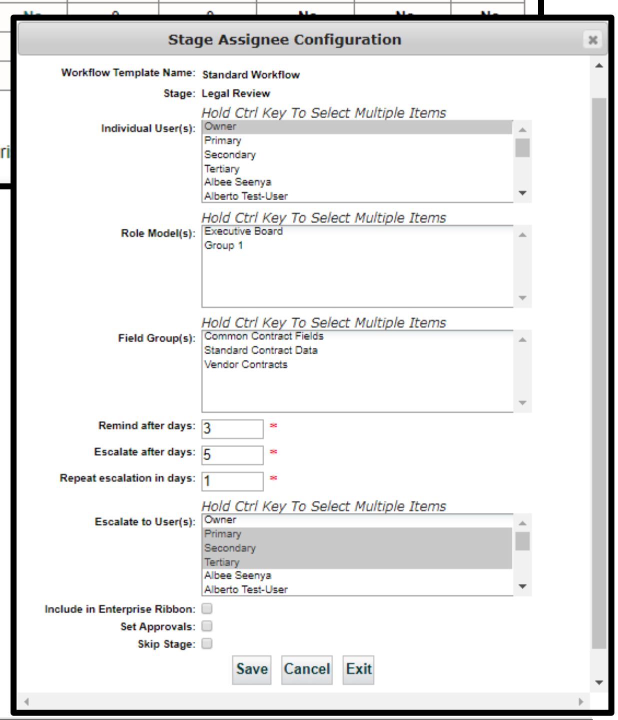
Copy allows you to duplicate a Workflow Template and all its attributes so it may be used as a starting point to create a new Workflow Template without having to start from scratch.

Working with Stage Configuration

To define the Stage Configuration on a Workflow Template:

- Select the Stage Configuration icon.
- Click the **Stage** you would like to assign.





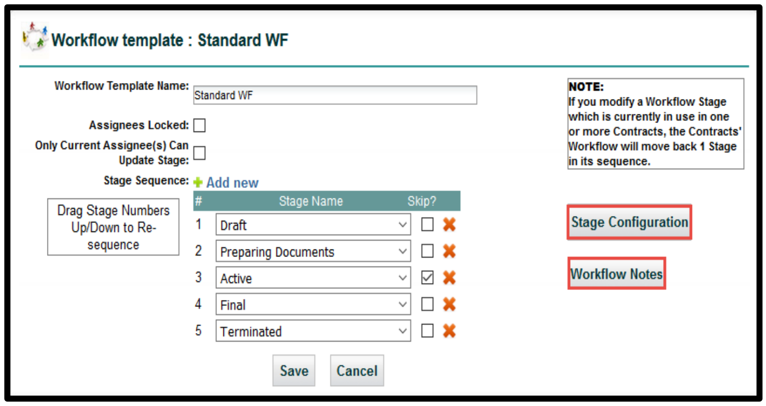
- Choose the Individual User(s) and/ or choose…
- Role Model(s) responsible for the Stage.
- Choose if any Field Groups are assigned to a Stage.
- Include in Enterprise Ribbon (Assigned Contracts).
- Click **Save** to update the Stage.
- The selections made appear in the table to the right of each Stage.
- Setting up *Reminders/Escalations/Escalation Users*, *Set Approvals*, *Skip Stage*, *Field Groups* and *Notes* are explained in the next section.
- Repeat these steps for each Stage assigned users.

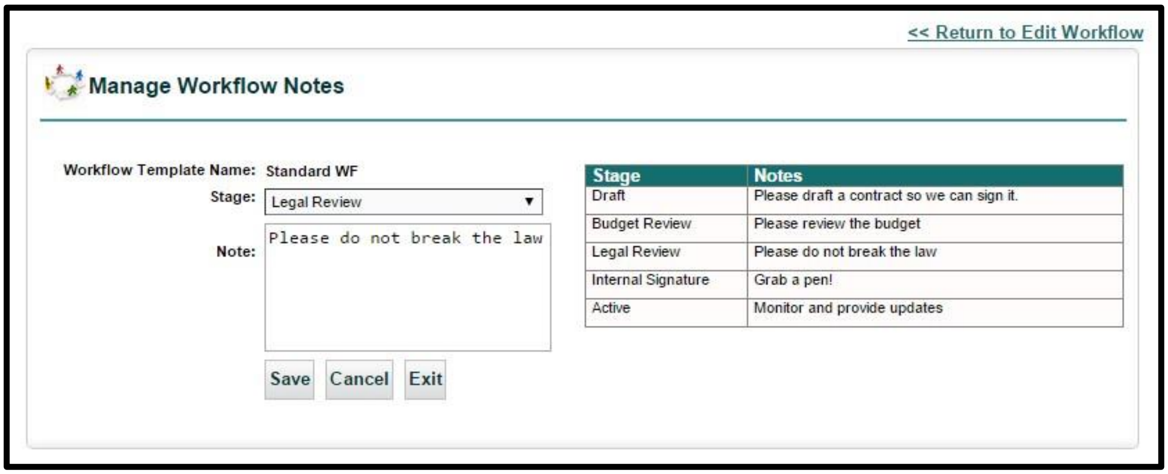
See the topic ***Working with Assignees Locally*** on the next page for additional information.

Workflow Notes

From within an existing Workflow Template there is one button to manage Workflow Assignees & Field Groups and another for **Workflow Notes**. These Notes are included in the email notifications sent to the Assignees to provide additional instructions and detail.

***Tip**: Use this area to let your Assignees know what they should be doing with a contract that has moved into another Stage for which they are now responsible.*

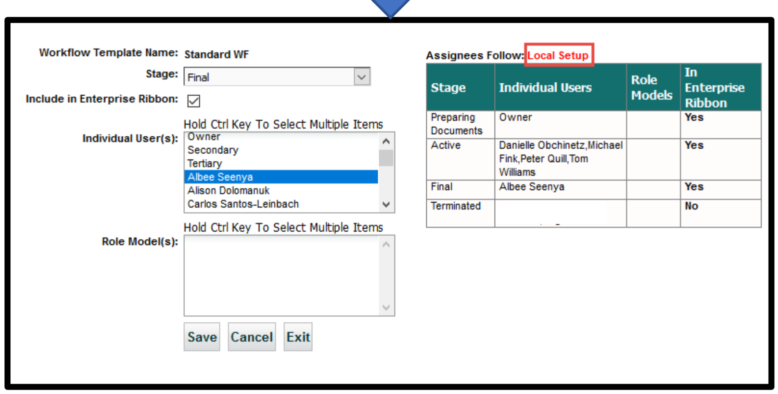




Working with Assignees Locally

To manage Assignees within a Workflow Template locally, even if none have been created yet, click on the **Manage Assignees** icon *(see image above)*.

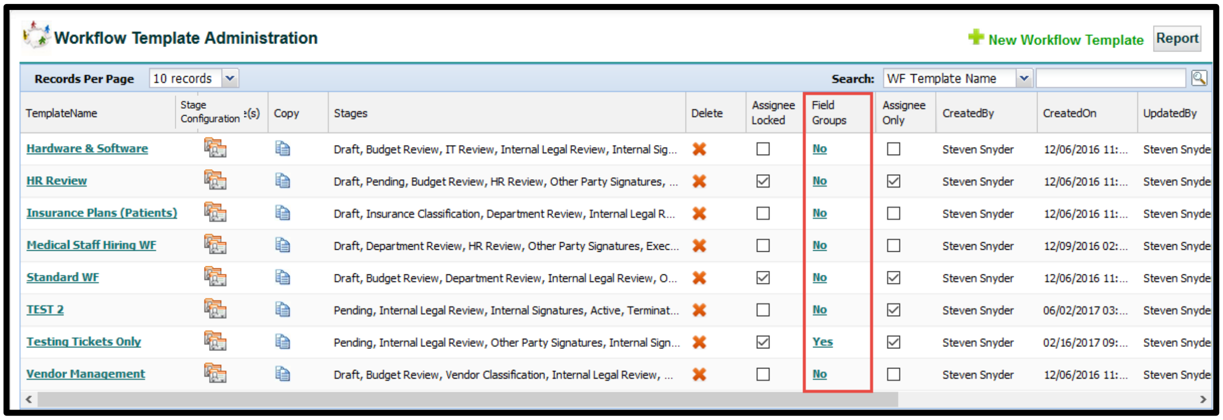
In the Manage Assignees pop-up window, you make local changes to the Assignees in the same way as in the Company Admin area. This area will also let you know whether the Workflow is following a **Local Setup** or **Admin Setup**.



Adding Field Groups to Stage Configuration

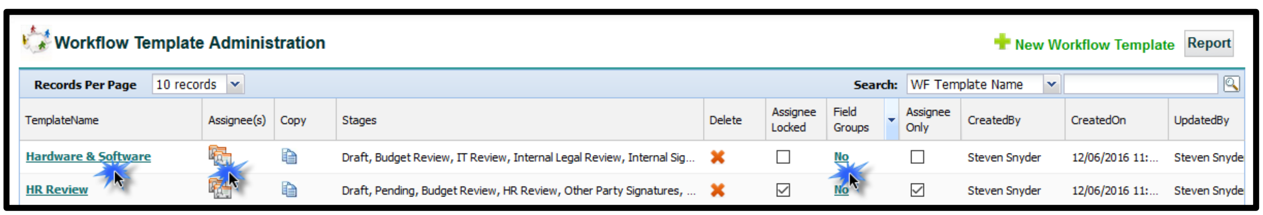
Admins can add Field Groups to a Stage Configuration, where the Individual Users or Role Models who are assigned to a Stage would have additional field groups automatically added to the Contract Container specific to that stage.

Accessing the Stage Configuration Screen

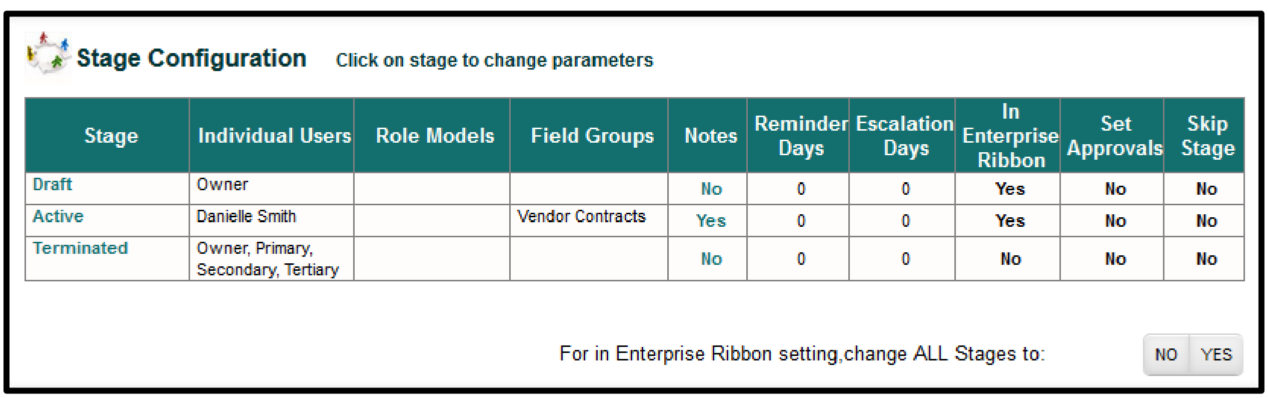


There are three ways to access the Stage Configuration screen. As you can see from the image above, there is a column, named "*Field Groups*", that contains a Yes or No link.

Click on the Yes or No for that Template Name, or click on the actual Template Name, or click on the icon under the Stage Configuration column.



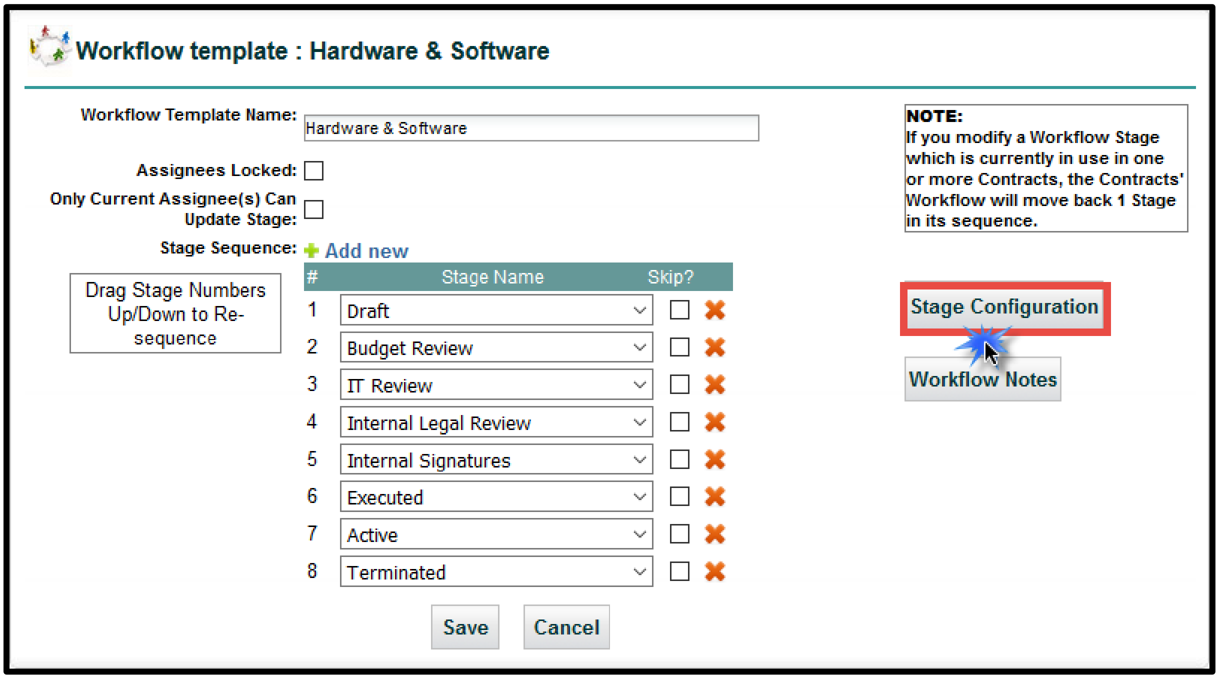
Clicking on either the Yes/No in the Field Groups column, **or** the Stage Configuration icon displays the *Stage Configuration* screen. Click on the Stage name to add or edit the Field Group.


Stage Configuration Click on stage to change parameters

Stage	Individual Users	Role Models	Field Groups	Notes	Reminder Days	Escalation Days	In Enterprise Ribbon	Set Approvals	Skip Stage
Draft	Owner			No	0	0	Yes	No	No
Active	Danielle Smith		Vendor Contracts	Yes	0	0	Yes	No	No
Terminated	Owner, Primary, Secondary, Tertiary			No	0	0	No	No	No

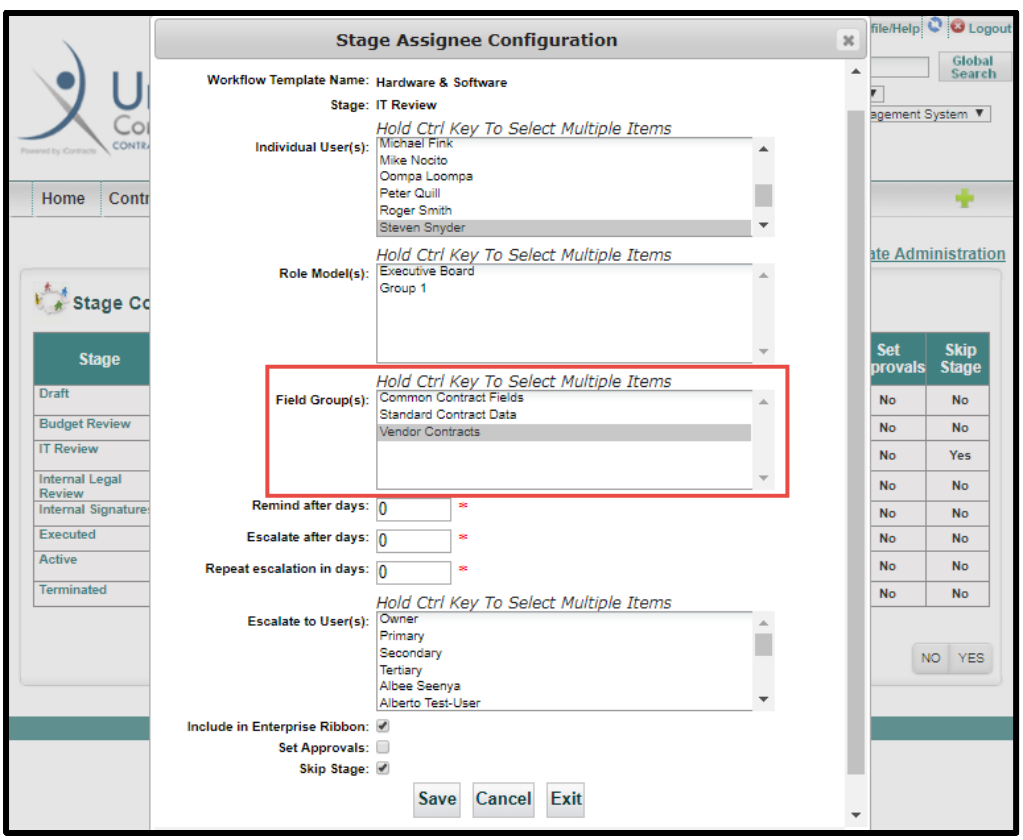
For in Enterprise Ribbon setting,change ALL Stages to: NO YES

Clicking on Template Name takes you to this screen. You will need to click on the **Stage Configuration** button to view the *Stage Configuration* screen.



Adding Field Groups to Stage Configuration

The Individual Users and Role Models assigned to each stage can also have one or more Field Groups assigned to them as an optional process.



Click on the **Save** button to update the Configuration. Repeat this for each Stage that you want to modify.

Stage	Individual Users	Role Models	Field Groups	Notes	In Enterprise Ribbon	Set Approvals	Skip Stage
Draft	Owner			No	Yes	No	No
Budget Review	Steven Snyder			No	Yes	No	No
IT Review	Steven Snyder		LEGAL REVIEW	No	Yes	No	No
Internal Legal Review	Mary Roberts			No	Yes	No	No
Internal Signatures	Peter Jones			No	Yes	No	No
Executed	Peter Jones, Steven Snyder, Owner			No	Yes	No	No
Active				No	Yes	No	No
Terminated				No	Yes	No	No

Editing Stage Configuration

Click **No** or **YES** to set all Stages to include or exclude from the *Assigned Contract Count* on the Enterprise Ribbon.

For in Enterprise Ribbon setting,change ALL Stages to: NO YES

Click **OK** to confirm. Your selection is color coded for easier identification.

Do you want to toggle Include In Enterprise Ribbon for all Stages? Changes will be Auto-Saved.

OK Cancel

For Include in Enterprise Ribbon setting,change ALL Stages to: NO YES

For Include in Enterprise Ribbon setting,change ALL Stages to: NO YES

Set Approvals

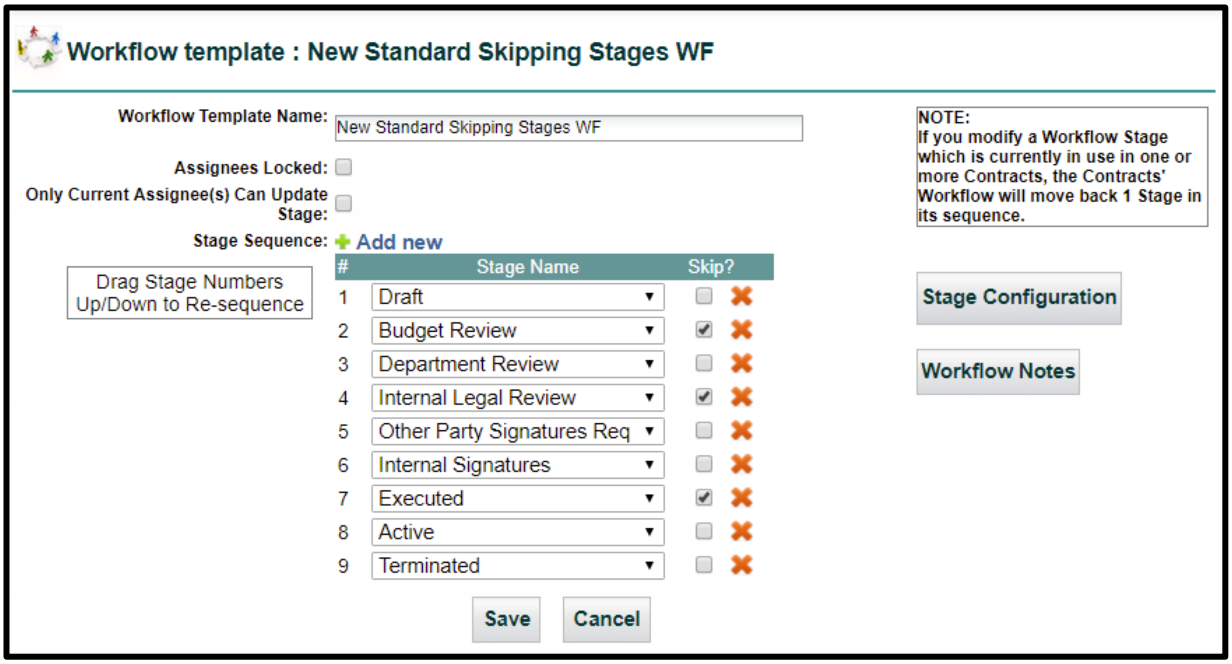
Similar to the *Contract Reviewers* function, Assignees for this Stage must approve or reject this contract. Click on the icon, located next to the Stage name, to display the Approver(s) pop-up window.

Stage	Individual Users	Role Models	Field Groups	Notes	Reminder Days	Escalation Days	In Enterprise Ribbon	Set Approvals	Skip Stage
Draft	Owner			No	0	0	Yes	No	No
Vendor Review	Owner			No	0	0	Yes	No	No
Department Review	Ian Goodenough, Rudolph Robinson, Danielle Smith, Owner			No	0	0	Yes	Yes	No

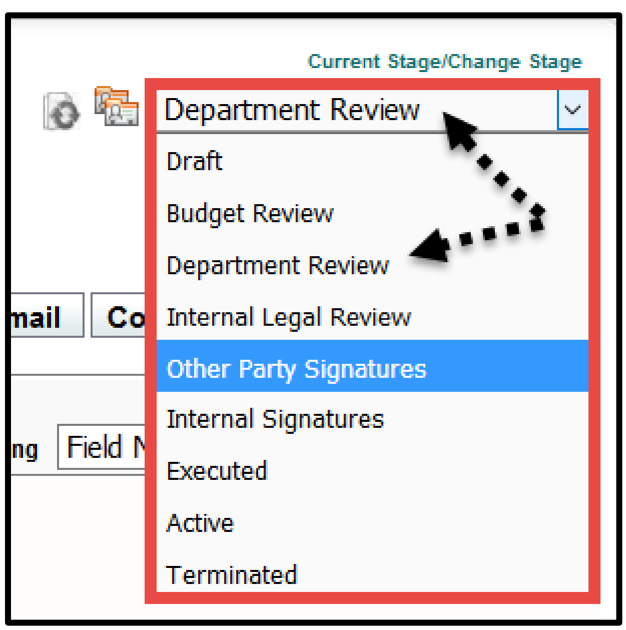
Only when all assignees approve this stage will the stage then automatically advance to the next stage.

Skipping Stages

As a general rule, you can choose any Stage to mark for skipping. You can choose one stage, multiple stages or multiple stages in succession. This allows more flexibility within a Workflow. You may even need fewer Workflows as a result of controlling which stages are mandatory and which ones can be skipped. If a stage is marked to be skipped, assignees can then "pass over" that stage. You cannot skip a stage that hasn't been defined ahead of time, but skipping that stage isn't mandatory.



Once the Skipped Stages are selected and the Workflow saved, users would need to know which stage they can skip in the Contract Container's *Current Stage/Change Stage*. In this example, this Contract is in **Department Review** stage. The user is skipping "*Internal Legal Review*" and going right to "*Other Party Signatures*" stage.



Results of Skipping Stages

The **History Tab** shows in the *Field Comment* column whenever a Stage is skipped.

History

Timeline View | Report

Records Per Page: 20 records

Comments	Field	FieldComment	HistoryDate
Stage updated to Other Party Signatures	Stage	Stage changed from Pending to Other Party Signatures after 0 days while skipping one or more stages as allowed	09/18/2017 9:17:33 AM

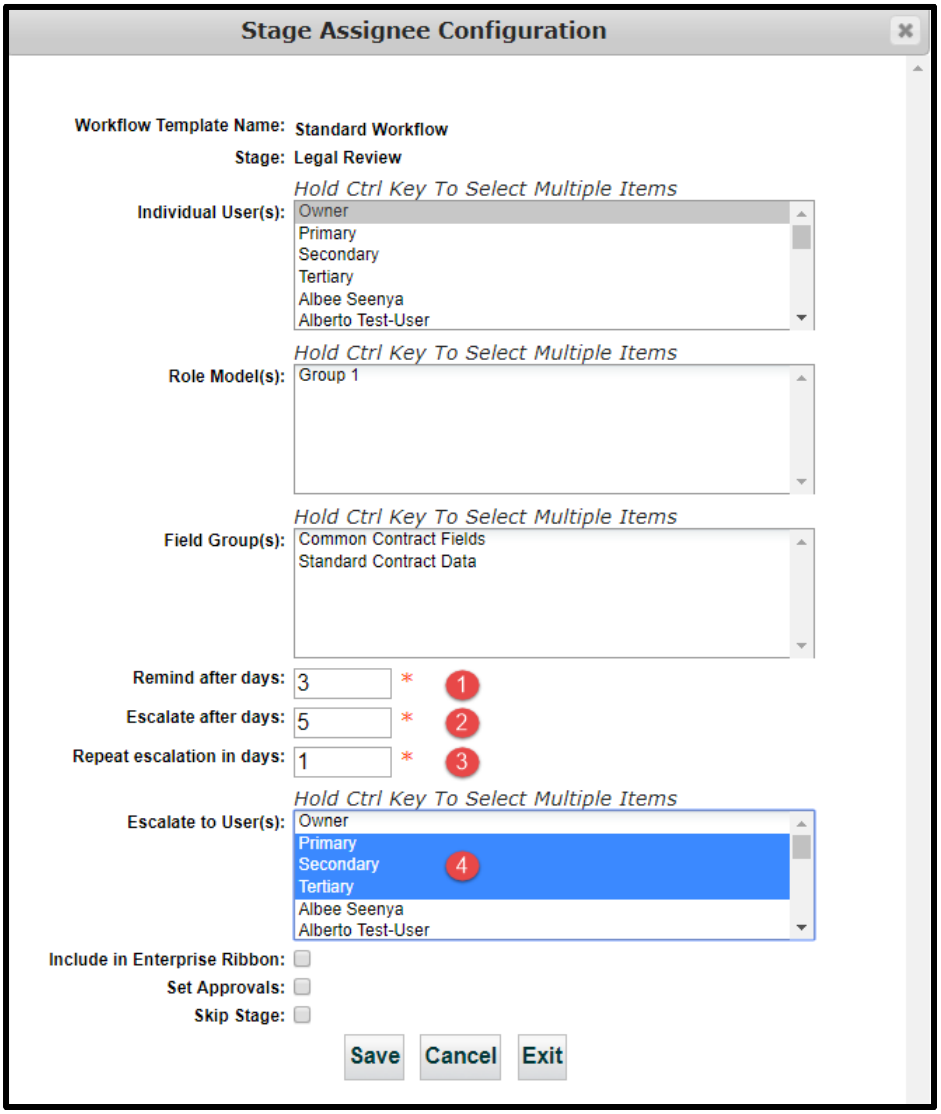
Using Workflow Stage Escalation

Admins have the ability to create an alert to notify user(s) by email if a Workflow Stage has not moved on after a set number of days. You can 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).

Stage Assignee Configuration Settings

Display the **Workflow Stage Configuration** and select which Stage you want to add a *Reminder Day* and *Escalation Day*. These are *optional fields* but if you choose to use one feature, the other two must also have values – even if that value is zero.

See the example on the next page.



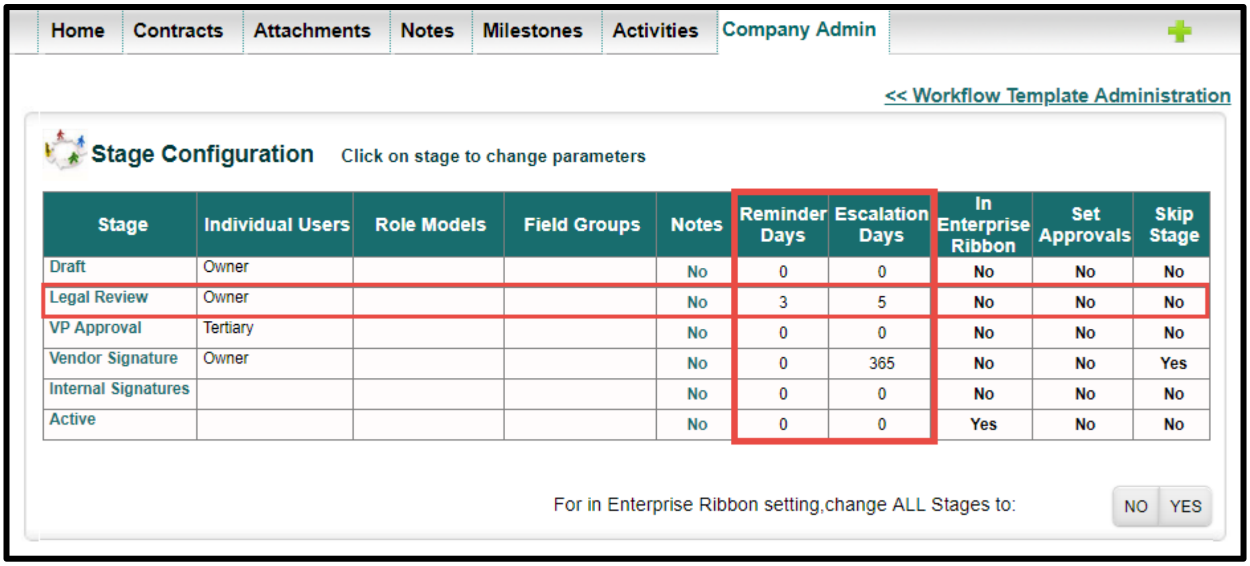
1. **Remind after days**: This generates an email to *Stage Assignees* that a Contract Container has been in a stage for a set number of days and requires attention. The default is zero and it is optional to activate this alert.
2. **Escalate after days**: This also generates an email to both the *Stage Assignees* and the User(s) selected in **4** to let them know that the Contract is *still* in this Stage and *action* is required. The default is also zero and again, it is optional to activate this alert.
3. **Repeat escalation in days**: This determines *how often* to repeat the escalation email notifications. If 0, don't repeat; 1 means daily; 2 means every other day, and so on.
4. **Escalate to User(s)**: Users who will be notified that a Stage has not been advanced. These users are in addition to the *Stage Assignee(s)*.

- Values cannot be negative numbers. Your range is from 0 to 500 days.
  Once you **Save** the *Stage Assignee Configuration*, you can repeat this for any additional Stages.

In the above example, the following notifications will be sent:

Reminder email to Assignees: after 3 days
Escalation email to Assignees and Escalation users: after 5 days
Repeat escalation email to Assignees and Escalation users: at 6 days, 7 days, 8 days, etc.

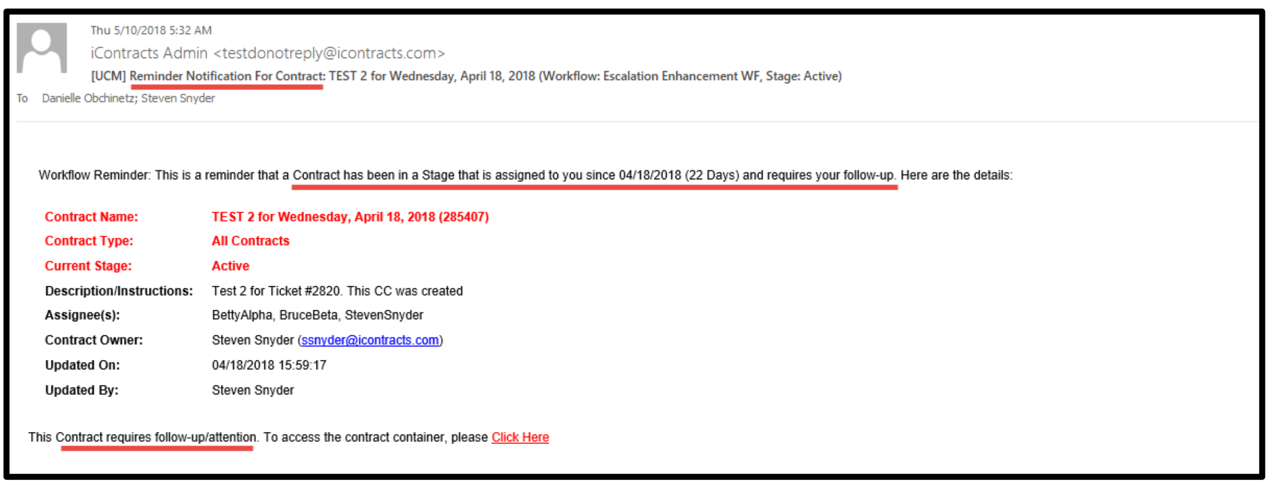
The **Workflow Stage Configuration** now shows the *Reminder Days* and *Escalation Days*.



Stage	Individual Users	Role Models	Field Groups	Notes	Reminder Days	Escalation Days	In Enterprise Ribbon	Set Approvals	Skip Stage
Draft	Owner			No	0	0	No	No	No
Legal Review	Owner			No	3	5	No	No	No
VP Approval	Tertiary			No	0	0	No	No	No
Vendor Signature	Owner			No	0	365	No	No	Yes
Internal Signatures				No	0	0	No	No	No
Active				No	0	0	Yes	No	No

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

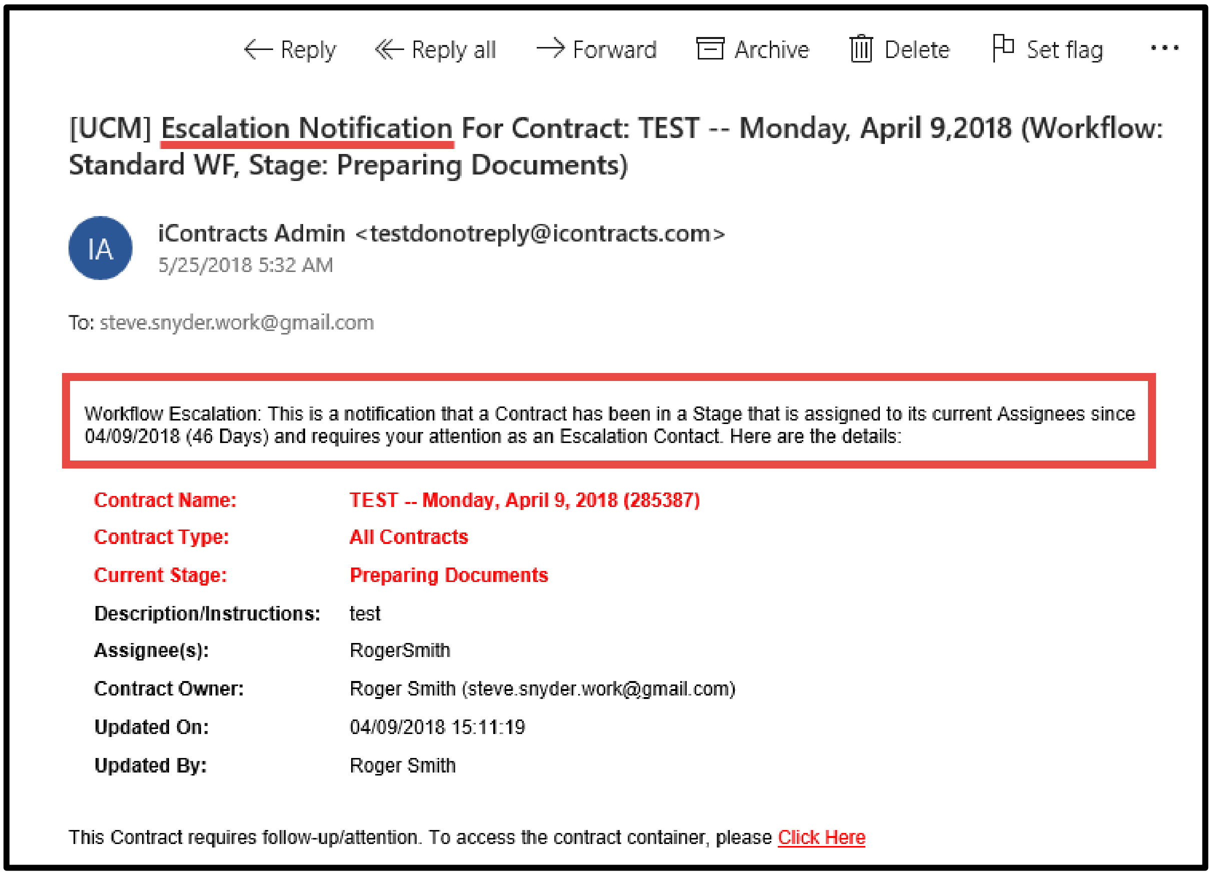
Workflow Reminder: This is a reminder that a Contract has been in a Stage that is assigned to you since 04/18/2018 (22 Days) and requires your follow-up. Here are the details:

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

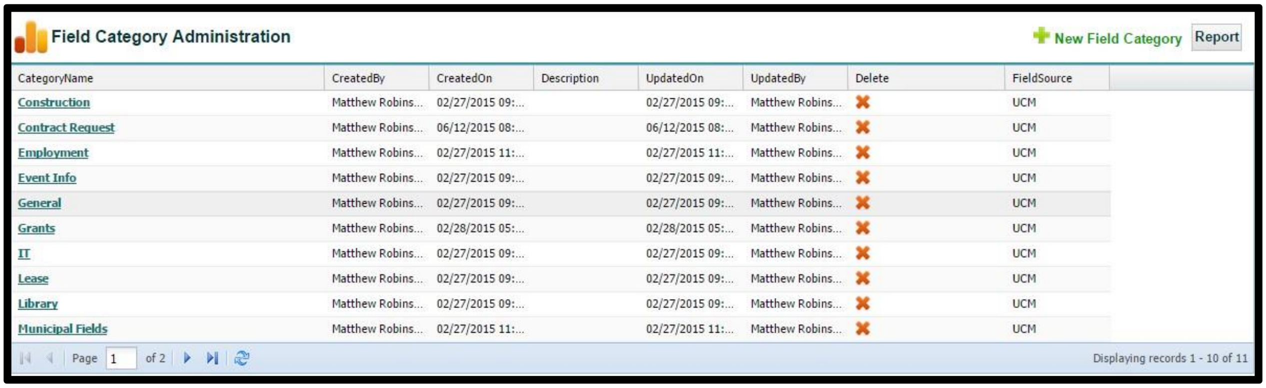
Workflow Escalation: This is a notification that a Contract has been in a Stage that is assigned to its current Assignees since 04/09/2018 (46 Days) and requires your attention as an Escalation Contact. Here are the details:

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

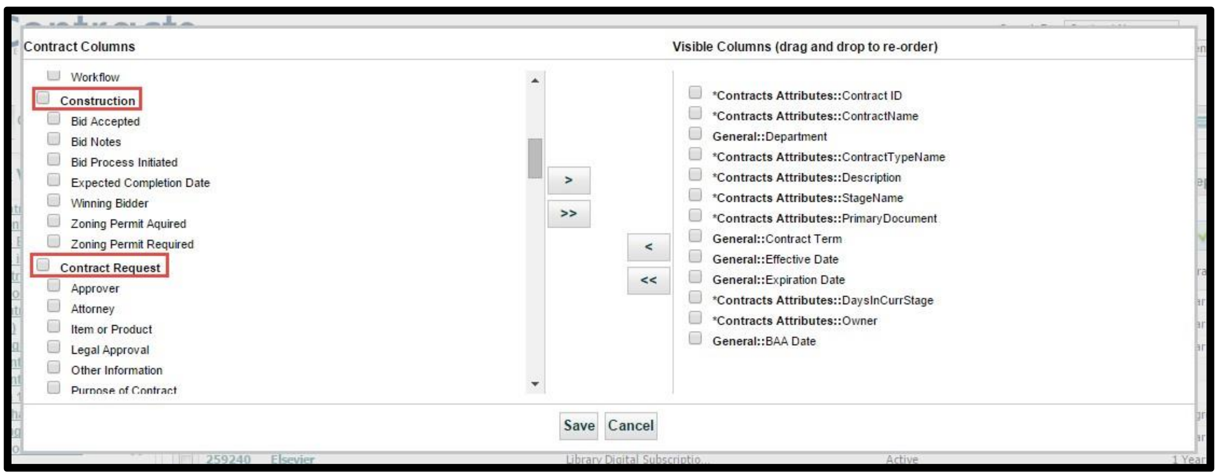
Field Category Administration

Field Categories allow the administrator to organize fields for ease of use in the grid view, either when choosing fields to display or when adding fields to a Contract Container. Without Field Categories, fields are listed in alphabetical order, as opposed to groups. For example, date fields may be in one category, outside vendors or speakers in another category.

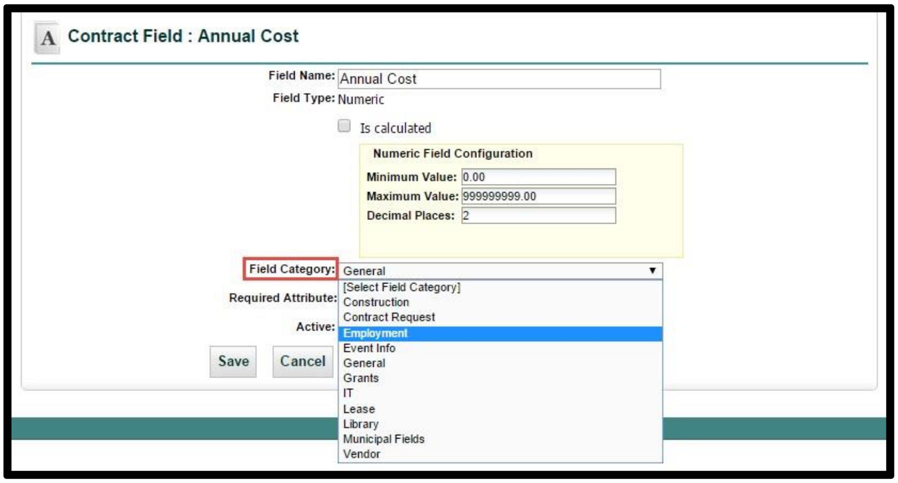


The following pages show locations where Field Categories will appear:

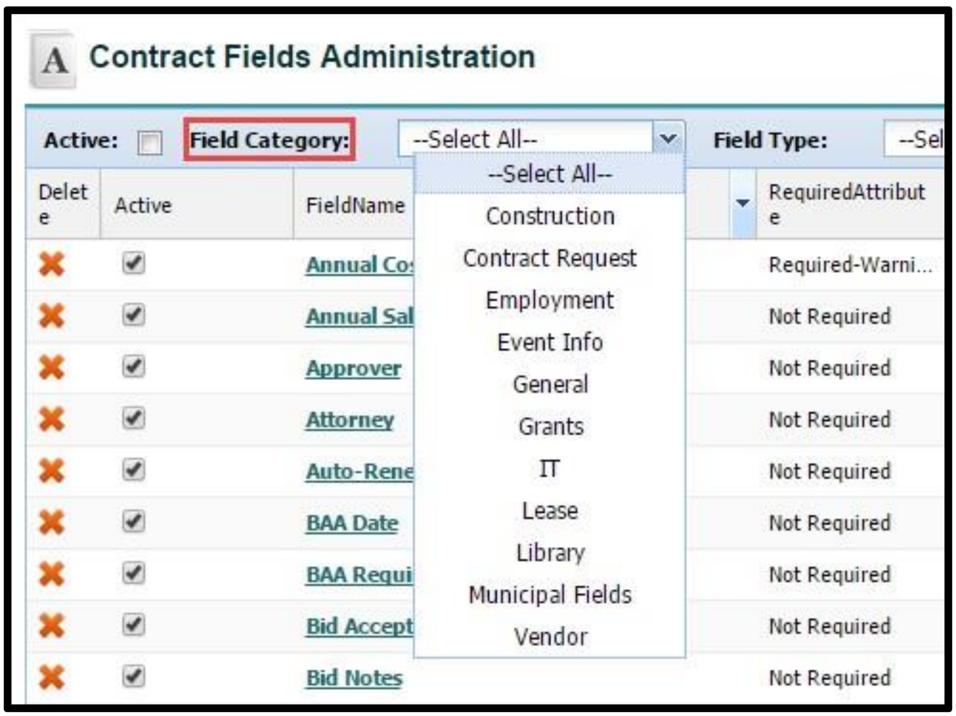
1. Column Headings (Fields) in the Contracts Tab grid or the Create/Modify Contracts View.



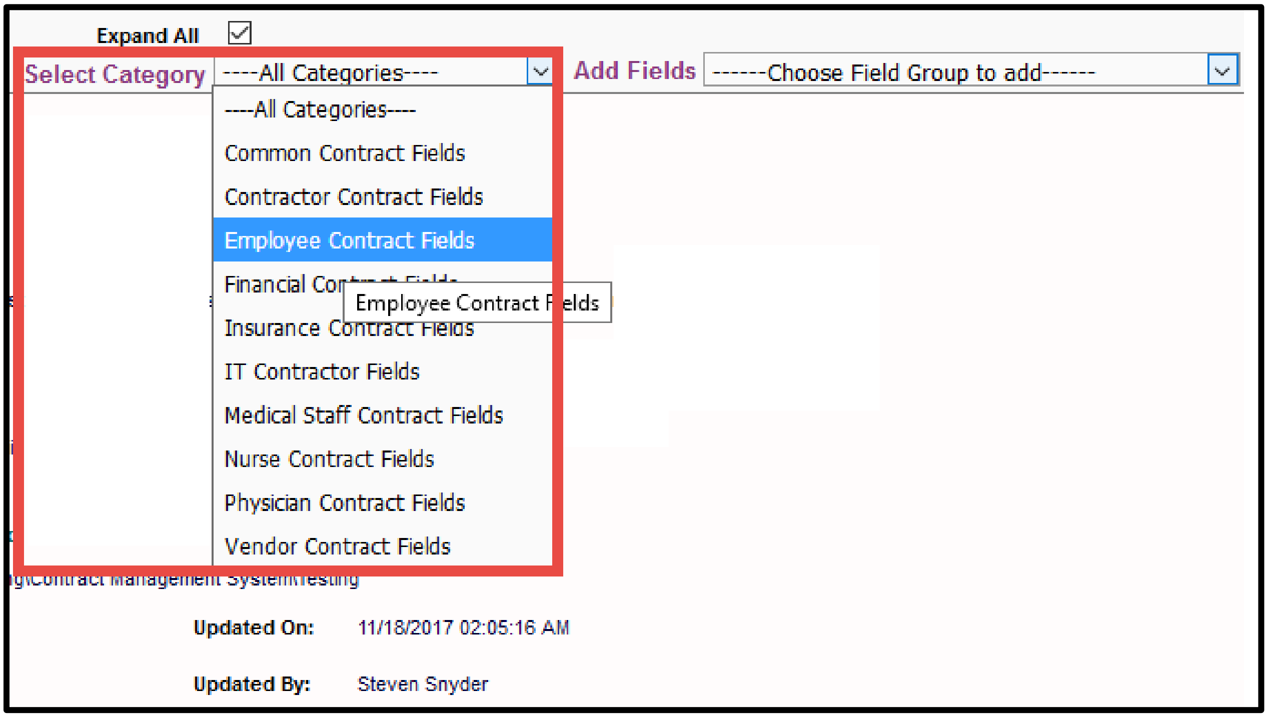
2. The New Contract Field Creation Screen.



3. The Contract Fields Administration listing.

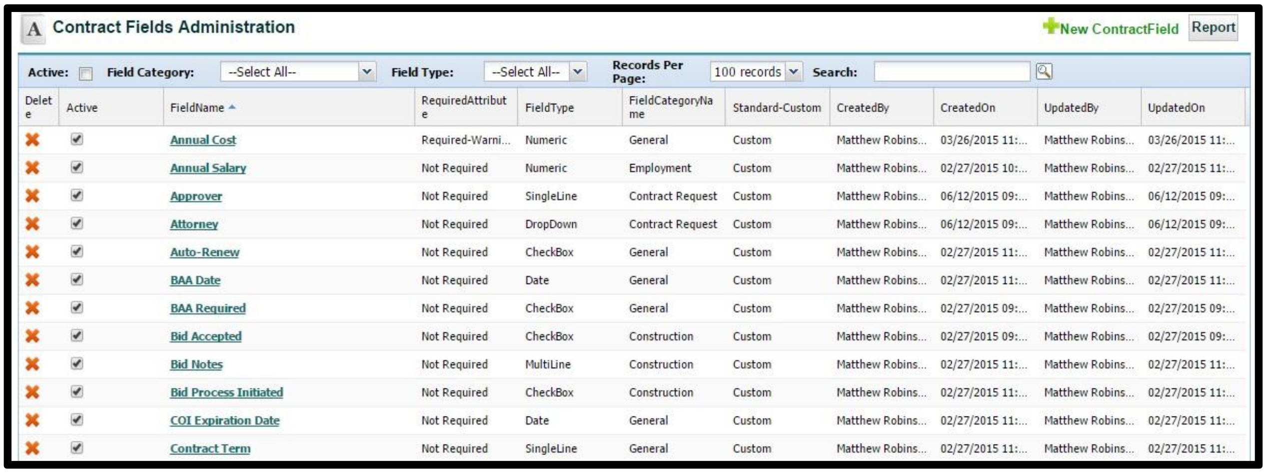


4. The Contract Field Listing on the Contract Summary Page.



Contract Fields Administration

The **Contract Fields Administration** area is where the System Administrator(s) define all the fields needed for identification and tracking purposes. There are eight (8) types of fields that are available and all have these 3 *Required Attributes*: Not Required, Required Warning, and Required Mandatory.


Contract Fields Administration

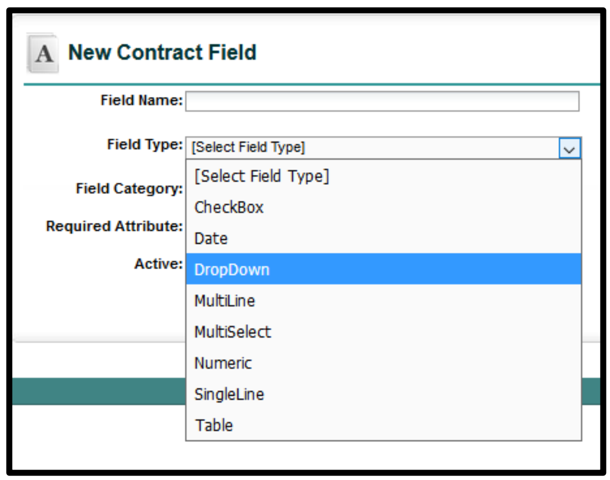
New ContractField Report

Active: Field Category: --Select All-- Field Type: --Select All-- Records Per Page: 100 records Search:

Delete	Active	FieldName	RequiredAttribute	FieldType	FieldCategoryName	Standard-Custom	CreatedBy	CreatedOn	UpdatedBy	UpdatedOn
✖	☑	Annual Cost	Required-Warni...	Numeric	General	Custom	Matthew Robins...	03/26/2015 11:...	Matthew Robins...	03/26/2015 11:...
✖	☑	Annual Salary	Not Required	Numeric	Employment	Custom	Matthew Robins...	02/27/2015 10:...	Matthew Robins...	02/27/2015 11:...
✖	☑	Approver	Not Required	SingleLine	Contract Request	Custom	Matthew Robins...	06/12/2015 09:...	Matthew Robins...	06/12/2015 09:...
✖	☑	Attorney	Not Required	DropDown	Contract Request	Custom	Matthew Robins...	06/12/2015 09:...	Matthew Robins...	06/12/2015 09:...
✖	☑	Auto-Renew	Not Required	CheckBox	General	Custom	Matthew Robins...	02/27/2015 11:...	Matthew Robins...	02/27/2015 11:...
✖	☑	BAA Date	Not Required	Date	General	Custom	Matthew Robins...	02/27/2015 11:...	Matthew Robins...	02/27/2015 11:...
✖	☑	BAA Required	Not Required	CheckBox	General	Custom	Matthew Robins...	02/27/2015 09:...	Matthew Robins...	02/27/2015 09:...
✖	☑	Bid Accepted	Not Required	CheckBox	Construction	Custom	Matthew Robins...	02/27/2015 09:...	Matthew Robins...	02/27/2015 09:...
✖	☑	Bid Notes	Not Required	MultiLine	Construction	Custom	Matthew Robins...	02/27/2015 11:...	Matthew Robins...	02/27/2015 11:...
✖	☑	Bid Process Initiated	Not Required	CheckBox	Construction	Custom	Matthew Robins...	02/27/2015 11:...	Matthew Robins...	02/27/2015 11:...
✖	☑	COI Expiration Date	Not Required	Date	General	Custom	Matthew Robins...	02/27/2015 11:...	Matthew Robins...	02/27/2015 11:...
✖	☑	Contract Term	Not Required	SingleLine	General	Custom	Matthew Robins...	02/27/2015 11:...	Matthew Robins...	02/27/2015 11:...

Date and Numeric fields also have their specific requirements (see next page).

- CheckBox
- Date (or Calculated Date)
- DropDown
- MultiLine
- MultiSelect
- Numeric (or Calculated Numeric)
- SingleLine
- Table



CheckBox Field Setup

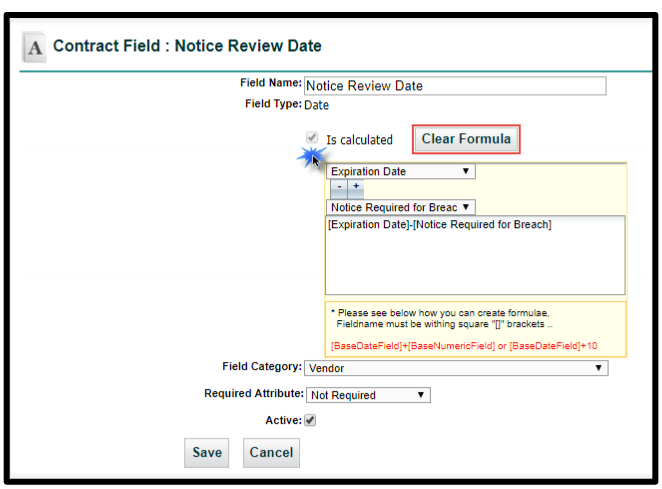
If you need to create a new Checkbox Field, simply navigate to the green link for "**New Contract Field**" at the top right of the Contract Field Administration Grid. Name the Field, select the *Field Type* **CheckBox**. You may also select a Field Category or mark the Checkbox as Requested (Checkboxes cannot be Mandatory fields).

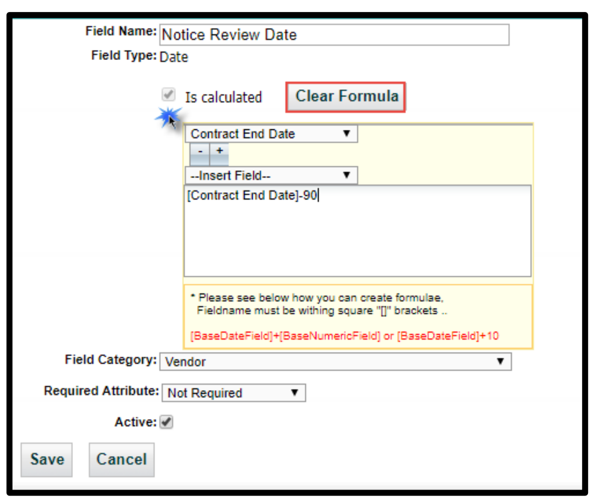
Date Field Setup

If you need to create a new *Date* or *Calculated Date* Field, select the Field Type **Date**. Date Fields require only a *Field Name* and you can include a *Field Category* or mark as a Required or Requested Attribute.

Date *Field Type* includes a checkbox "Is calculated". To create a calculated date field, select this checkbox. The area appearing below allows you to select which other date field you would like to start this calculation, select **+** or **–** and then select another date/numeric field, or you can type a number manually. This will calculate in number of days.

Use the ***Clear Formula*** button to reset the calculations at any time and start over.



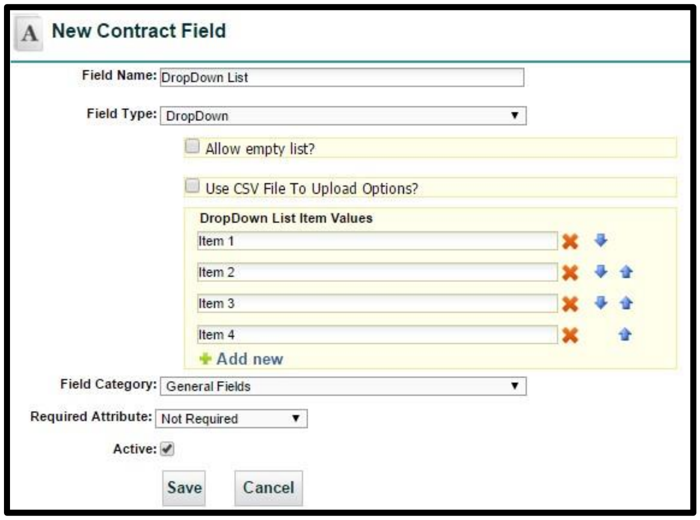


DropDown List Field Setup

To create a **DropDown List**, start by naming your new Field and choosing "DropDown" as the Field Type. Next, you populate the List Item Values. You can rearrange the order of the values with the blue arrows to the right. You can also use a CSV file to import values into your list by checking the box next to the option for "Use CSV File to Upload Options?".

When editing Dropdown lists, you can use a CSV File to replace or append the values in your list. You can also click **Sort** to rearrange.

You may select a Field Category or mark the Field as Requested or Mandatory as well.



MultiLine Field Setup

MultiLine Fields are long text fields. To create one, select MultiLine from the Field Type. Again, you may select a Field Category or mark the Field as Requested or Mandatory.

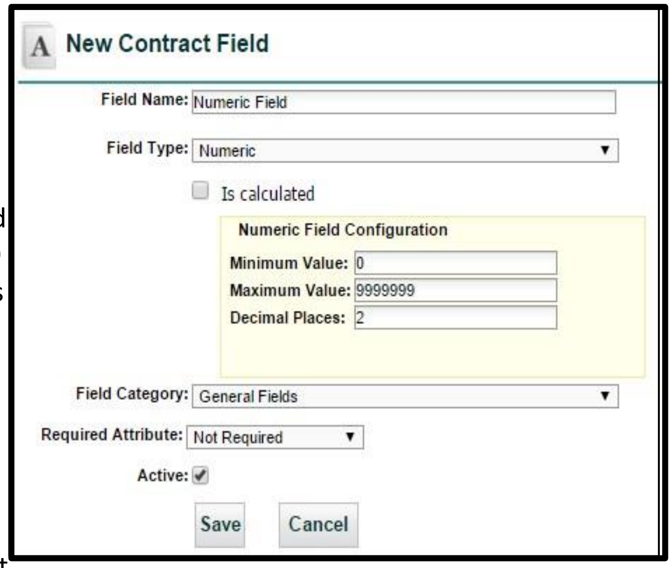
MultiSelect Field Setup

MultiSelect Field Types are very similar to DropDown Fields. They are setup exactly the same way. You can still use CSV Files to create these lists, as well as Sort an edited list.

Within the Contract Container, you will be able to choose multiple values (unlike a DropDown that only selects a single value). These multiple selections will show next to or below the field name, separated by what's called a pipe (|).

Other Field Setups

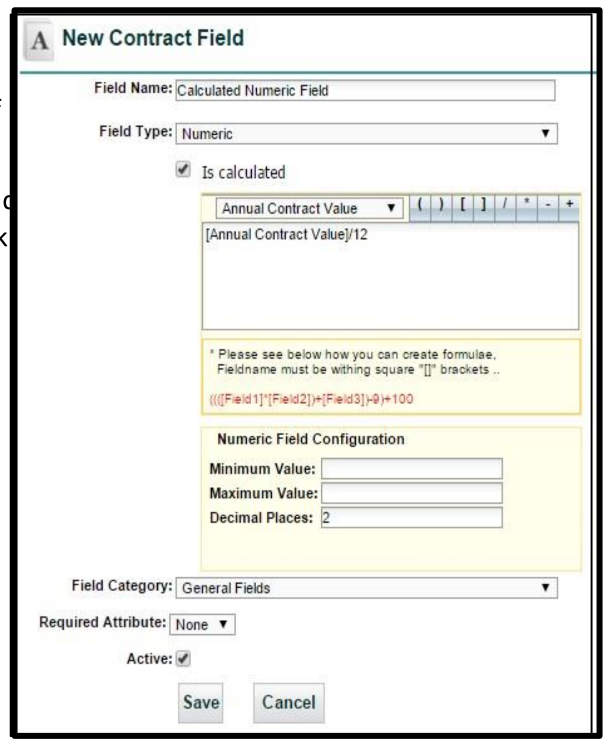
Numeric Field Setup



When setting up a **Numeric Field**, you will need to give the Field a name and select the option DropDown, but you will also need to populate values for Minimum, Maximum, and the number decimal places. In this example, the numeric field lists a series of 9's in the Maximum Value Field, 0 the Minimum Value, and 2 decimal places. This is used for setting up any Numeric Fields that may used for currency or calculations.

If you create a **Numeric Calculated Field**, select option for "*Is calculated*". This opens the Field to enter a calculation. You are able to use other and integers for calculating in this area. In this example, the Field is dividing the Annual Contract Value by 12 to create a monthly value. Like Date fields, click "*Click Formula*" to erase the calculation.

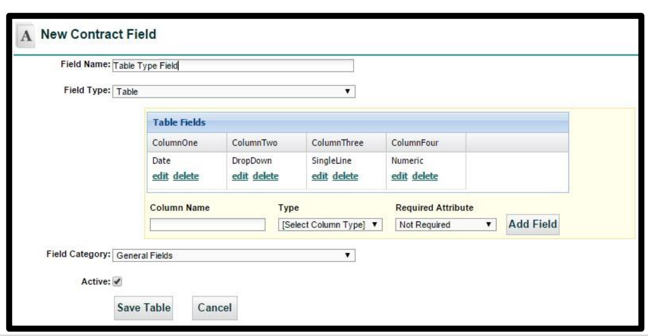
SingleLine Field Setup



This Field is useful for short text information. for email addresses, phone numbers, or short lines of text. These Fields are limited to 80 characters.

The setup for **SingleLine Fields** is simple. Give the Fiel name, select SingleLine from the DropDown and mark whether you would like this to be Requested or Mandatory, if applicable. You can also determine the Field Category from this screen.

Table Fields Setup

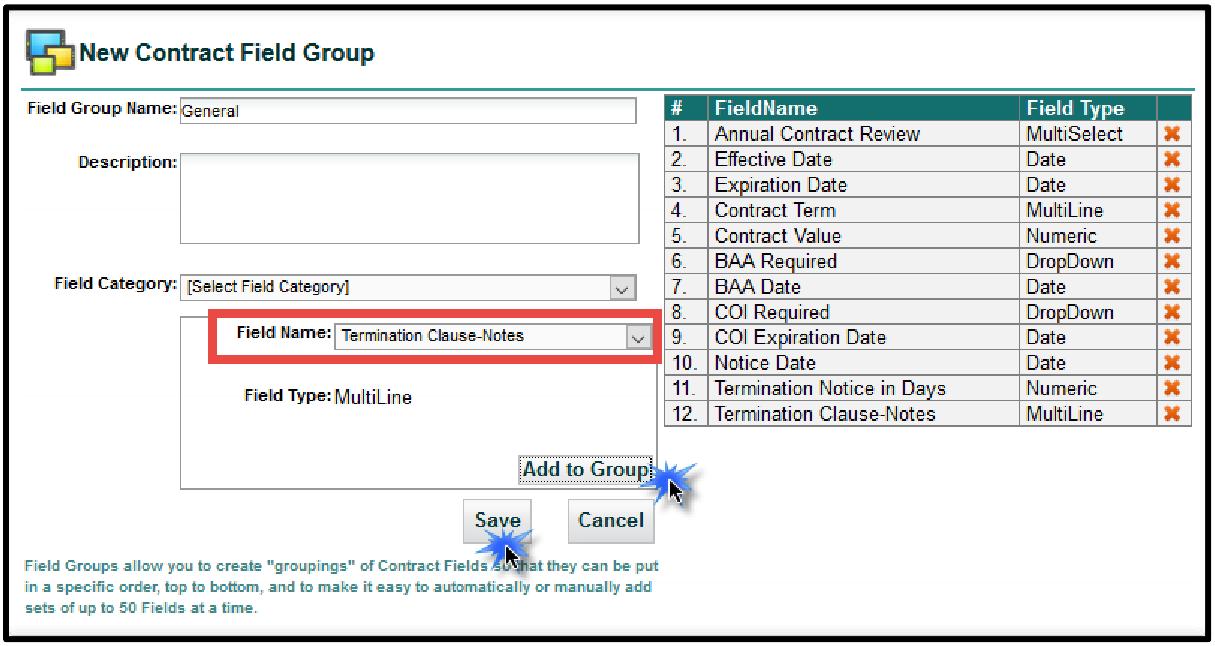


When creating a **Table Type Field**, start by giving the field a name. You will then select the types of data you would like to show for the columns in your table. Name each column and mark whether this is Not Required, Requested, or Mandatory.

Field Group Administration

Creating **Field Groups** minimizes the effort and space required to enter groups of data that pertain to your contracts without the need to setup each field individually. Field Groups are easy to setup, maintain, and modify.

Click on the "**New Field Group**" button at the top right above the grid, name your Field Group, enter a description, and select the desired fields one at a time – clicking on "*Add to Group*" after each field. You can also rearrange the order of your Fields by *dragging* anywhere within the Field Name-avoid the X-up and down the list (the # updates automatically). The Description and Field Category areas are optional, but helpful in searching and organizing. You are limited to 50 Fields per Field Group.



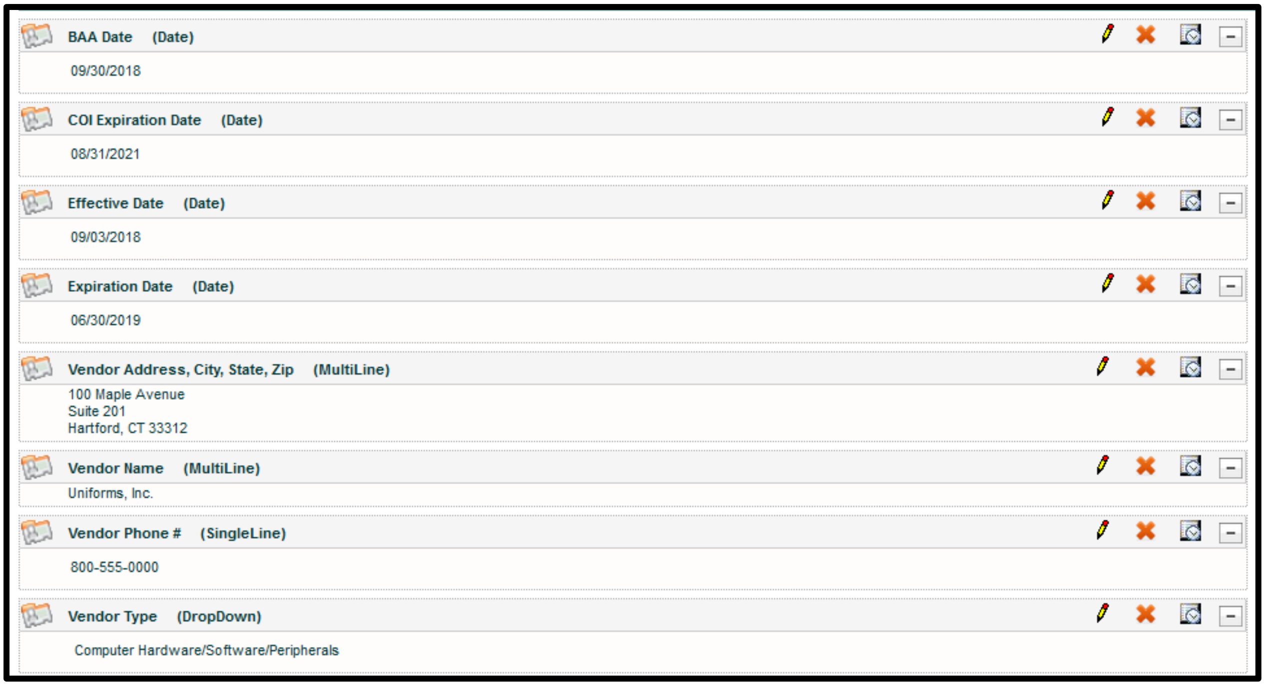
Use **Copy Field Group** to create a new Field Group that contains all the Fields you have already organized in the "source" field group. You then add additional fields (or remove) to the new field group.

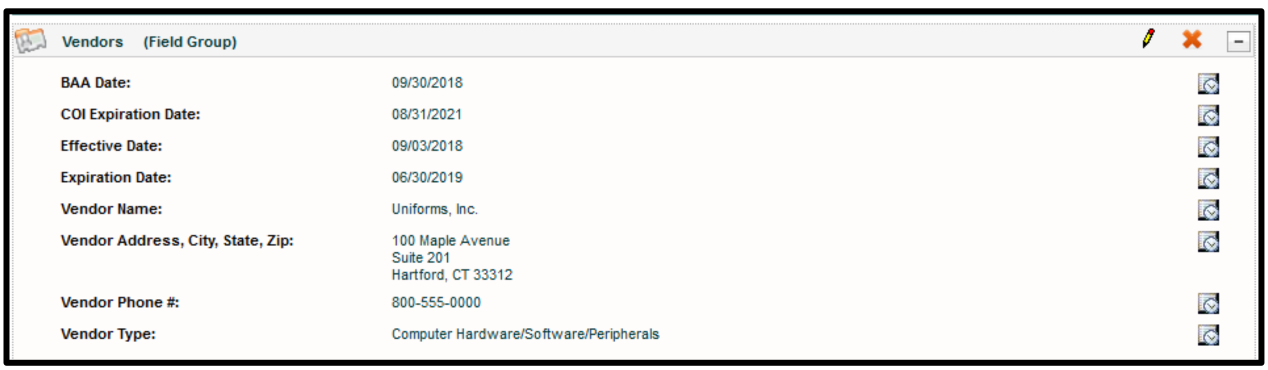
- ***Tip:** adding new Fields to an existing Field Group will automatically add the new Fields to all Contracts in your system that are already using that Field Group.*

There are many reasons to create Field Groups - some of which are:

1. Conservation of space,
2. Custom order (individual Fields in a Contract Container are listed alphabetically),
3. The ability to group necessary Fields together (and in any order).

The differences are obvious when both layouts are shown together.

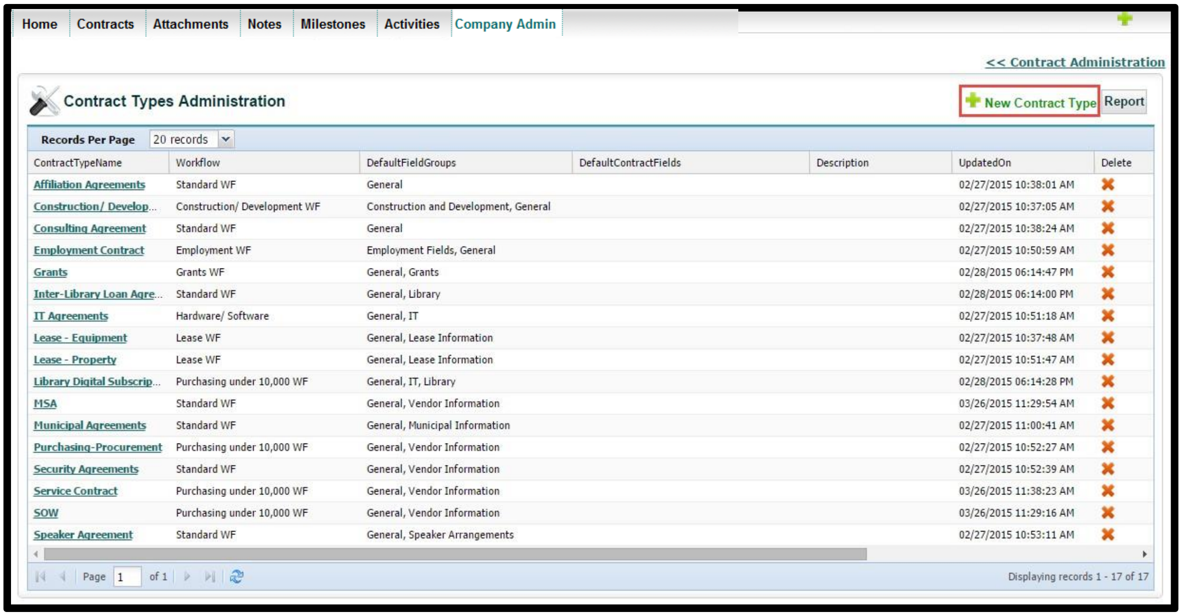




This Field Group takes up much less space on the screen and you can still use the *Edit Pencil* to modify any individual field within the Field Group.

Contract Types Administration

Contract Types Administration is the area where Contracts are categorized and configured. This is done by setting up the default items (Workflow and Field Groups) for each Contract Type.

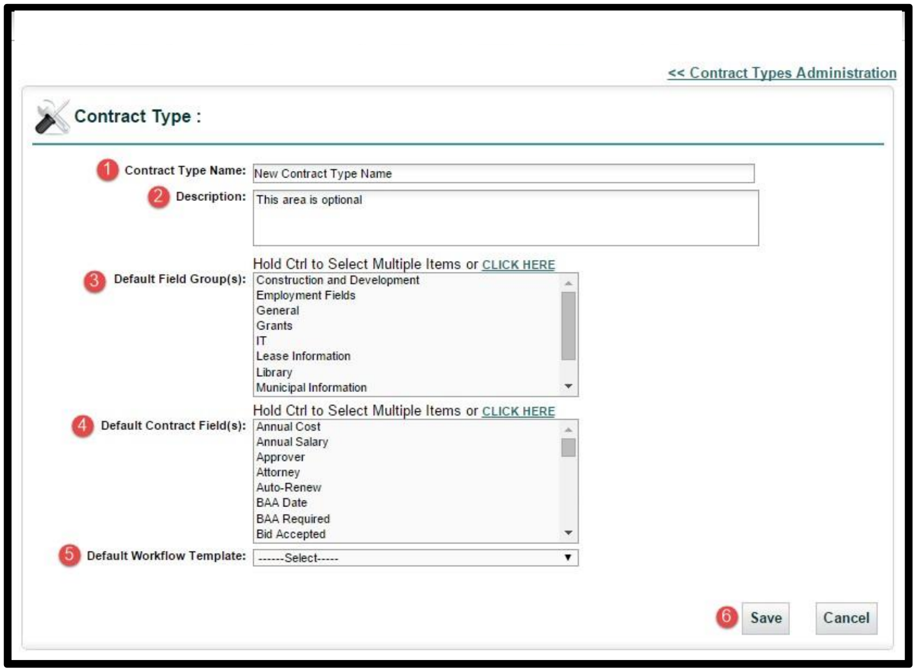


ContractTypeName	Workflow	DefaultFieldGroups	DefaultContractFields	Description	UpdatedOn	Delete
Affiliation Agreements	Standard WF	General			02/27/2015 10:38:01 AM	
Construction/ Develop...	Construction/ Development WF	Construction and Development, General			02/27/2015 10:37:05 AM	
Consulting Agreement	Standard WF	General			02/27/2015 10:38:24 AM	
Employment Contract	Employment WF	Employment Fields, General			02/27/2015 10:50:59 AM	
Grants	Grants WF	General, Grants			02/28/2015 06:14:47 PM	
Inter-Library Loan Agre...	Standard WF	General, Library			02/28/2015 06:14:00 PM	
IT Agreements	Hardware/ Software	General, IT			02/27/2015 10:51:18 AM	
Lease - Equipment	Lease WF	General, Lease Information			02/27/2015 10:37:48 AM	
Lease - Property	Lease WF	General, Lease Information			02/27/2015 10:51:47 AM	
Library Digital Subscrip...	Purchasing under 10,000 WF	General, IT, Library			02/28/2015 06:14:28 PM	
MSA	Standard WF	General, Vendor Information			03/26/2015 11:29:54 AM	
Municipal Agreements	Standard WF	General, Municipal Information			02/27/2015 11:00:41 AM	
Purchasing-Procurement	Purchasing under 10,000 WF	General, Vendor Information			02/27/2015 10:52:27 AM	
Security Agreements	Standard WF	General, Vendor Information			02/27/2015 10:52:39 AM	
Service Contract	Purchasing under 10,000 WF	General, Vendor Information			03/26/2015 11:38:23 AM	
SOW	Purchasing under 10,000 WF	General, Vendor Information			03/26/2015 11:29:16 AM	
Speaker Agreement	Standard WF	General, Speaker Arrangements			02/27/2015 10:53:11 AM	

To create a new Contract Type, click on the green "**New Contract Type**" button and fill out the form which assigns the *Default Field Group(s)*, *Field(s)*, and *Default Workflow Template* (all of which were explained in the previous Administration sections).

You can edit any Fields, Field Groups, or Workflow Templates for a specific Contract Container locally, whether done during Contract Entry, or at any point later. This area dictates the default settings only for new Contracts added to your system. This lets your end users know what information they should be filling out inside the Contract Container.

To select multiple items, use the CTRL key or use the CLICK HERE option to use the side-by-side selector interface.



1. Contract Type Name (what you select during Contract Entry)
2. Description for Contract Type
3. Default Field Group(s) area
4. Default Single Field(s) [only choose if not included with Field Groups]
5. Default Workflow Template drop-down
6. **Save** or **Cancel** confirmation buttons

Document Category Administration

Document Category Administration is the area where you define what types of documents might be used within your system. You may add as many Document Categories as you wish. To add more, click on the green "*Add New*" link and provide a name for the new Category in the list. The Categories defined in this area will appear in the drop-down list when adding an attachment.

Document States Administration

Document States Administration is the area where you define what possible States a document might be within your system. You may add as many Document States as needed. To add more, click on the "*Add New*" link and provide a name for the new State in the list. Use the blue up and down arrows to reposition the order within the list.

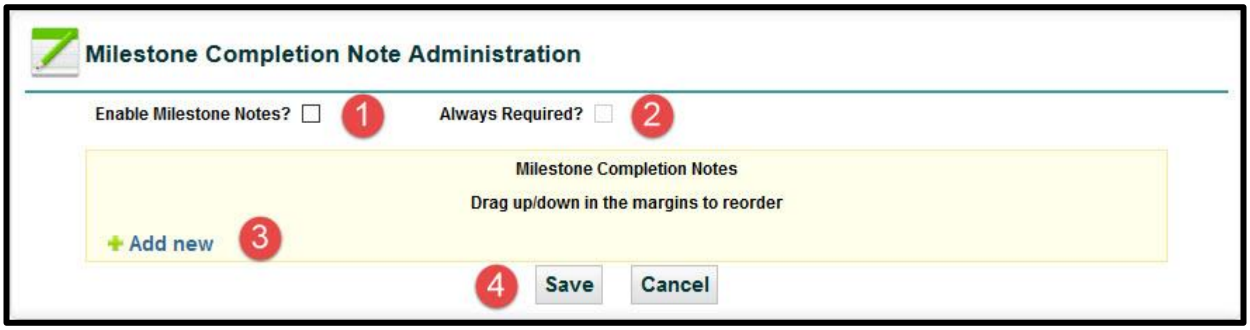
The States defined in this area will appear in a drop-down list when adding an attachment.

Milestone Completion Note Administration

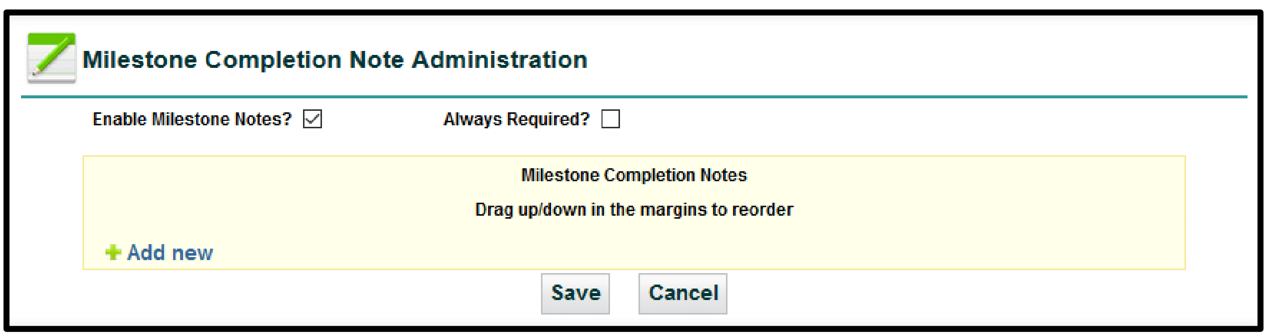
When Milestones are flagged as completed, you have the option to enter specific notes about the completed milestone. This recent enhancement is available whether you click the complete checkbox or display the milestone detail page by clicking on the milestone name in the milestone grid.

In addition to adding free-form notes, you can setup pre-configured responses from a drop-down list. Any completed milestone notes you enter, or select from the drop-down, are added to the contract's History.

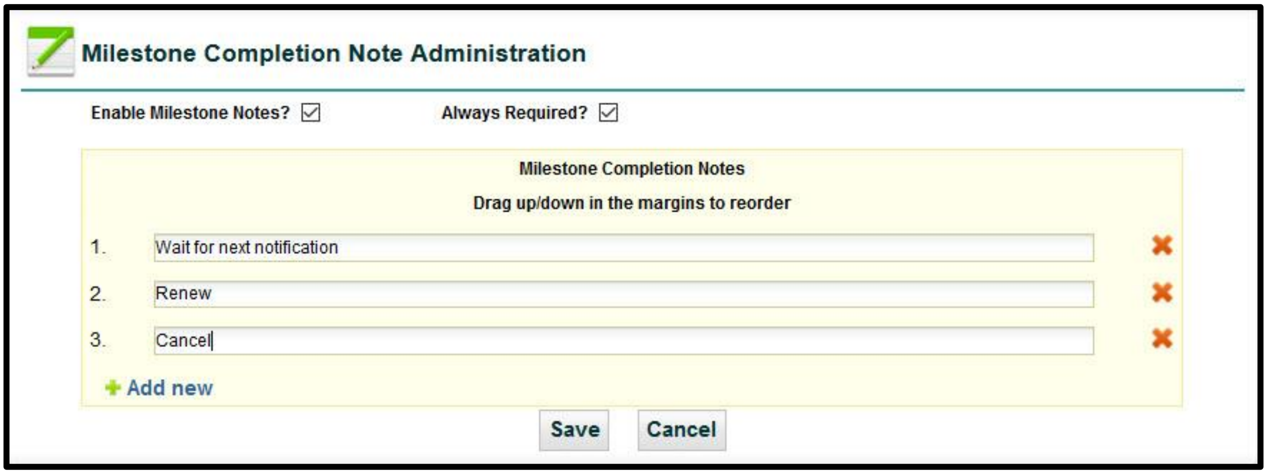
Once you Enable Milestone Notes, you have several options to use these completed milestone notes.



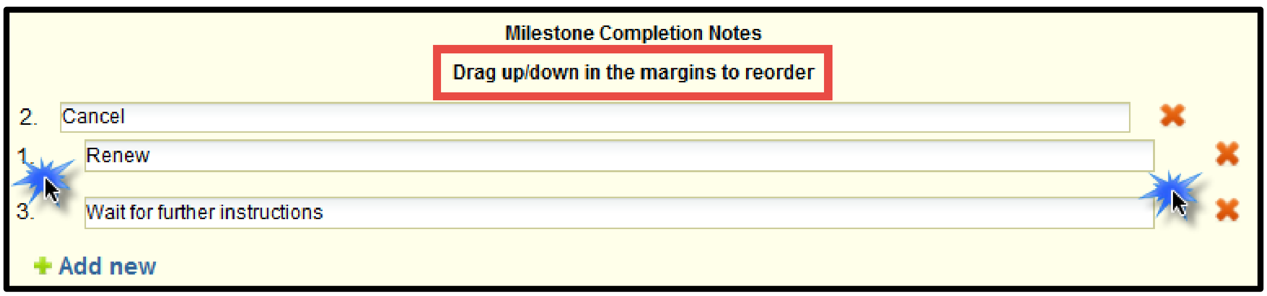
1.	**Enable Milestone Notes?**	Click checkbox to activate. This checkbox can also be unchecked to turn off this feature.
2.	**Always Required?**	If checked, you must have at least one type of note: free-form text, or pre-configured responses setup with "**Add new**".
3.	**Add new**	Click to enter your responses. For example, "Wait for next notification", "Renew", or "Cancel". See images below.
4.	**Save**	Saves your milestone completion notes.



You can have many responses set up, whether your completed milestone notes will use them now or later.

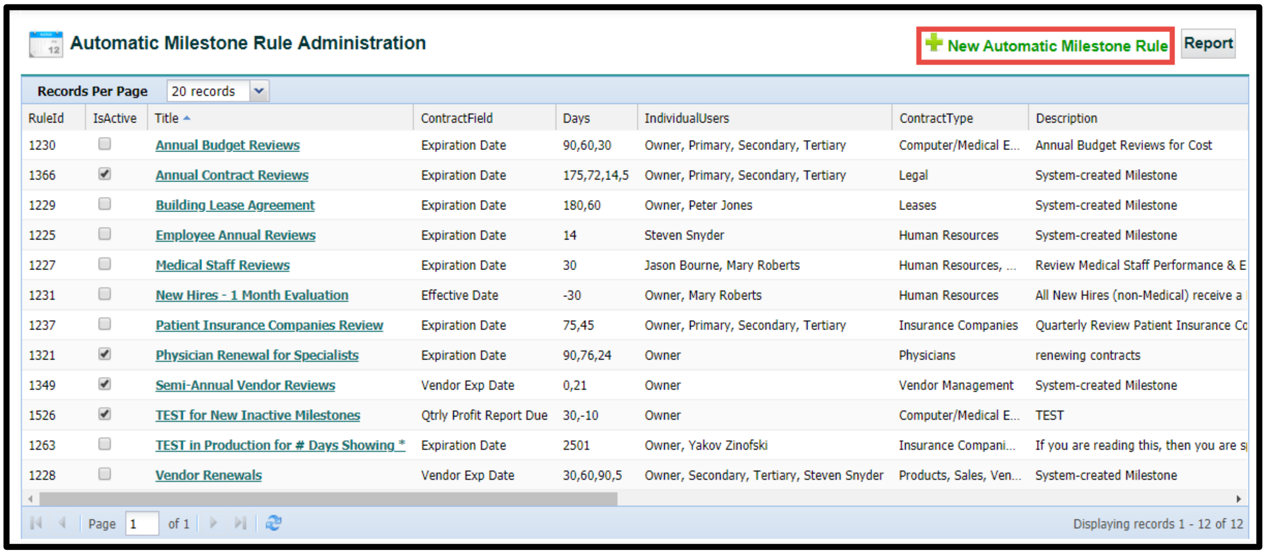


Once you **Save** your milestone completion notes, you can then click and drag the notes from either the left or right margins to reorder. The numbers will automatically adjust to the correct sequential order.



Automatic Milestone Rules

Automatic notifications are configured in the **Automatic Milestone Rules (AMR)** area to be emailed to any User based on a *Date Field* defined in your system. These rules are configurable by <u>Contract Type</u> and will notify users at up to <u>five</u> <u>intervals</u> per rule.


Automatic Milestone Rule Administration

New Automatic Milestone Rule | Report

Records Per Page: 20 records

RuleId	IsActive	Title	ContractField	Days	IndividualUsers	ContractType	Description
1230	☐	Annual Budget Reviews	Expiration Date	90,60,30	Owner, Primary, Secondary, Tertiary	Computer/Medical E...	Annual Budget Reviews for Cost
1366	☑	Annual Contract Reviews	Expiration Date	175,72,14,5	Owner, Primary, Secondary, Tertiary	Legal	System-created Milestone
1229	☐	Building Lease Agreement	Expiration Date	180,60	Owner, Peter Jones	Leases	System-created Milestone
1225	☐	Employee Annual Reviews	Expiration Date	14	Steven Snyder	Human Resources	System-created Milestone
1227	☐	Medical Staff Reviews	Expiration Date	30	Jason Bourne, Mary Roberts	Human Resources, ...	Review Medical Staff Performance & E
1231	☐	New Hires - 1 Month Evaluation	Effective Date	-30	Owner, Mary Roberts	Human Resources	All New Hires (non-Medical) receive a
1237	☐	Patient Insurance Companies Review	Expiration Date	75,45	Owner, Primary, Secondary, Tertiary	Insurance Companies	Quarterly Review Patient Insurance Cc
1321	☑	Physician Renewal for Specialists	Expiration Date	90,76,24	Owner	Physicians	renewing contracts
1349	☑	Semi-Annual Vendor Reviews	Vendor Exp Date	0,21	Owner	Vendor Management	System-created Milestone
1526	☑	TEST for New Inactive Milestones	Qtrly Profit Report Due	30,-10	Owner	Computer/Medical E...	TEST
1263	☐	TEST in Production for # Days Showing *	Expiration Date	2501	Owner, Yakov Zinofski	Insurance Compani...	If you are reading this, then you are s
1228	☐	Vendor Renewals	Vendor Exp Date	30,60,90,5	Owner, Secondary, Tertiary, Steven Snyder	Products, Sales, Ven...	System-created Milestone

Page 1 of 1 — Displaying records 1 - 12 of 12

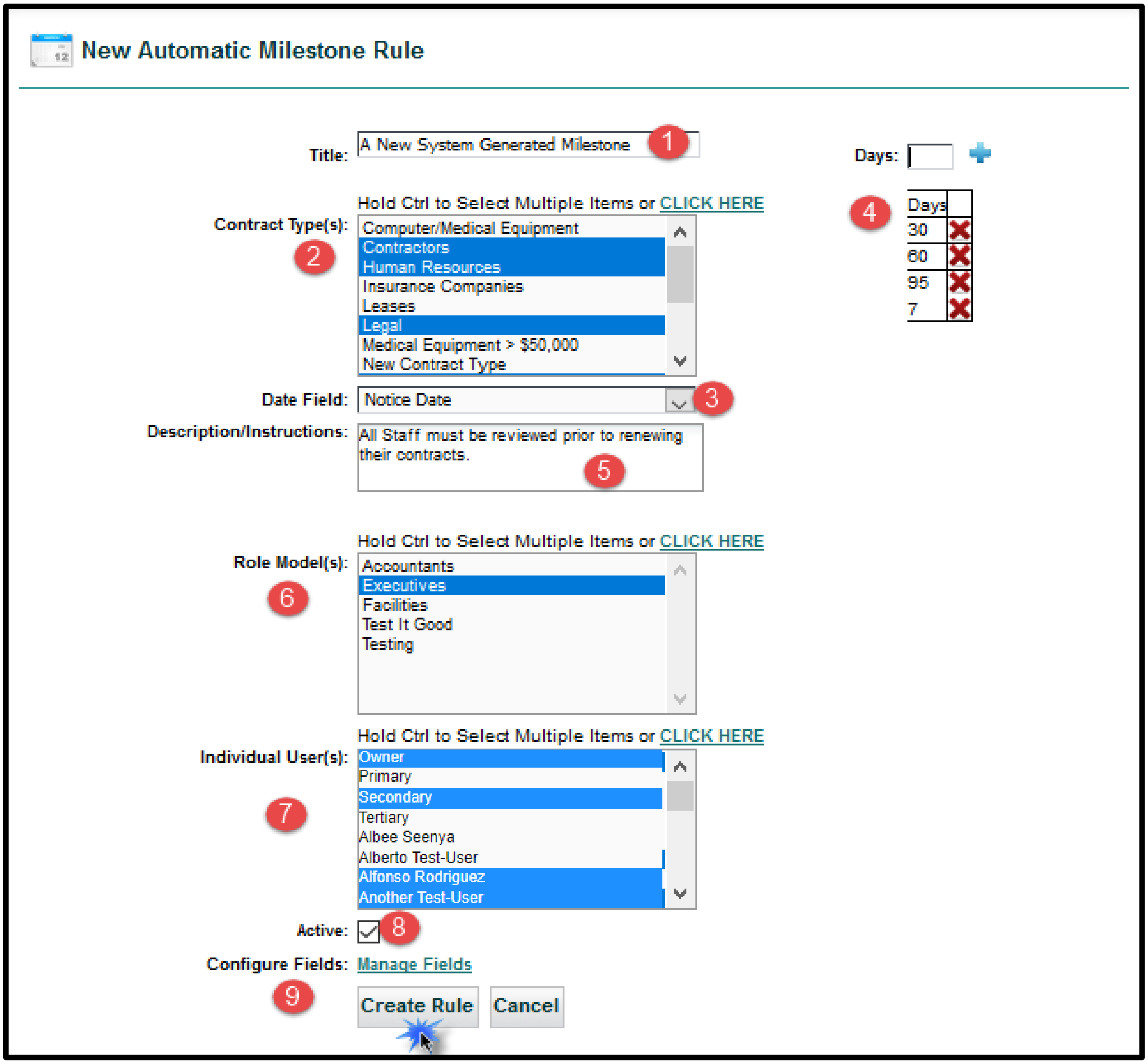
You can also create an automatic milestone and set is as *Inactive* until such time when you need to activate the rule.

To create a new Auto Milestone Rule, click on the green link for **New Automatic Milestone Rule** and then fill out the options as shown on the following page.

<u>Creating a new Automatic Milestone Rule</u>

1. **Title** the Rule (name).
2. Choose the **Contract Type(s)** that would be affected.
3. Choose the predefined **Date Field** from the drop-down list.
4. Specify the intervals (Days) at which the notifications should be sent by entering the number in the box (± 0-4000) and click the blue **+** sign (remember, you can have up to **five** intervals).
5. Type the Description/Instructions for any users who are notified about this milestone.
6. Choose if any Role Models will receive the notifications.
7. Choose the Individual Users that will receive the notifications (you *must* select at least one user or role model). *All selected users are notified on the same interval schedule.*
8. New Milestone Rules are Active by default; uncheck to make Inactive initially.
   The "Is Active" checkbox in the AMR grid displays a checkbox when active.
   NOTE: You cannot edit the "Is Active" checkbox within this grid.

9. Click the "Manage Fields" link to specify what data from your predefined fields should be included in the email notifications (optional).



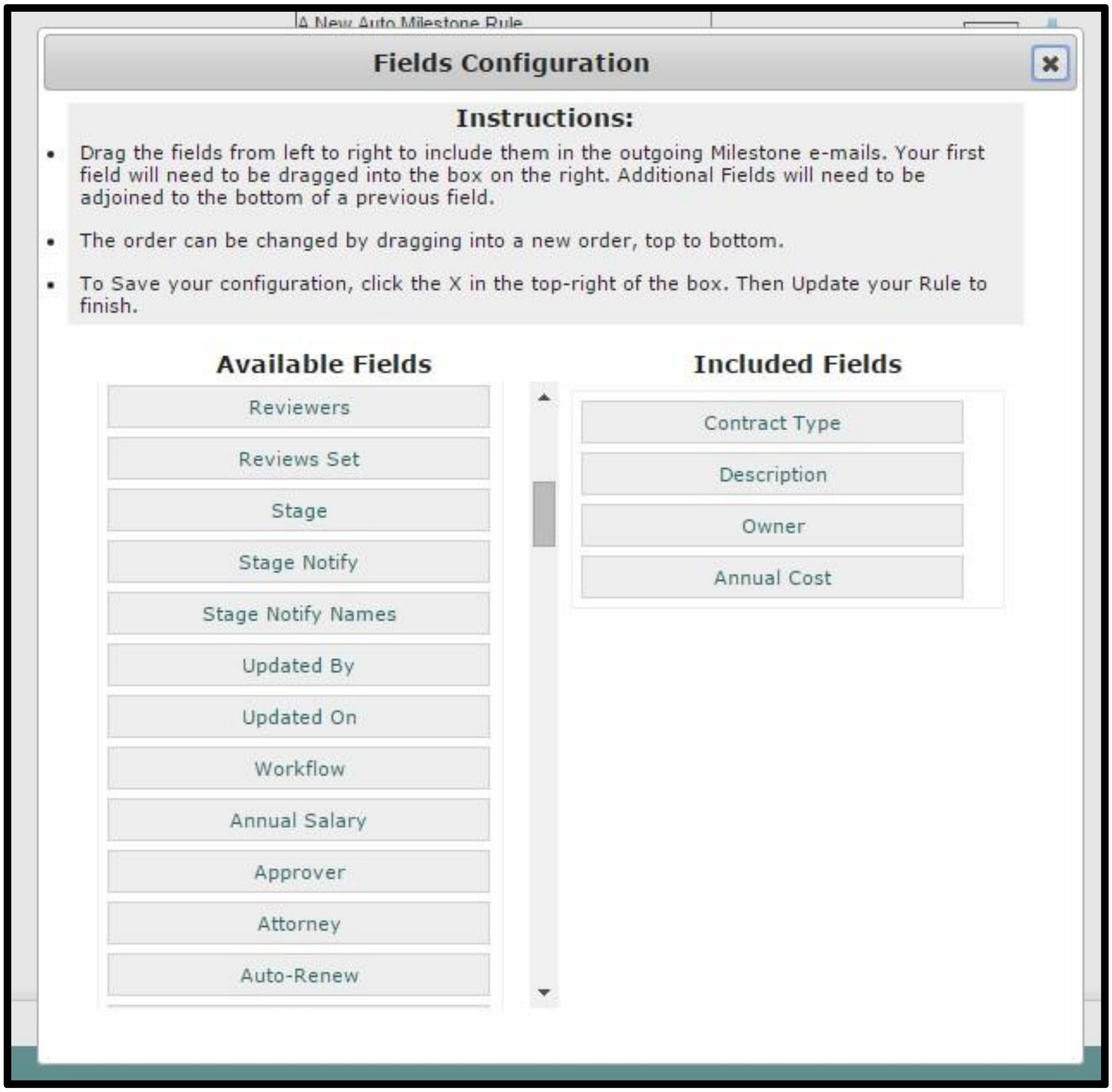
Click the "**Create Rule**" button. UCM updates all Contract Containers meeting the criteria for this new milestone (Archived contracts are skipped).

- ***Tip:*** *Use the CLICK HERE option to select Contract Types, Role Models, or Users using the side-by-side column Selector Interface.*

*Any Contract that does **not** meet the Milestone Rule will **not** generate a milestone. For example, if your Date Field's actual date for that contract is in the past, or less than the interval # days, no emails are sent. So any expired contracts will not have a milestone or email generated from this rule.*

The **Manage Fields** link allows you to augment the information sent out in the Automatic Milestone. When using this area, there are no save buttons, but simply closing the screen when you are done will preserve your work. To select Fields to be included in your notifications, drag from the left column and drop it in the right column.

If you ever forget what to do in this area, Instructions are included at the top of the interface.

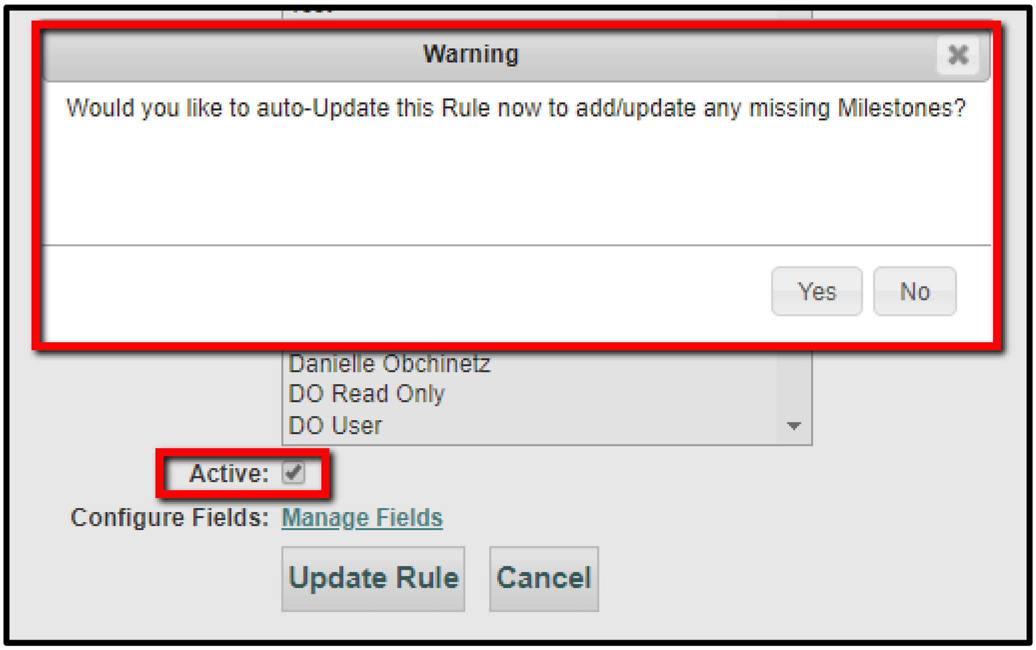


Activating/Deactivating Automatic Milestone Rules

You cannot mark Automatic Milestone Rules as active or inactive directly from the grid, only by clicking on the **Title** then editing the Automatic Milestone Rule. Deactivating an existing milestone means that no new milestones would be generated. You go into the Automatic Milestone Rule and click *"Update Rule"* to update its activation status. In doing so, UCM will prompt you with a question on how to handle any existing milestones.

Activating an Automatic Milestone Rule

When editing an Automatic Milestone Rule to activate it, a message window appears to say:
"Would you like to Auto-Update this Rule now to add/update any missing Milestones?"

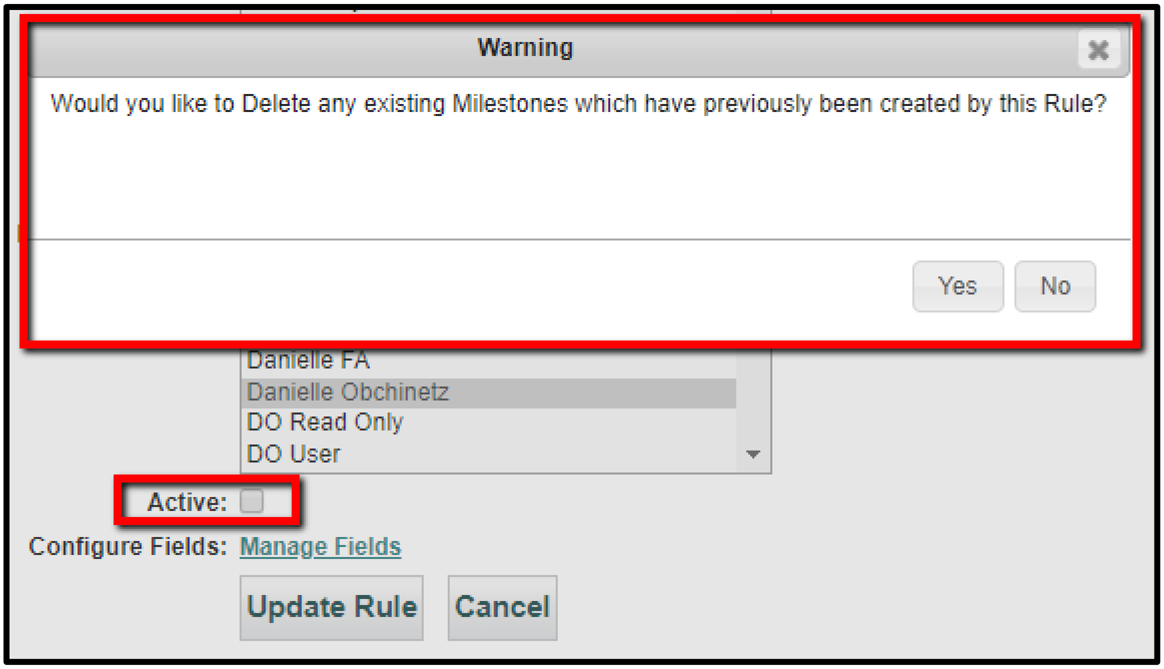


Selecting *"Yes"* updates any existing milestones and/or create new milestones based on the rule's configuration.

Selecting *"No"* activates your rule but only create/update milestones for contracts entered after this point of activation.

Deactivating an Automatic Milestone Rule

When editing an Automatic Milestone Rule to deactivate it, a message window appears to say:
"Would you like to Delete any existing Milestones which have previously been created by this Rule?"

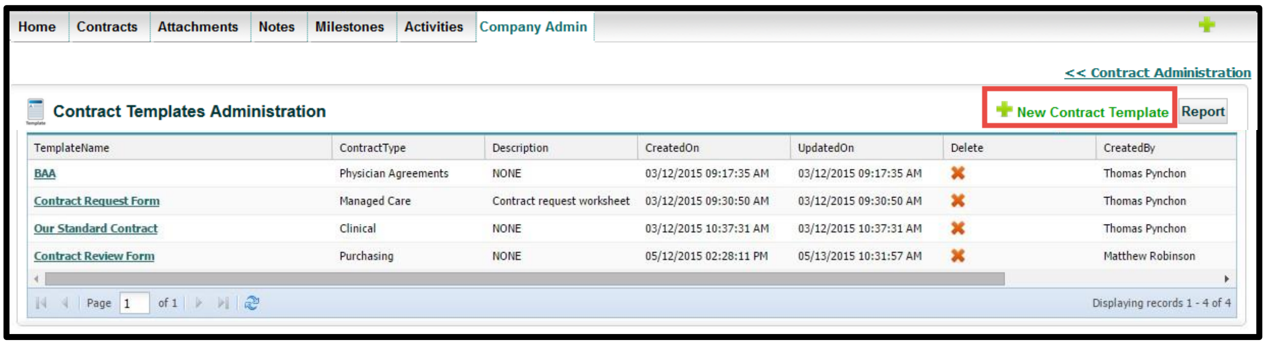


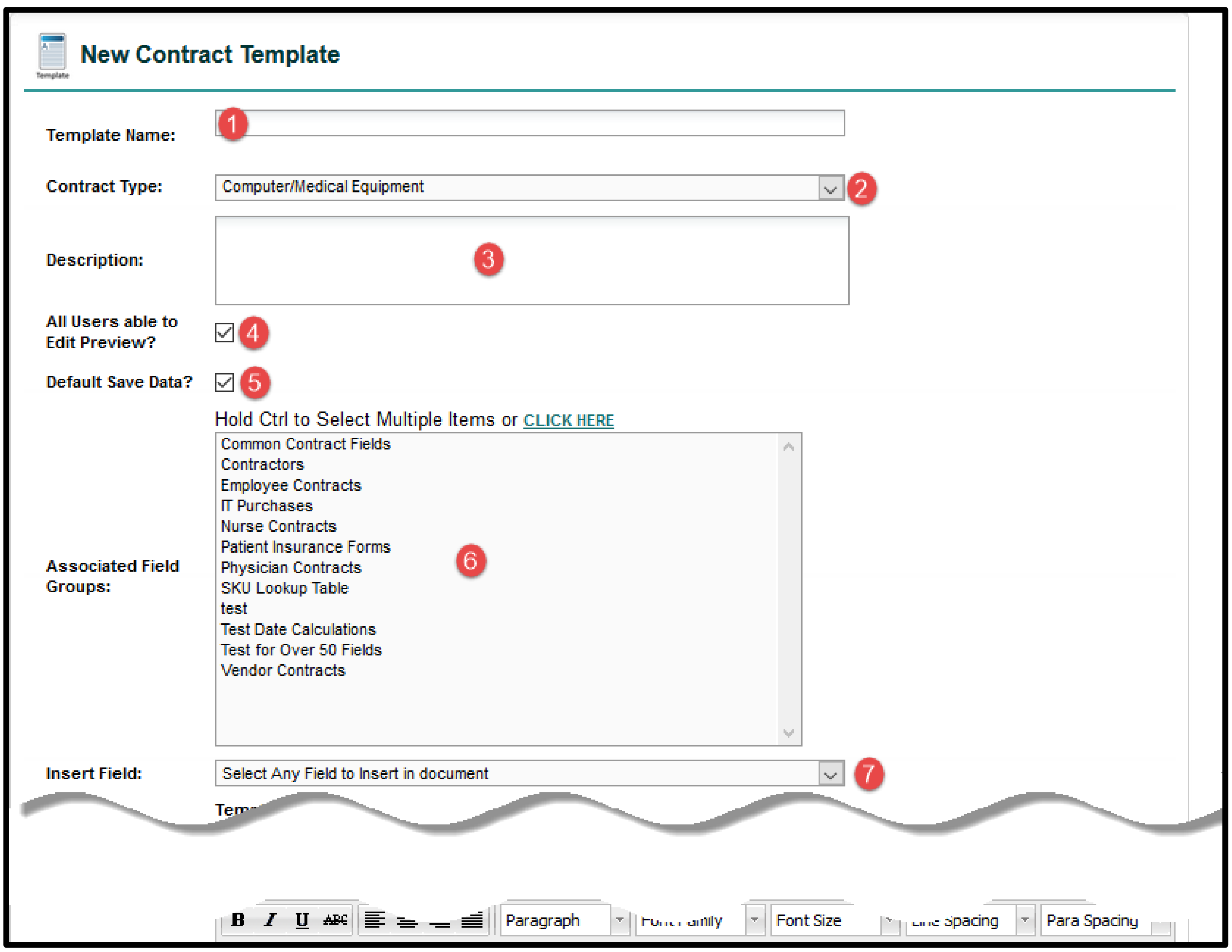
Selecting *"Yes"* deletes any unsent milestones that were generated by this rule.

Selecting *"No"* keeps and continues to send all open milestones for this rule; however, the milestones going forward will not be updated to reflect any date changes made on the associated contracts.

Contract Templates Administration

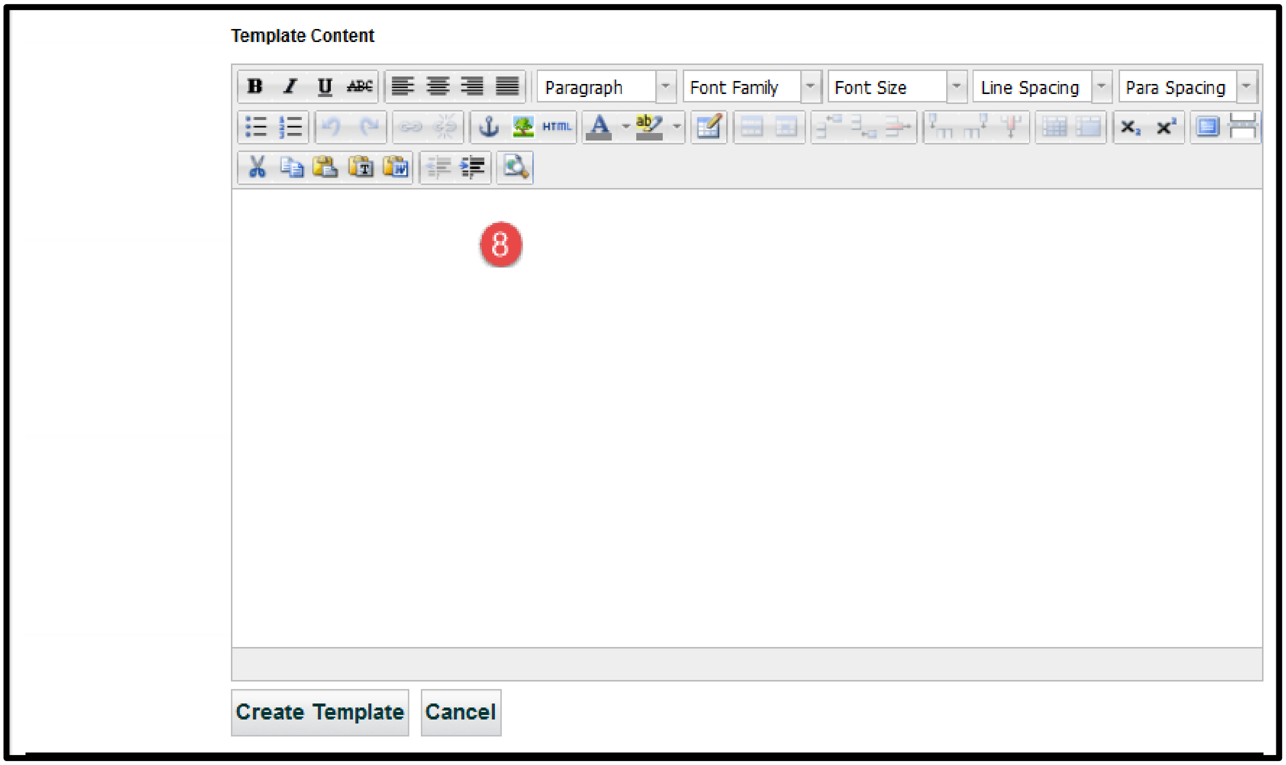
Contract Templates are better known as "boilerplate" documents and are usually the internal contracts that go out to other entities. To create a Template, click on the "**New Contract Template**" link. You will name the Template, assign a Contract Type, and then enter the contract text and format it in the box. Fields can also be added to this area from the drop-down list of defined fields in the system, which will enable you to enter data that will be filled out when saving the document.





The sections are explained on the following page.

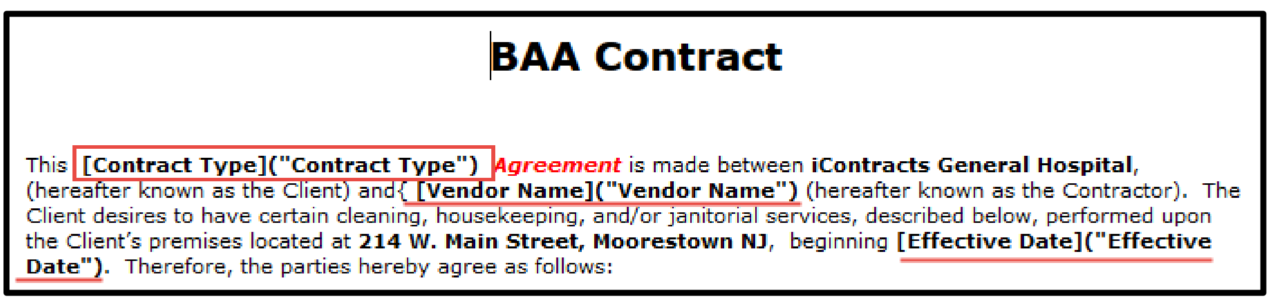
1. Template Name
2. Contract Type (used when creating any new contracts)
3. Description Area
4. Allow Users to Edit Template?
5. Default Save Data? (used to automatically add the Fill Values into Contract Containers.
6. Select Field Groups Associated to Contracts used when creating new contracts.
7. Drop-down List for Adding Fields to Template
8. Template Content (see below image)



Template Content (enter text or copy and paste from another document) and basic document editing controls. This area becomes the actual Template. Use the "*Insert Field*" drop-down list of fields to add a field at the cursor's insertion point. *The example below shows the fields "Contract Type", "Vendor Name", and "Effective Date".*

Click the **Create Template** button to create the template.

If you open the Template later to edit, this button becomes a *Save* button.

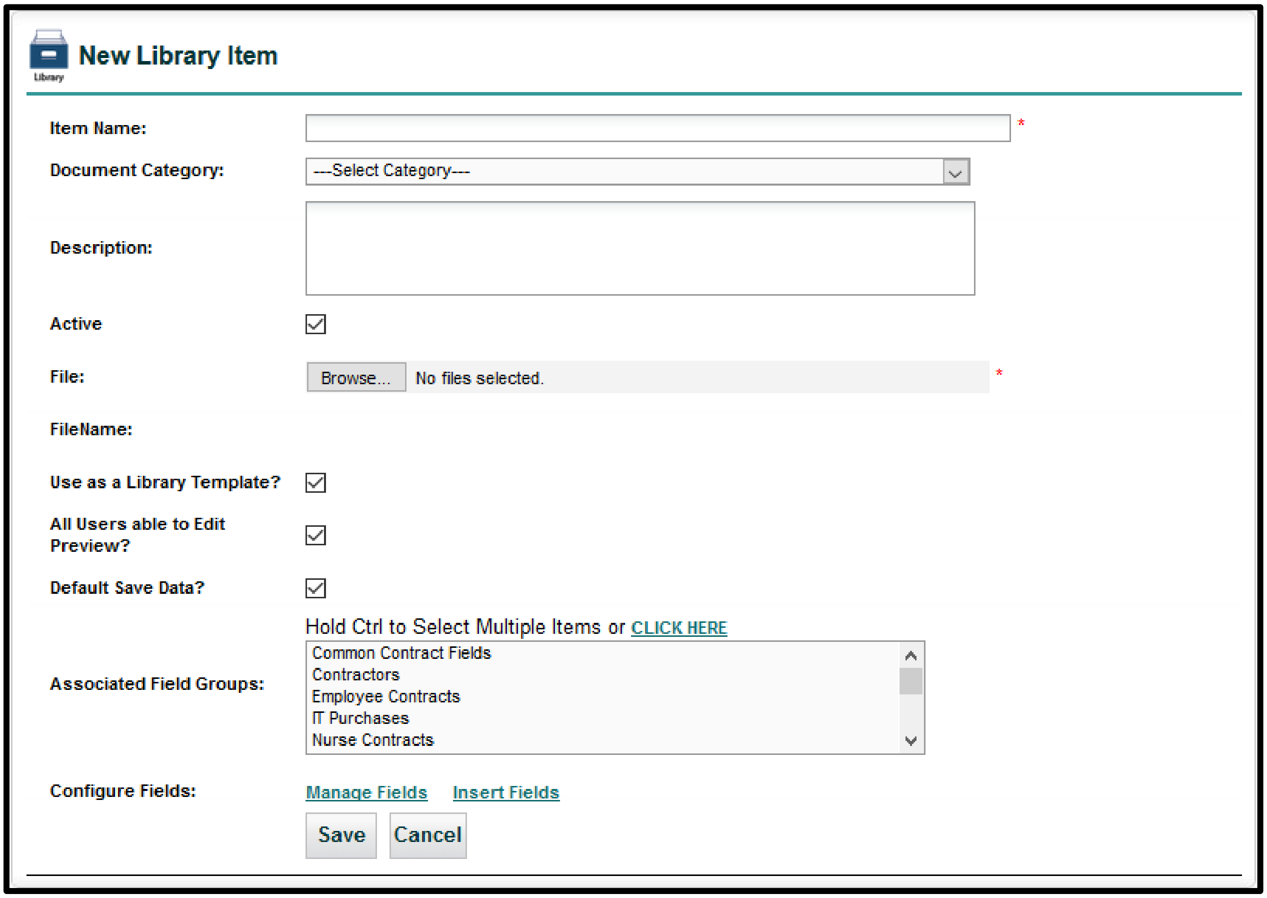


BAA Contract

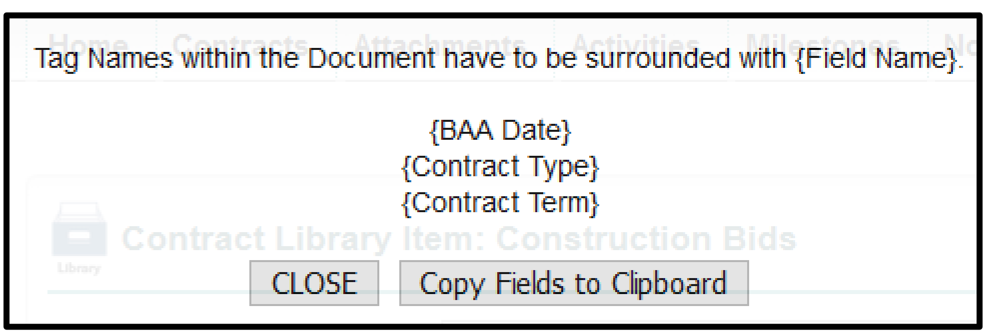
This **[Contract Type]("Contract Type")** ***Agreement*** is made between **iContracts General Hospital**, (hereafter known as the Client) and **[Vendor Name]("Vendor Name")** (hereafter known as the Contractor). The Client desires to have certain cleaning, housekeeping, and/or janitorial services, described below, performed upon the Client's premises located at **214 W. Main Street, Moorestown NJ**, beginning **[Effective Date]("Effective Date")**. Therefore, the parties hereby agree as follows:

Contract Document Library Administration

Contract Document Library contains formatted documents used to attach to Contracts. To create a Library document, click on the "**New Library Item**" link. You will name the Item, assign a Document Category, and then upload a file with the "*Browse*" button. This feature is similar to Templates.



The **Configure Fields** section is used to "*Manage Fields*", which creates a list of fields to later insert into the library document (see **Manage Fields** for help setting up this section). Use the "*Insert Fields*" link to display those fields so you can copy and paste them into the document afterwards (see image below) which creates a "mail merge" type of document. Open the external library document to paste the fields into the document and then position these "merge fields" where they need to go.

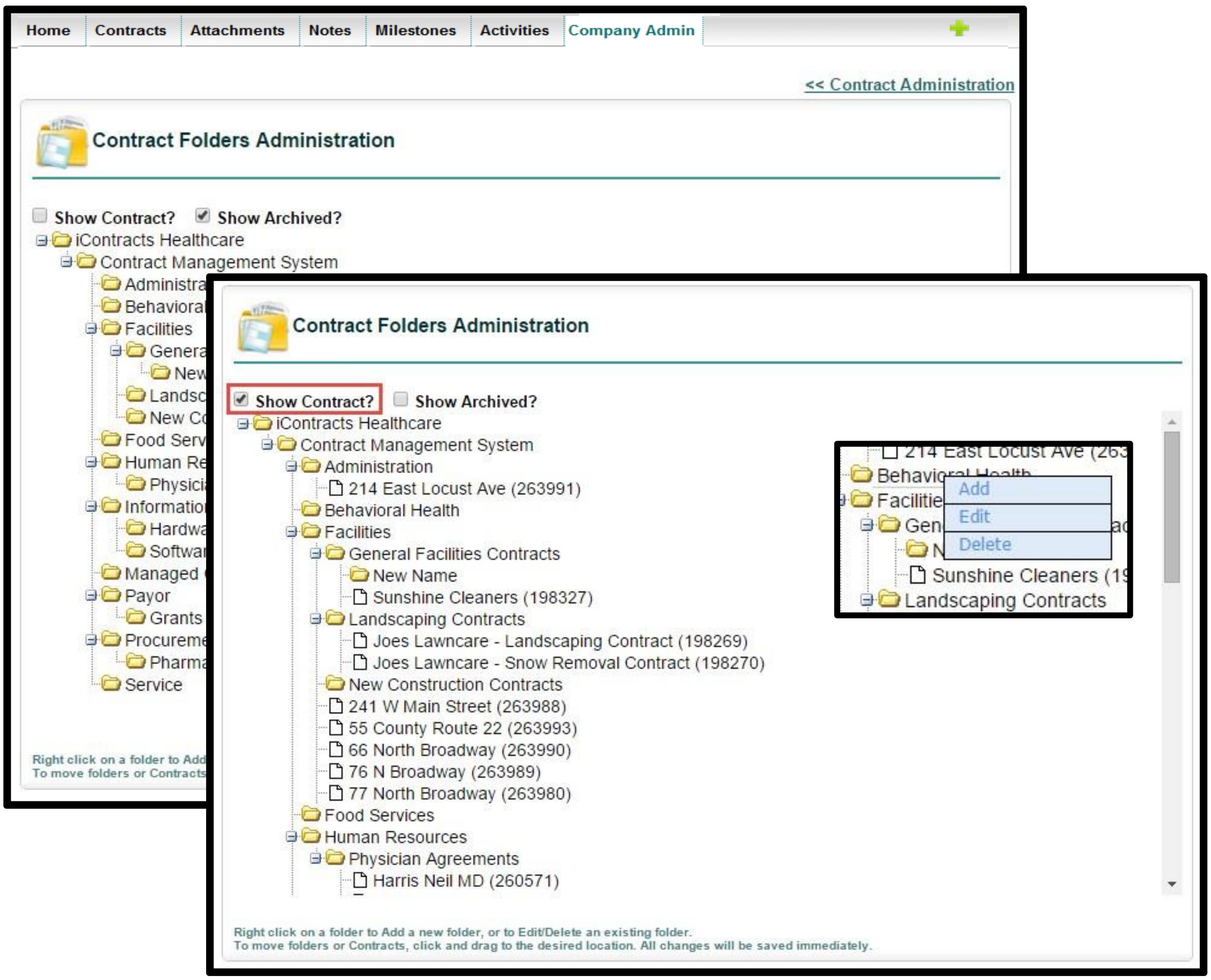


Contract Folders Administration

The **Contract Folders** are where you create and edit the system folder structure. It is where contracts are stored. It is extremely important for organizing and setting security for users within an organization. Shown here are both condensed and expanded folder views (showing contract names) that give the administrator a real-time view of which contracts are organized into the current folders.

Folder structures defined in this area are also used in the “Manage Users” settings to assign permissions for each user. See ***Defining Folder*** Permissions for assistance with security settings.

You drag and drop contracts to/from desired folders. Right-click on a folder name to *Add* a new folder, or to *Edit* or *Delete* an existing folder. To move folders or Contracts, click and drag to the desired location. All changes will be saved immediately. If you delete a folder, none of the associated contracts will be deleted; they are simply promoted up to the parent folder and given the permissions set forth by that folder.



Bulk Load Contracts

The **UCM Bulk Load** application is a UCM Utility Program used to import entire spreadsheets of data into your system very quickly. For large amounts of information, this will save you the time and effort of entering contracts manually one-by-one. The Bulk Loader can be used in two key ways:

- To upload multiple new contracts.
- To update multiple contracts already in your system with new or changed data.

This area in the Contract Administration section has a link to download the Bulk Loader installer. Once installed, the Bulk Loader will reside on your computer as a separate application, as opposed to UCM, which is cloud-based. **Always check to make sure you have the latest version installed.**

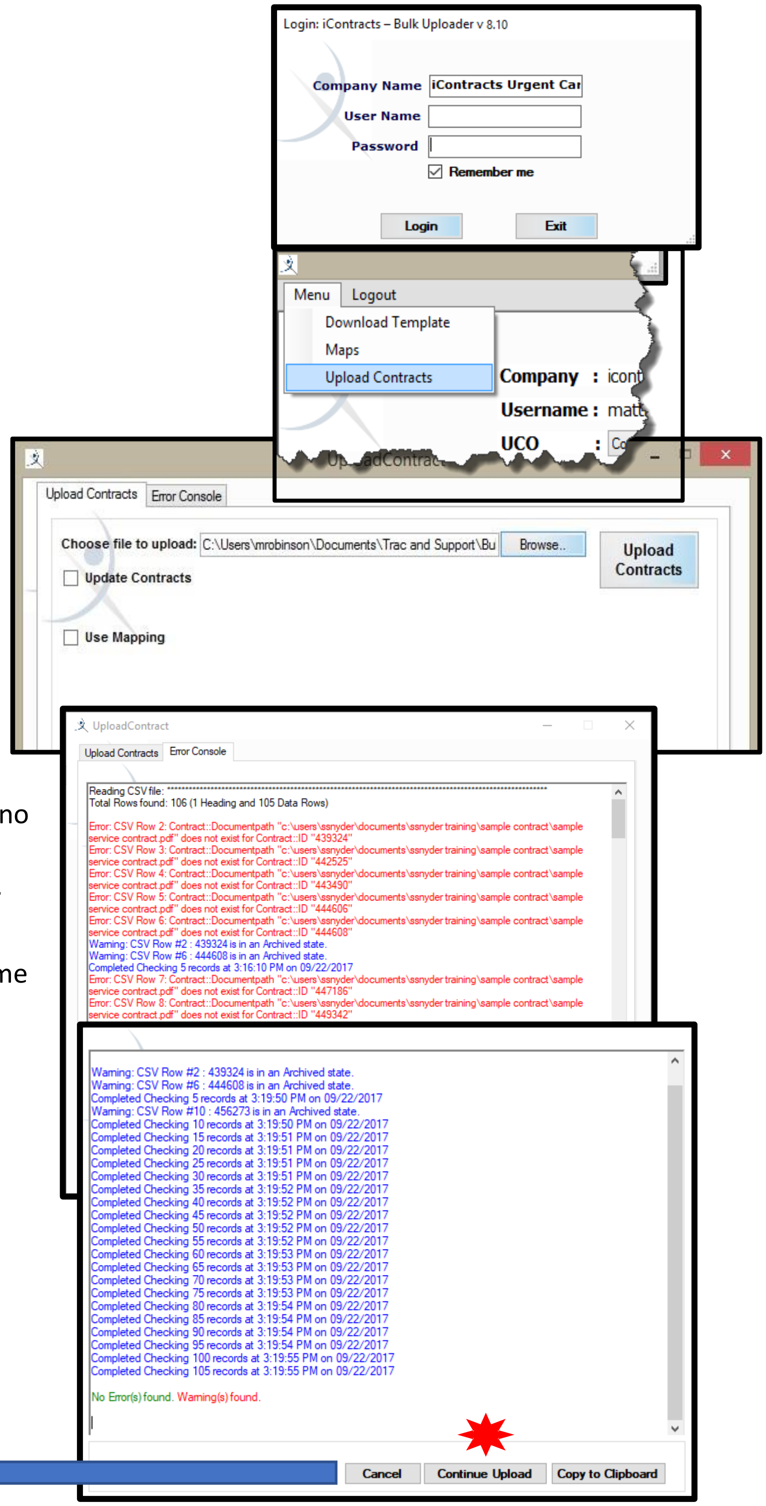
You may need to reach out to your company's IT Department for assistance since many companies block users from downloading outside applications to company desktops.

We can provide a spreadsheet-based "workbook" to fill out which helps you examine your company's set-up so that your system is set up properly and helps you identify the information that needs to be put into UCM.

For more information regarding the Bulk Loader and the Workbook, see our more comprehensive Bulk Loader Tutorial, part of our UCM Training Videos Library, found under "*Profile/Help*".

Using the Bulk Loader

After downloading and installing the application, open the Bulk Loader and log-in, and select the option to upload contracts from the drop-down Menu.



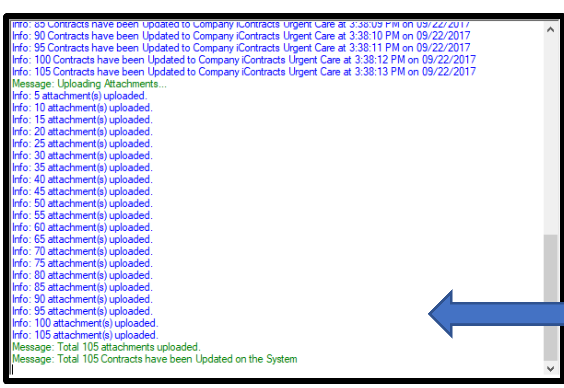
There are two options for running the Bulk Loader, which are described in the previous section above. Locate the CSV file you would like to upload into the system. Remember, if *Update Contracts* is not checked, the Bulk Loader will treat each row in your spreadsheet as a new contract in UCM.

Errors, if any, will appear on the *Error Console* screen and describe the type of error to correct for proper loading of contracts into the system. You can click on the Stop Processing button to stop the Error Console at any time.

Attention to detail in the CSV file or workbook to ensure proper folder-paths, spelling, and field names will ensure smooth loading of contracts and associated data into the system. We recommend that you copy any error messages to the Clipboard and paste them into a word processing document for easier navigation and reference for cleaning up errors in the CSV file by using the "*Copy to Clipboard*" button.

Once errors are fixed, rerun the Bulk Loader and if no new errors found, use the "*Continue Upload*" button to import the information into your system.

If *Update Contracts* is checked, the Bulk Loader will look for an existing contract with either the same **Contract ID** (preferred) or the first contract with a matching **Contract Name** and update it with the information provided on that row of the CSV file. If there is no match, then no update is done.



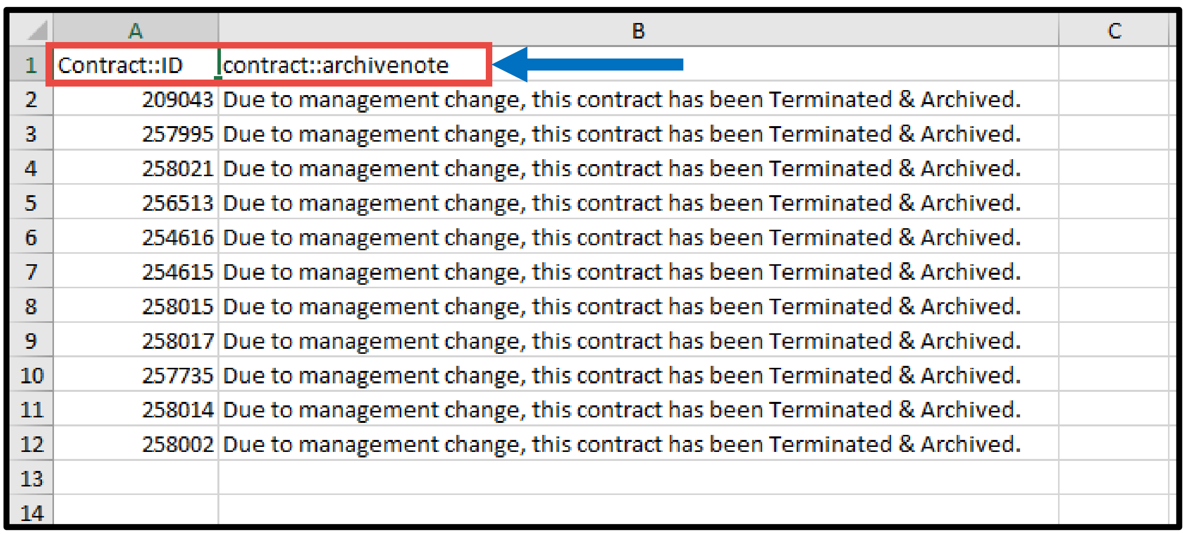
Bulk Archive Contracts

This function takes a batch of contracts in your system and moves the *Workflow Stage from their current Stage* to **Archived Agreement**.

There is a two-part process in doing this. First, like the Bulk Loader function, you need to create an Excel CSV file, containing a list of Contract ID's and Archive Notes. Once this file is generated, you would then run the Bulk Archive program (by going to **Company Admin: Contract Administration: Bulk Archive Contracts**) to select those Contract Containers from the CSV list and archive them. There are checks and balances done along the way, which are explained below.

Setting Up the Excel CSV File

This Excel CSV file is designed to require just two columns. Column A will list all *Contract ID's* and Column B will list *Archive Notes, which YOU create from scratch, including the actual column heading*. One way to create this file is to run a Contract View, where the search criteria (such as Expiration Date on or before mm/dd/yyyy) would generate all contracts that match. Then you click Report to upload the contract grid to Excel (you will really only need the Contract ID column). Once you have the Excel file, add the *Archive Note* column to the file and Save As a CSV file. Don't forget to remember the filename for later and then **close the file**.



	A	B	C
1	Contract::ID	contract::archivenote	
2	209043	Due to management change, this contract has been Terminated & Archived.	
3	257995	Due to management change, this contract has been Terminated & Archived.	
4	258021	Due to management change, this contract has been Terminated & Archived.	
5	256513	Due to management change, this contract has been Terminated & Archived.	
6	254616	Due to management change, this contract has been Terminated & Archived.	
7	254615	Due to management change, this contract has been Terminated & Archived.	
8	258015	Due to management change, this contract has been Terminated & Archived.	
9	258017	Due to management change, this contract has been Terminated & Archived.	
10	257735	Due to management change, this contract has been Terminated & Archived.	
11	258014	Due to management change, this contract has been Terminated & Archived.	
12	258002	Due to management change, this contract has been Terminated & Archived.	
13			
14			

Column A = contract::id
Column B = contract::archivenote

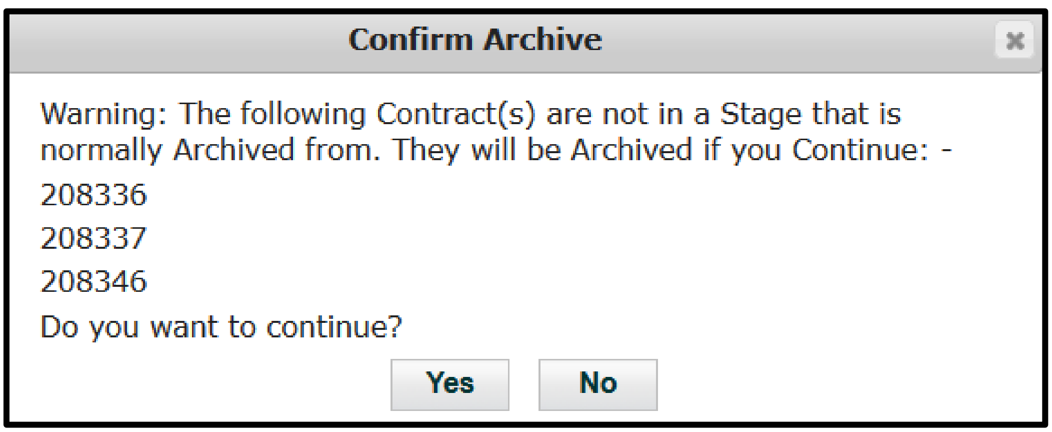
Running the Bulk Archive Program

Click on "**Bulk Archive Contracts**", which functions similar to the *Bulk Load Contracts*.

- Click the **Browse…** button and select the CSV file you just created.
  Did you remember the filename?
- Click the **Open** button and the filename appears to the right of the Browse button.
- Click the **Archive** button to begin archiving your listed contracts.

Archiving the Contracts

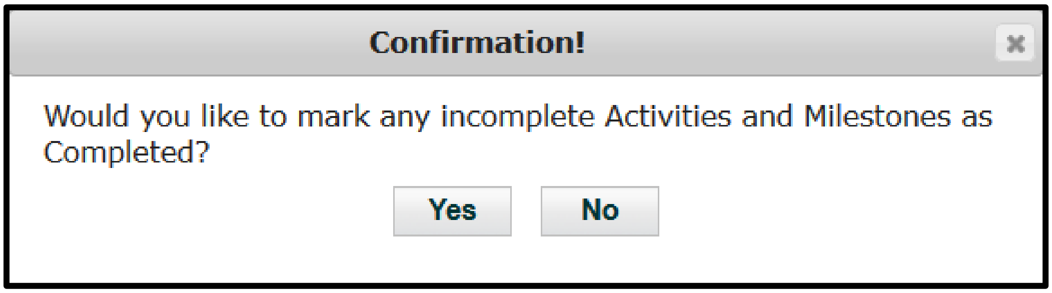
When you **Bulk Archive**, the system will verify that your list of contracts is legitimate and actually eligible to be archived. For example, a contract in Draft, Pending, or something like Under Legal Review would probably trigger a *Warning Message* (see below).



If you click **Yes**, all of these contracts will be archived. Their current Stage is "bookmarked" in case you select *Unarchive Agreement* for any of these contracts at a later date.

If you click **No**, the entire process will stop and you will need to edit the Excel CSV file and restart the entire process again.

You have one more confirmation before Archiving begins. Depending on the results of your Bulk Archive "pre-check" Verification, you may see this **Confirmation!** screen.



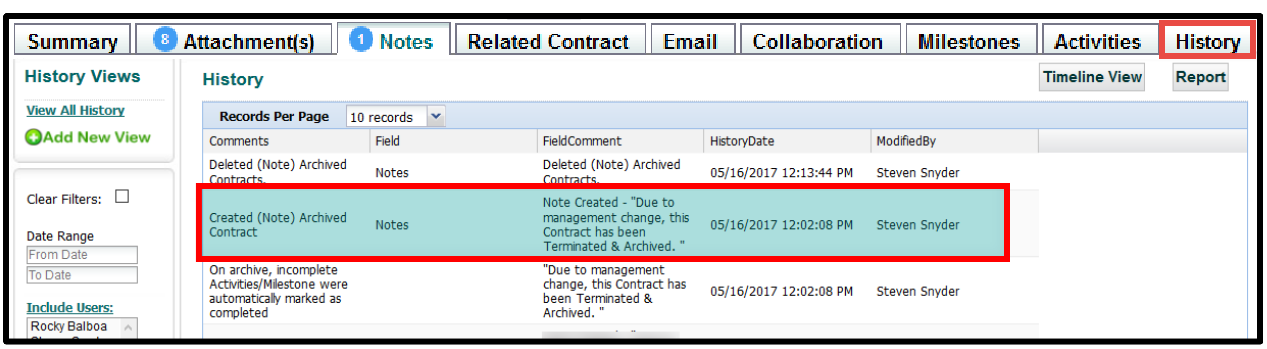
Click **Yes** to confirm and complete the Archiving.

The Contract Container is now archived. The Workflow is also locked at its last known Stage.

Updating the Notes & History Tabs

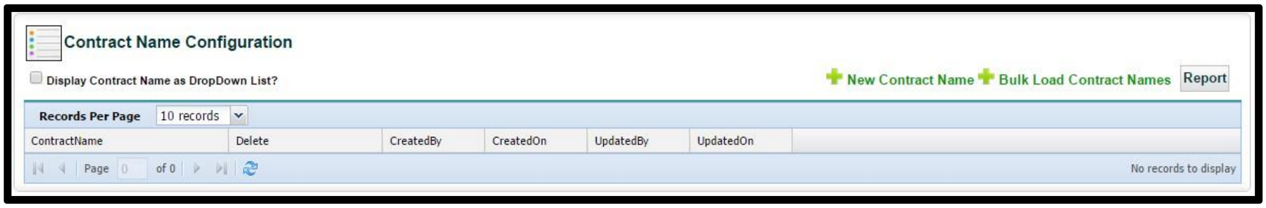
Whenever contracts are bulk archived, the contract::archivenote text is added to the **Notes Tab**. See the "*Note*" field below to see how this note is displayed.

The **History Tab** shows the Note has been added as well. This view shows the Notes came from the *Notes Tab*, so once the Notes are added to the Notes Tab, then the Notes Tab information is added to the History Tab.



Contract Name Configuration

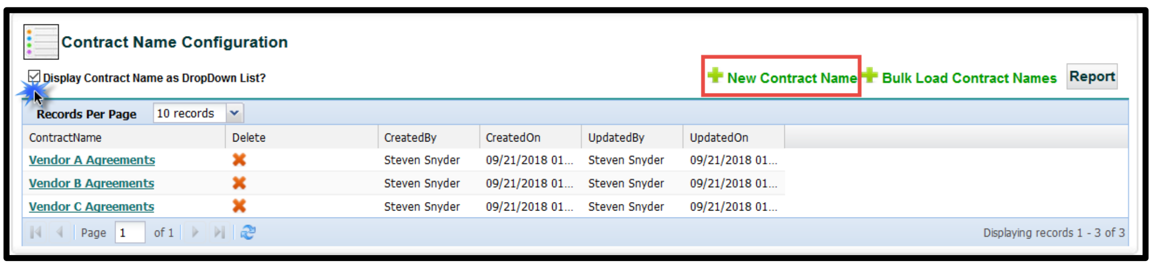
If you want to restrict users from creating their own Contract Names, there is an option within the system to only allow Contract Names setup by an Administrator. The **Contract Name** section will be a drop-down list instead of a text field, and the User would then select the correct name from the list.



Click the checkbox for "*Display Contract Name as a DropDown List?*" to activate this option. Administrators then have the ability to use the "**New Contract Name**" link or "**Bulk Load Contract Names**" (see the section **Using the Bulk Loader**).

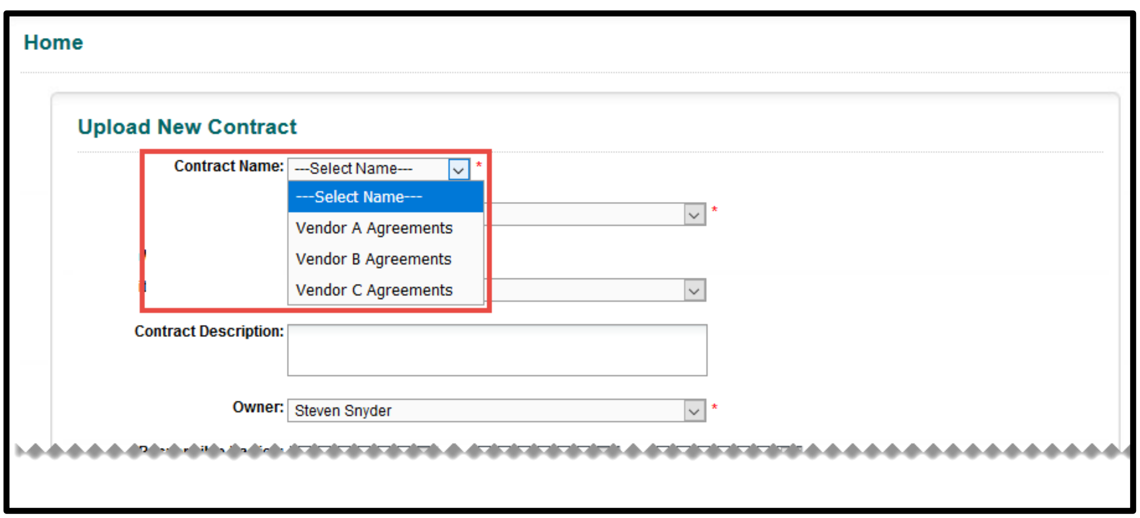
Defining Contract Names

1. Click **New Contract Name** and enter a Contract Name into the text box.
2. Click the **Save** button to update the grid.
3. Repeat the previous two steps until all Contract Names are entered into the grid.

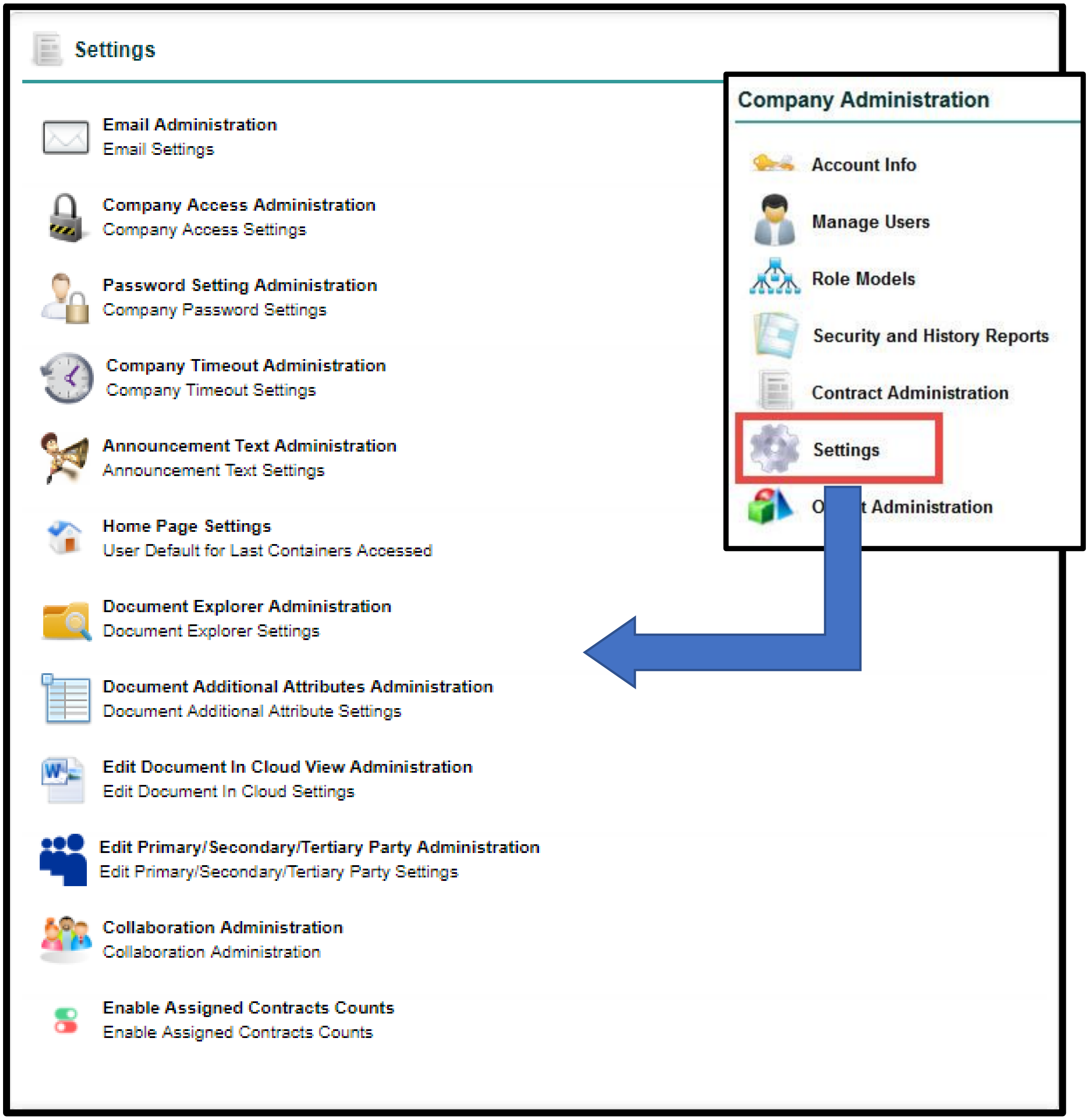


Using Configured Contract Names

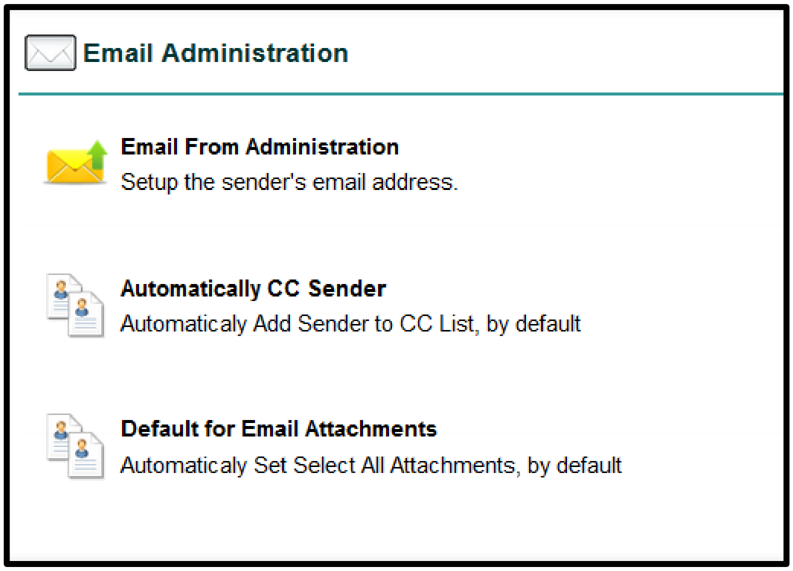
When a user clicks on the **Direct Entry** icon on the Home tab, the Contract Name is no longer a text box. Instead, there is a drop-down list of pre-defined Contract Names to select. In addition, these Contract Names *cannot* be edited from within the Summary tab.



Settings

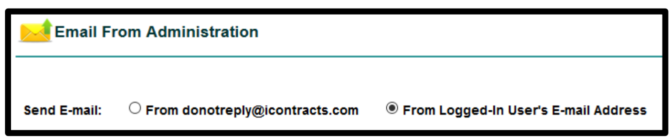

Settings
Email Administration
Email Settings
Company Access Administration
Company Access Settings
Password Setting Administration
Company Password Settings
Company Timeout Administration
Company Timeout Settings
Announcement Text Administration
Announcement Text Settings
Home Page Settings
User Default for Last Containers Accessed
Document Explorer Administration
Document Explorer Settings
Document Additional Attributes Administration
Document Additional Attribute Settings
Edit Document In Cloud View Administration
Edit Document In Cloud Settings
Edit Primary/Secondary/Tertiary Party Administration
Edit Primary/Secondary/Tertiary Party Settings
Collaboration Administration
Collaboration Administration
Enable Assigned Contracts Counts
Enable Assigned Contracts Counts
Company Administration
Account Info
Manage Users
Role Models
Security and History Reports
Contract Administration
Settings

Email Administration



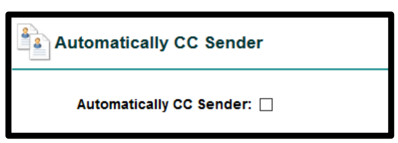
Email From Administration

You can determine globally if you would like emails originating from the system administrators appear with a "*donotreply@icontracts.com*" email address or from the logged in User's email address.



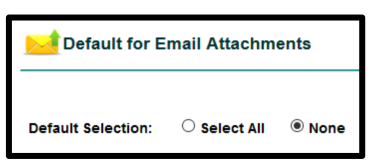
Automatically CC Sender

You can designate emails sent out from the system to automatically "*carbon copy*" the logged in User. This way they will have the full email chain.



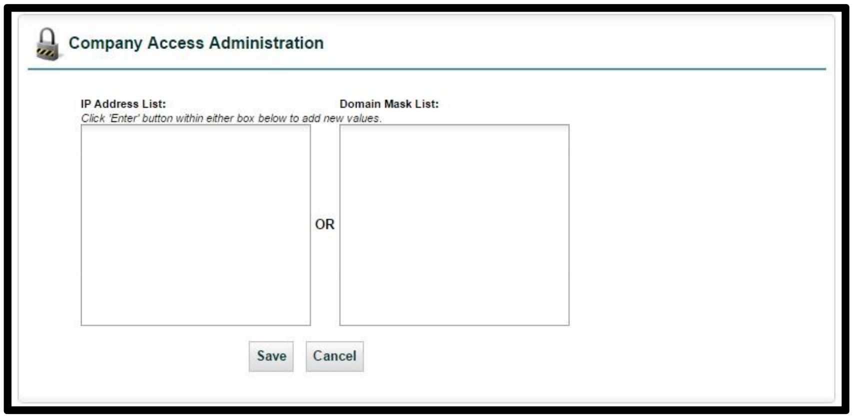
Default for Email Attachments

You can control whether documents are selected or unchecked when using the Email or Collaboration tabs within a Contract Container. It is recommended to set the default as "*None*" to avoid users from accidentally emailing attachments that certain people or organizations should not have access to view.



Company Access Administration

Used to setup any limitations for IP addresses that can log in to your company. For example, preventing users from accessing UCM from their home computers or from another location. Enter any specific IP addresses in the box on the left or sets of IP addresses by domain mask on the right. If you are not sure of your IP address, one of the free services we use is www.whatismyipaddress.com.

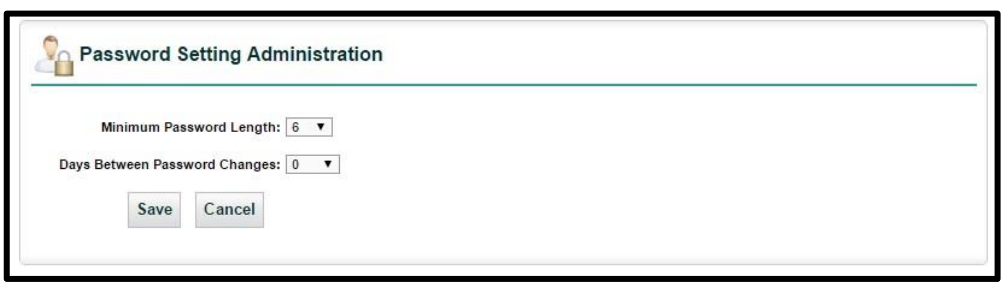


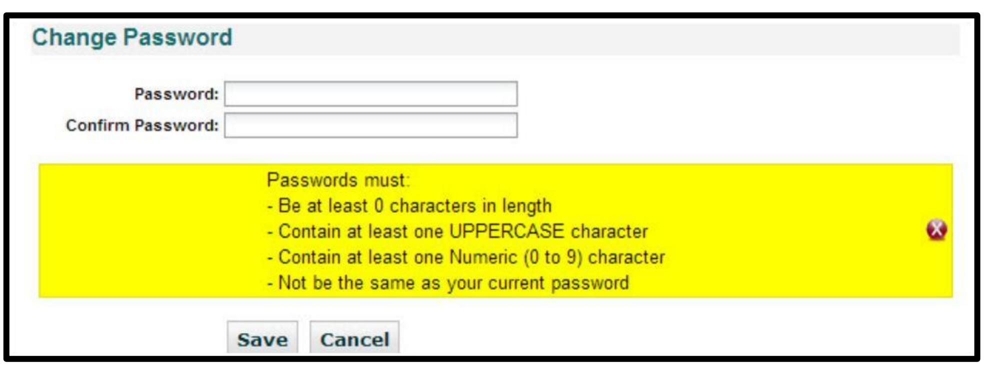
Password Settings Administration

UCM provides Administrators the ability to encourage Users to change their passwords in a specified timeframe for security purposes. By default, passwords are set to *never expire* (set to zero), but by changing the preset number of days (up to 365), Users will be notified to change their passwords when logging into UCM. If an illegal format is used, the warning dialog appears with the rules, as shown below.

The *Minimum Password Length* is set to **6 characters** (A123 is too short), but many companies will use eight-character passwords. Our system will allow administrators to expand passwords to **20 characters**.

By default, *Days Between Password Changes* remains 0, which means user passwords never expire. The setting ranges **from 0 to 365 days**.

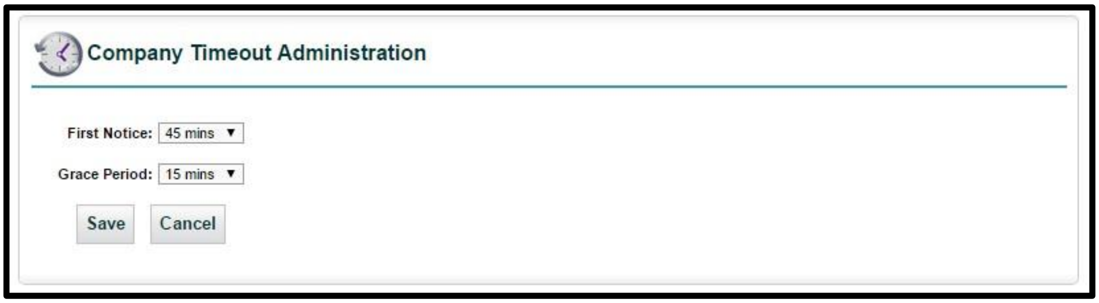




Company Timeout Administration

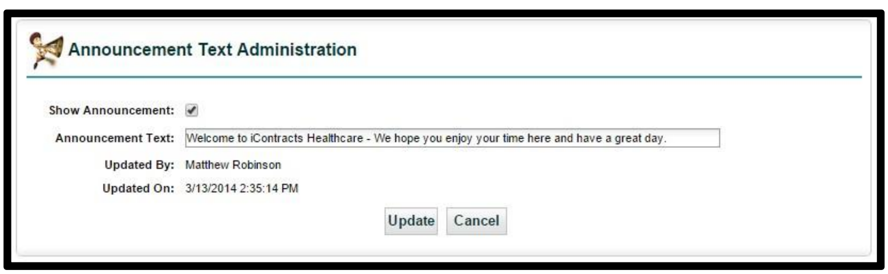
Use this area to control the minimum amount of time before the system forcibly logs out a User in UCM who is not working in any tabs. This is useful for those who leave the system running in the background without doing anything within the system.

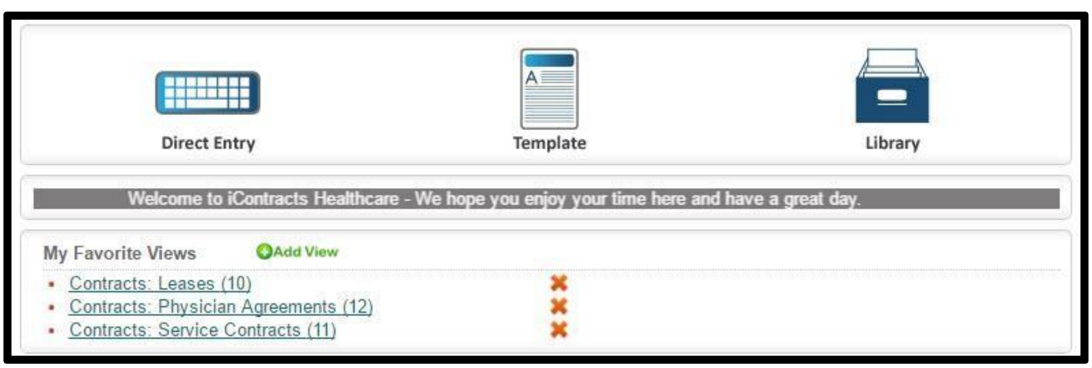
Initially, the times are set to *45 minutes* and the "grace period" to *15 minutes* before the system logs you out (the default is 1 hour). You can alter these settings to meet your needs, depending on how many ***Concurrent User Licenses*** your company purchased from iContracts, or to fit your security model.



Announcement Text Administration

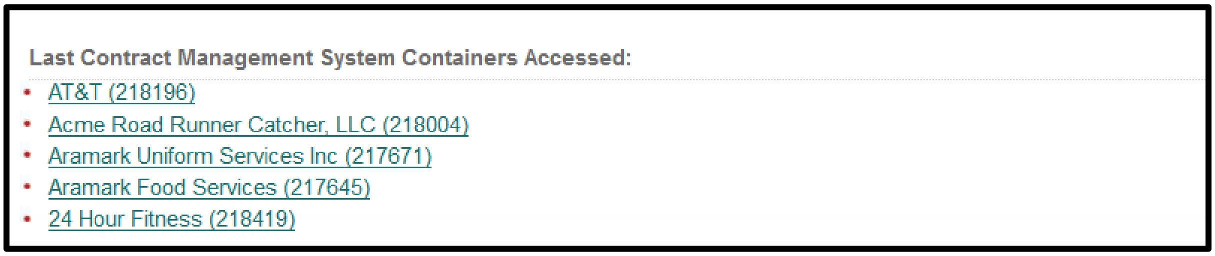
In this area, you can create an announcement that will scroll across the Home Screen when a User logs in to the system. To turn this feature on, check the box next to "*Show Announcement*" and fill out the message that you would like your Users to see. This banner is a good way to announce new enhancements introduced to UCM. You can update the announcement text as many times as needed.





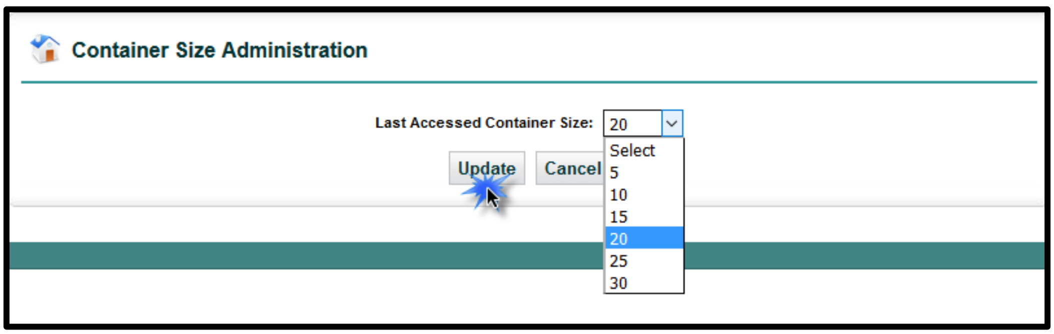
Home Page Settings

Users on the Enterprise Ribbon: Home Screen display the last Contract Containers accessed. Up to five contracts display at any one time.



Administrators setup a new company default for how many Containers users can view, from 5-30.

Select the number of Containers to display from the drop-down list, then click the **Update** button.

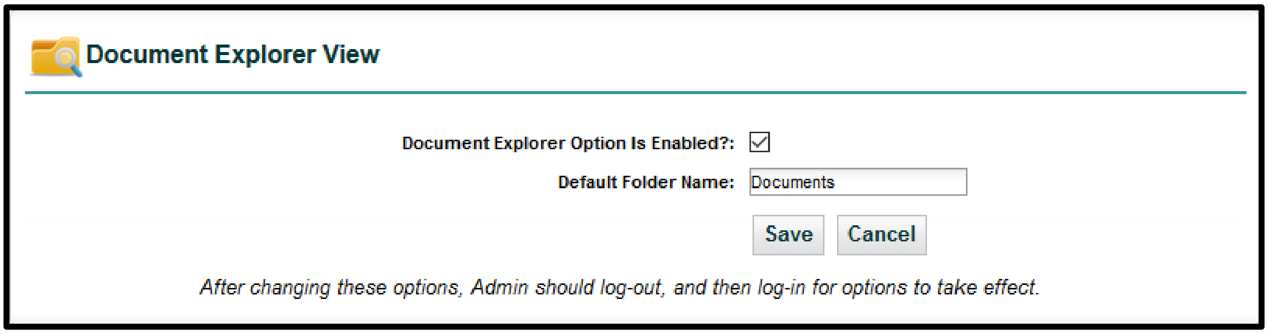


The "updated" Home Screen shows your *Last Contract Management System Containers Accessed* with a scroll bar to display your selected number of containers (if your Container size is greater than 5). You still see 5 containers at a time. Scroll up and down to locate your contract, always seeing five at a time.

Document Explorer Administration

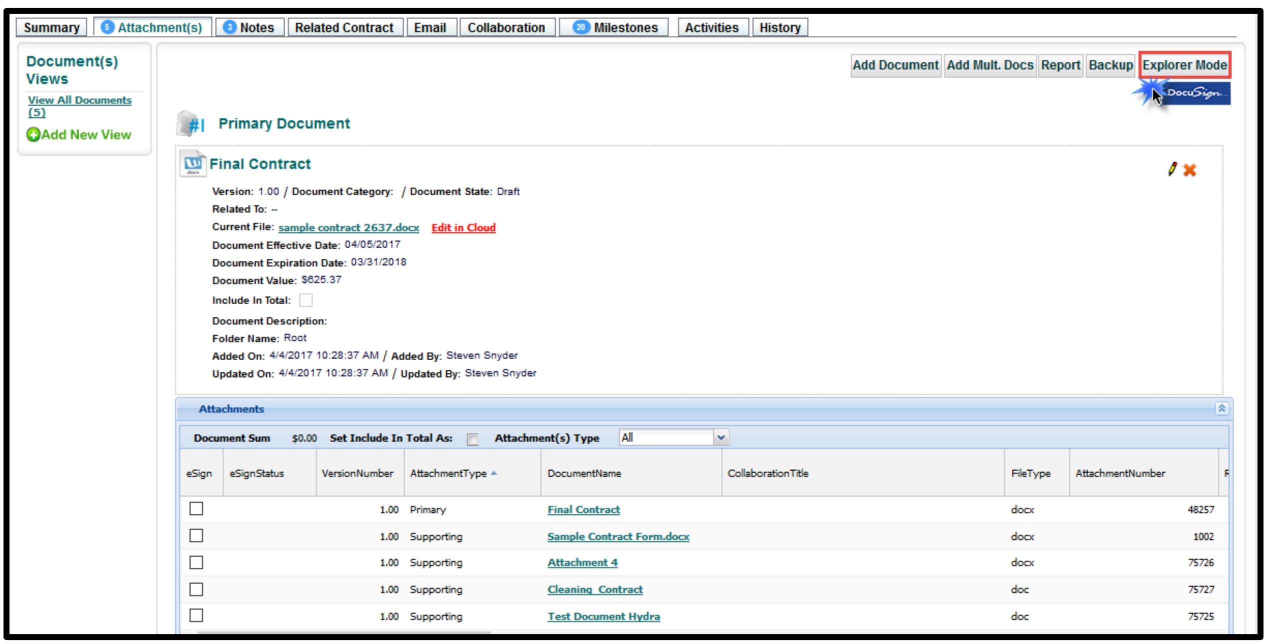
This area dictates whether or not to use the **Explorer Mode View** for documents in the *Attachments Tab* within a Contract Container, instead of the standard grid pattern. To turn this feature on, check the box next to "Document Explorer Option is Enabled?". By default, this is inactive for all Companies, and UCM will operate normally in the Attachments Tab without it. This view replaces the attachments grid with the explorer view instead.

You also have the option to set up a default *Folder Name* for the Explorer View for any new contracts entered into the system. After making changes to this area and saving your work, be sure to log out and log back in for changes to take effect.

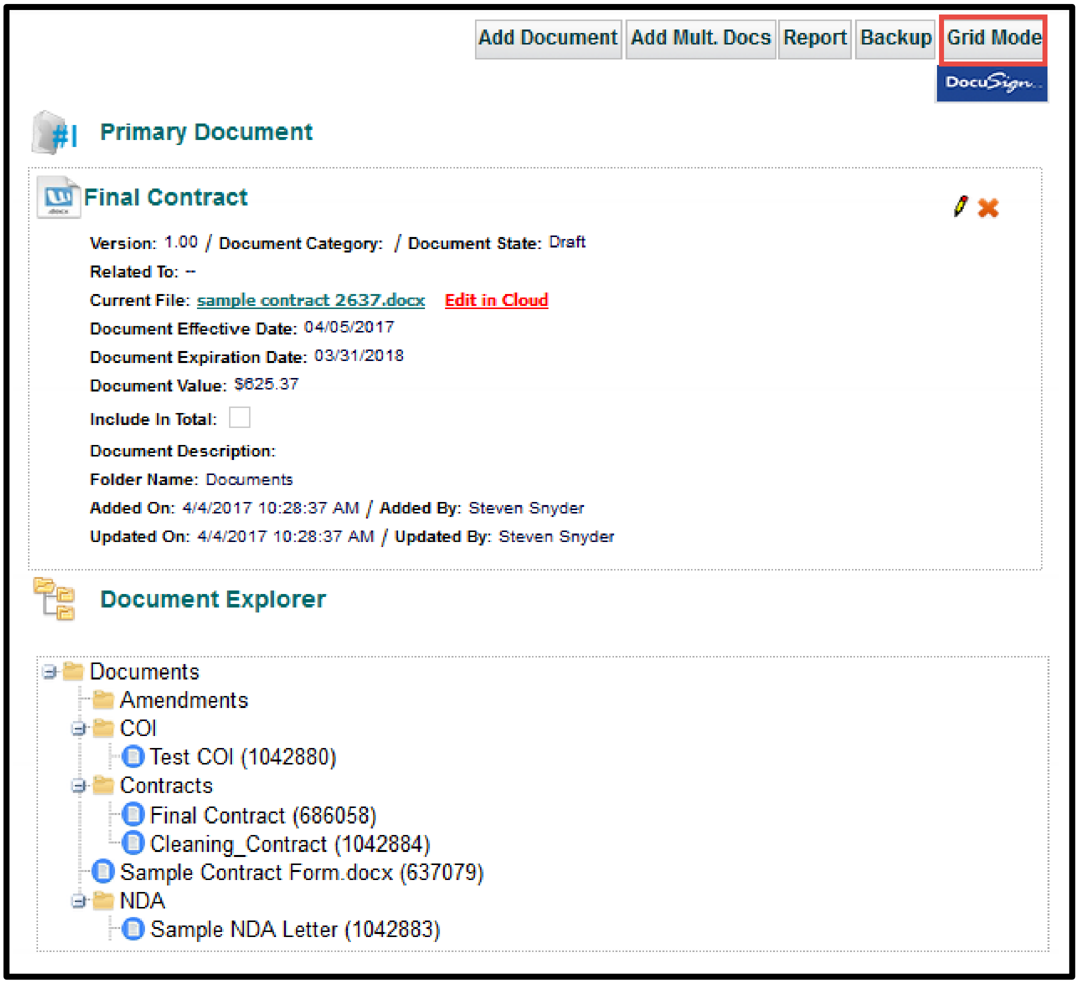


Using Document Explorer Mode

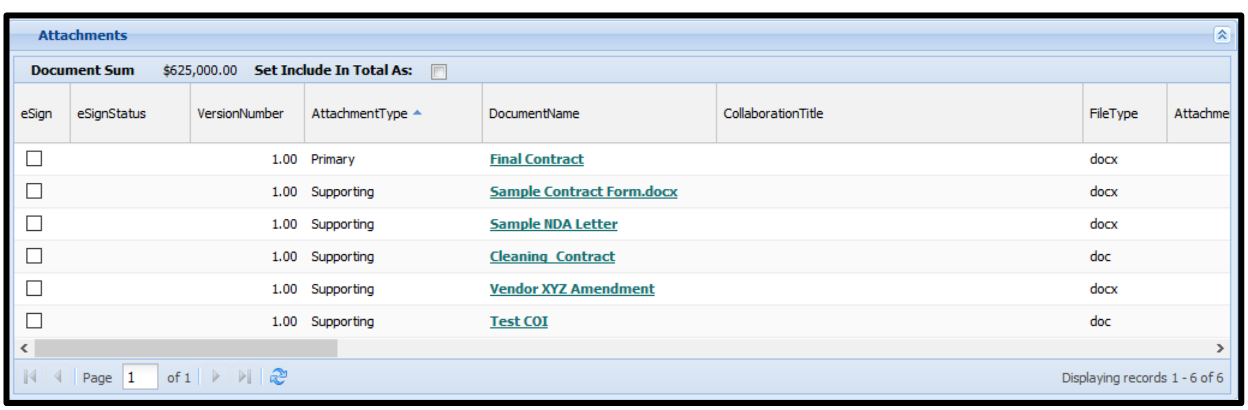
After turning this feature on for your company, log back in and navigate to a Contract Container Attachments Tab. The option to view documents in Explorer Mode will become available. This is a toggle between **Explorer Mode** and **Grid Mode**.



This functionality works like the Contract Administration: Folder Permissions. You can add sub-folders using the right-click mouse button. You can also rename or delete folders using the same method. However, only subfolders can be deleted. To move a document into a different folder, simply drag the document and drop it in to the folder. Click on the Attachment(s) tab to refresh and sort the Folders and Subfolders.



Clicking on the **Grid Mode** switches back to viewing an Attachment(s) grid.



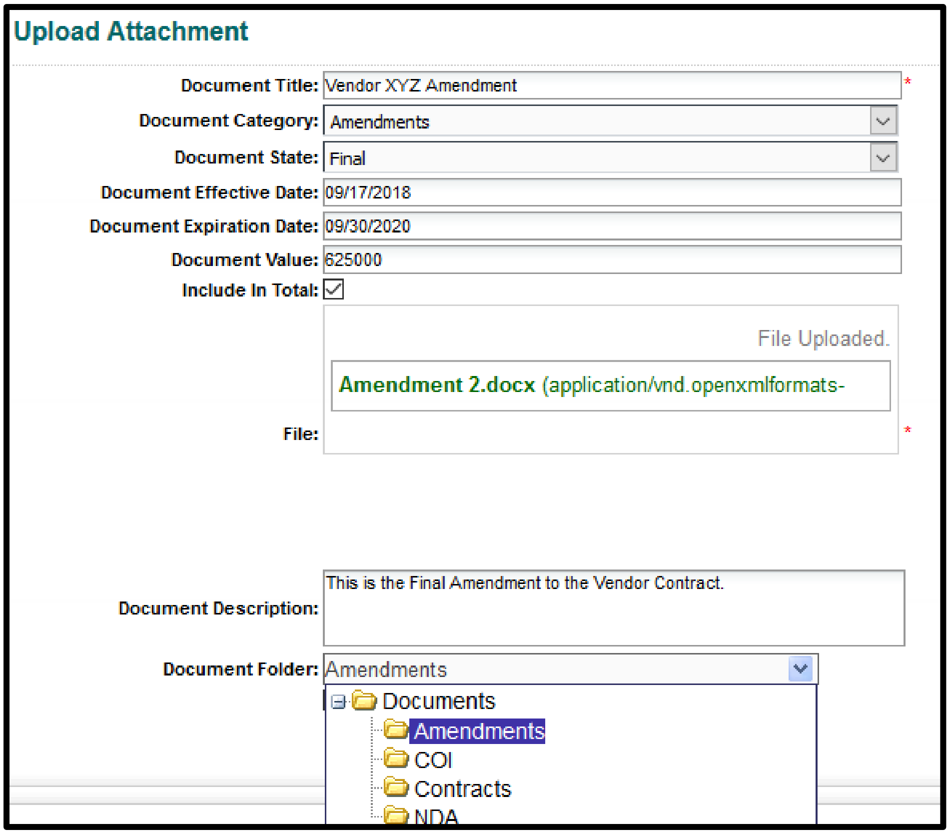
Attachments

Document Sum $625,000.00 Set Include In Total As:

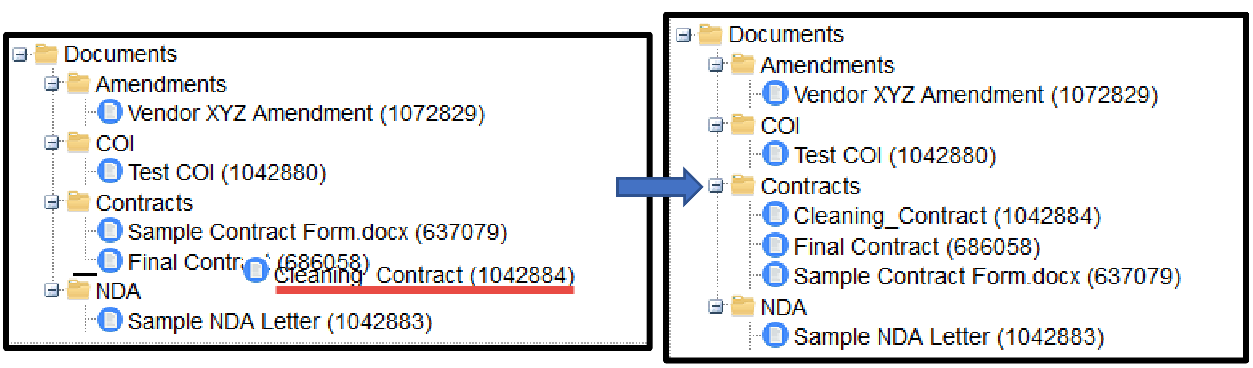
eSign	eSignStatus	VersionNumber	AttachmentType	DocumentName	CollaborationTitle	FileType	Attachme
☐		1.00	Primary	Final Contract		docx	
☐		1.00	Supporting	Sample Contract Form.docx		docx	
☐		1.00	Supporting	Sample NDA Letter		docx	
☐		1.00	Supporting	Cleaning_Contract		doc	
☐		1.00	Supporting	Vendor XYZ Amendment		docx	
☐		1.00	Supporting	Test COI		doc	

Page 1 of 1 Displaying records 1 - 6 of 6

When adding documents to a Contract Container with Document Explorer turned on for your company, users are asked to select where the *Document Folder* would like to placed.



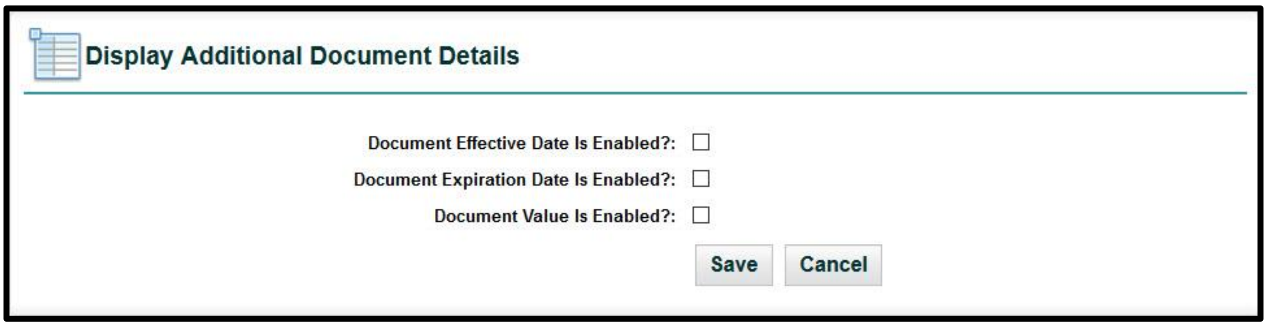
Using Explorer Mode, you can reposition which Document Folder the document is located. Documents can be dragged to another subfolder.



Document Additional Attributes Administration

This feature allows 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. This "running total" can be set by Document Category or a document-by-document basis.

From the **Display Additional Document Details** menu, select which of the three available options you need (from none to all three). Click **Save** to apply the changes to all current and future documents.



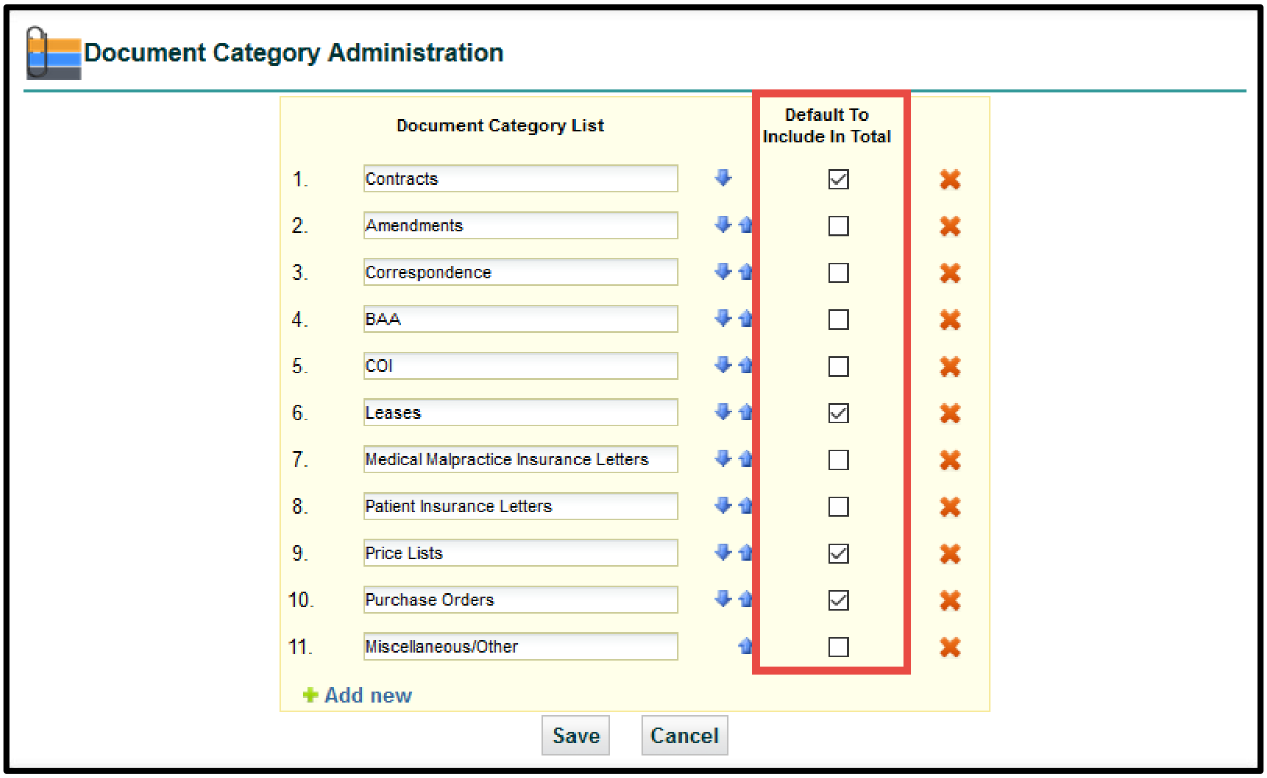
The enabled fields become available on the documents page on the *Attachments* tab (both on the Enterprise ribbon and the Contract ribbon). Use the Edit Pencil to add information to existing documents that require this information.

This illustration shows all fields enabled. In addition, you'll only see "Include In Total" IF "Document Value" is enabled.

Adding "Default To Include in Total" Checkbox to Document Category

If you want to define all documents within a *Document Category* to by default, include their **Document Values** in the Document Grid Totals, edit the Document Category Administration screen.

Click on **Company Admin: Contract Administration: Document Category Administration** and choose which Document Categories you want to add Values by default.

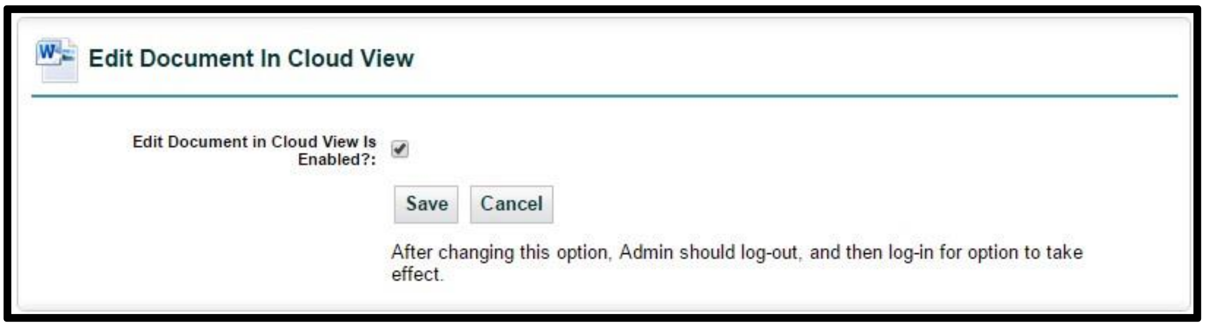


Click the **Save** button to update.

Edit Document in Cloud View Administration

Users have the ability to edit documents from within the *Attachments tab* and save them back as a new version without having to save locally and then re-upload manually, which should save a lot of time and make it easier from a process standpoint. A plug-in (called Aceoffix) will need to be installed on each Users' computer to be able to utilize this function, but after installation, each User will have their full Word functionality for editing right in the cloud.

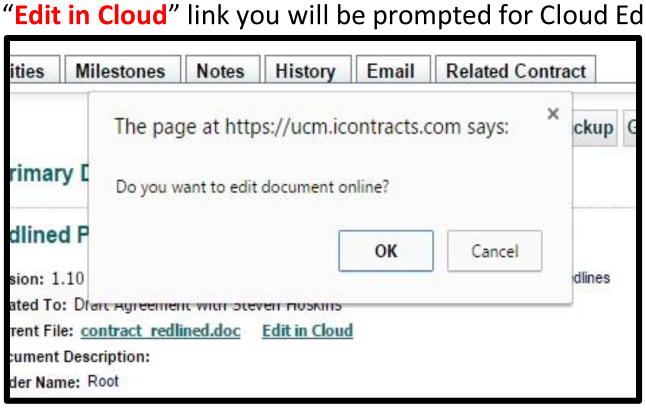
However, an Administrator must activate cloud editing for the entire Company. By default, this is inactive for all Companies, and UCM will operate normally in the Attachments tab without it. To turn on **Cloud Editing** for your company, click on the link for *Edit Document in Cloud View* from the Settings area.



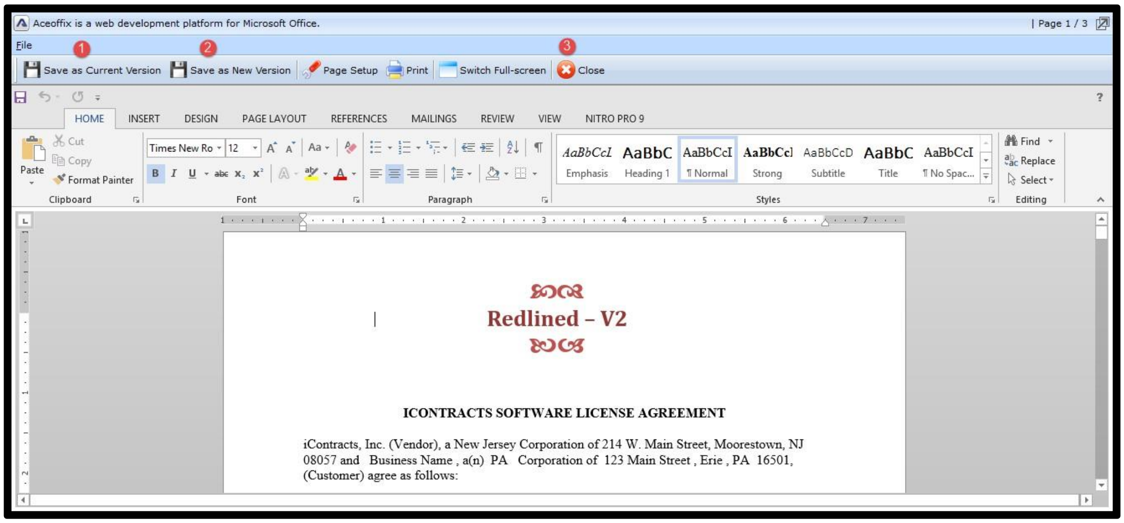
Check the box to enable *Edit in Cloud* for your Company and click *Save*. Users already in the system must log-out for the option to take effect, as the dialog box states at the bottom.

Log back in and go to a document (This must be the Current Version, as past versions are ineligible for Editing in the Cloud). Users will now see this option next to the link to open the document.

Upon clicking on the "**Edit in Cloud**" link you will be prompted for Cloud Editing.



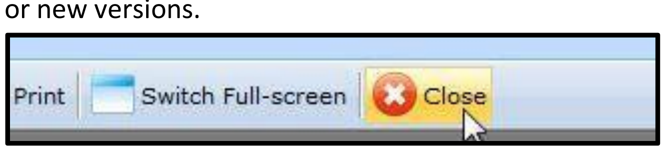
Now, users may be prompted for Installing Aceoffix 5.7, which might require your IT Department's involvement, depending on your Company Policies (click the link above for more information). While the install is in progress, users will probably have to close out of their web browser and re-launch, as instructed. Users will then have to log back in and navigate back to the Contract Container, but it will be this way only the first time this Plugin is installed.



Now when they "*Edit in Cloud*" a new window containing their document will appear and they can edit the document. When saving the document, after changes are made, there are a few options:

1. **Save as Current Version**: this will save it as the same version number, as it was when it was opened. It overwrites the document, but with the same number.

2. **Save as New Version**: This will save another version as a new higher version number.
3. **Close**: this will close the Window. If Options 1 or 2 have not already been chosen, it will close with no changes or new versions.



Note: *The User will be prompted with this dialog box, no matter whether or not they have just saved the new version. They will simply click OK to exit the window when prompted.*

The new versions will now be listed in the Version Group in the grid. Only the highest version can be Edited in the Cloud, not any of the previous versions – clicking on their document link will simply open the document locally.

When editing the Primary Document, if a new version is saved a warning will display letting you know there may be a more current version of this document.

Edit Primary/Secondary/Tertiary Party Administration

This area of UCM allows Users to specify additional Users who may need to be notified, in addition to, or in place of, an Owner or User by name.

Like Owner, **Primary, Secondary,** and **Tertiary Parties** can be change on a per-Contract basis.

These three designations are optional and Administrators can decide if Users are required to select any additional parties. Administrators can also hide any combination of the three responsible parties for their company.

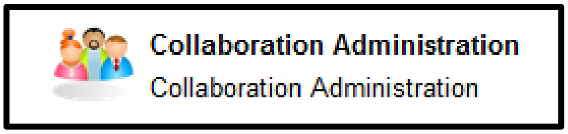
There are no security parameters tied to Primary, Secondary, and Tertiary parties, so nothing needs to be done in *Manage Users* to allow or disallow them to be used by users or Role Model groups.

The list of users that can be set for each of the new attributes is based on currently Active and Confirmed users of any User Type (just like Owners).

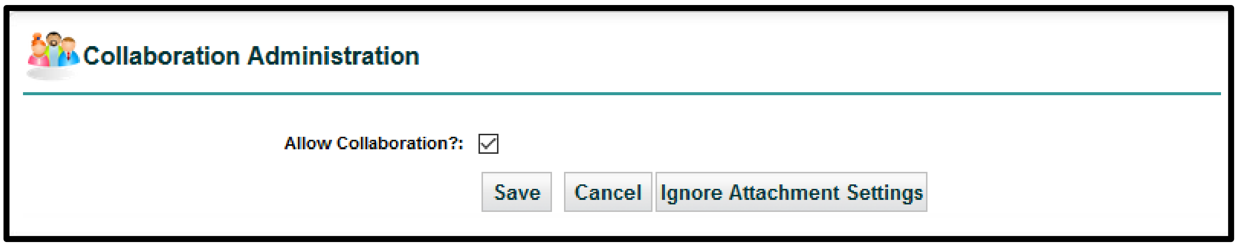
In this part of the Company Admin, you can select whether or not this functionality is enabled at all. If you decide to turn on the **Responsible Parties**, you must select to show at least one of the three options, i.e. Primary, Secondary, or Tertiary. In addition to turning these on, you can also determine whether any, all or none of these are required to be filled out by your Users when creating new containers in the system.

Collaboration Administration

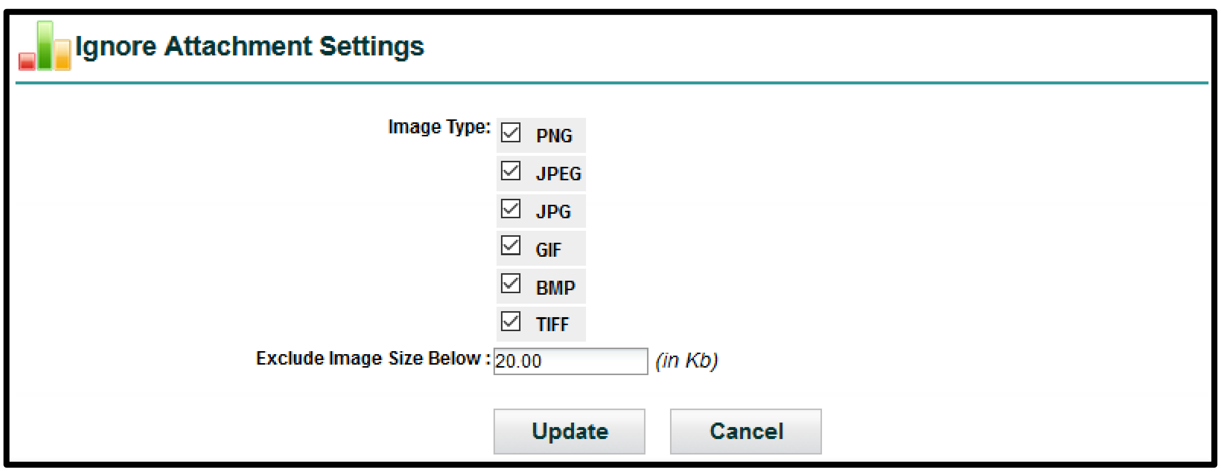
This is a feature that your company will request activation from iContracts and then added to your Company Admin Training. Once activated by us, this icon is added to your Setup Administration.



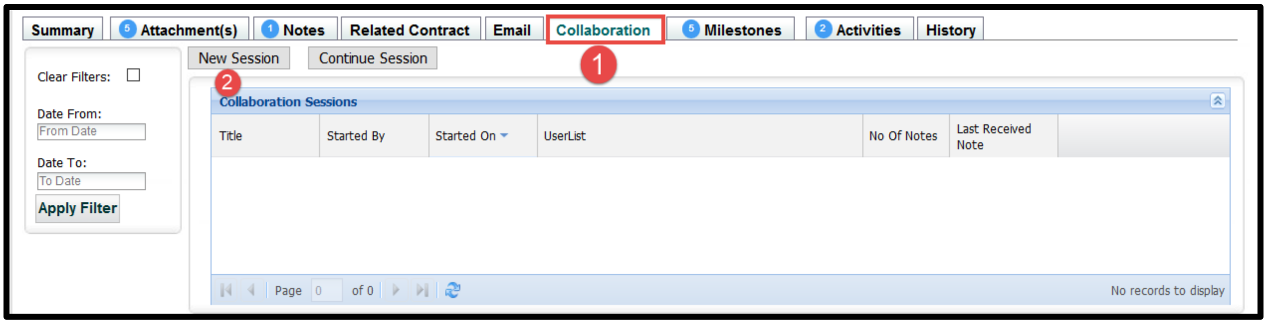
You must "turn on" Collaboration by checking the "*Allow Collaboration?*" checkbox.
Click **Save** to update.



Use the optional "*Ignore Attachment Settings*" button to manage image types and sizes when recipients reply to their collaboration emails. These images are typically found in your email signatures, which could "clog up" the Attachments tab back in UCM.

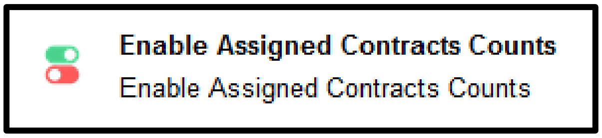


Once enabled, the *Collaboration* tab is added to your Contract Ribbon. When you create a **New Session**, this works similar to sending an Email from within the Contract Container. The replies are incorporated into the Contract Container, which is different than using the *Email* tab. This functionality is explained in more detail in another document.



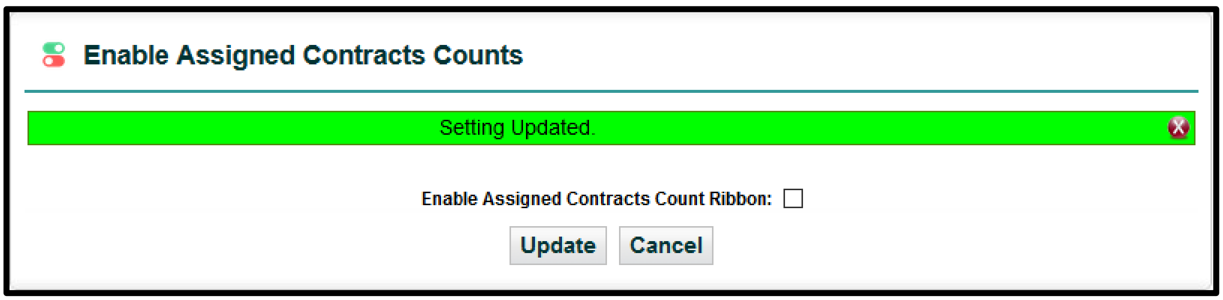
Enable Assigned Contracts Counts

UCM Administrators can now turn off the list of Assigned Contracts tab.



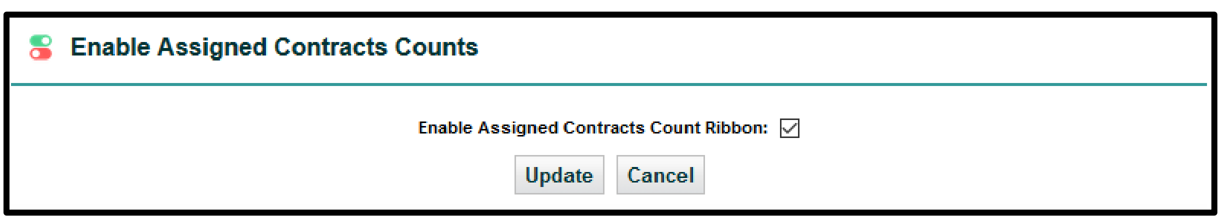
Select "*Enable Assigned Contracts Counts*". By default, the checkbox is checked on. This means that all company users will have the Enterprise Ribbon display the number of Assigned Contracts for that user.

Uncheck the checkbox and click the "**Update**" button to remove the Contracts Count Ribbon.

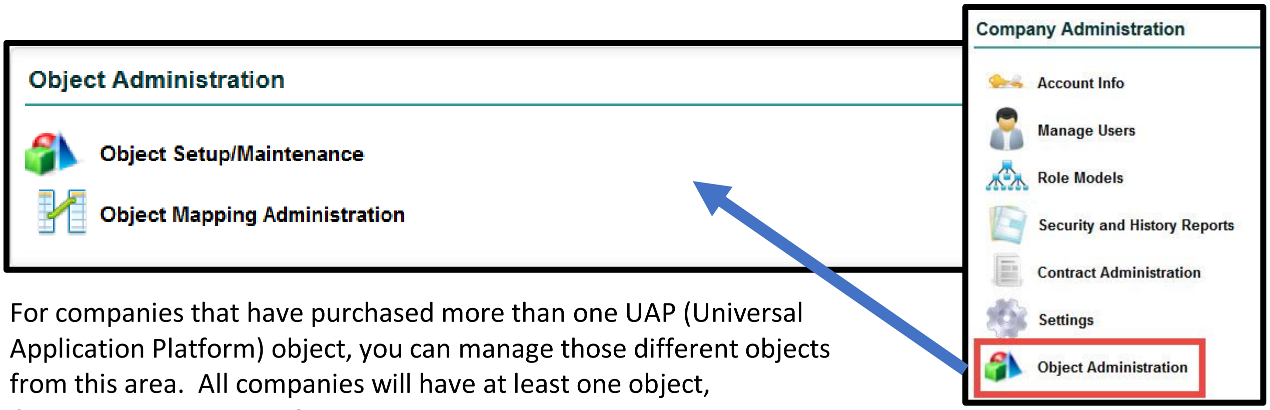


Once you navigate to another tab, the Contracts Count Ribbon disappears.

To add the Contract Count Ribbon to the Enterprise Ribbon, check the box and click the "**Update**" button.

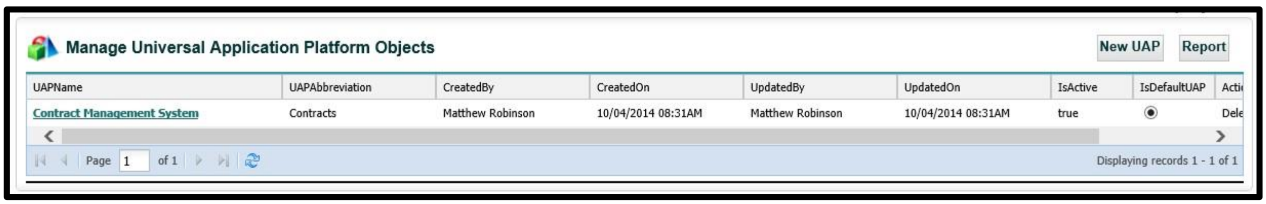


UAP Administration



For companies that have purchased more than one UAP (Universal Application Platform) object, you can manage those different objects from this area. All companies will have at least one object, **Contract Management System**.

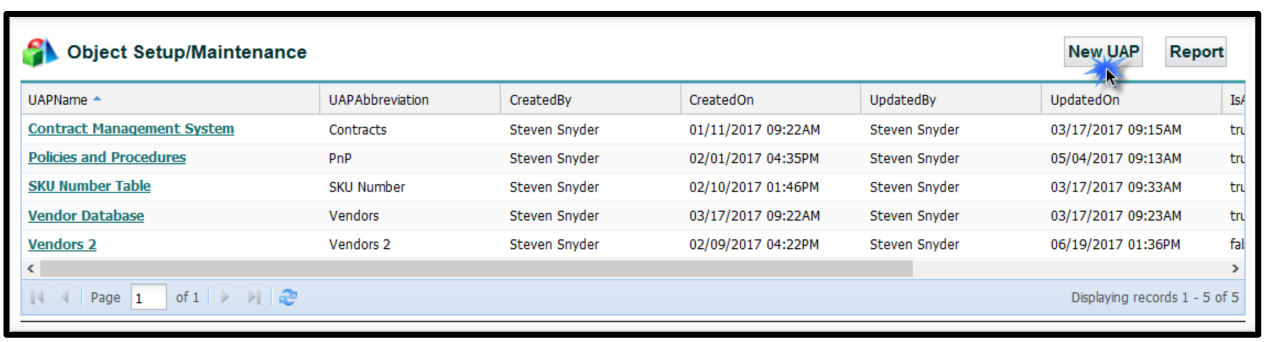
For more information on purchasing additional UCM Objects, please contact your **iContracts Account Executive**.



Object Setup/Maintenance

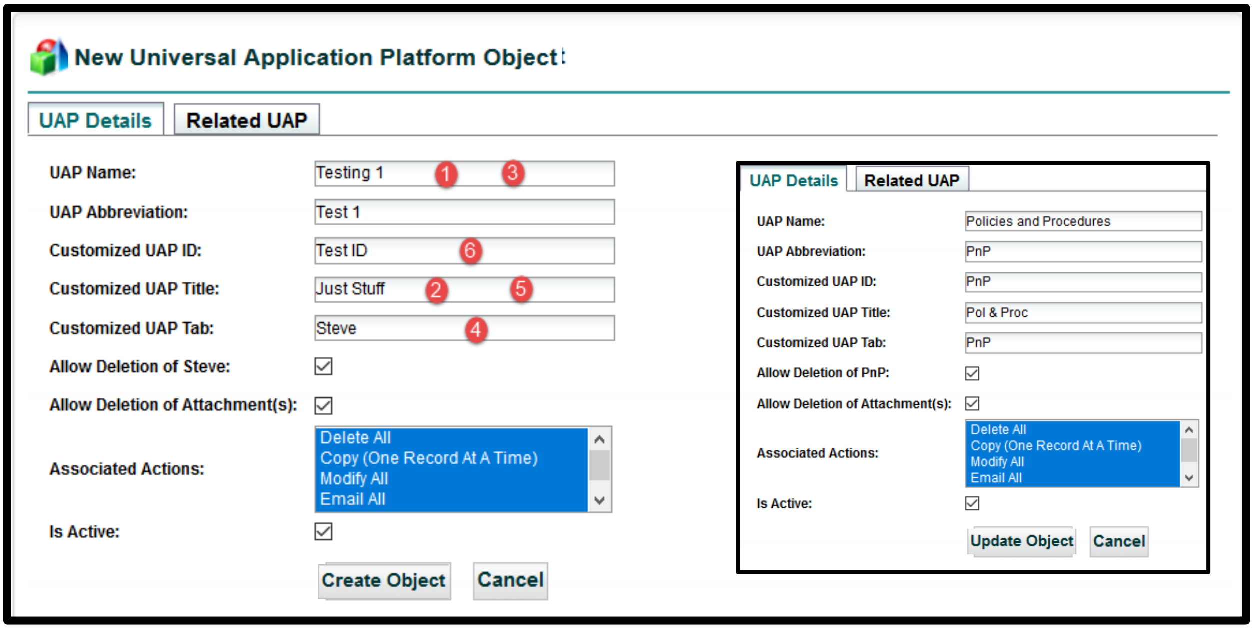
Depending on how many Objects you purchased from iContracts, you can setup additional UAP objects here.

Creating a New Object



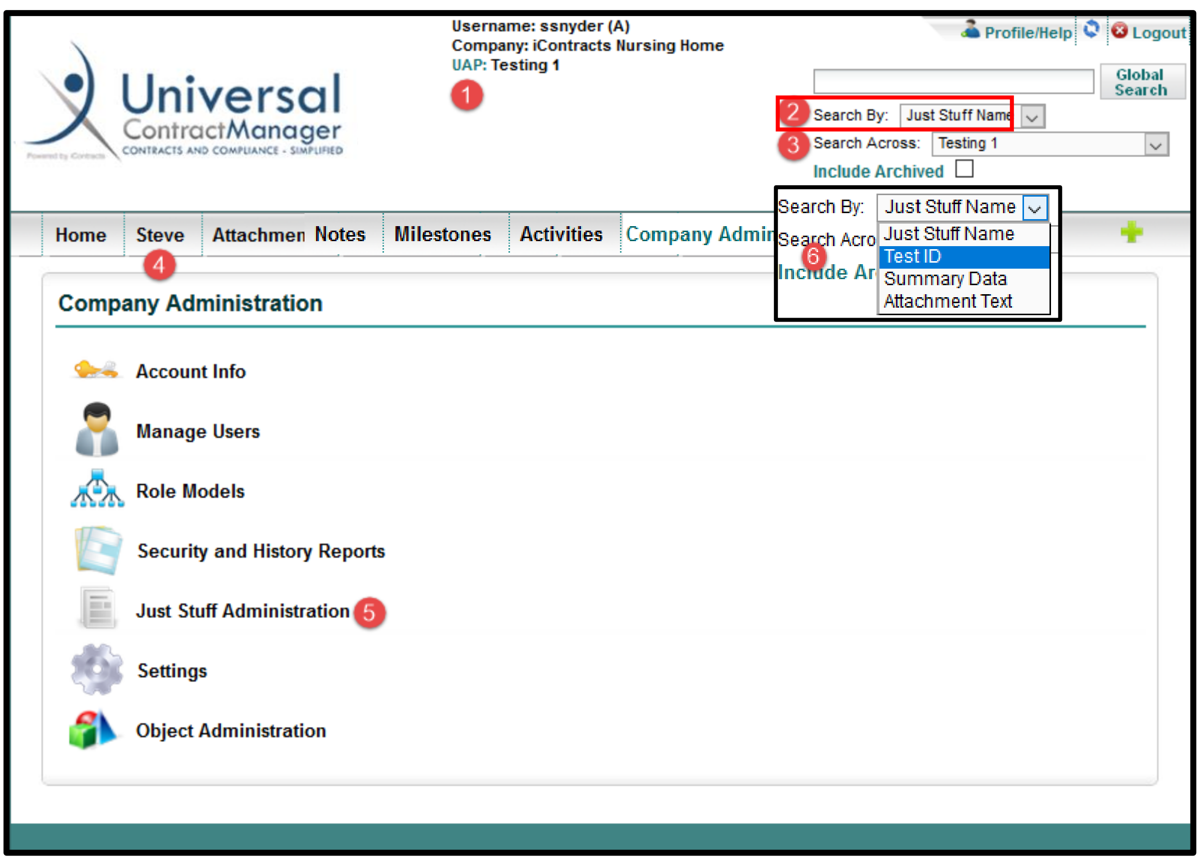
Click on the **New UAP** button.

Enter your information into the **New Universal Application Platform Object** screen. When you return to edit an Object, the screen name changes from "*New*" to "*Edit*".



Click on the "**Create Object**" button to save your information. This button becomes the "**Update Object**" button after saving your initial data.

The numbers in the illustration show where on the Home tab you see your UAP Details.

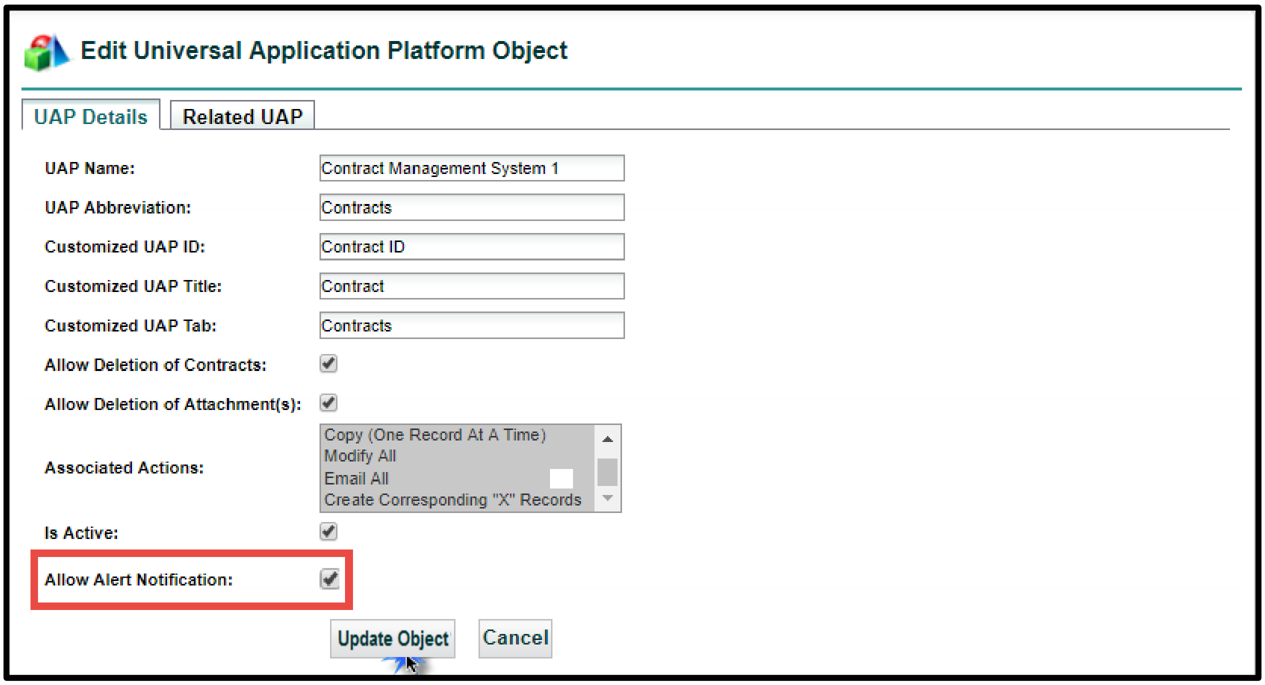


Allowing Alert Notifications

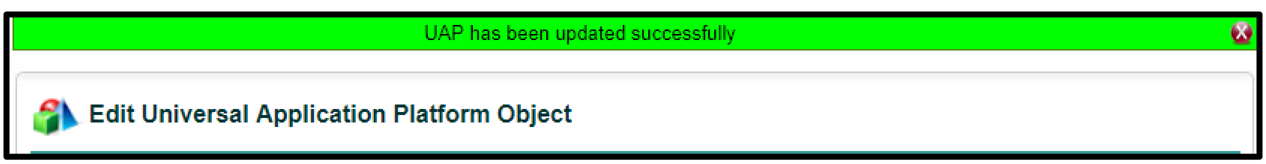
Admins must first have this function enabled for their company by iContracts (via a UCM Support Ticket or email *ucmsupport@icontracts.com*). Once the feature is turned on by us, the primary admin will need to activate it for their database(s) and then *deactivate* access for any Full-Access users that should **not** have the ability to create or edit alerts.

Step One: Turn on the Alert Feature

Select the UAP Name for allowing the alert notifications. For most companies, the Object's UAP Name will be "Contract Management System". Click on the link to display the "***Edit Universal Application Platform Object***" screen. Activate this feature as shown below.



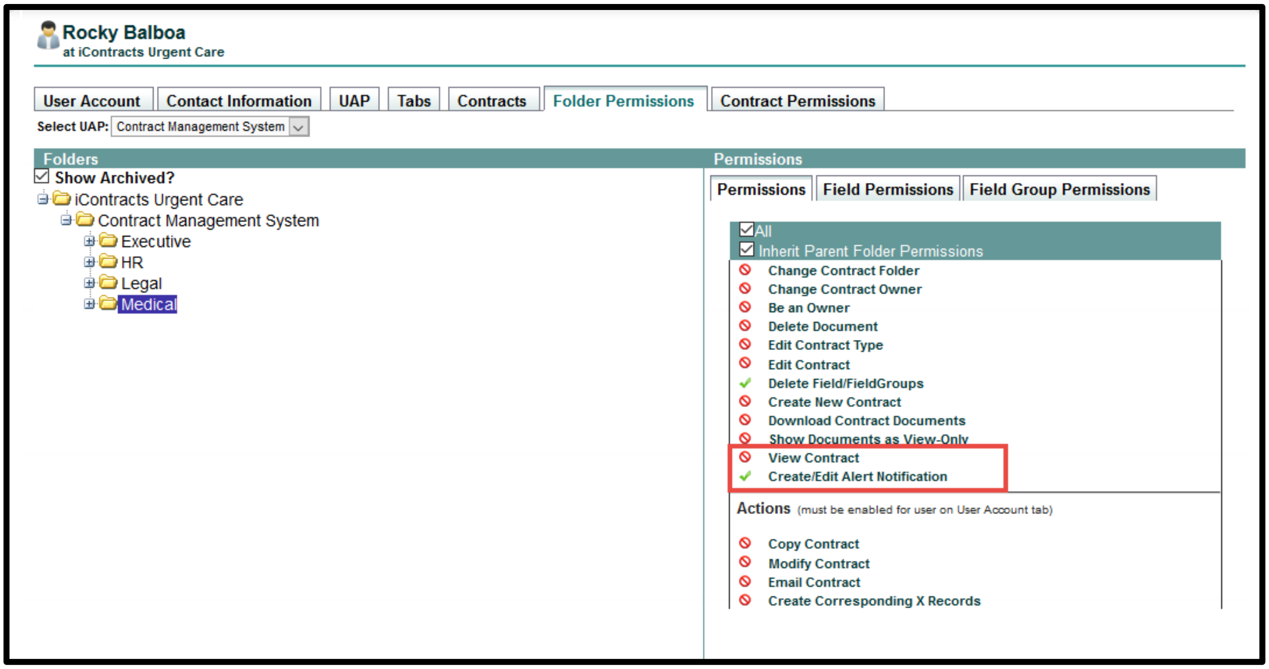
Check the "***Allow Alert Notification***" checkbox and then click **Update Object** to save your changes.



Repeat **Step One** if you have additional UAP Objects created and you want those objects to also use Alert Notifications.

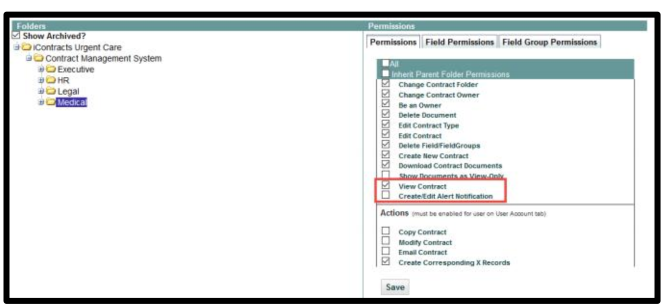
Step Two: Deactivating Permission for a Full-Access User

Using **Manage Users: Folder Permissions**, you can see that Full-Access Users have the *Create/Edit Alert Notification* active by default, regardless of the rest of the folder permissions. If the *View Contract* permission is denied, the user will not be able to use Alert Notifications.

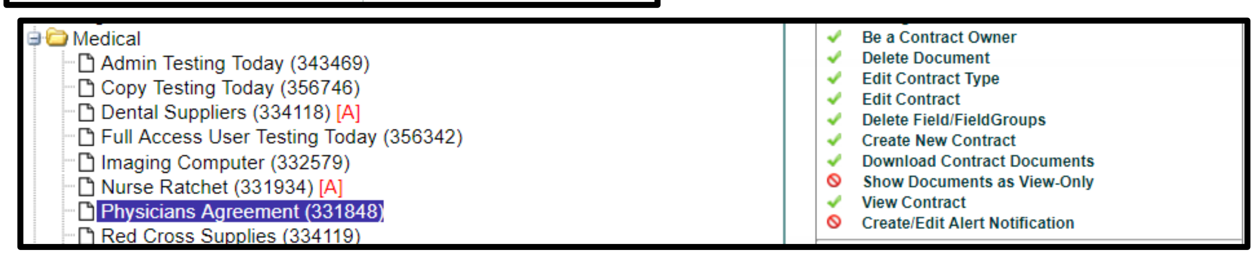


This example shows a Full-Access User's Folder Permission for the "Medical" folder.

You (as an Admin) control who can and cannot Create or Edit Alert Notifications and for which folders. Admins can also control if a Role Model will have access to *Create/Edit Alert Notification*. To remove access, uncheck the *Create/Edit Alert Notification* checkbox. This works the same for individuals, as well as for Role Models.



This first example, left, shows the Create/Edit Alert Notification permission is removed after folder access granted. Make sure you also check permissions for individual contracts to verify if they inherit parent folder permissions, as shown in second example, below.

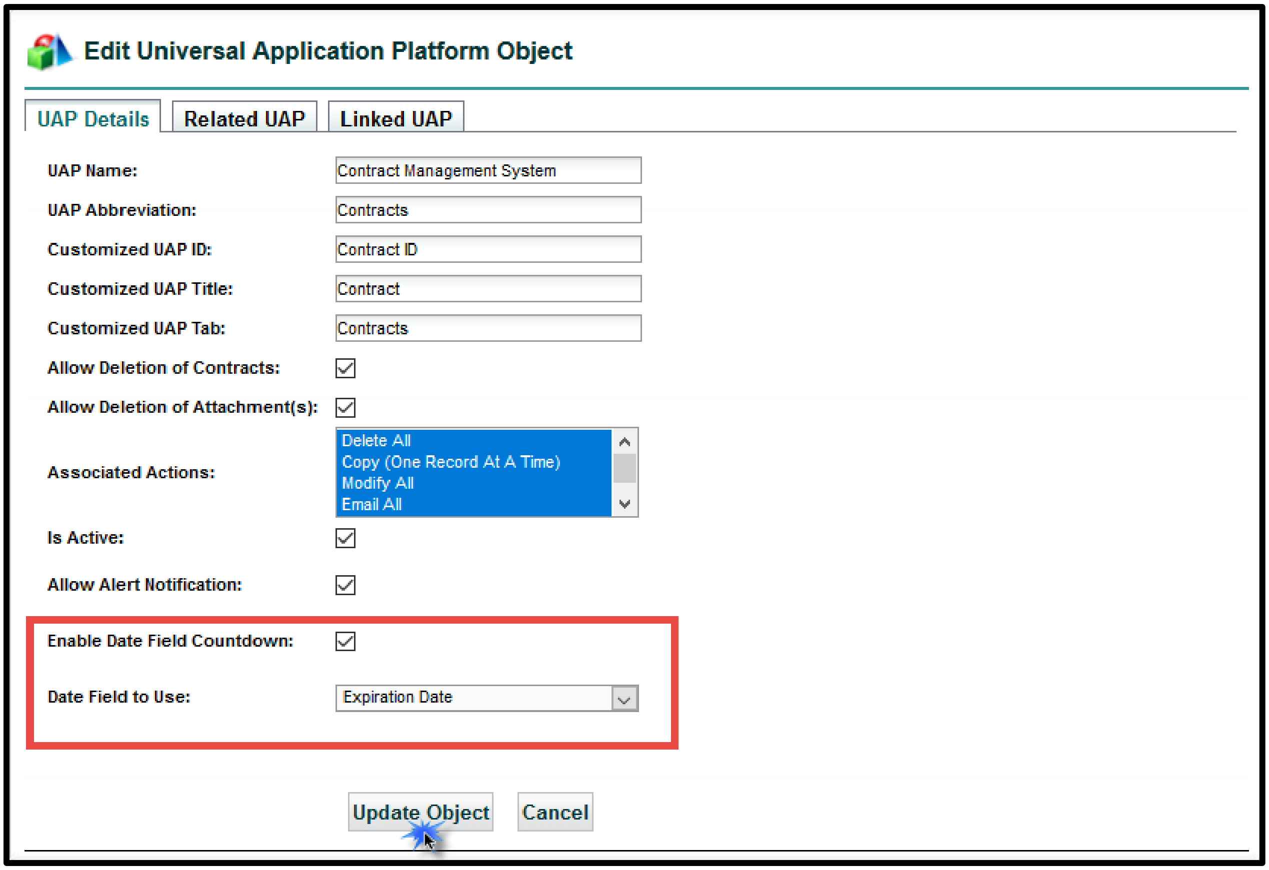


Make sure to click the **Save** button to update any changes made to a Folder or Contract Permission.

See **Alerts** in the Full Access UCM Manual for additional information on **Configuring Contract Alerts**.

Date Field Countdown

For most companies, the Object's UAP Name will be "Contract Management System", but you can select any UAP Object. Click on the link to display the "***Edit Universal Application Platform Object***" screen. Activate this feature as shown below.



Once you check the box to **Enable Date Field Countdown**, use the drop-down for **Date Field to Use** to select ***which*** pre-defined *Date Field* to display in the countdown. Most companies will probably use "*Expiration Date*" (or an equivalent field), but you can select any date field to suit your countdown needs.

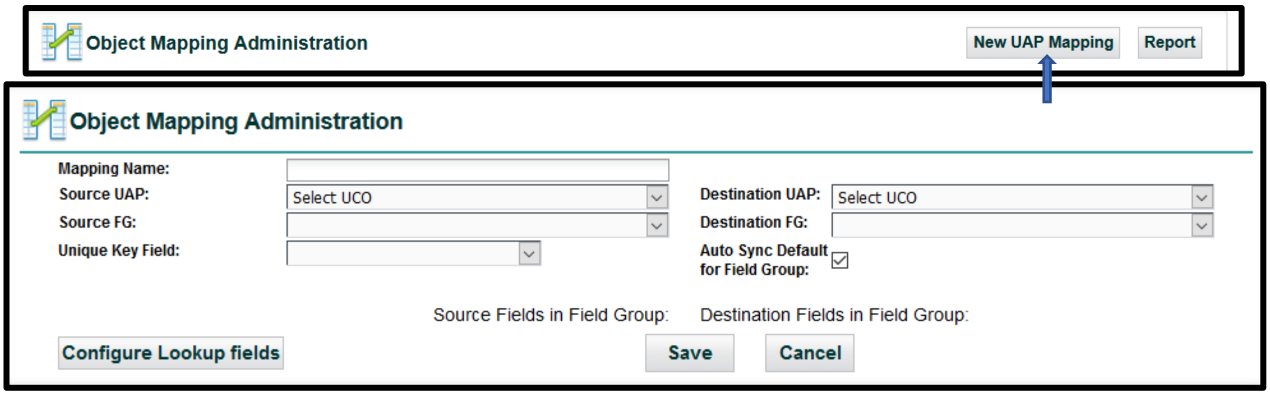
Be sure to click the **Update Object** button to save and activate.

We recommend that Admins, and any users that are logged in at the time of this countdown configuration, log out and log back in to see the updates take effect.

Object Mapping

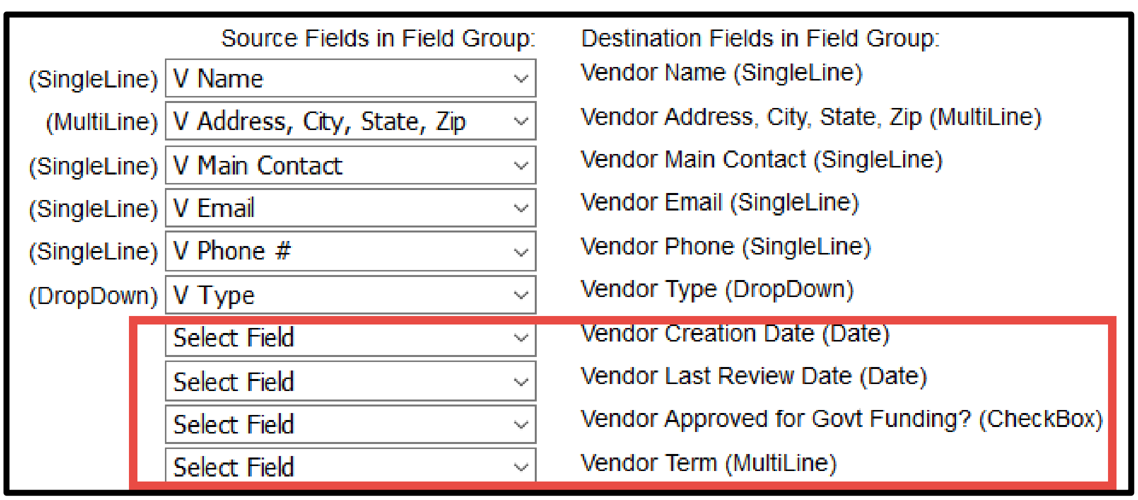
Click the "*New UAP Mapping*" button on the upper right corner. We have additional documentation available to provide a more in-depth guide to setting up a Vendor object (or other object type) to link to your Contract Containers.

Select the Source and Destination information from the Drop-Down lists.



Mapping Name:	A descriptive label for this Object (like "Vendors").
Source UAP:	The Object used to store these vendor fields.
Source FG:	The Field Group containing these vendor fields.
Unique Key Field:	The identifier (field) used to search across the vendors.
Destination UAP:	Usually the Contract Management System object.
Destination FG:	The Field Group on the Contract Object side.
Auto Sync Default for Field Group:	If checked, any edits to the Source FG are automatically "pushed" to the Destination FG (this option is checked on by default).
Configure Lookup fields:	A checklist used to create searches for the Vendor information.

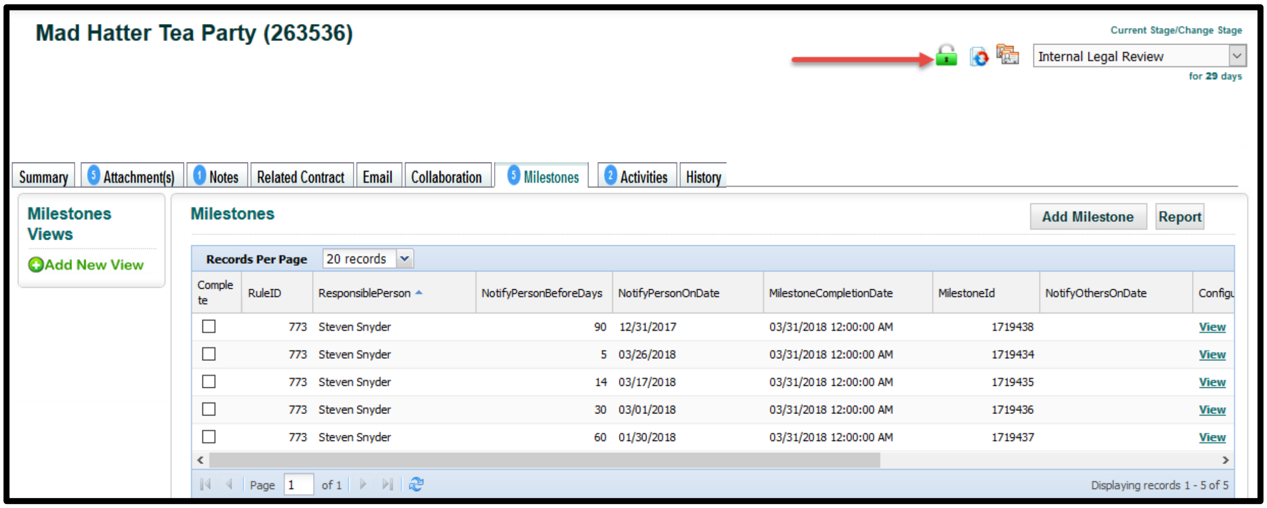
The **Destination Fields** populate first.
Select from the Source Fields drop-down list which fields you want to match to Destination fields.
You don't have to use all the Source Fields that you created earlier.



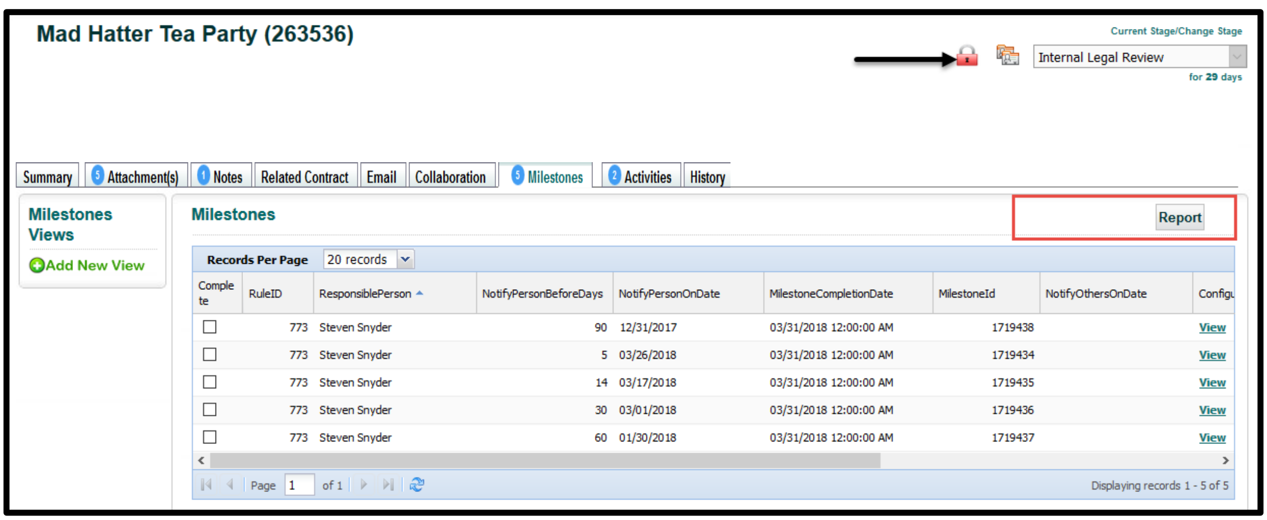
Click the **Save** button when finished.

The Contract Container Lock

This is an Administrator-only function that allows an individual Contract Container to be “locked” and therefore, a read only document. For example, the Contract Container displayed below has several Milestones. The *Add Milestone* button is displayed to create another Milestone for the Container.



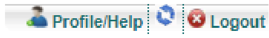
Clicking on the **Lock** changes the icon from a **green** open lock to a **red** closed lock. The screen refreshes, and the *Add Milestone* button disappears.

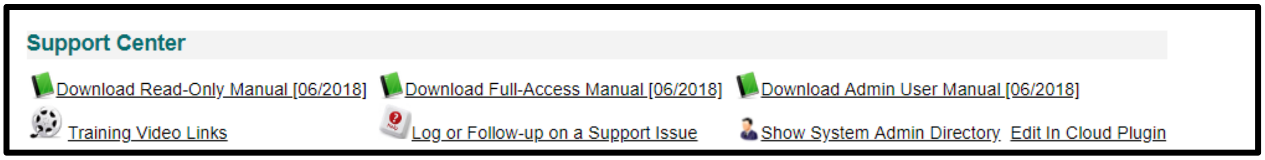


- On the *Summary Tab*, all the edit functions are disabled (no Edit Pencils).
  You cannot add, modify, or delete Contract Attributes, Fields and Field Groups.
- On the *Attachments Tab*, you can only view current documents.
- You can still send emails from the *Email Tab*.
- You cannot Add Notes, Milestones, or Activities; or edit via Modify Contract Actions.
- You can view in the *History Tab* whenever a Contract Container is locked or unlocked.

You can “unlock” the Contract Container at any time by clicking on the Lock icon.

The UCM Administrator Support Center

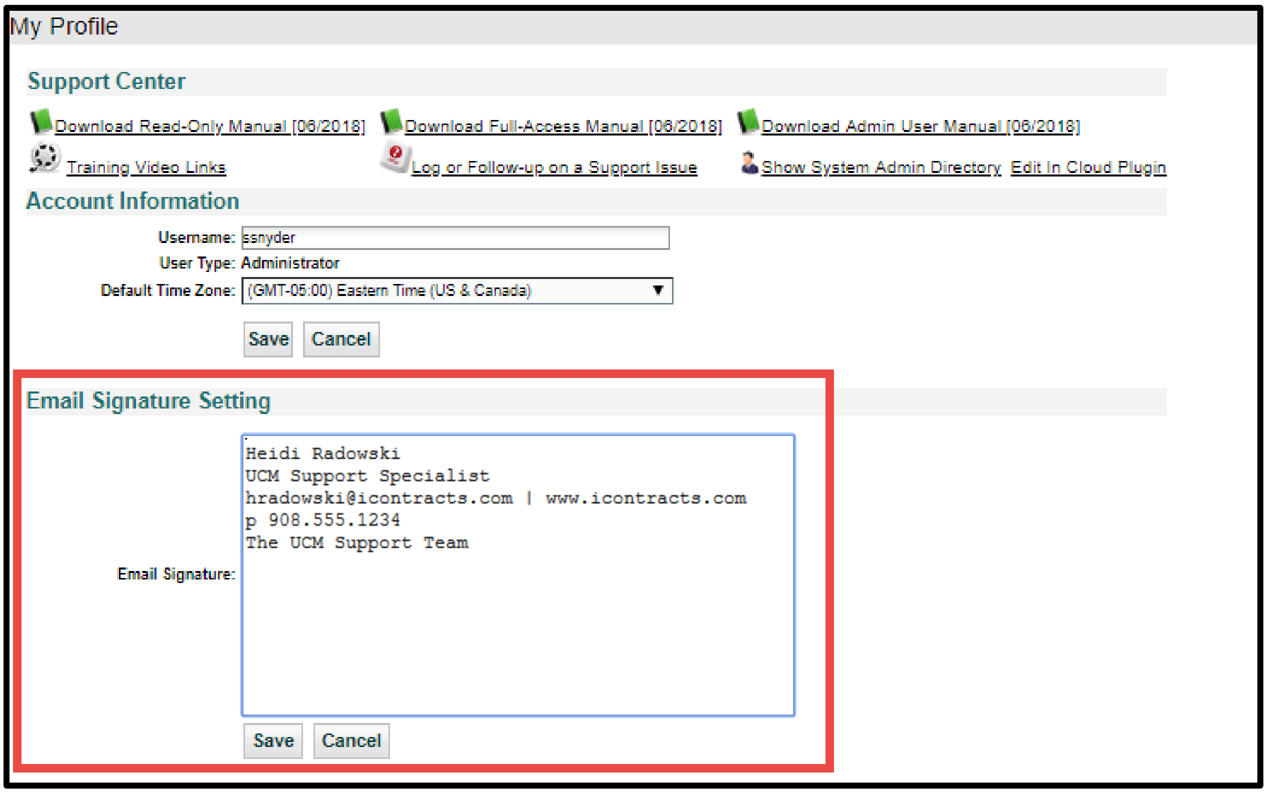
When Admins click on the **Profile/Help** link in UCM, they have access to the Support Center. This  link is available from all screens within UCM.



The **Administrator Support Center** provides access to all User Manuals, Training Videos, the Edit in Cloud Plugin (Google Chrome only), and the System Admin Directory. In addition, there is a link to the *Support Ticketing System*, where only Administrators can create new Support Tickets for communicating with iContracts' Support Specialists. More on "*Log or Follow-up on a Support Issue*" later.

Using Email Signature Setting

Currently, the email signatures are text-only (no graphics, like a company logo). Once the user creates their UCM signature in *Profile/Help*, new emails in both the **Email Tab** and **Collaboration Tab** (if enabled) display your Signature automatically. You can edit your Email Signature Setting anytime.



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.

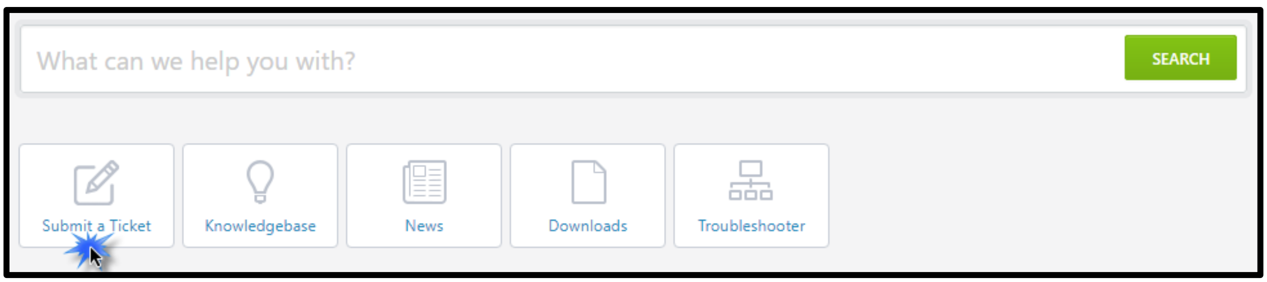
Click the **Save** button to update your settings. You can also delete or edit a signature setting.

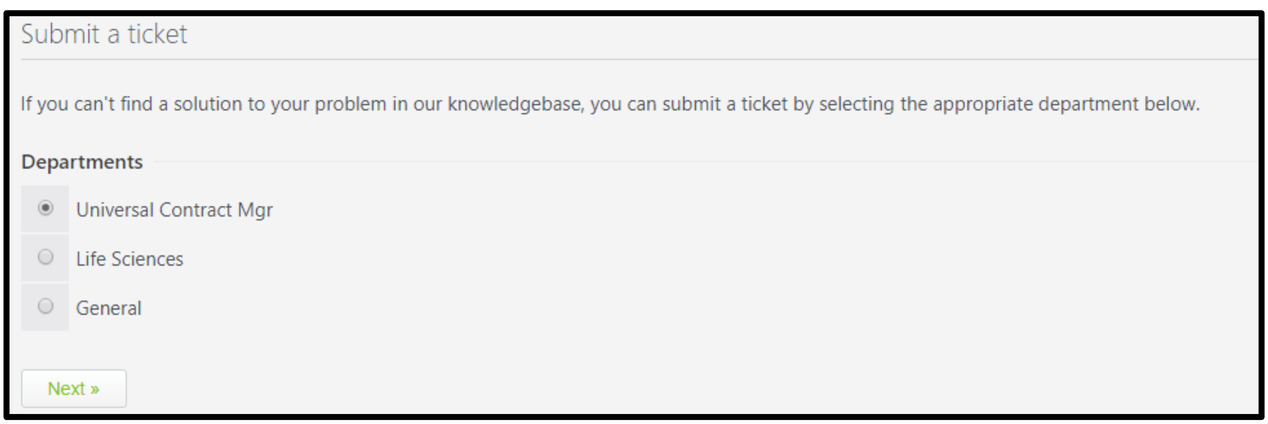
Using the UCM Support Ticketing System

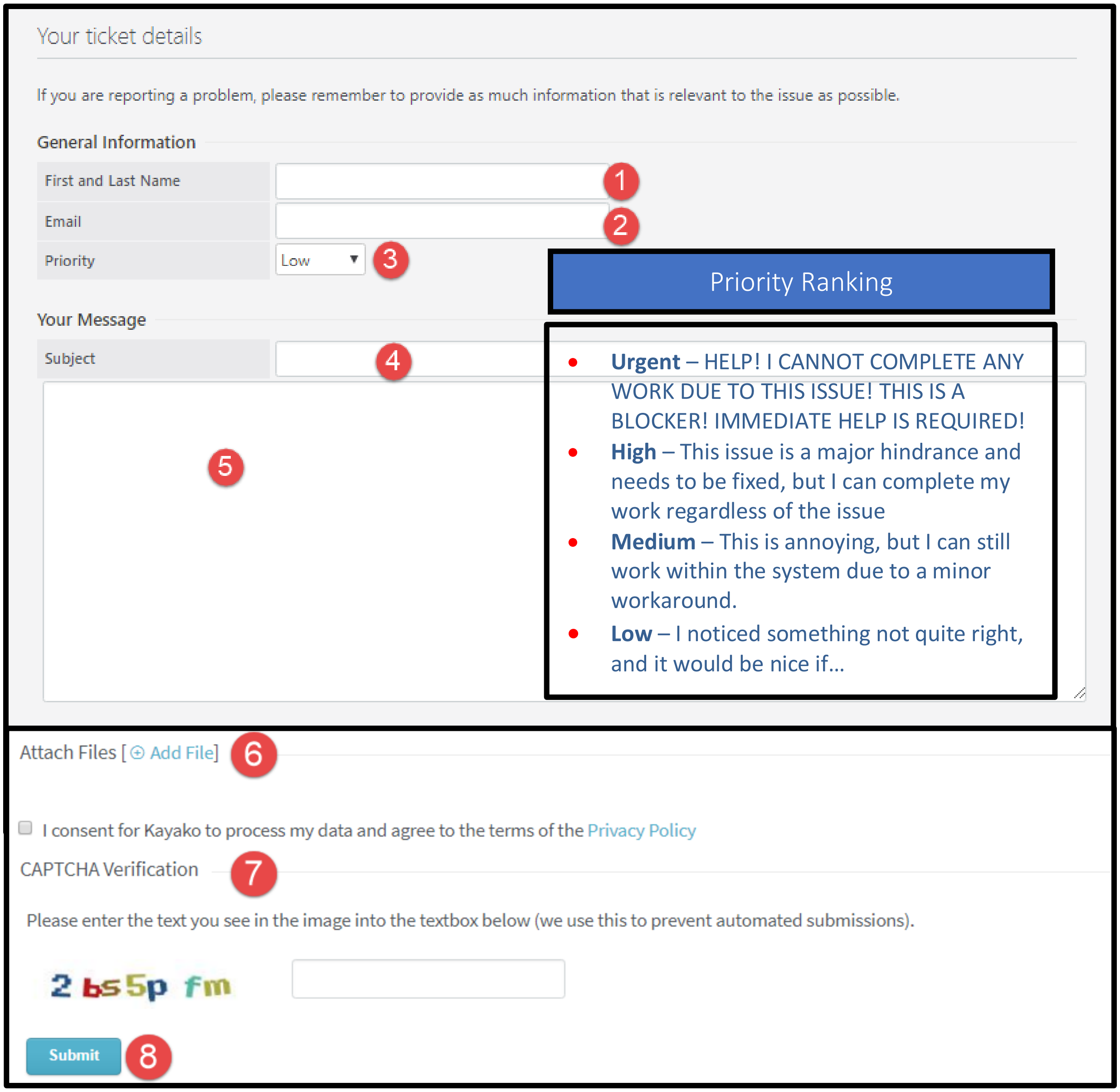
If you have questions or need assistance from our **Support Specialists**, you have several ways to communicate with iContracts. The **Support Ticketing System** is our preferred method because any Support Team Member can view and respond to your ticket in a timely manner.

We also have an email address, ucmsupport@icontracts.com, which directs your inquiry to the same group of support staff. This is helpful if you don't have access to UCM at the moment, or you want to include non-UCM email addresses.

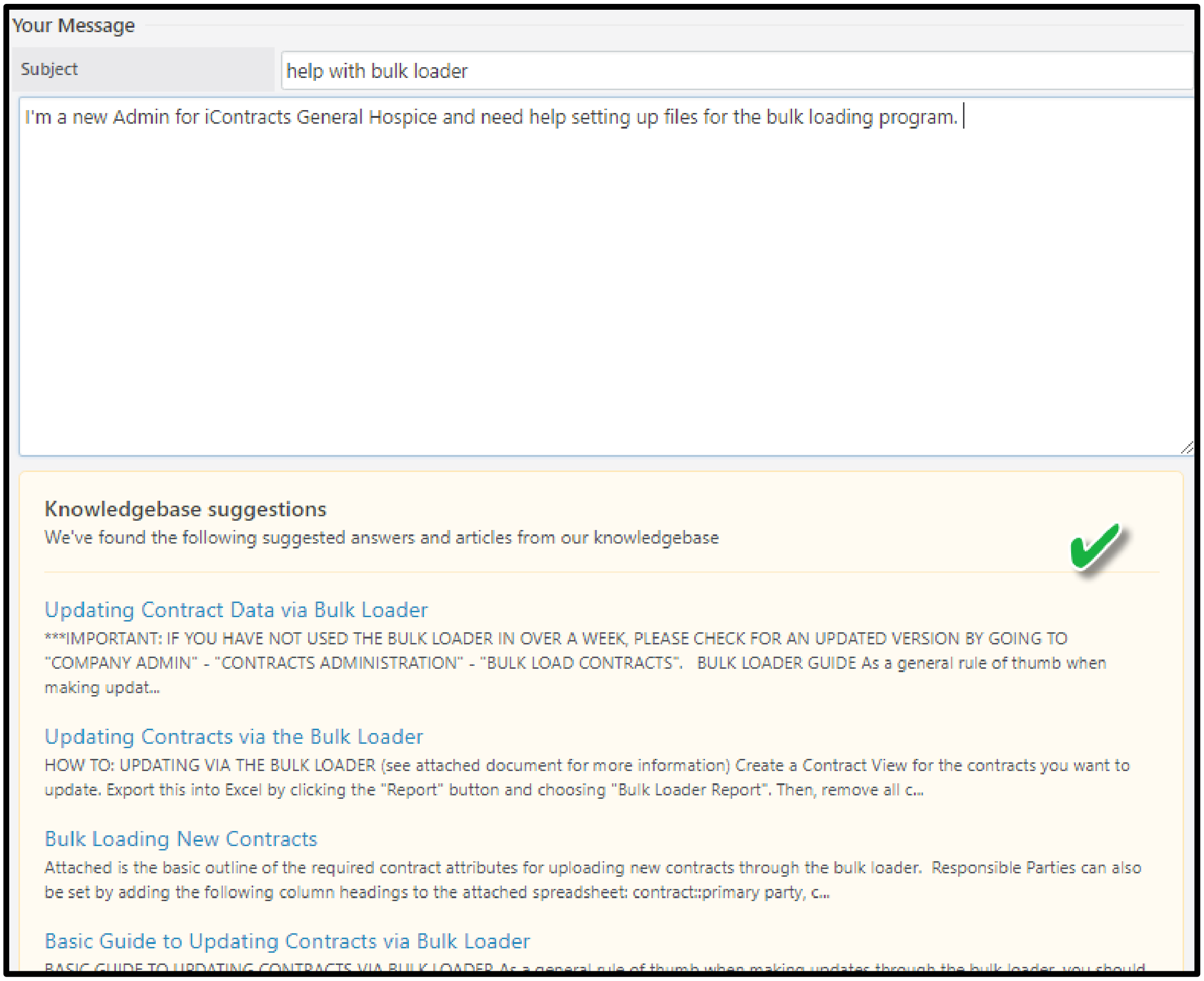
Click **Log or Follow-up on a Support Issue**. Click on **Submit a Ticket**, select **Universal Contract Mgr**, click **Next**, and then complete the *Ticket Details* with all the required information.







1. Enter your name so we know who you are as we would like to know who is contacting us.
2. Enter your email address so we can reply to your request for help.
3. We respond on a first-come, first-served basis so ***please*** don't escalate the **Priority Ranking** to High or Urgent *unless* your UCM is down or your issue is extremely time-sensitive.
   See examples of the different Priority Rankings above.
4. Enter the Subject, such as "help with creating a new workflow" or "Using the Bulk Loader". Try to be specific, as typing 'I need help' is why you are filling out this form in the first place.
   - The Subject line looks for any keywords that can be searched in the Knowledgebase for suggested answers and lists any articles below the subject detail area.
5. Type as much detail as you can in the subject area. This will cut down on any back-and-forth emails for such information as a Contract Container #, or who is the User locked out.
6. Upload any attachments here to show us screen images if possible.
   You can add more than one file if necessary.
7. Click the "I consent …" checkbox and enter the CAPTCHA Verification text into the textbox.
8. Click **Submit** to process and send us the Support Ticket.
   You will see a Confirmation right away. An email response is also generated.


Your Message

Subject	help with bulk loader

I'm a new Admin for iContracts General Hospice and need help setting up files for the bulk loading program.

Knowledgebase suggestions

We've found the following suggested answers and articles from our knowledgebase

Updating Contract Data via Bulk Loader

***IMPORTANT: IF YOU HAVE NOT USED THE BULK LOADER IN OVER A WEEK, PLEASE CHECK FOR AN UPDATED VERSION BY GOING TO "COMPANY ADMIN" - "CONTRACTS ADMINISTRATION" - "BULK LOAD CONTRACTS". BULK LOADER GUIDE As a general rule of thumb when making updat...

Updating Contracts via the Bulk Loader

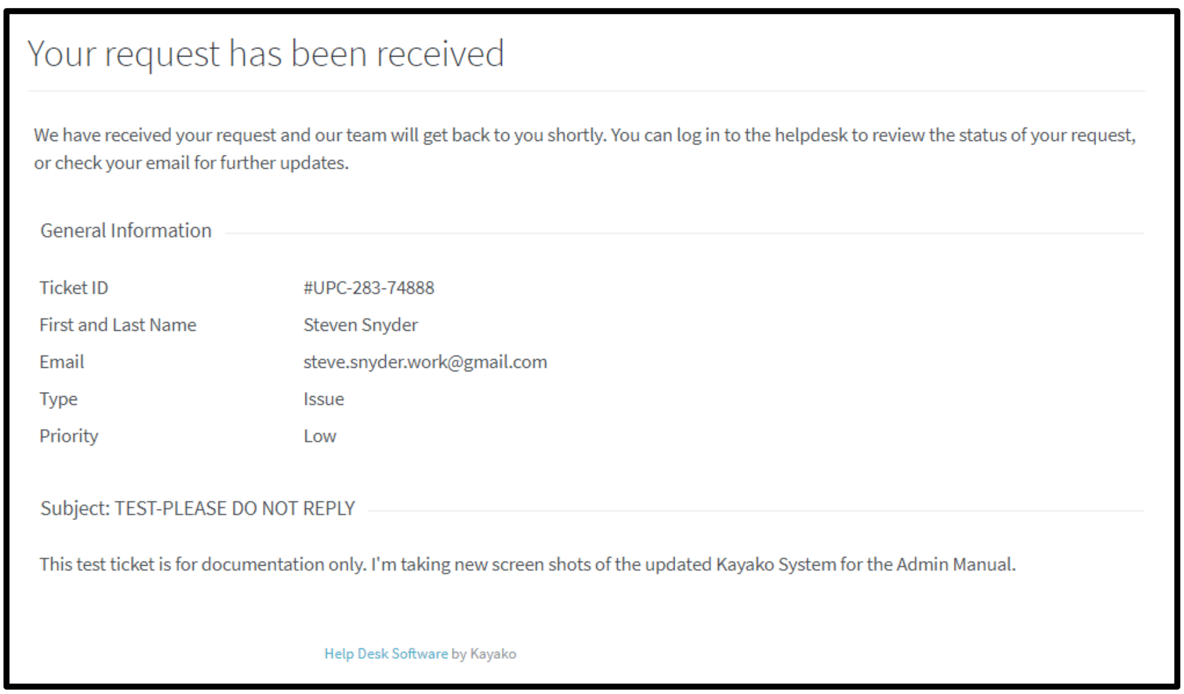
HOW TO: UPDATING VIA THE BULK LOADER (see attached document for more information) Create a Contract View for the contracts you want to update. Export this into Excel by clicking the "Report" button and choosing "Bulk Loader Report". Then, remove all c...

Bulk Loading New Contracts

Attached is the basic outline of the required contract attributes for uploading new contracts through the bulk loader. Responsible Parties can also be set by adding the following column headings to the attached spreadsheet: contract::primary party, c...

Basic Guide to Updating Contracts via Bulk Loader

BASIC GUIDE TO UPDATING CONTRACTS VIA BULK LOADER As a general rule of thumb when making updates through the bulk loader, you should


Your request has been received

We have received your request and our team will get back to you shortly. You can log in to the helpdesk to review the status of your request, or check your email for further updates.

General Information

Ticket ID	#UPC-283-74888
First and Last Name	Steven Snyder
Email	steve.snyder.work@gmail.com
Type	Issue
Priority	Low

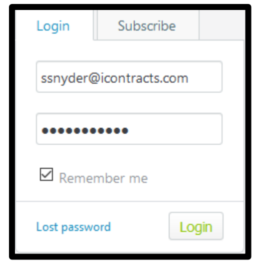
Subject: TEST-PLEASE DO NOT REPLY

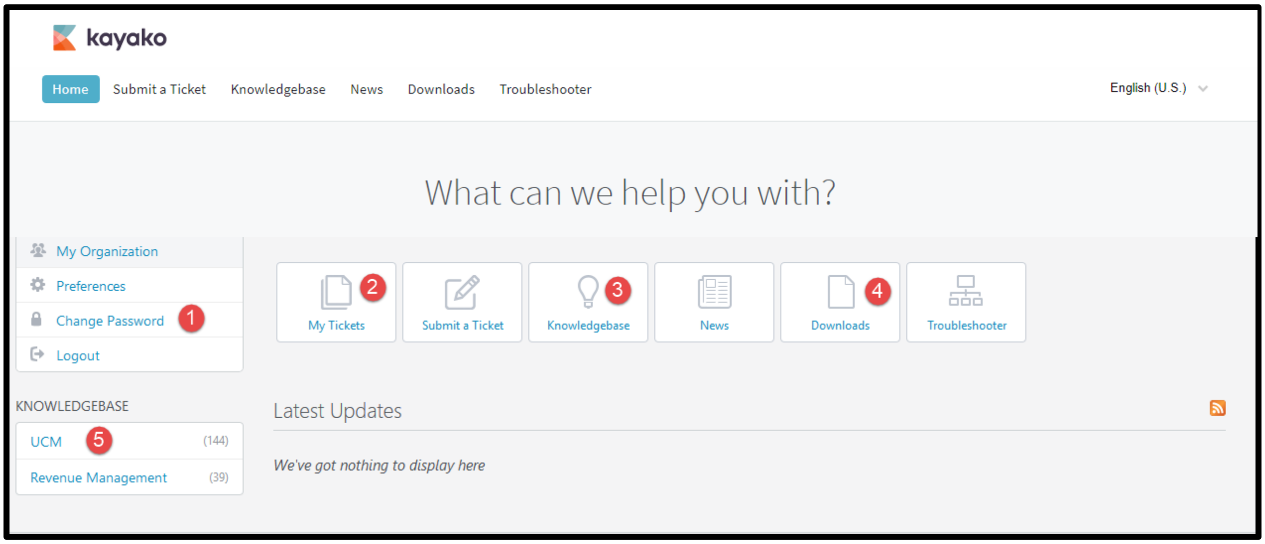
This test ticket is for documentation only. I'm taking new screen shots of the updated Kayako System for the Admin Manual.

Help Desk Software by Kayako

Other Support Features

When you click on the "*Log or Follow-up on a Support Issue*" link you have an option to log into the Support System to perform other tasks, such as change your login to support password (**not** the UCM password), use the knowledgebase, or lookup previous support tickets.



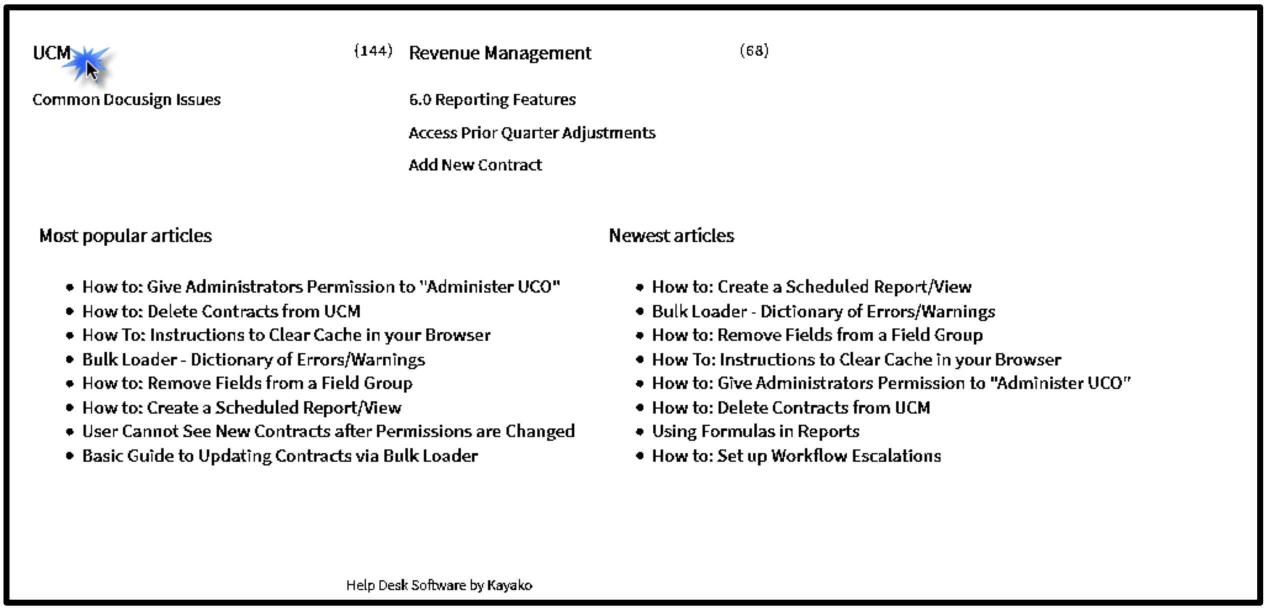


Click on either the task on the Menu Bar, or click the appropriate link or button as defined below.

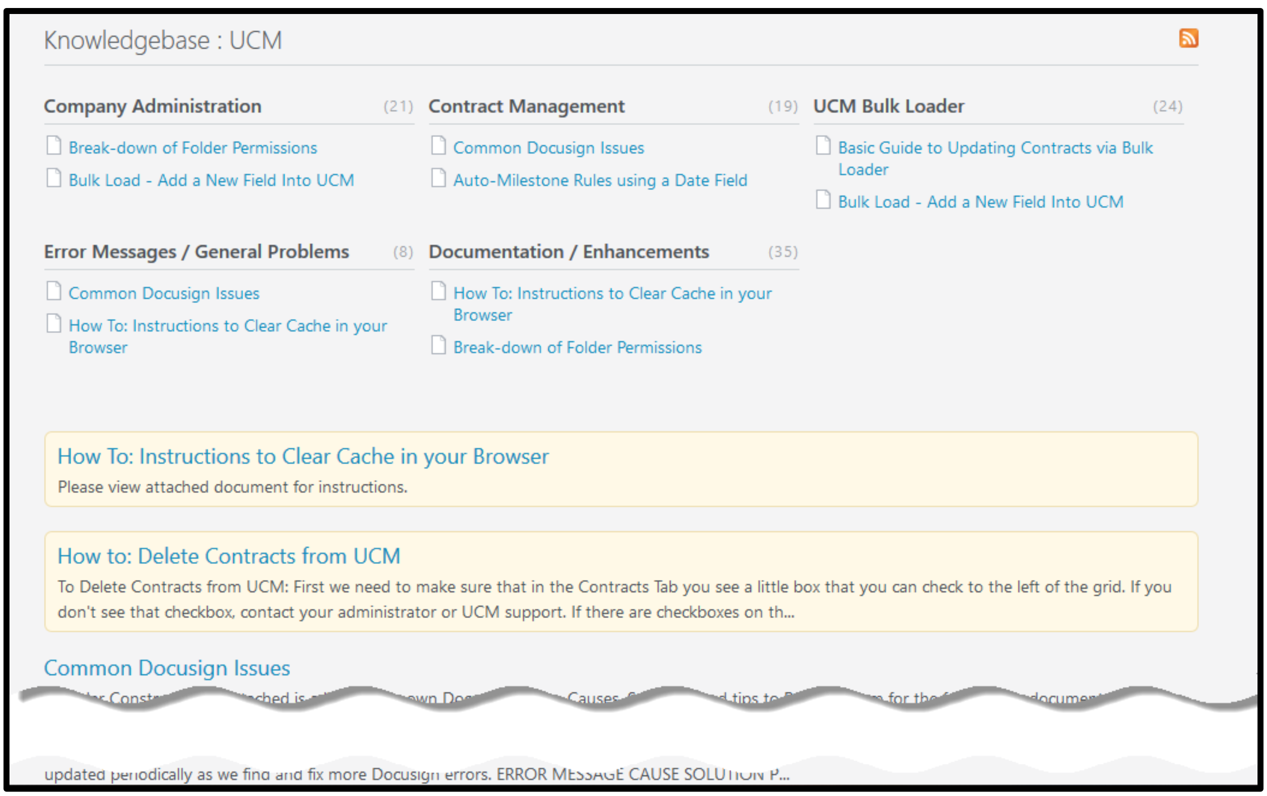
1. **Change Password**: We suggest that you change your Support Password!
2. **My Tickets**: If you have an issue that you would like to follow up on, click this button. Otherwise, click on "Submit a Ticket" to report a new issue.
3. **Knowledgebase**: We keep some of our most commonly reported items here. It may contain the answer to your question.
4. **Downloads**: New functionality documents and other tutorials are stored here.
5. **Knowledgebase quick links**: Categorized items similar to the button (**3**) or the menu bar. In most cases, you will click on **UCM**.

Viewing the UCM Knowledgebase

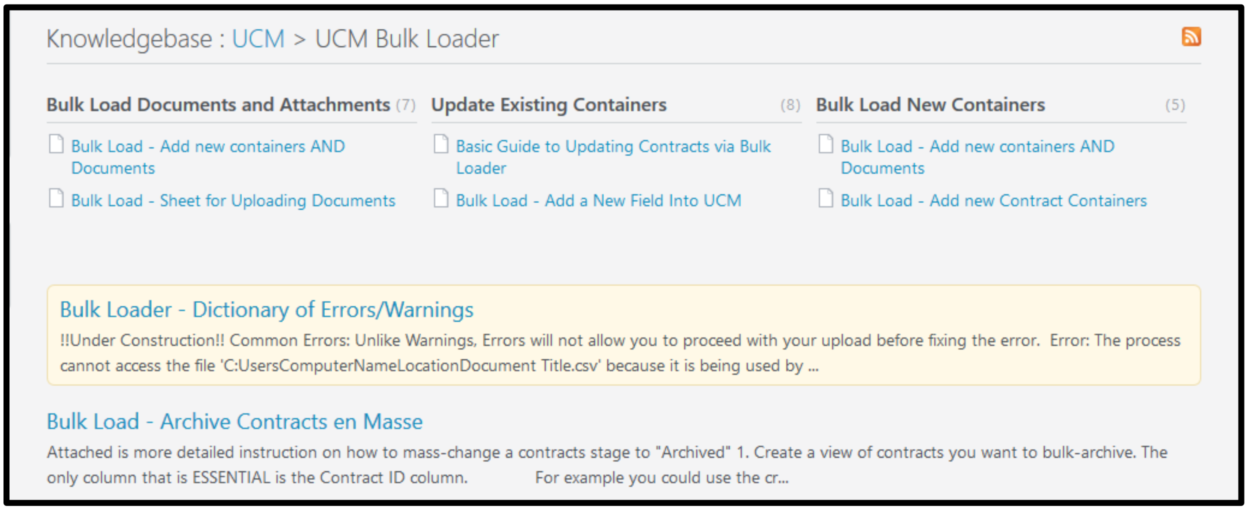
As you can see from the previous picture, there are several ways to access the **UCM Knowledgebase**. When you're on the Support (Kayako) Home page, you have a menu bar, menu buttons (#**3**), and a link on the left side of the screen (#**5**).



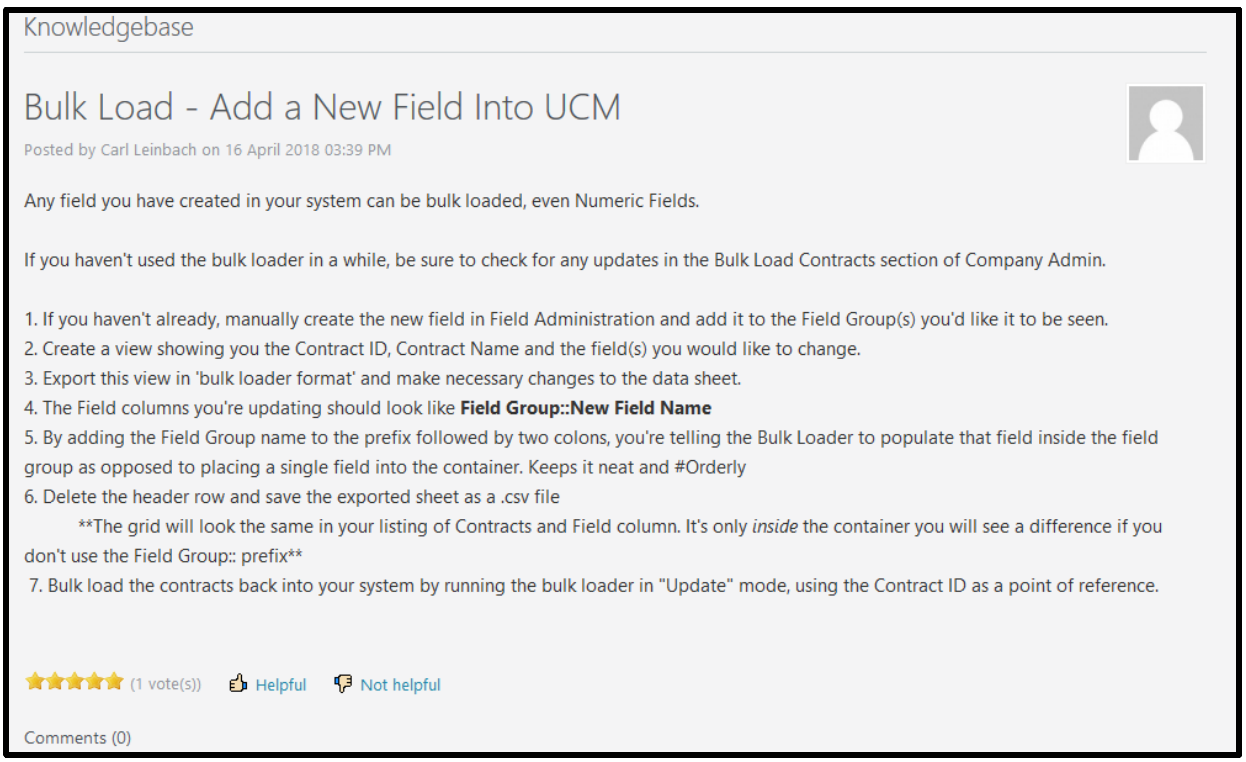
Click on the **UCM** heading to list all Knowledgebase articles under UCM.



You can click on a topic heading.



Or click on a specific topic to learn more about that issue.

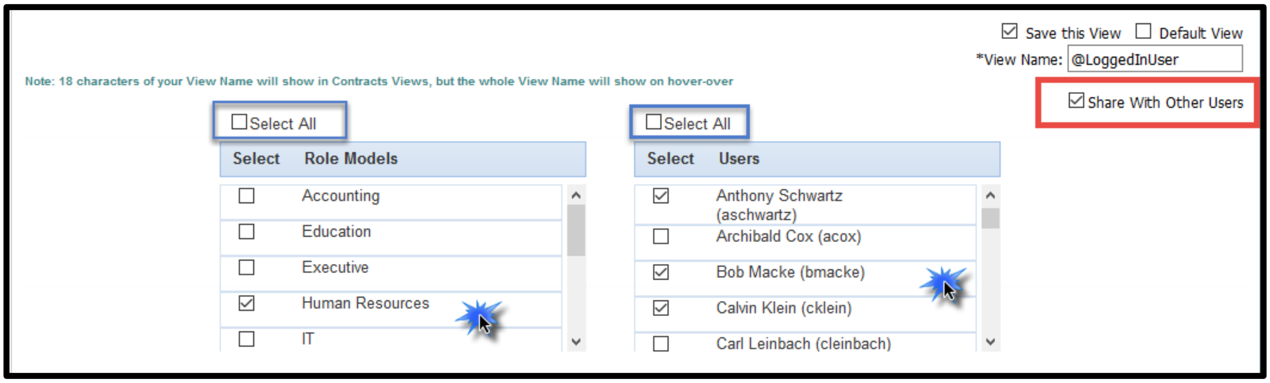


Click on “**Knowledgebase**” in the Menu Bar to return to the first screen and start over if you’d like to explore other UCM topics. Support topics are updated and new topics are added as necessary.

Click *Logout* when finished and close the Kayako Support window to exit the Support System.

Appendix A – Sample Contract Reports to Share with Users

As an Administrator, you may find that there are several Contract Views that other users could find useful. When creating and saving a Contract View, you must also select "*Share With Other Users*" and which Role Models and/or Users (or Select All) to include in your Shared View.

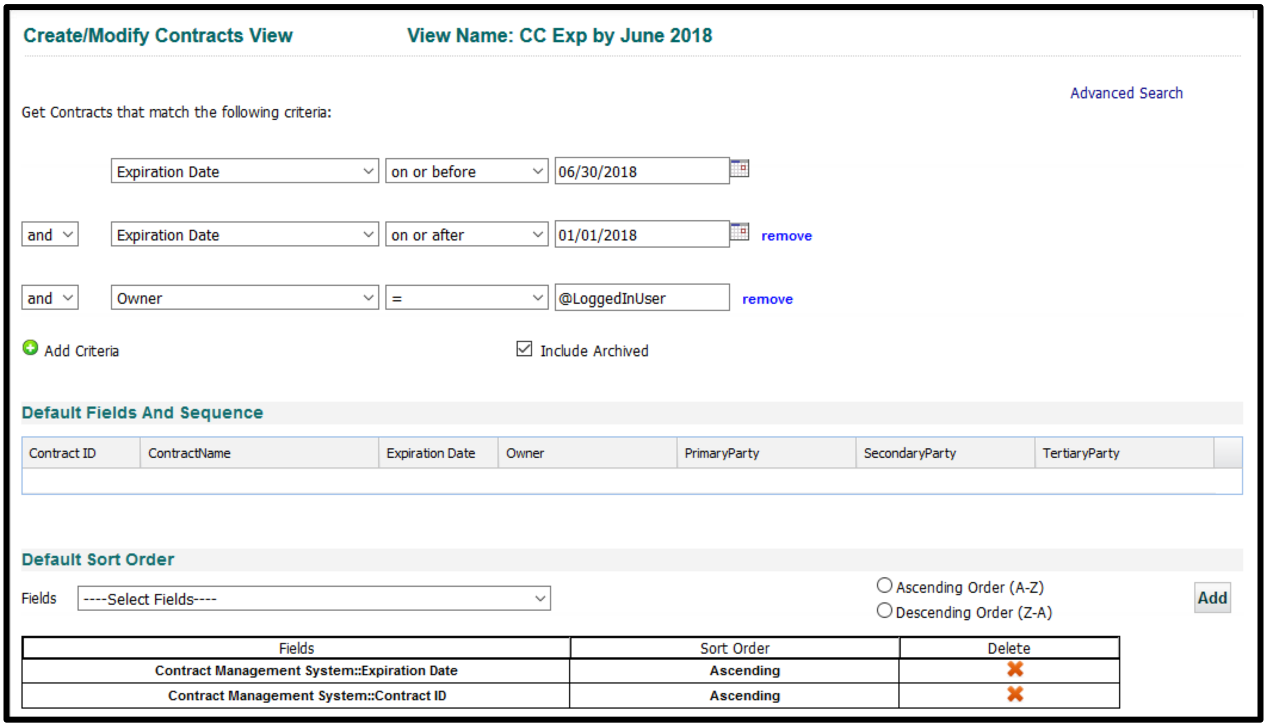


Any user who has access to your shared view will see the icon to the right of the View's Name which indicates that this is a View created by another user you, the admin) and *Shared* by you to them. If any other user deletes a Shared View, the originating user (the author, in this case, you the admin) will still be able to see and re-share this View with them again. If a user hovers their mouse pointer over the icon, they can see who is the author.

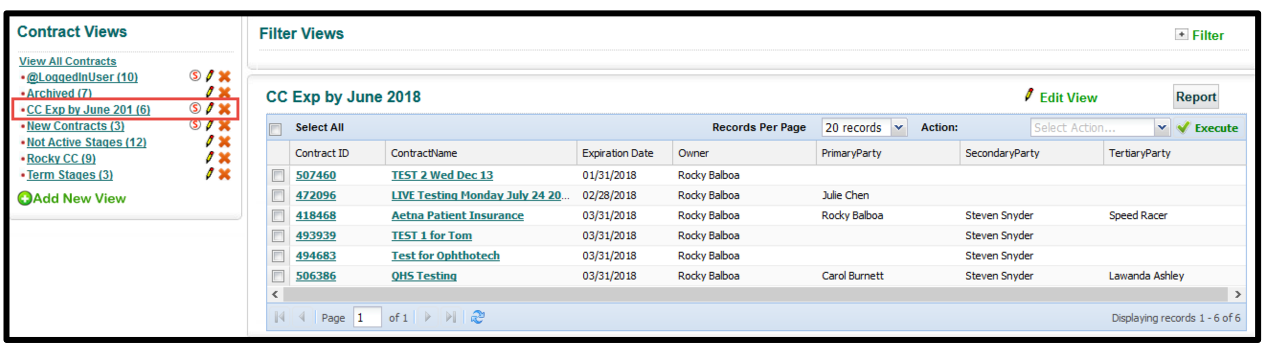
- If YOU are the author of a View and Share the View, you will not see this icon. Only the recipients of the View that you have shared with, through this list of checkboxes.

Expiring Contracts

To help your UCM users keep track of their expiring contracts, you can setup a “global” Contract View based upon two criteria. The first criteria would be the Expiration Date (this example shows the date is June 30, 2018). The second criteria defined as the Owner, which is defined as **@LoggedInUser** (capitalization as shown here is **REQUIRED**). Whomever is logged into UCM sees just their contracts.



Here is an example of how the Create Contract View should appear, including Columns and Sort Order.



Here is what another user would see after they select the Contract View that has been shared with them (remember, the circled Ⓢ shows them this view is shared to them).

New Contracts

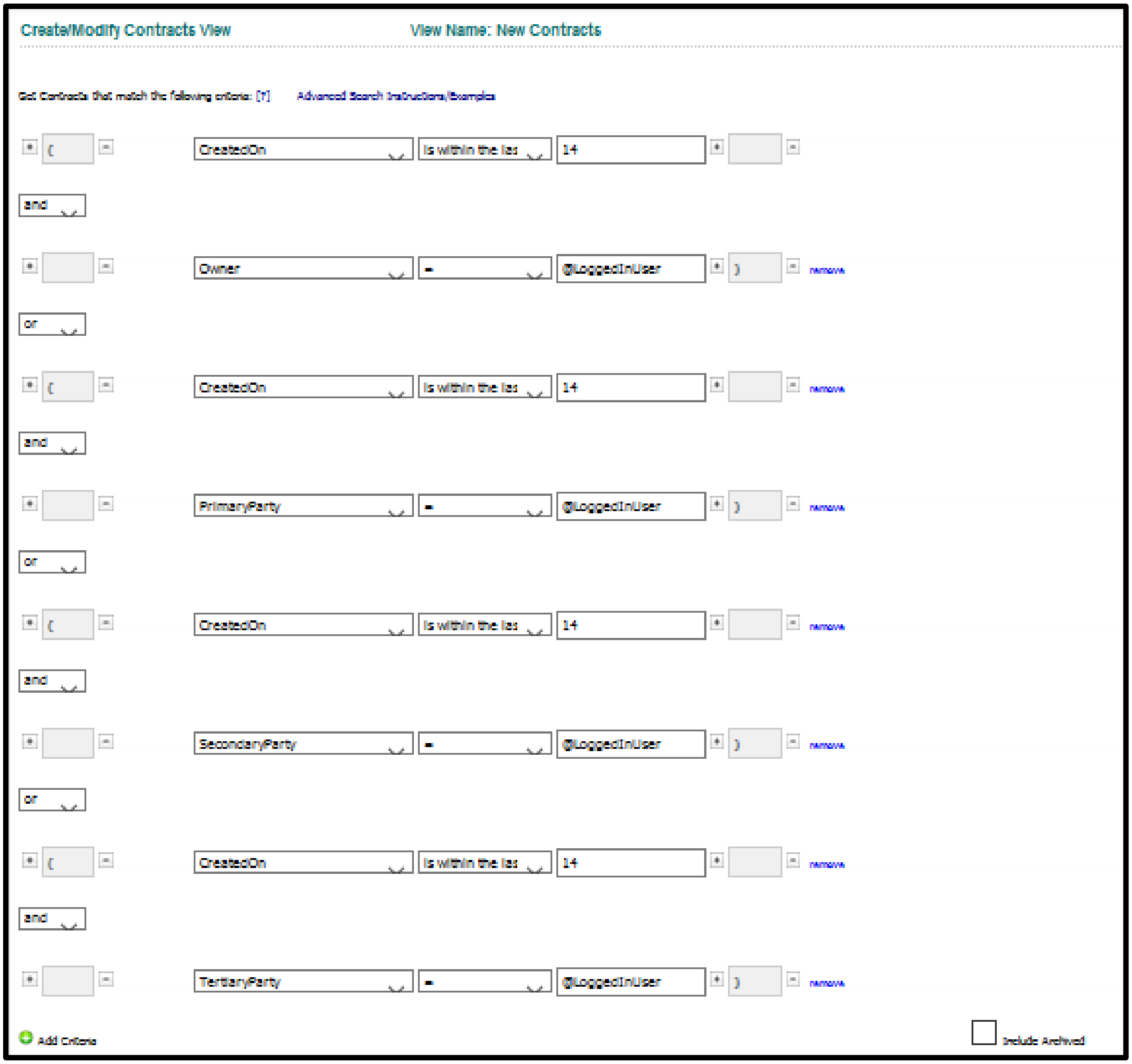
Another view you may find useful to setup and share is a report of new contracts assigned to users. This setup may be more complicated, as you may need to use **Advanced Search** to group contracts by Responsible Party (Owners, Primary, Secondary, and Tertiary users).

Basically, each grouped criterion is defined as the following:

(CreatedOn is within the last x days AND Owner = @LoggedInUser) OR
(CreatedOn is within the last x days AND Primary = @LoggedInUser) OR
(CreatedOn is within the last x days AND Secondary = @LoggedInUser) OR
(CreatedOn is within the last x days AND Tertiary = @LoggedInUser)

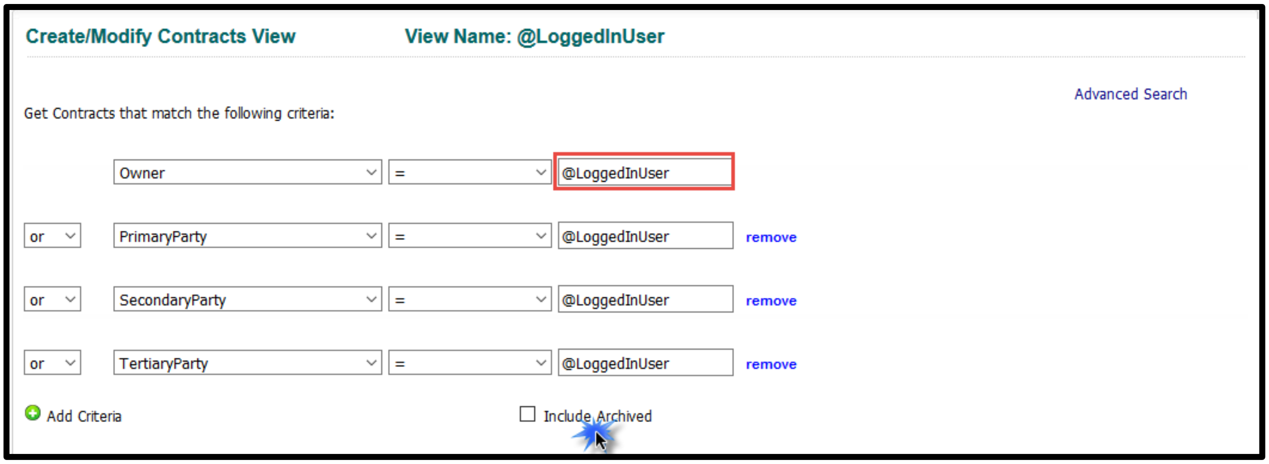
Below is a sample of using Advanced Search to setup multiple and-or criteria:

On the next page is an example of how the entire Create Contract View should appear, using parentheses in the Advanced Search. This sample shows new contracts created within the last 14 days.


Create/Modify Contracts View
View Name: New Contracts
Get Contracts that match the following criteria: [?]
Advanced Search Instructions/Examples
(CreatedOn Is within the las 14
and
Owner = @LoggedInUser) remove
or
(CreatedOn Is within the las 14 remove
and
PrimaryParty = @LoggedInUser) remove
or
(CreatedOn Is within the las 14 remove
and
SecondaryParty = @LoggedInUser) remove
or
(CreatedOn Is within the las 14 remove
and
TertiaryParty = @LoggedInUser) remove
Add Criteria
Include Archived

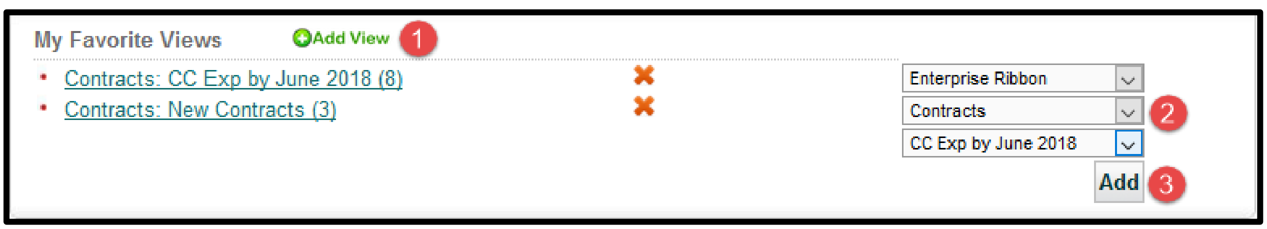
Using @LoggedInUser

This command allows any UCM User to view just their contracts. As an admin, you don't want to enter an actual name so this "placeholder" is a good way to generate customized views.



Adding Custom Views to My Favorite Views

On the Home tab, users should set up a Favorite View to see after logging into UCM how many contracts are waiting for them.

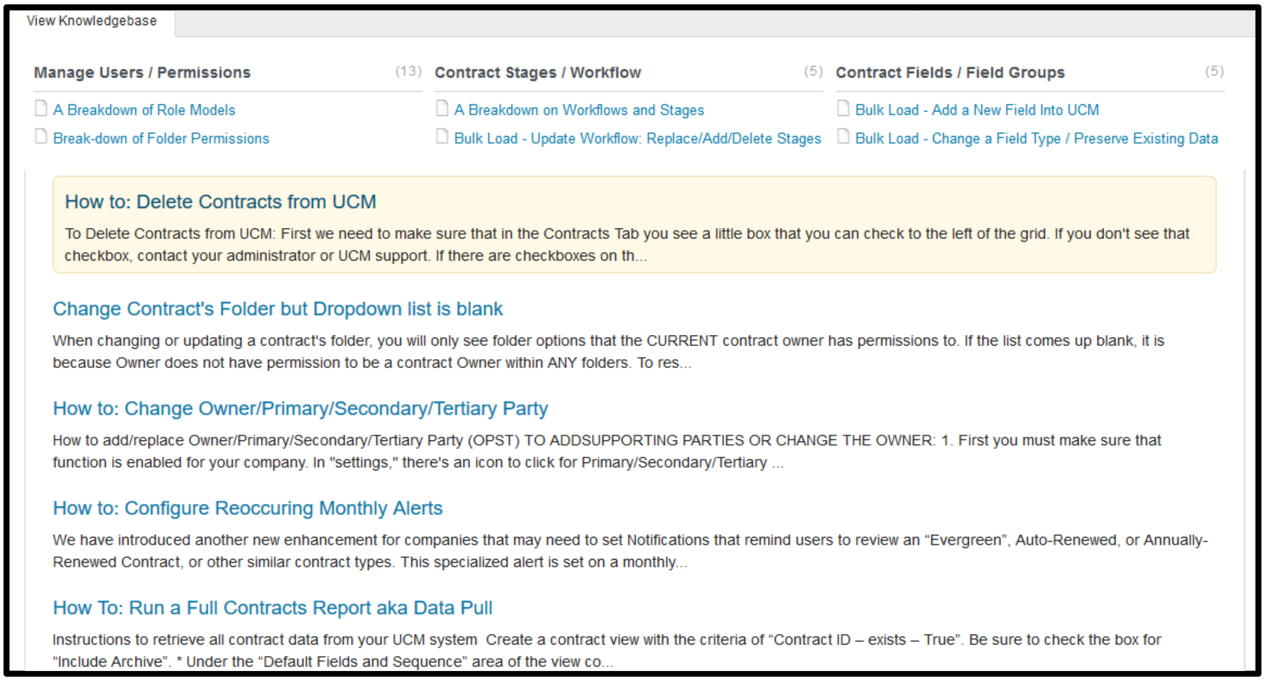


1. Click on the Add View button.
2. Select your Favorite View.
   In this case, you start with the Enterprise Ribbon, then Contracts, followed by the name of the shared view.
3. Click the Add button to update your Favorite Views.

My Favorite Views show the number of Contracts associated with that view as if you are looking at the grid in the Contract View. Only Contract Views will show the number. Notes, Attachments, Milestones or Activity Views do not display a value.

Appendix B – How to Handle Different Admin Scenarios

As previously discussed under the topic "**Viewing the UCM Knowledgebase**" there are pages of information available to help you use the Administrative functions of UCM. We've highlighted a few of the more commonly-asked questions below. These topics are listed under *UCM: Company Administration*.



How to: Give Administrators Permission to "Administer UCO"

If any of your administrators receives an error saying "*(User) is not allowed to administer this UCO*", here is how to resolve it as the Primary Admin for your company:

- Go to Manage Users, look for the column heading called "**Administer UAP**" in the grid.
- Click the "**Administer UAP**" link next to the Administrator's name.
- Select the appropriate UAP (for example, Contract Management System).
- Click **Save**.

Your administrator must refresh their permissions profile by clicking the circular blue arrows (the "dolphins") at the top right of the screen. Logging out then logging back in will also refresh their user permissions.

- If you do not see the "Administer UAP" column in your Manage Users grid, please submit a support ticket and let us know so we may correct this for you.

How to Change Owner/Primary/Secondary/Tertiary Party

To Add Supporting Parties or Change the Owner:

1. First you must make sure that function is enabled for your company. In *Company Admin: Settings* there's an icon for *Edit Primary/Secondary/Tertiary Party Administration*. Click the check-box to enable P/S/T parties and click the checkbox to activate at least one supporting party (doesn't have to be Primary). There's also an option to make this Required. Click Save.

2. Open the contract container. Click on "**Responsible Parties**" to edit or add names. Clicking Owner and/or Primary, Secondary or Tertiary Party links will open a drop-down of available users.

3. Select the user you wish to be the P/S/T and click Save. To change an Owner: Select the **Owner** link and choose your new Owner from the drop-down list. Be sure to click Save to update the owner.

4. If you don't see the user you wish to be responsible for the contract, you must then go to their user permissions and be sure they have access to the folder the container is in, and that they have permission to own contracts.

To Replace O/P/S/T Parties with a new user:

1. Create the new user's profile, select the "*Force Confirmation*" box from the Manage Users grid. This will allow them to be selected as a supporting party without waiting for them to confirm their account via the welcome email link.

2. Click "Copy Permissions" and select the previous user from the drop down and the new user from the list of users with a checkbox then select Copy Permissions.

   You don't have to use copy permissions, but make sure the new user has the right permissions to view the appropriate contracts!

3. Create a contract view with the criteria of: Owner –> Contains –> Old User (you may want to consider including archived contracts)

4. Use the "*Select All*" checkbox at the top of the grid to check all contracts in this view. Choose "Modify Contract(s)" from the "Action" box, then click Execute.

5. Click on Owner and update to the new user!

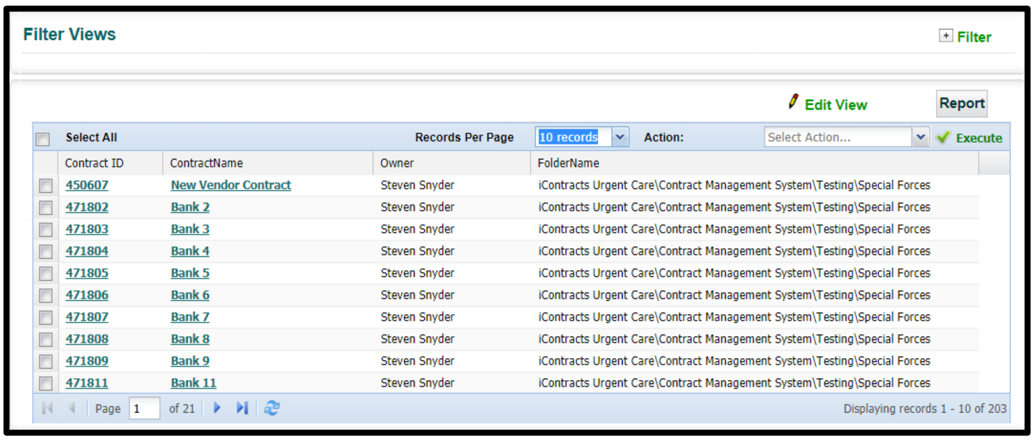
6. Repeat these steps but replacing Owner with Primary, then Secondary, and Tertiary (4 views in total) Parties. Finally, deactivate the old user (if necessary).

How to Move Multiple Contract Containers to Another Folder

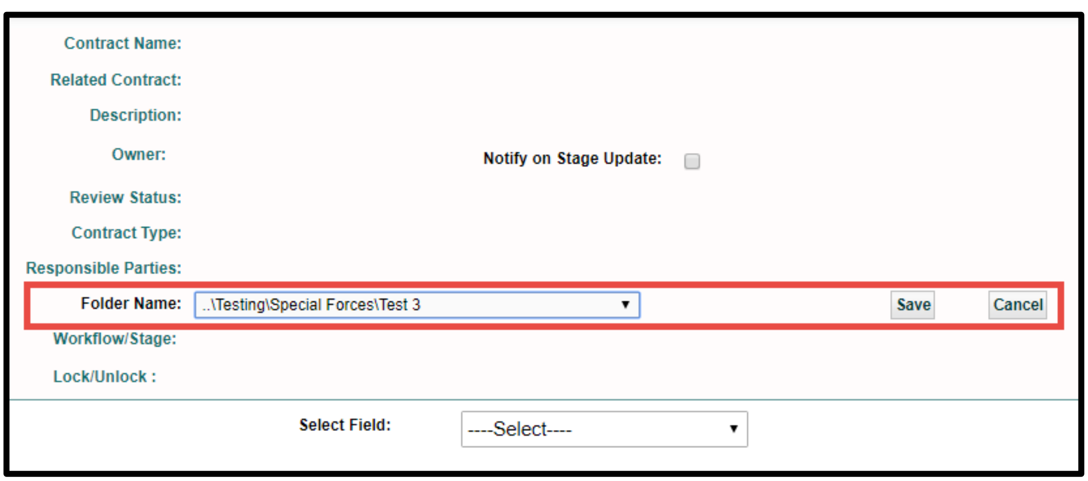
Whenever you have a Contract Container that you need to change which Folder it associated with, you edit the Folder by clicking on the "Folder Name" link at the bottom of the Summary Tab. However, if you have many containers that you need to move to another folder (the same folder for all), then the **Modify Contract Action** is better suited for such a task.

Procedures

1. Create a **Contract View** where the Search Criteria is *Folder Name – contains – old folder name*, where the old folder name is where the contracts are currently located.
2. Make sure that *Default Fields and Sequence* include FolderName.
3. **Run** the view and widen the Folder column to make sure all the Containers listed are showing the correct Folder Name.

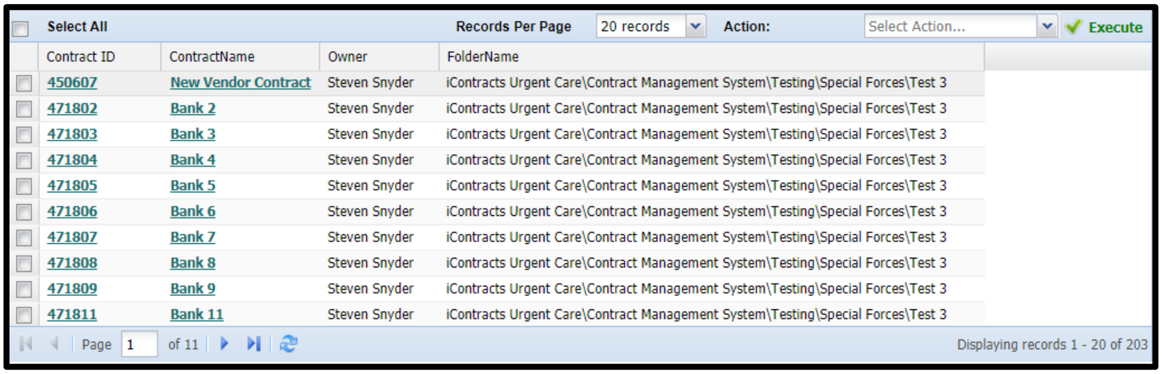


4. Click the **Select All** checkbox to highlight all the records.
5. Select **Modify Action** and **Execute**.
6. Click on "Folder Name" and then select the NEW Folder Name.
7. Click the Save button.



Click the **OK** button to acknowledge this request is being processed.

8. Click the Close Window button to exit the Modify Action task window.
   The Contract View updates, displaying the NEW Folder.



Select All | Records Per Page 20 records | Action: Select Action... | Execute

Contract ID	ContractName	Owner	FolderName
450607	New Vendor Contract	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471802	Bank 2	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471803	Bank 3	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471804	Bank 4	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471805	Bank 5	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471806	Bank 6	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471807	Bank 7	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471808	Bank 8	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471809	Bank 9	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3
471811	Bank 11	Steven Snyder	iContracts Urgent Care\Contract Management System\Testing\Special Forces\Test 3

Page 1 of 11 | Displaying records 1 - 20 of 203

How to Remove Fields from a Field Group

During the initial Implementation, you created some field groups that seemed logical at the time. After using the system for a while, you realize some of the fields are redundant or not applicable to your company's processing method any longer.

Create a Contract View of all your contracts using **Contract ID – Exists – True**. Add all the columns to the "*Default Fields And Sequence*". Once you run the view, generate a Report. Use the Bulk Loader report to save a manual back-up of your data just to be on the safe side.

Here are the steps to remove the fields you don't want, without breaking apart the current field groups:

1. Rename the "*Old Field Group*" to one with an X at the front, so that your new field group can have the proper name appear in your system. *For example, "Old Group" to "X Old Group".*

2. Create a "New Field Group" with the fields that you want to appear on your containers (leaving out the fields you don't like from the "old" Field Group.

3. Add the "New Field Group" as a default Field Group to all the contract types you want it to appear under. Make sure you update associated field groups within your templates by changing the "Old" Field Group to the "New" Field Group.

4. Create a contract view in your Contracts Tab with
   - Contract ID – Exists – TRUE, include archived;
   - Under Default Fields and Sequence, select the fields you want to appear in your "New" field group. *Make sure to include the Contract ID and define it as the first column!*

5. Save the View and click "Report" to export the view to a .csv file.
   Be sure to select the "Bulk Loader" button.

6. In the exported spreadsheet, add the New Field Group name and 2 colons in front of the field names, using the format **Field Group::Field Name**. (For example, General Information::Expiration Date). This ensures that the field data is uploaded to the right field group. Without doing this step before the sheet is uploaded, the new fields are created as stand-alone fields.

   The first row of your spreadsheet should be your column headings (Column::ID, etc.). Delete any rows that may be above these column headings.

7. Delete any unnecessary columns, leaving **only** the Contract ID and fields being updated.
   Click Save (or Save As to ensure you are providing a proper name and saving as CSV not XLS).

8. After closing the spreadsheet, run the file through the bulk loader in *Update* mode (i.e., Check the box for "Update Contracts" and use "Contract ID").

9. Once you have uploaded the new sheet, you can now delete the "*Old Field Group*" with the X in front of it (from Step 1).

How to Edit Field Types After Data Entered

This question comes up often when Administrators realize that a Field Type should have been defined as another type. For example, a Numeric field is better defined as a Single Line field type (common with fields used for telephone numbers or a number like an Employee ID). The challenge is how do you change an existing field type and still preserve the existing data.

Making a Master "All Contracts" Backup File

Before doing any mass changes to your system, we suggest that you do a full contract back-up!

You can do this by creating a View with the criteria: ContractID – Exists – True ** Make sure to check "Include Archived" checkbox! **
From the *Default Fields and Sequence*, add all the columns from the left to the right using the double arrows (>>). This way you preserve all your fields and attributes!
Save the View with a name that makes sense to you, then after the grid populates, click the "Report" button. This will create an Excel CSV file with ALL of your contract's attributes and fields, should something go wrong! Save that file where you can find it again and then you are ready to proceed!
Having a "*Master Backup*" means that in a worst-case scenario, you can Bulk Load all your original data back into UCM. *Now that's what we call Life Insurance!*

Changing a Field Type can be done, but it takes some effort. It's a multi-step process that basically involves creating a new Field of the correct type, and then replacing the Old Field with the New Field in your Contracts.

1. First, add the letter X in front of the **Old Field** so it's easy to see which one gets deleted later.
   For example: XTermination Clause
2. Next, create a **New Field** with the correct name (Termination Clause, for example) and select the correct Field Type.
   Next, insert the Field into your Field Group(s). Don't worry about deleting the other XTermination Clause from this Field Group yet.
3. Make a **Contract View** or report with the following criteria to bring up all contracts with data in the old field:
   XField Name **–** is null **–** false
   ** Make sure to check the "Include Archived" checkbox! **
4. Export that View out to a CSV file using the "Report" button. Be sure to select the "Bulk Loader" button. Delete the first two rows of the Excel file (the top row contains the View Name, and row two, which is blank).
5. Make sure the headers match appropriately so your new field group is added to this set of contracts. For example, Contract Term Details::Termination Clause ("Contract Term Details" is the name of the Field Group). The Contract ID column should have the header Contract::ID.
6. Save this file as a .CSV (best to save on your Desktop to locate quicker later).
7. Run the Bulk Loader (see **Using the Bulk Loader** for additional help) and make sure to select "Update Contracts by Contract ID".
8. Delete the old Field AFTER you verify the data appears in the new Field.

Appendix C – Updating Contract Containers via Bulk Loader

As a general rule of thumb, when you update Contracts through the Bulk Loader, you want to be aware of the following tips and tricks:

- Run a "**Bulk Loader Report**" from a Contract View. Include columns for *Contract ID* (best if the first column), plus any fields that you will be changing, such as Owner, Primary Party, or Expiration Date.
  - If you are changing the Workflow, you must also include the contract Stage.
  - Save this View so you can refer back to it for edits later.
  - Always click Report Type Button "*Bulk Loader*" when generating the Report.
- Use the Excel spreadsheet (CSV format) to update your columns. Select **File..Save As** to create a new file (that is, make a copy of the original, to safeguard your original data) and make sure to save as type "**CSV (MS-DOS)**" for best results. Don't forget that bulk loader headings are not case-sensitive <u>but</u> you must have the "double-colon" (contract**::**id or Contract**::**ID).

Please be aware that any updates (such as Contract Type) made through the Bulk Loader ***may*** affect your System-Generated Milestones. Since Automatic Milestone Rules (AMR) run on Contract Type, it is important to check your rules before changing Contract Type (or dates such as Expiration Dates).

Examples of Spreadsheet Column Headings for Bulk Loader Updates

Changing Workflows

Contract::ID	Contract::workflowtemplate	Contract::stage
123456	Standard WF	Internal Legal Review

Changing Responsible Parties (Primary/Secondary/Tertiary)

Contract::ID	Contract::primary party	Contract::secondary party	Contract::tertiary party
123456	Sally Starr	Gene London	Captain Noah
246800		#NULL	#NULL

Use **#NULL** to delete a field within a Contract Container. A blank entry leaves the original content unchanged.

Changing Field Data Within Field Groups

The column format is "Field Group::Field Name".

Contract::ID	Computer Vendor::Vendor Name
123456	Industrial Light and Magic

Changing Dates (such as Expiration Dates)

Contract::ID	Common Contract Fields::Expiration Date
123456	12/31/2020

Changing Contract Owners

Contract::ID	Contract::Owner
123456	Nicholas Foles

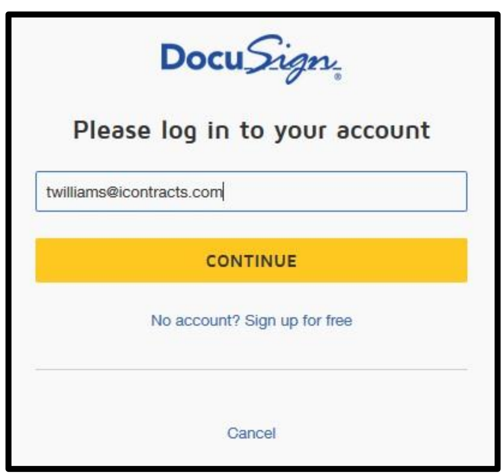
Appendix D – Using Docu*Sign* ($)

UCM has an additional feature for purchase that links UCM and DocuSign to complete approvals and signatures in hours—not days—from anywhere and on any device. You can quickly and securely access and sign documents, easily upload and send documents for others to sign, send reminders, and check signing status any time.

Logging into DocuSign

Click on the **DocuSign** icon to log into DocuSign through UCM.

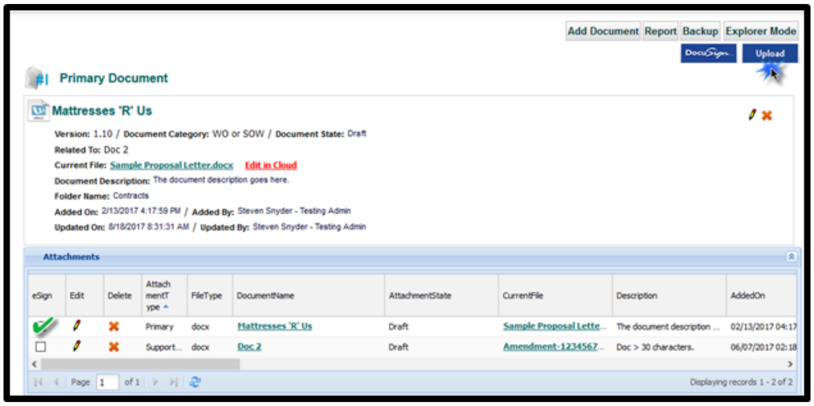
You must have an account through DocuSign in addition to the connector to UCM. Enter your DocuSign credentials and click **LOG IN**.



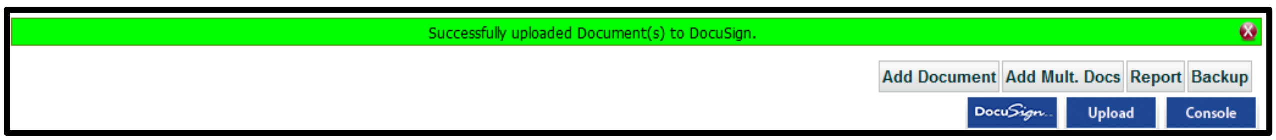
Uploading Documents to DocuSign

You can select the document(s) to upload by clicking on the eSign checkbox, then clicking the **Upload** button.

☞ **Warning!** You will be unable to upload any document *over* 25 megabytes (25,000.00 KB) in size. If the file size is too large for Docu*Sign*, the checkbox will not be displayed.

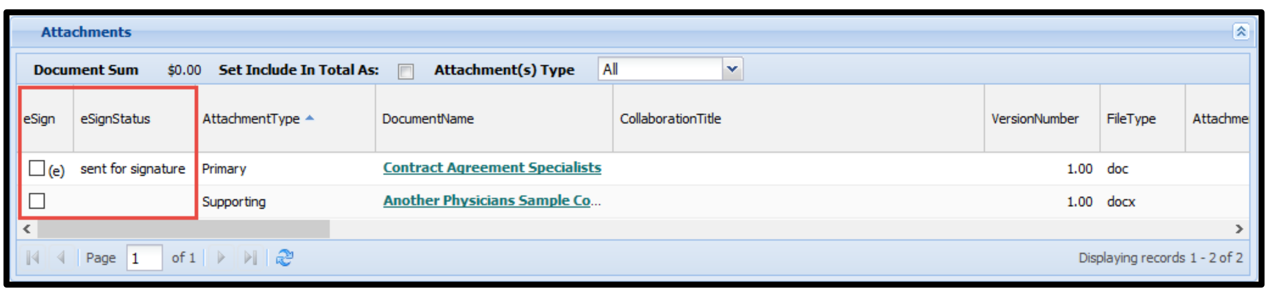


After the document is uploaded to DocuSign, you receive this message.



In addition, the eSign column shows **(e)** to note that the document is uploaded to DocuSign.

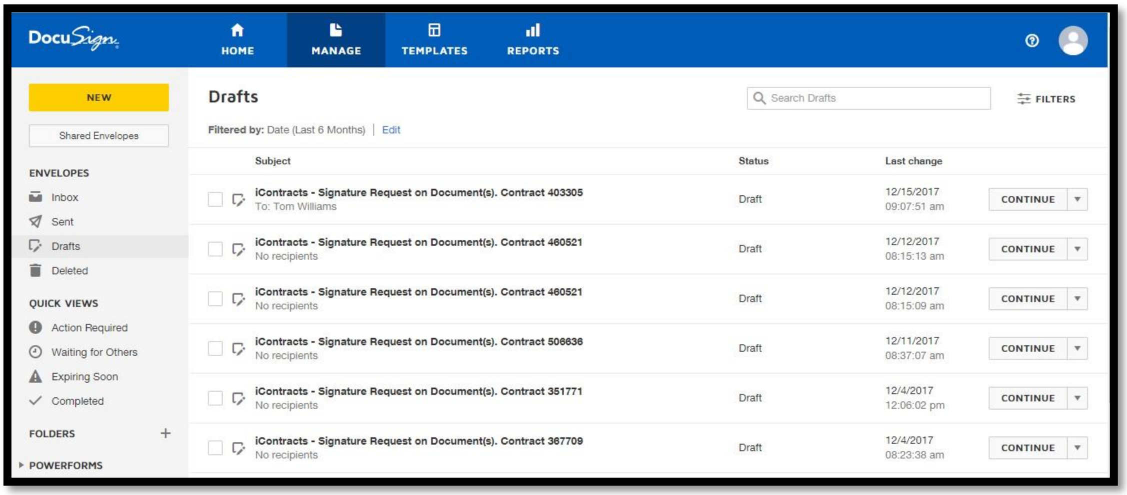
There is also a column "eSignStatus" available to display in the grid to let you know what is this document status.



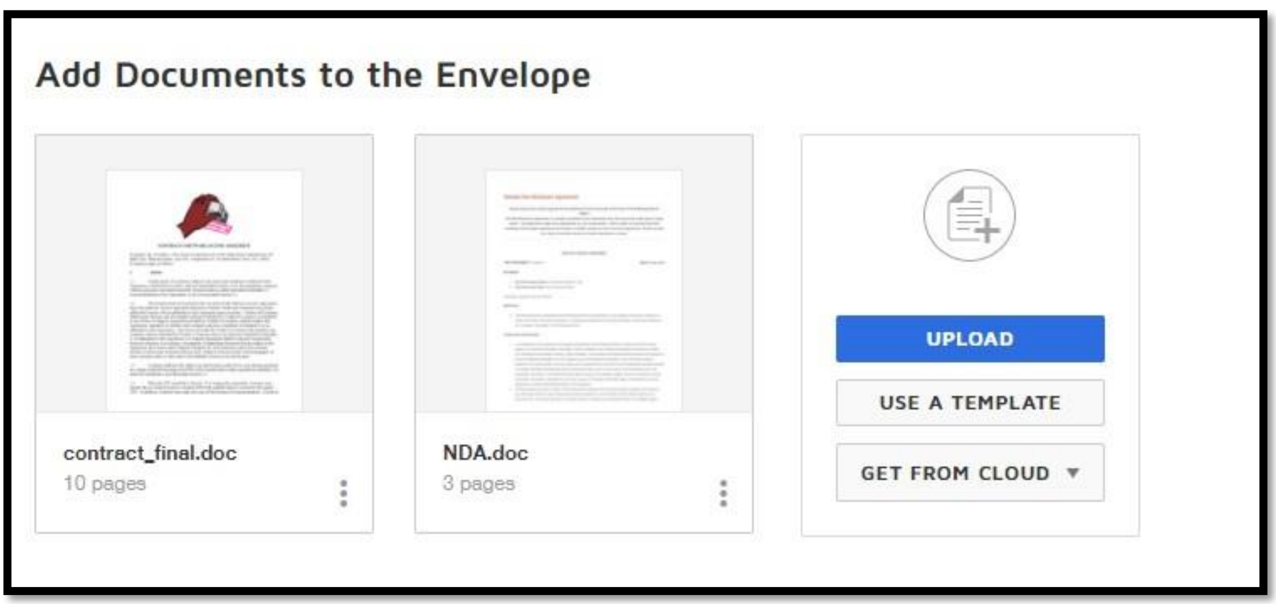
Processing the Documents in DocuSign

Click on the **Console** button. This loads DocuSign in a separate window (please ensure your browser allows this pop-up window).

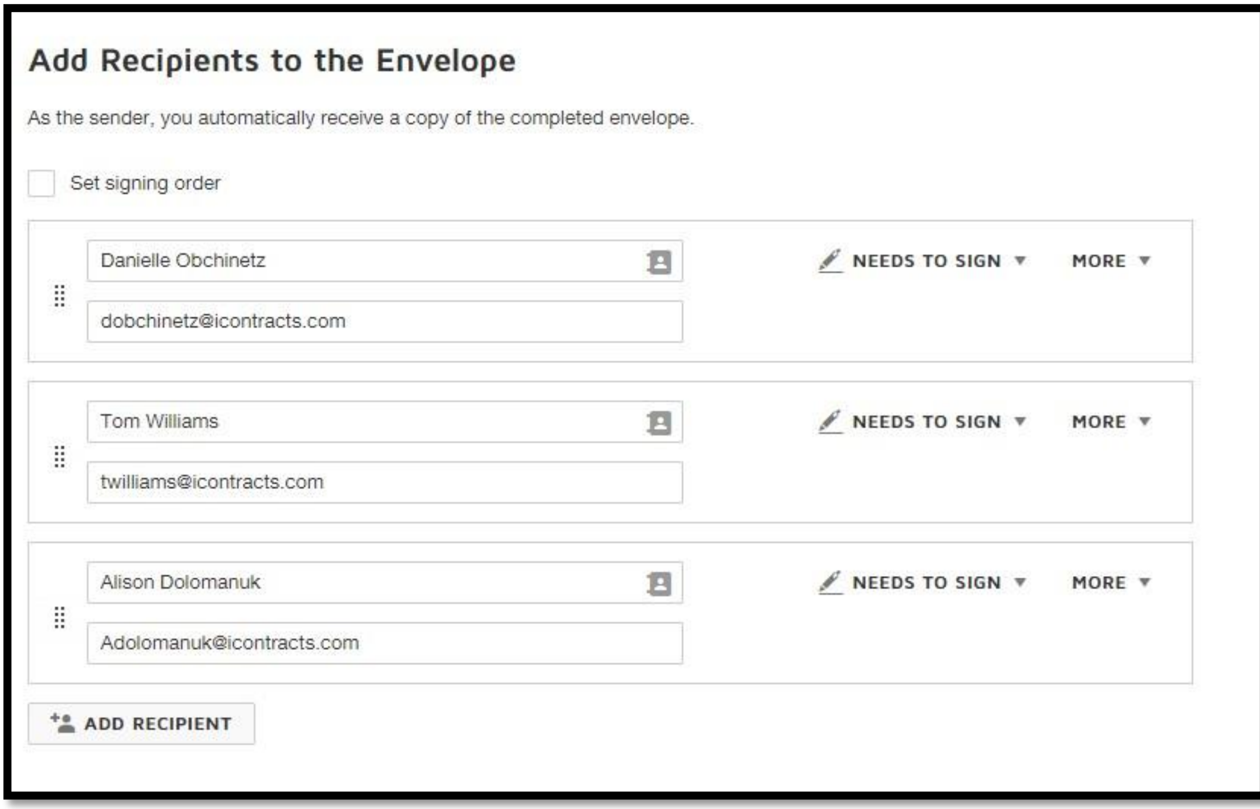
Click the **Manage** tab, followed by the **Drafts** option. Select your document, then click **Continue** next to the document name to assign signers.



You can add additional documents to the envelope by clicking **Upload** to browse local files, **Use a Template** to use common files as determined by a pre-defined template created within DocuSign, or **Get From Cloud** to pull from a cloud-based platform such as DropBox or Google Drive.



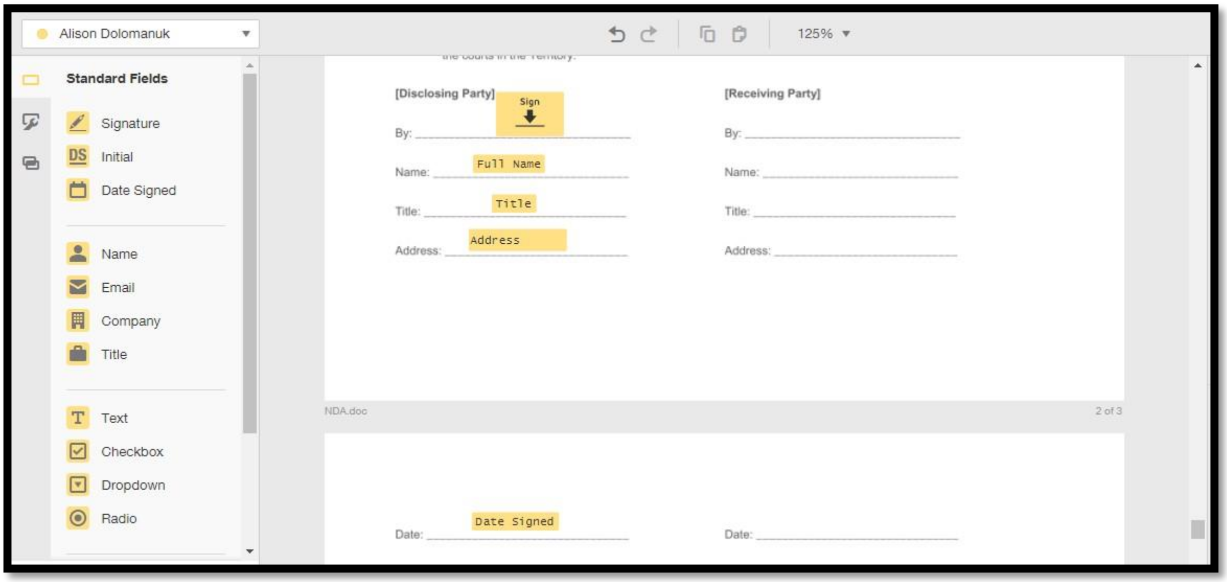
Enter the information for each recipient in the ***Add Recipients*** section. The document will be sent to these individuals for signature.



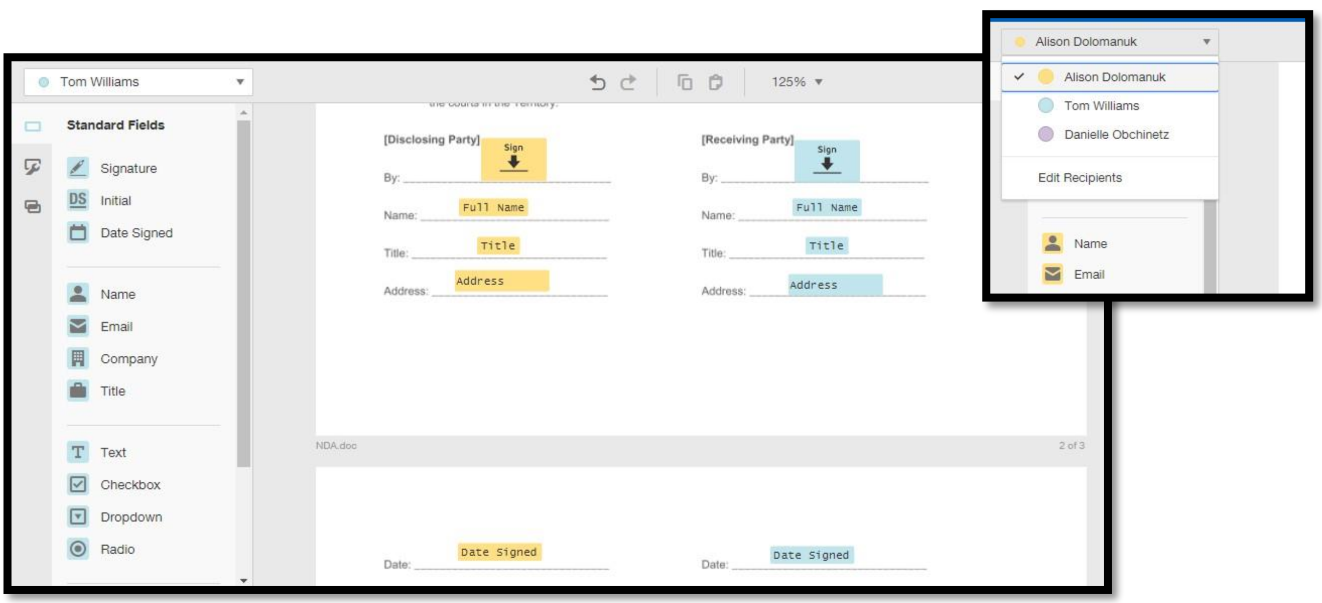
If you would like to add an additional message to the email or configure additional options, you can do so after adding your recipients.

Click **Next** when finished.

You can insert fields to your document, indicating where recipients should sign, initial, or enter other required information. Click and drag a field from the menu on the left to its appropriate placement within your document.



Using the dropdown list above the fields, you can assign other recipients to enter information as well.



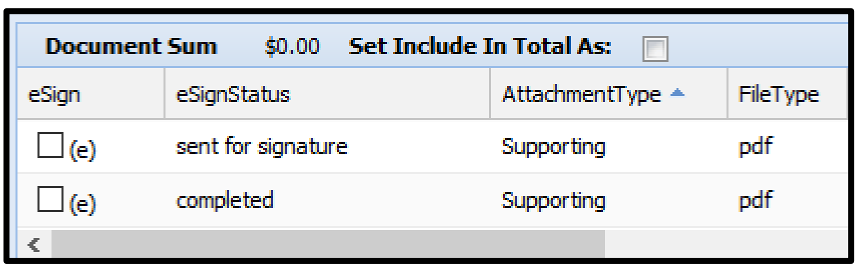
When finished with specifying where recipients should sign and enter additional information, click **Send** in the top right corner of the screen.

Downloading Signed Document Back into UCM

DocuSign takes about 30 minutes to process the document after the last signature.
Click the **Download** button to retrieve the signed document from DocuSign.

After documents are brought back into UCM, the **Download** and **Console** buttons are replaced with the **Upload** button in case you wish to upload more documents from the container.

The Attachment(s) grid displays the updated eSignStatus. The example below shows one document "sent for signature" while the other has been downloaded back into UCM from DocuSign, and therefore, "completed".



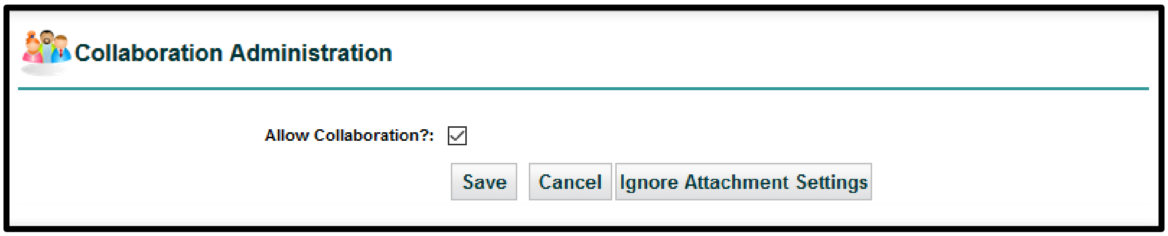
Appendix E – Contract Collaboration ($)

Introduction to Collaboration

This is an optional feature (with an ***additional charge*** associated) available for purchase. Once your company has the service activated, admins must also activate which users will use collaboration. Users who have Collaboration enabled can generate collaboration sessions to exchange emails back and forth. Unlike the Email tab, the responses are stored in multiple locations within UCM.

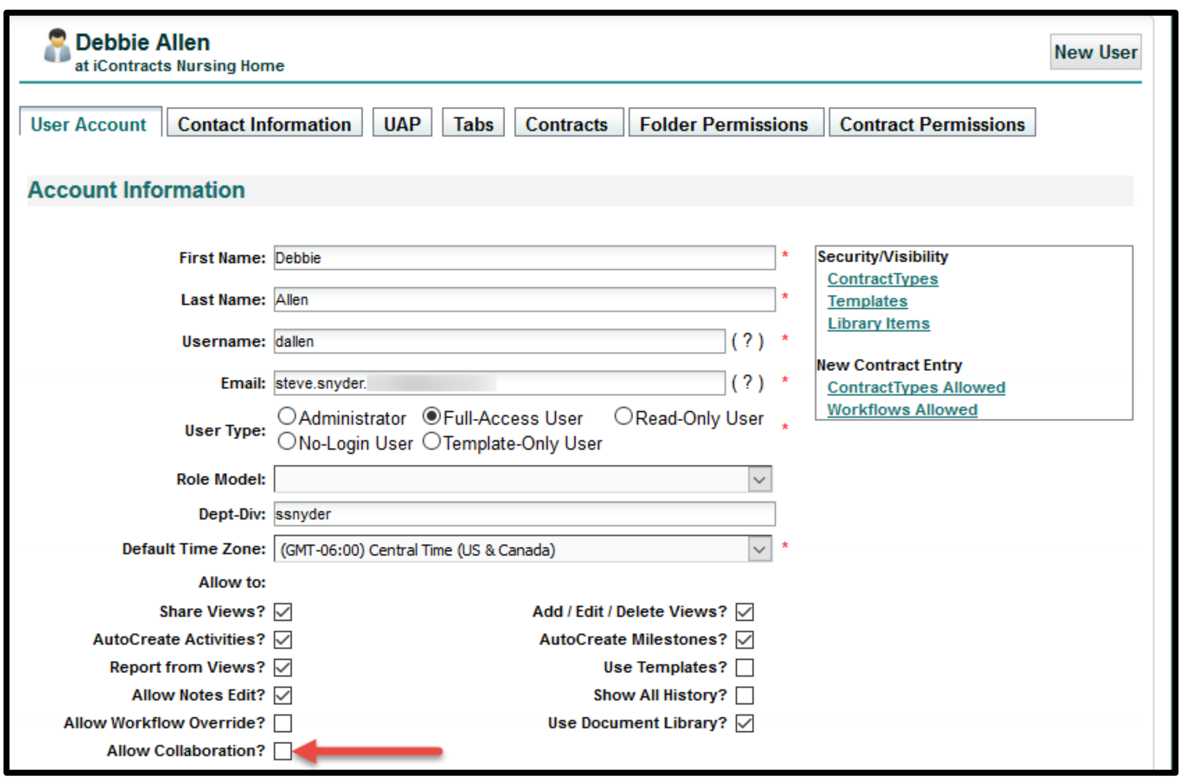
Administration Tasks

Admins will turn on/off Collaboration at the Company level. This is done in **Company Admin: Settings**.



There is more information available by clicking on this [Collaboration Administration]() link.

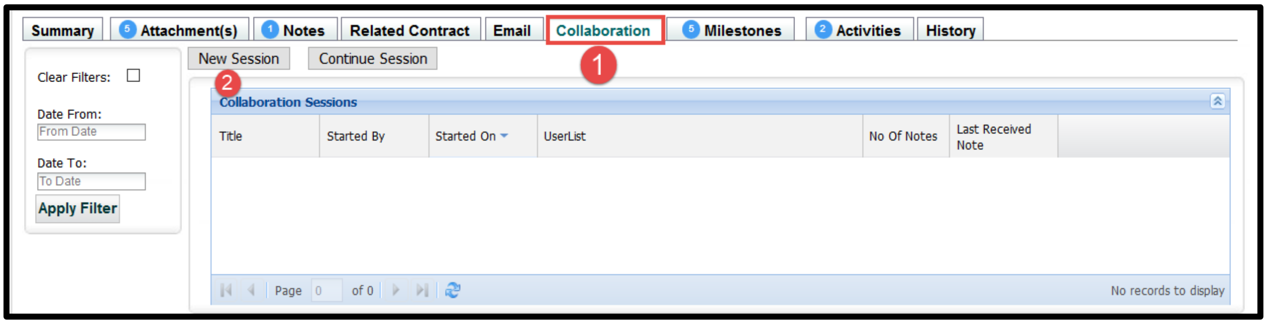
Next, the Admins will turn on/off Collaboration at the User level for *each* user who will participate in the Collaboration. This is done in **Company Admin: Manage Users**. Make sure to **Save** your changes.



Users who had their Administrators not Allow Collaboration will not see the Collaboration Tab in UCM.

The Contract Ribbon

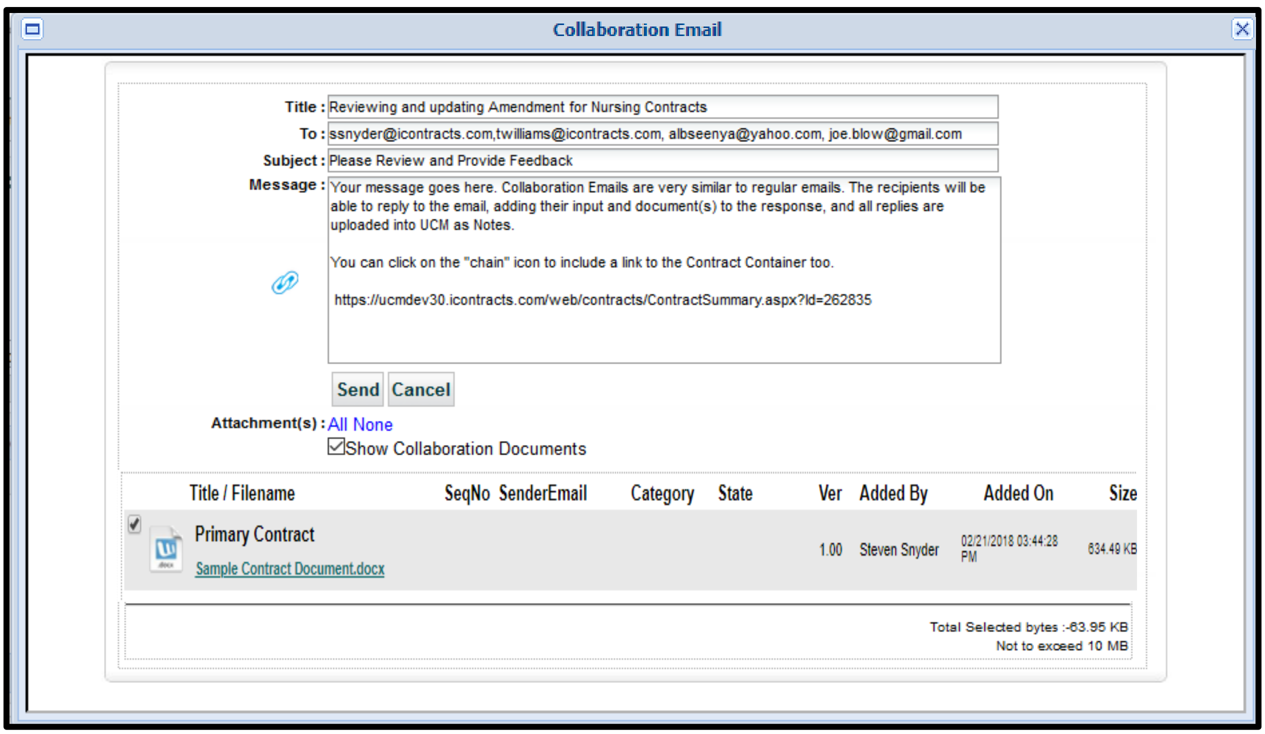
Click on the **Collaboration Tab** to either create a *New Session* or update an existing one with *Continue Session*.



Creating a New Session

Compose the email as you would for any email. Notice that outgoing emails have a "*Title*" which is an identifying label for each new session which should be unique to that session.

Click on the ☐ "*Show Collaboration Documents*" checkbox to include (or exclude) any documents added to the collaboration email replies (such as any Amendments).



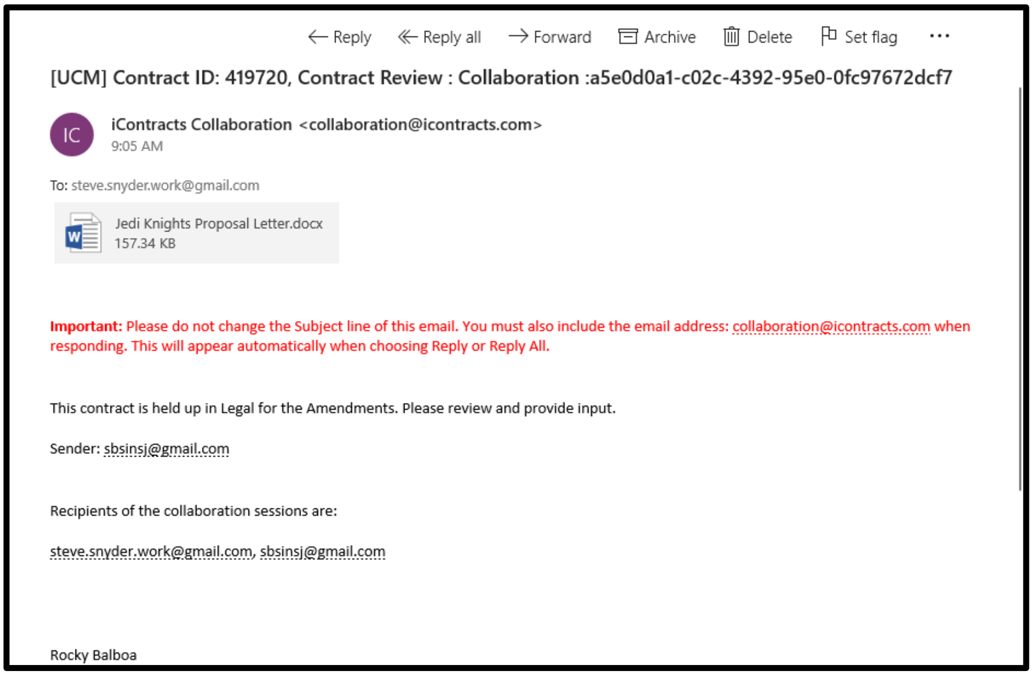
In addition, select any attachments to include with the email. Click *All* or any individual documents.

Sending the Collaboration Email

Click **Send** to process and deliver your email messages. The Collaboration tab will show the blue dot once you navigate to another tab on either ribbon. If you click **Cancel**, the Collaboration Email is cleared out of any content, but the window stays displayed on your screen. Click the small **X** in the upper-right corner to exit the Collaboration Email screen.

Reading and Replying to a Collaboration Email

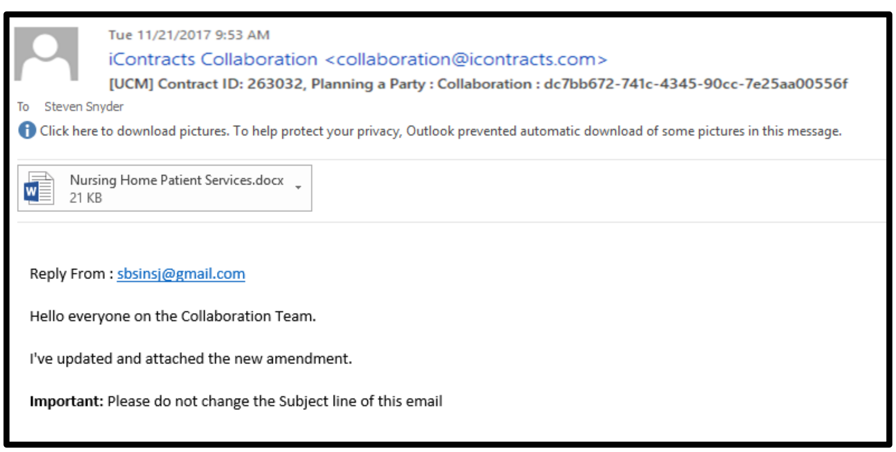
Collaboration Emails are received like any email and treated as such. The sender displays as a Company Collaboration as opposed to an individual name like John Smith.



When you use **Reply**, your email goes to the "*collaboration@icontracts.com*" distribution list. Therefore, all of the recipients listed at the bottom of the email message receive the same response.

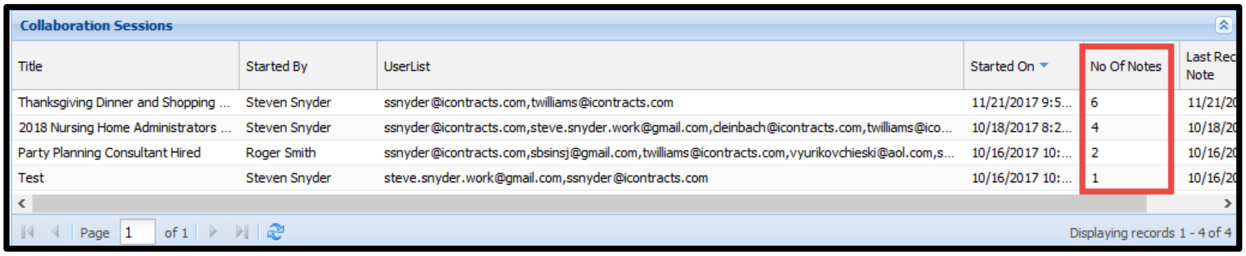
You have the ability to save any attachments, as well as edit its contents. If you do modify the attachment, save the edited document under a new filename, and make sure to attach the new document to your email response prior to sending the reply back to the collaboration group.

All the recipients of your collaboration email response will see this same reply. The list of recipients, however, *do not* show at the bottom of the response email. Only the original collaboration email displays the list of recipients.



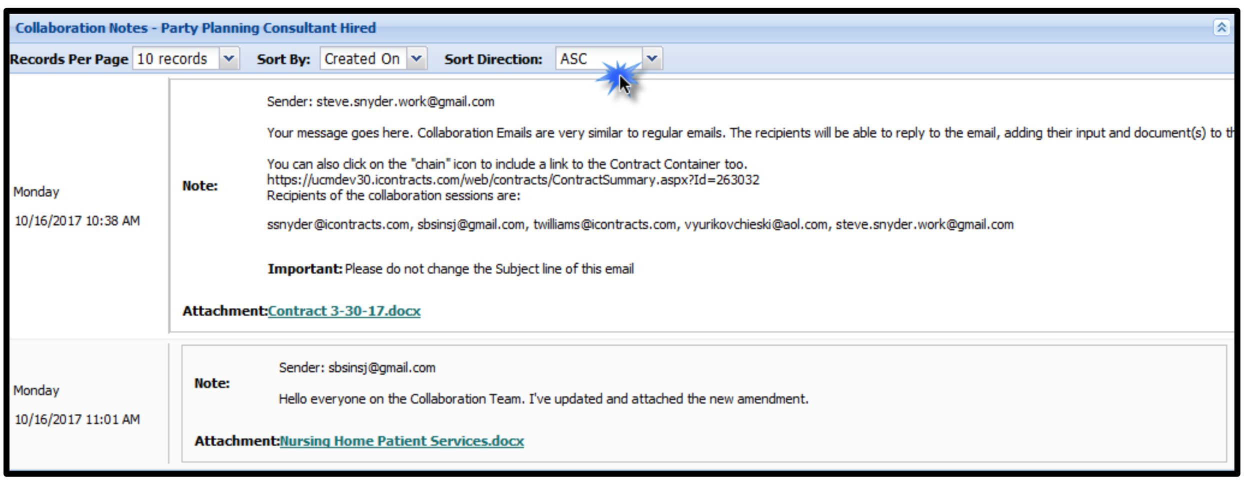
Collaboration Email Replies Added to UCM

The *Collaboration Sessions* grid displays the number of notes for each Title so you can track how many responses have circulated so far. Of course, non-Admins must first be given access to this tab.

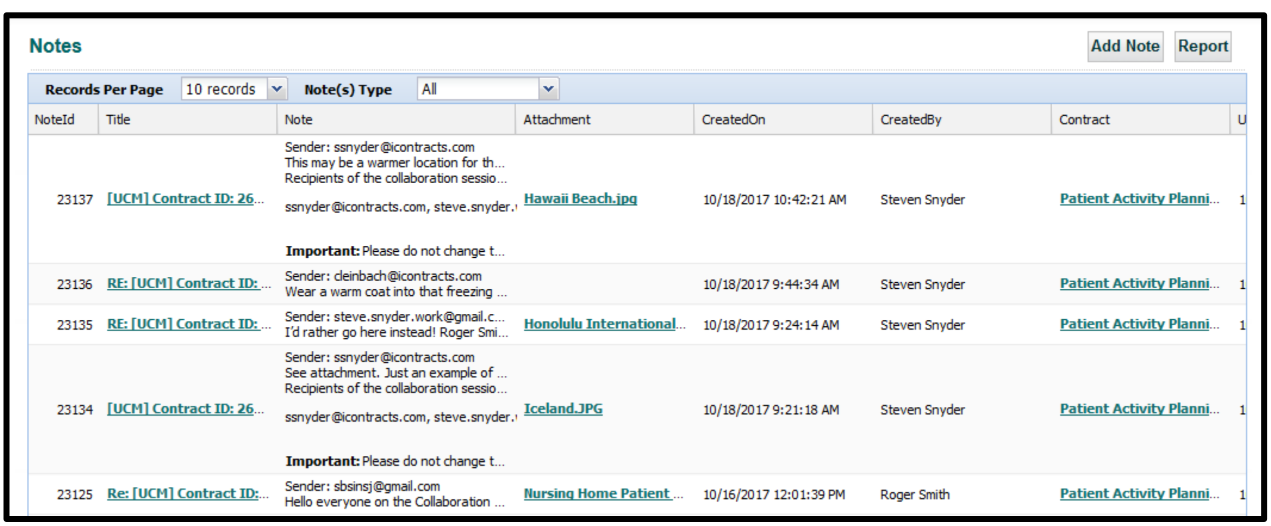


If you select any of the Collaboration Sessions, the selected **Title** appears as part of the Collaboration Notes heading in the session window below.

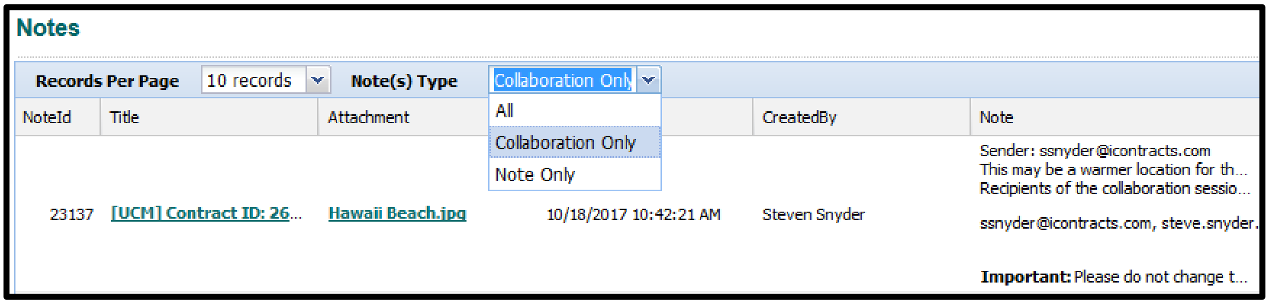
Scroll down to see the outgoing email and all replies. As your list of replies grows, you can edit the *Records Per Page*, *Sort By*, or *Sort Directions*.

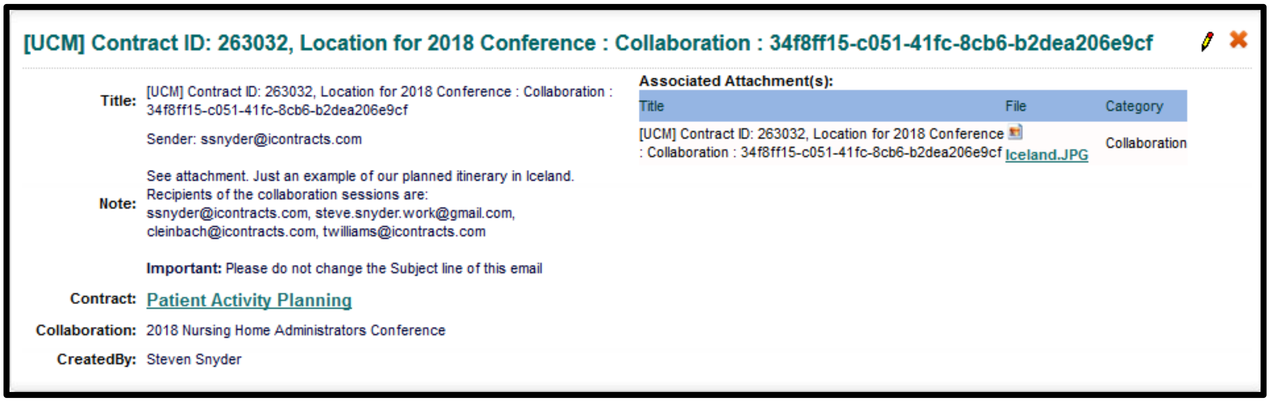


When the Contract Container receives responses, the system generates a **Note** for each response, placing them into the Contract Ribbon's *Notes tab* in addition to the Collaboration tab.

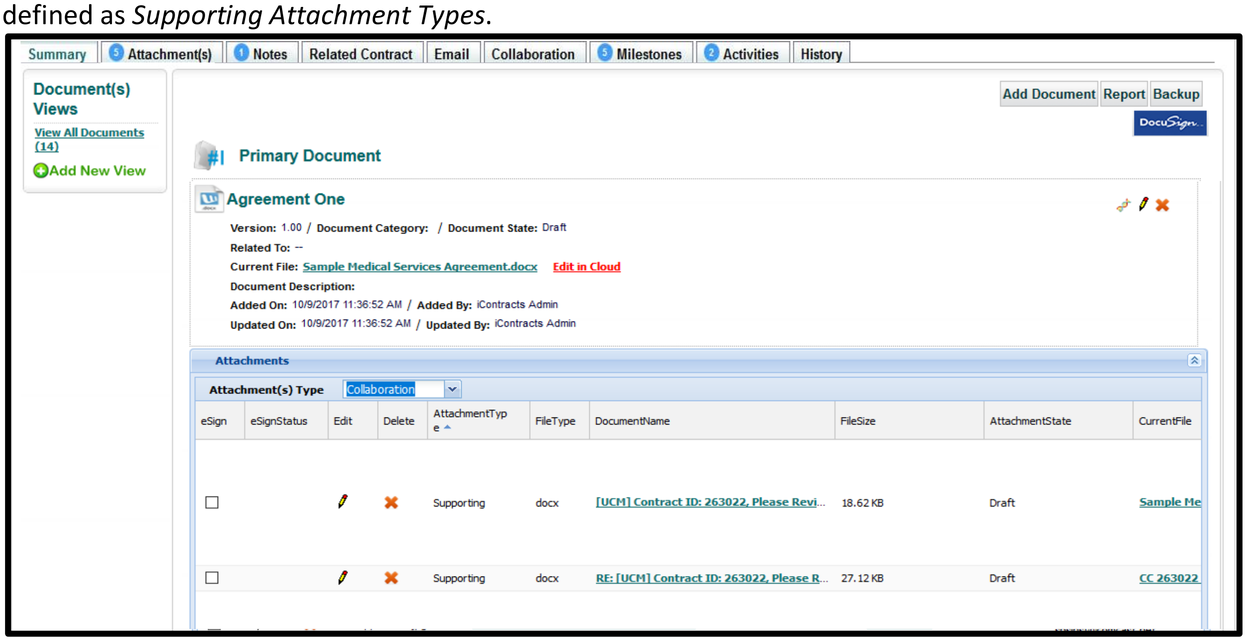


You view notes by type. The **Note(s) Type** shows views in the grid by All, Collaboration Only, or Note Only (both on the Enterprise and Contract Ribbons). Click on the note **Title** to see the collaboration note information as you would with any other note type.





In addition to the Notes Tab, the **Attachment(s) Tab** is updated to list documents which are attached to any Collaboration emails. The **Attachment(s) Type** shows views in the grid by All, Collaboration Only, or Non-Collaboration (both on the Enterprise and Contract Ribbons). These collaboration documents are defined as *Supporting Attachment Types*.

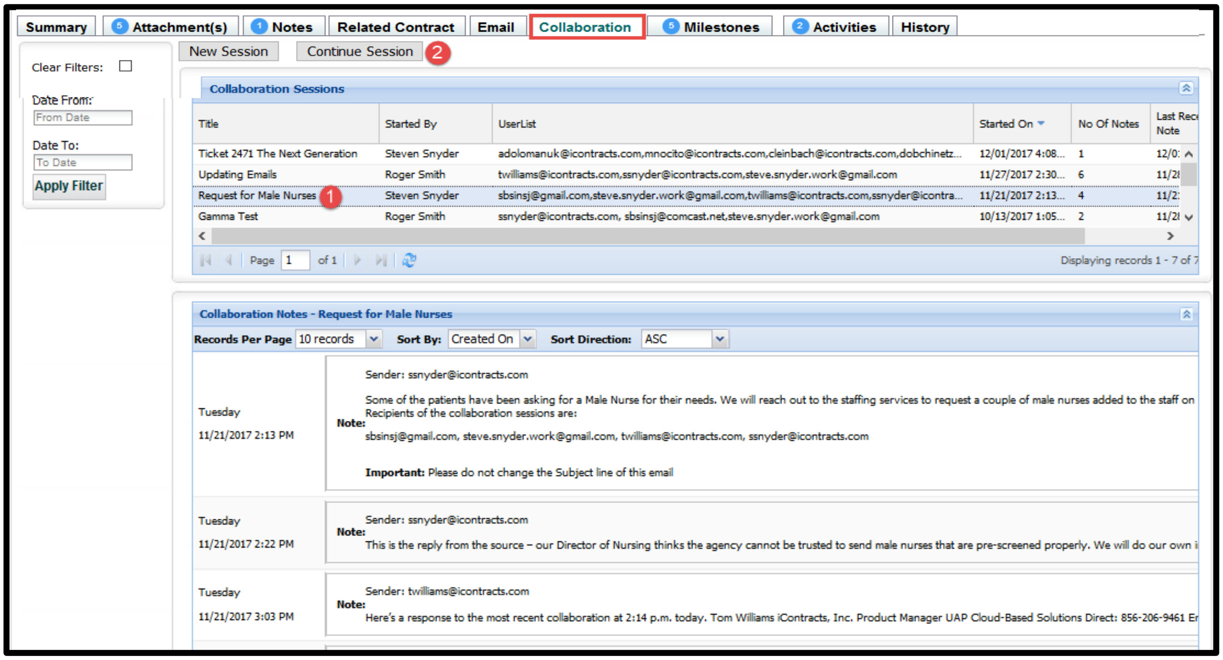


☞ Any UCM user with access to this Contract Container will see Collaboration documents listed in the **Attachment(s) Tab**, the **Notes Tab**, and the **History Tab**, regardless of their access to the *Collaboration Tab*. Their Security settings, however, do control what they can actually see in detail.

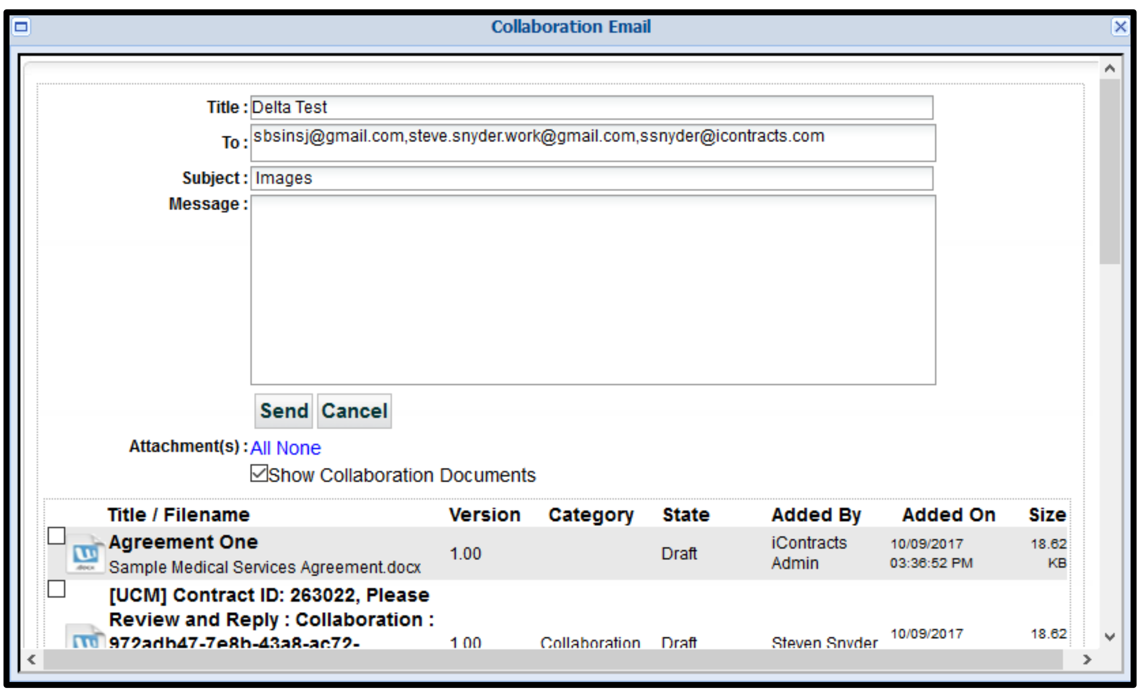
Using Continue Session in Collaboration Tab

Since a collaboration is a collection of email communications back and forth, you will probably need to "continue the conversation" with an existing session.

Click on the Title in the **Collaboration Sessions** grid, which displays the conversation chain below the grid. Click on the "*Continue Session*" button to add to the conversion.



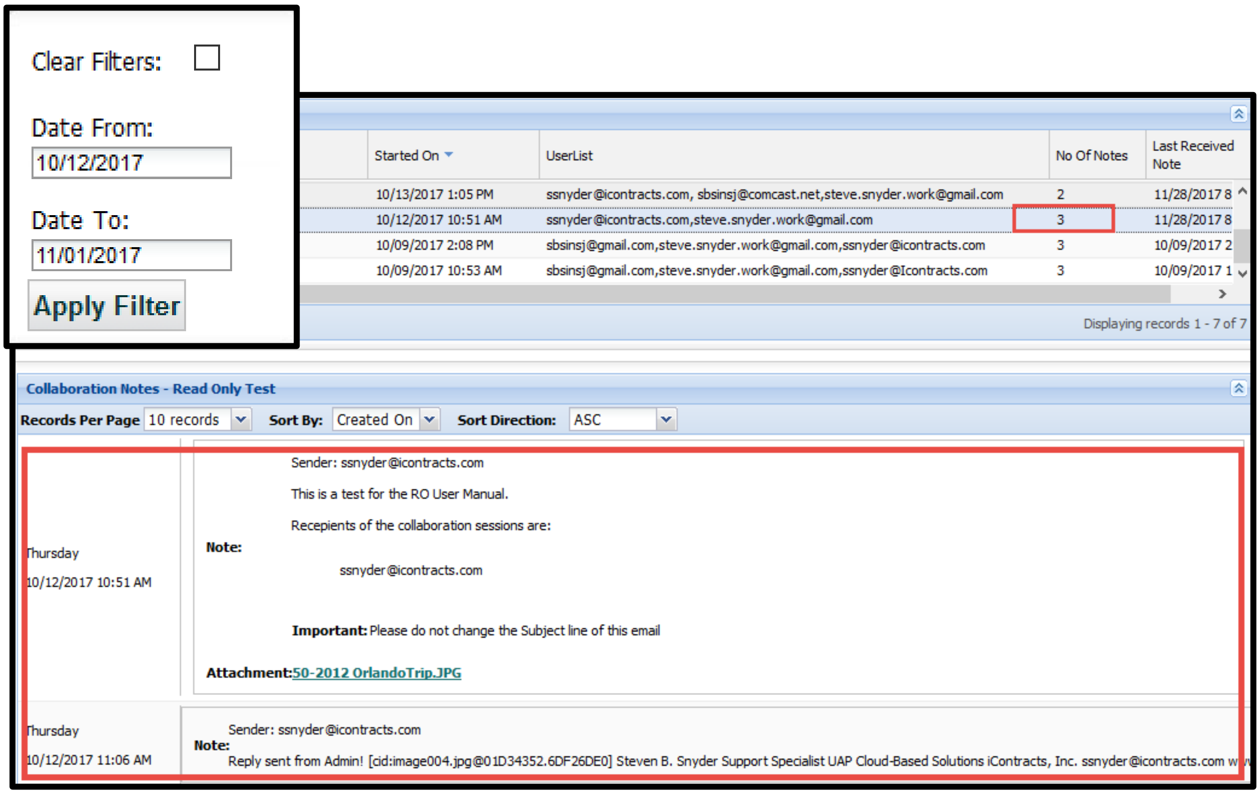
This opens the **Collaboration Email** screen with the original email header information already filled out. Type in your message and add (if necessary) any additional documents. Recipients can be added too. Click **Send** to deliver the emails. The grid updates the No. Of Notes after clicking the "*dolphins*".



Filtering Collaboration Sessions by Date

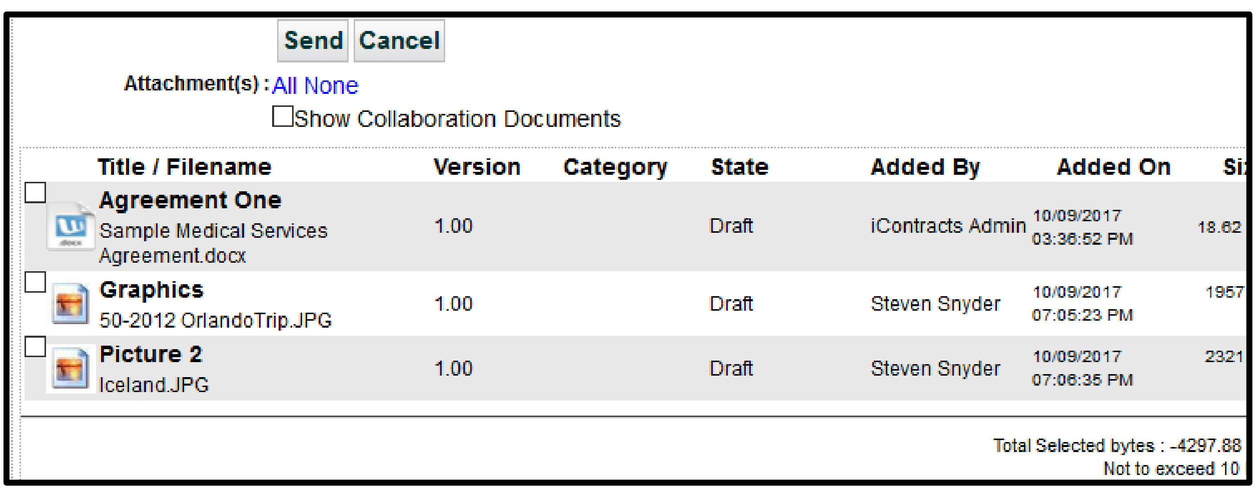
As your number of Notes per Title increase over time, you may need to filter these notes by a Date Range. After selecting a Collaboration Title, you can apply the **Date Filter** for that group of notes.

Enter "Date From" and "Date To", then click "*Apply Filter*" to control how many notes you will see below the list of Collaboration Sessions. Click the "*Clear Filters*" checkbox to remove any filter.

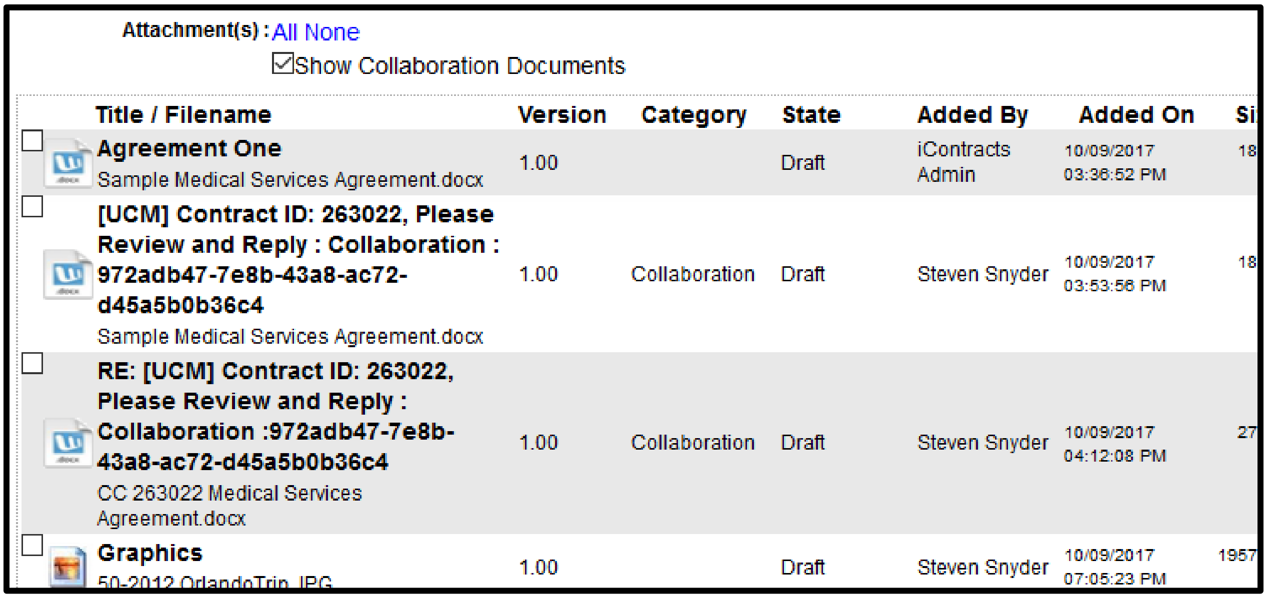


Showing Collaboration Documents

Documents uploaded to the Contract Container are not all used for collaboration emails. If you uncheck "*Show Collaboration Documents*", you should only view non-collaboration documents.

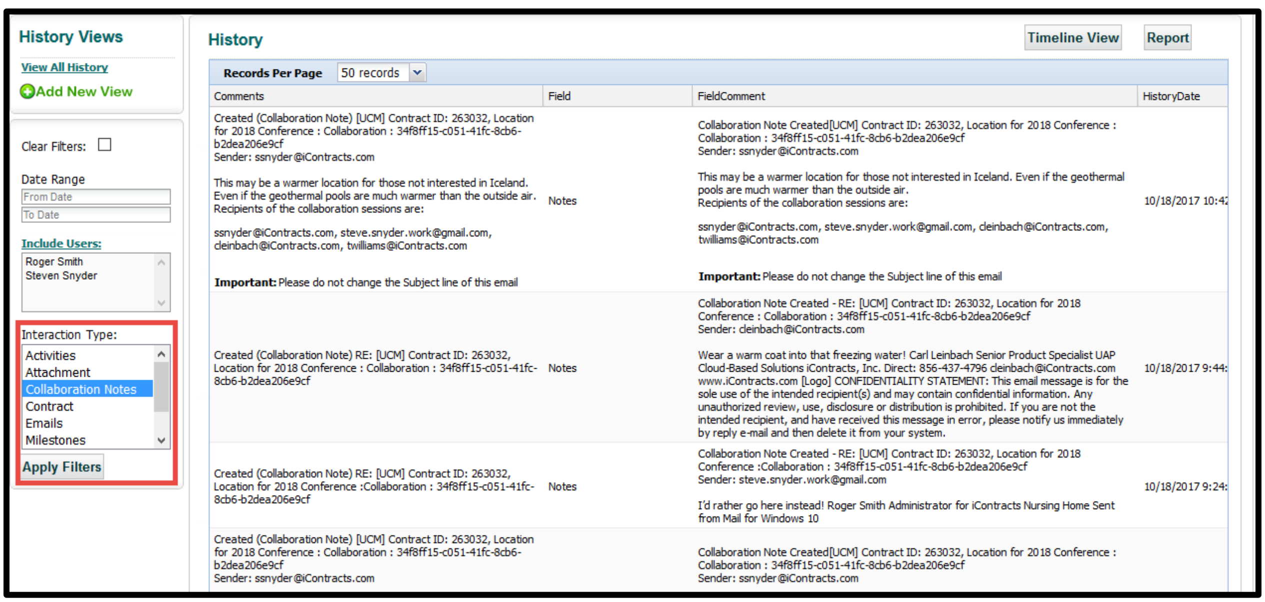


When "*Show Collaboration Documents*" is checked, the collaboration documents are included in the list of attachments. You can click the "All" Attachment(s) button to check all documents, or select individual documents as needed.



Viewing Collaboration Notes in History Tab

All Contract Container activities, from creating the Container going forward are tracked in the History Tab. Use *Interaction Type* to filter out the **Collaboration Notes** to view only those items.
Click on "*Clear Filters*" to reset the view to see all the history again.



Appendix F – Introducing Aceoffix Version 5.7

In order to continue using both the **Edit in Cloud** and **Library** functions in UCM with all supported web browsers, each user must upgrade the software add in, known as Aceoffix, on their computers.

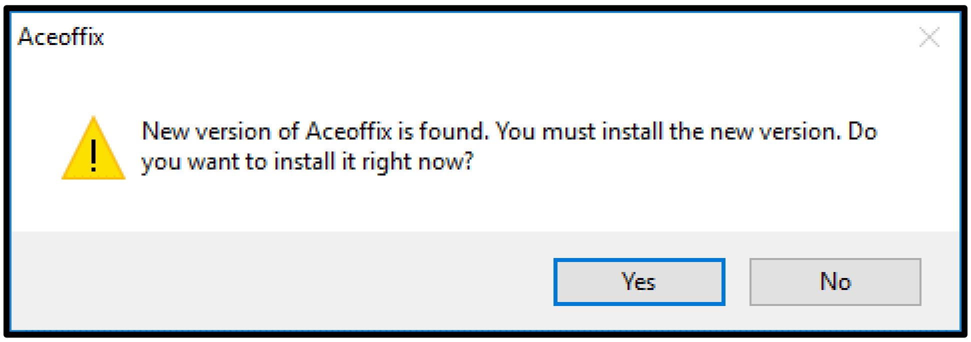
Installing Aceoffix 5.7

Depending on your company's IT policies, UCM Users *may be able* to upgrade the current program version themselves; otherwise, please contact your IT Department or Hardware Support Group for further assistance. These instructions are using Internet Explorer for the screen images.

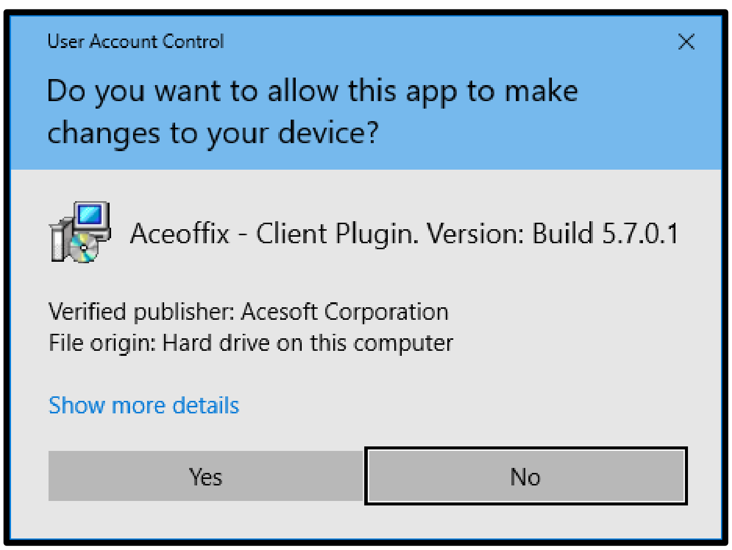
Using Edit in Cloud to install new version

When you click the **Edit in Cloud** link, 

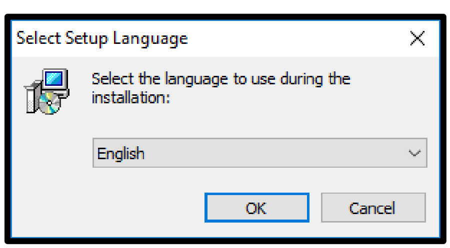
you will get a pop-up message (after you first click **OK** to the "*Do you want to edit document online?*" message).



Click **Yes** to continue. Windows displays the following message. Click **Yes** to continue with the update.

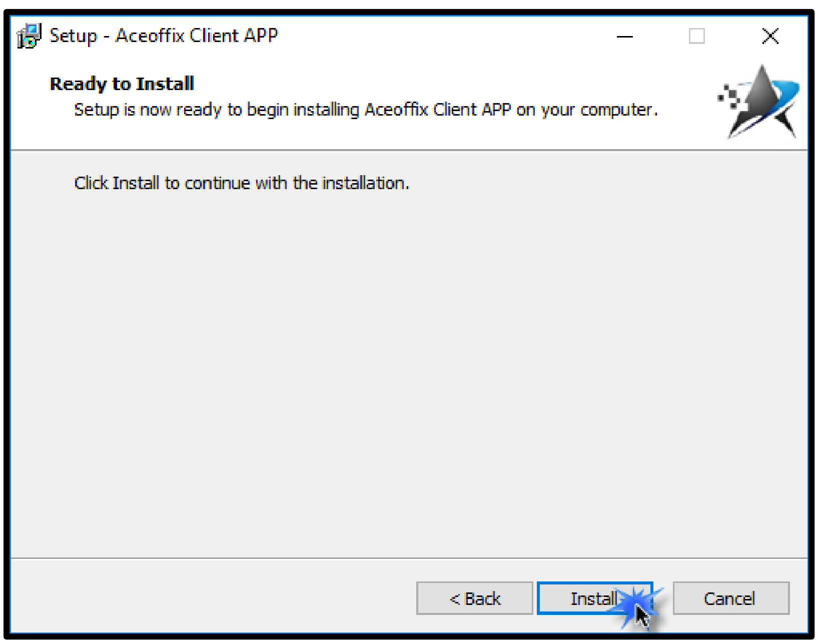


Click **OK** to select "English". You **MUST** next close any open web browser(s). **Please log out of UCM first!**



Once you have closed your web browsers, **check the box** at the bottom of this screen to confirm that you have indeed closed all the browsers before you can continue with the install.

Click **Next >** to continue with the installation. Click **Install** to begin the process.

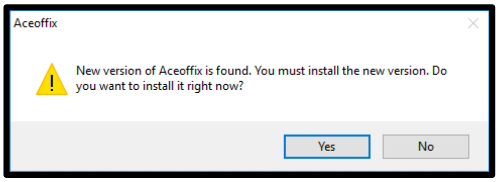


The current version of Aceoffix will now *uninstall* before the new version is added to your computer.

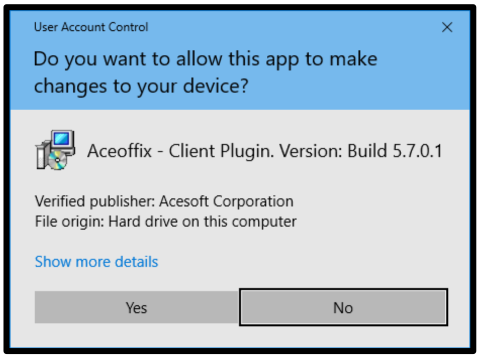
If Prompted, click **Yes** to restart your computer. Follow the rest of the instructions below.
*If you are **NOT** prompted* to restart your computer, you will simply click the **Finish** button when the install has completed.

IF you have restarted your computer:

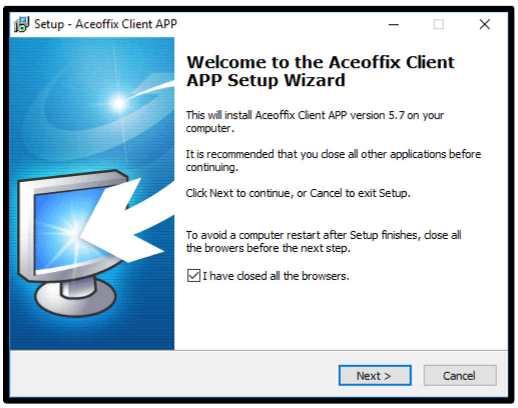
1. Reopen your web browser, login to UCM and return to the Contract Container you last displayed, but you can display any Summary or Attachments tab that has a document that you can edit online.
2. Click the **Edit in Cloud** link, click **OK** to the "*Do you want to edit document online?*" message.
3. Click **Yes** to install the new version of Aceoffix.



4. Click **Yes** to continue with the update.



5. Click **OK** to select "English".
6. Close any open web browser(s). **Please log out of UCM first!**
7. Check the box at the bottom of the *Welcome to the Aceoffix Client APP Setup Wizard*.

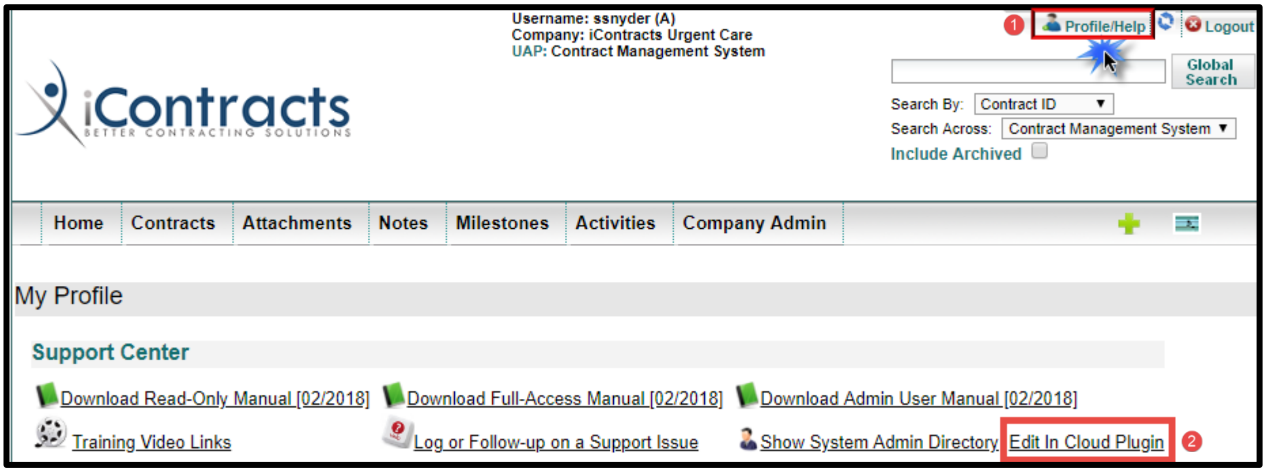


8. Click **Next >** to continue with the installation.
9. Click **Install** to begin the process.

10. The new version of Aceoffix will now install onto your computer.
11. Click the **Finish** button to exit the setup.
12. Reopen your browser(s) and log back into UCM. You can now use Edit in Cloud normally.

Downloading the Aceoffix Plugin from Chrome's Profile/Help

UCM is compliant with Internet Explorer, Google Chrome, and Firefox. All three browsers use the same Aceoffix plugin so you would only need to install it once. *Google Chrome*, however, is unique, as the Profile/Help's "*My Profile*" screen displays this **Edit in Cloud Plugin** hyperlink in Chrome only.



1. Display *My Profile* from the Profile/Help link.
2. Click on the *Edit in Cloud Plugin* link. This downloads the install file to your computer.
3. Click the downloaded file "**pluginsetup.exe**" which is located at the bottom left corner of the browser. 

4. When prompted, click **Yes** to continue. Make sure you follow your company's IT rules for downloading software.
5. Click **OK** to continue installing using English instructions.
6. The *Welcome to the Aceoffix Client APP Setup Wizard* appears.
   Leaving this screen up, you **MUST** next close any open web browser(s).
   Please log out of UCM first!
7. Click the checkbox for "*I have closed all the browsers*" and click **Next >** to continue.
   Click the **Install** button.
8. Click the **Finish** button to exit the setup.
   Reopen your browser(s).

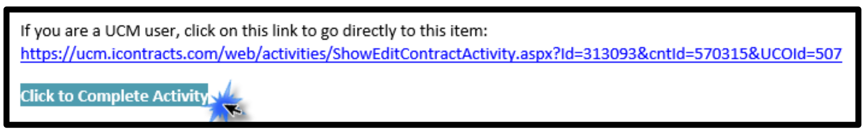
Recommended Last Step: Clear Your Browser Cache before Using Aceoffix 5.7.

Please refer to your **UCM Login Page** for *Instructions to clear your browser cache* before starting with any new feature.

Appendix G – Email Responses to Activities

We have another 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.

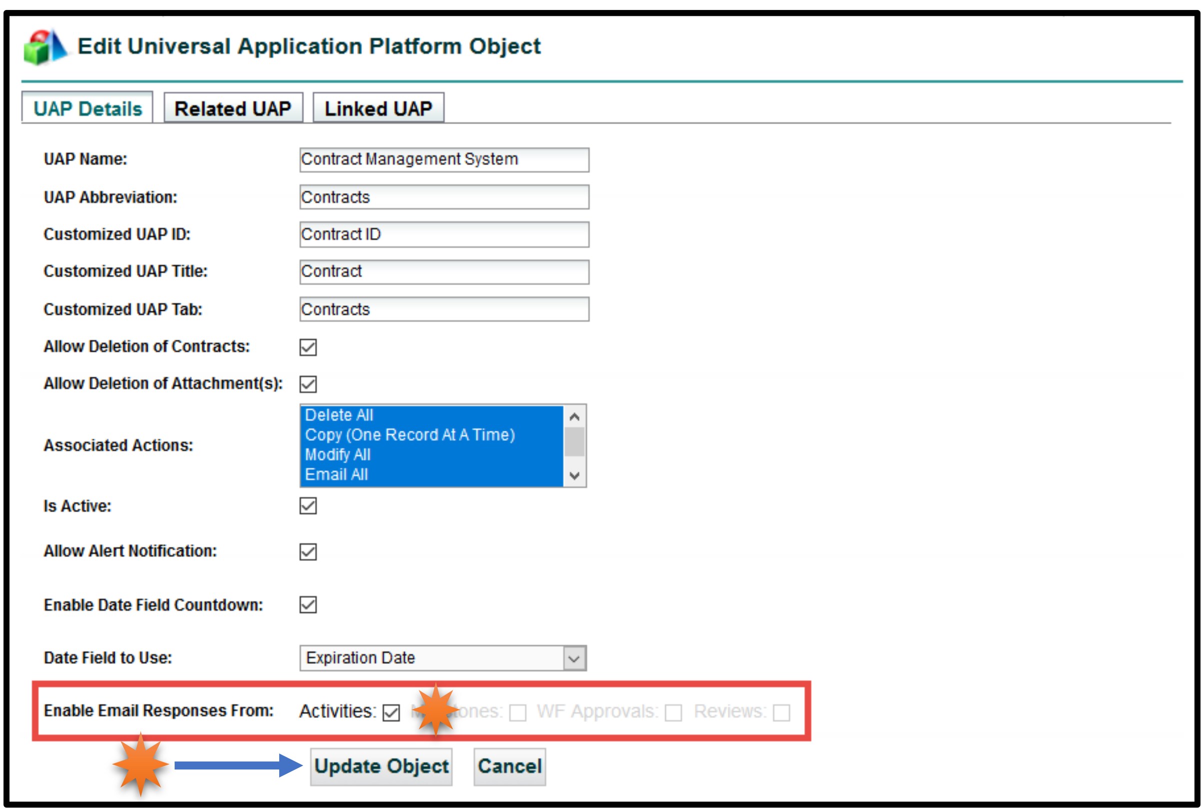
Only the "*Assigned To*" user will be able to Complete the Activity directly from the email. Regardless of User-Type – Admin, Full-Access, Read-Only, or No-Login – this user will see a blue button at the bottom of their notification email. Any user set as an "Assigned Other(s)" will NOT have this functionality, 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.



Activating this Feature

Before any "*Assigned To*" users can click on the *Complete Activity* button, an Administrator must first activate the Object's Email Responses to allow this to occur, which is **OFF** by default. Without activation, all notification email recipients will only see an email link which reroutes the user to UCM, where they would need to login and then manually Mark the Activity as Completed.

Access this checkbox (see the bottom of the image below) from **Company Admin: Object Administration: Object Setup/Maintenance**. Click on the UAP Name (Contract Management System).

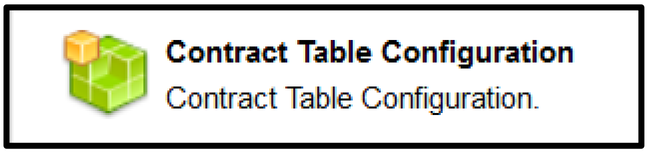


Appendix H – Using Contract Tables ($)

This is an optional feature (with an ***additional charge*** associated) that allows you to display different fields, as configured in the Contract Administration area, on a contract container within another tab of the Summary page.

Contract Administration

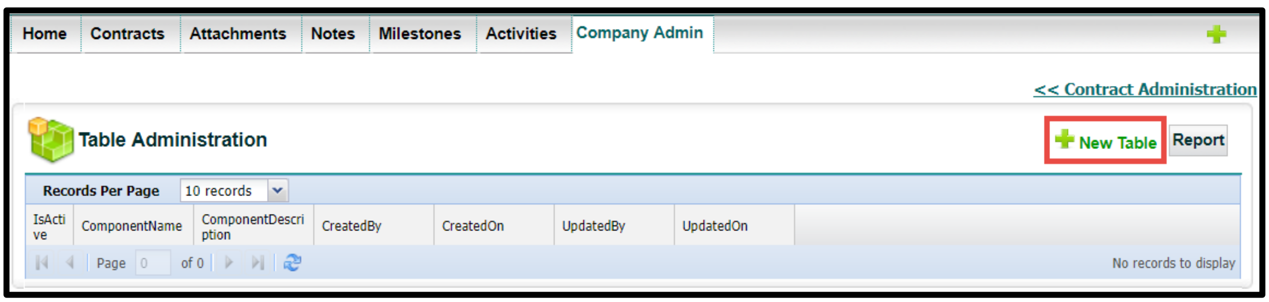
Once your company has this feature activated by iContracts, you can begin creating new tables under **Company Admin: Contract Administration: Contract Table Configuration**.



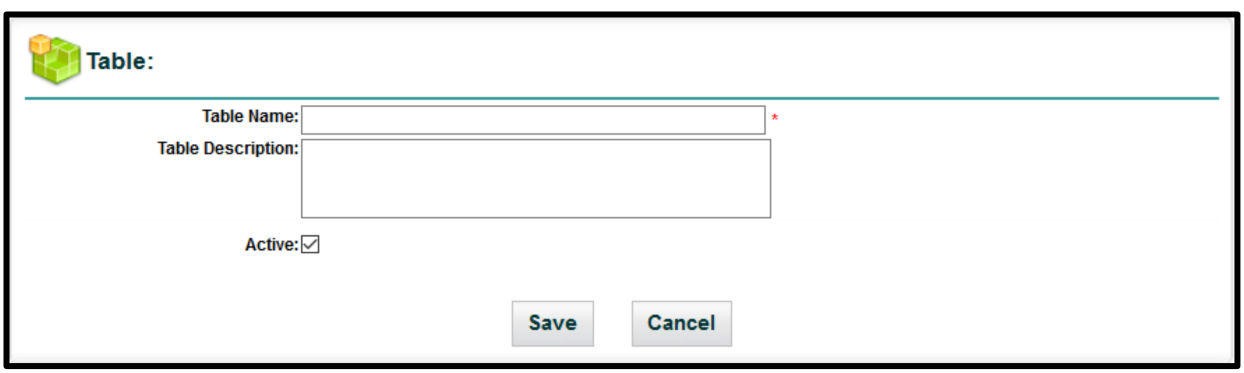
Creating a New Table

Each Table acts like a separate Field Group within the contract container; hidden from immediate view but accessible from another tab on the Summary page. You create brand new fields for each Table that are unique and separate from those available in the Add Fields link on a contract or columns in a Contracts grid.

Click on the **New Table** link.

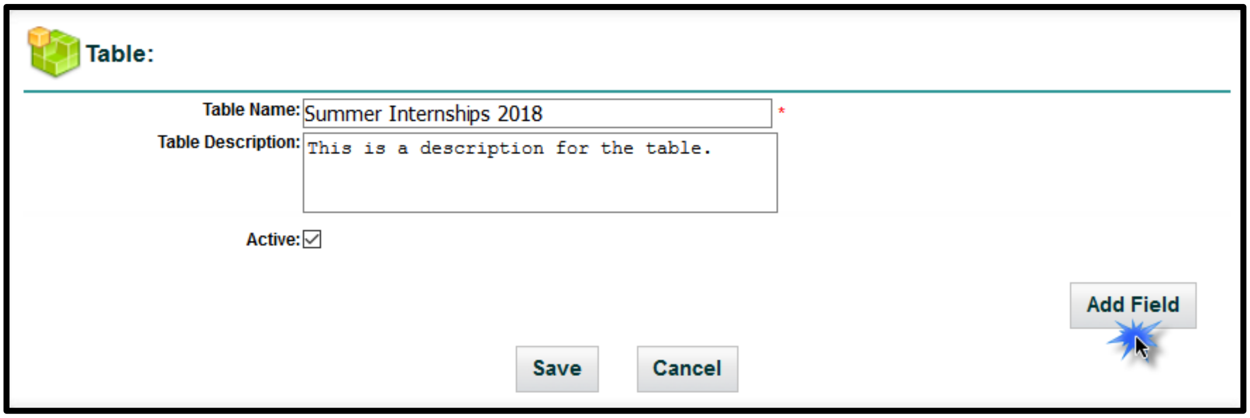


Enter the *Table Name* and *Description*. The *Active* box is checked on by default, but you can deselect this if you'd like to postpone the roll-out of this feature until all Tables have been configured.



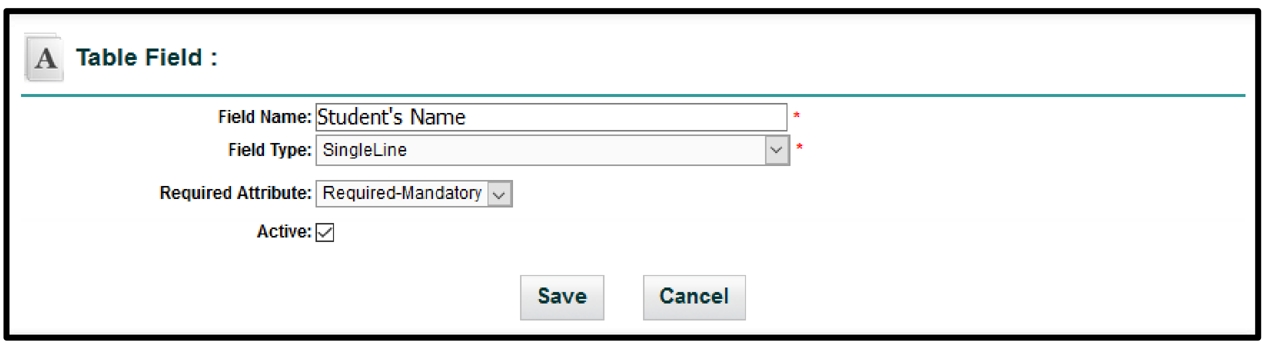
Click **Save** to continue.

Click on the new **Table Name** to edit, then click the **Add Field** button. This button will not appear until *after* you initially **Save** your new Table with Table Name and Table Description first.



Adding Table Fields

Type the *Field Name*. This is a required entry.
Select the *Field Type* from the drop-down list. This is also a required entry.
All field types are available EXCEPT calculated Date and calculated Numeric fields.
Choose if this field is a *Required Attribute* (optional).

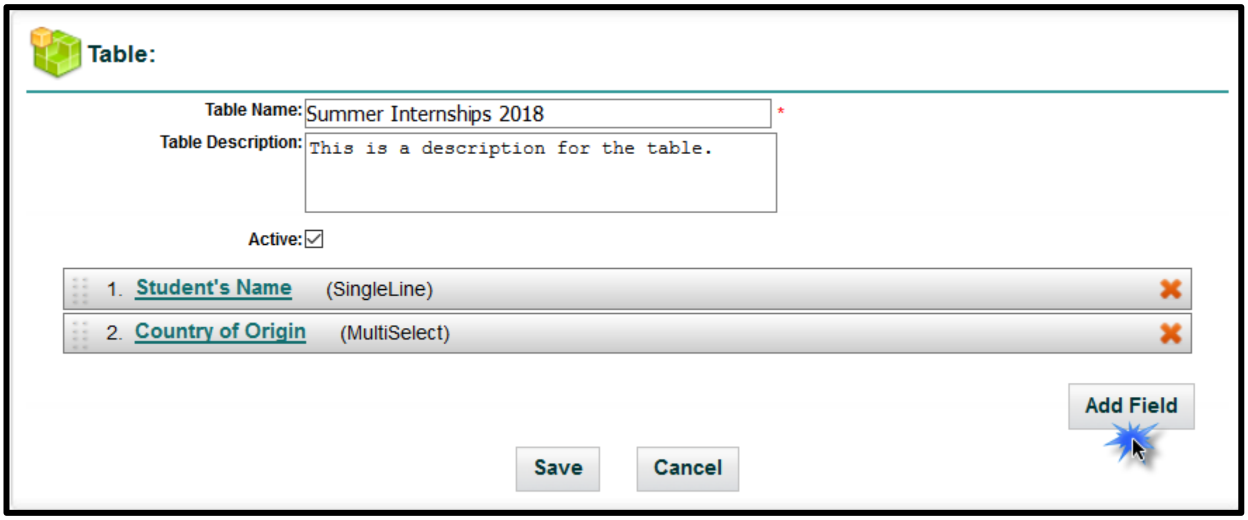


Leave the field checkbox as *Active* (in most cases).

Click the **Save** button.

You will see a confirmation that the Table Field was Saved successfully.

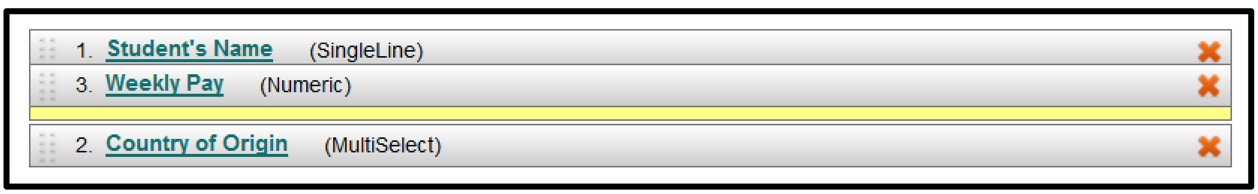
Repeat the process of clicking **Add Field** for each additional Table Field you want to add.



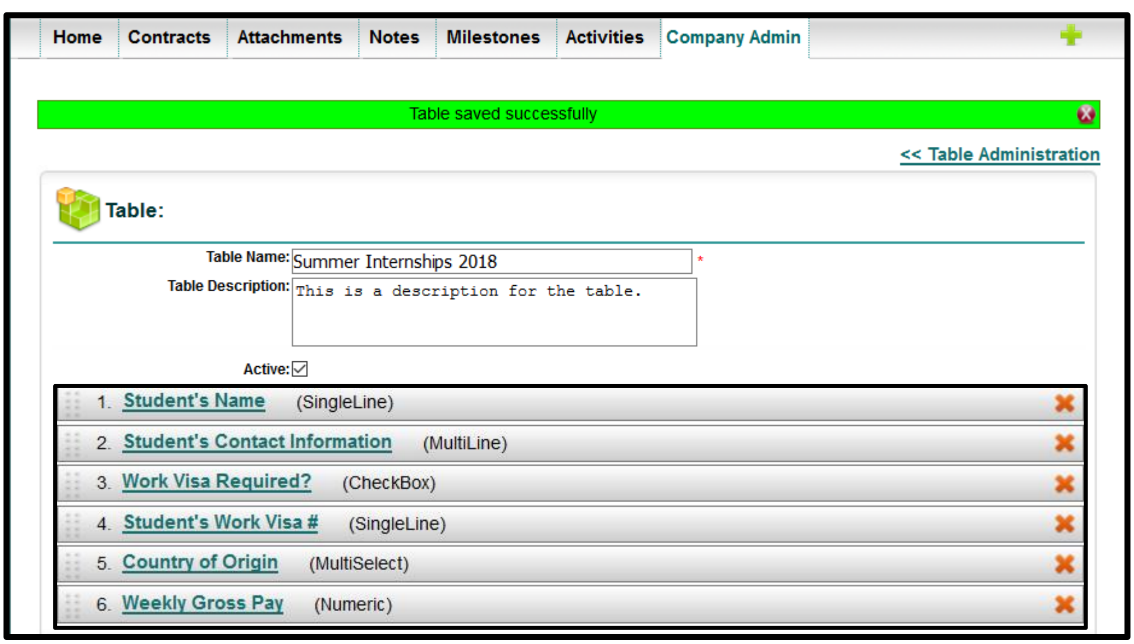
Click the **Save** button when finished adding fields.
Recommended: Save your Table before trying to make any edits.

At any time, you can edit the fields by clicking on the field name or rearrange their order by dragging the field block. Drop-down and Multi-Select fields can have their values rearranged in the same way.

You can also add new fields or delete current fields (by clicking on the **X** but not reversible) at any time.



Make sure to **Save** any changes to your Table when you are finished editing.
Field Type *cannot* be changed once the Table is saved successfully.

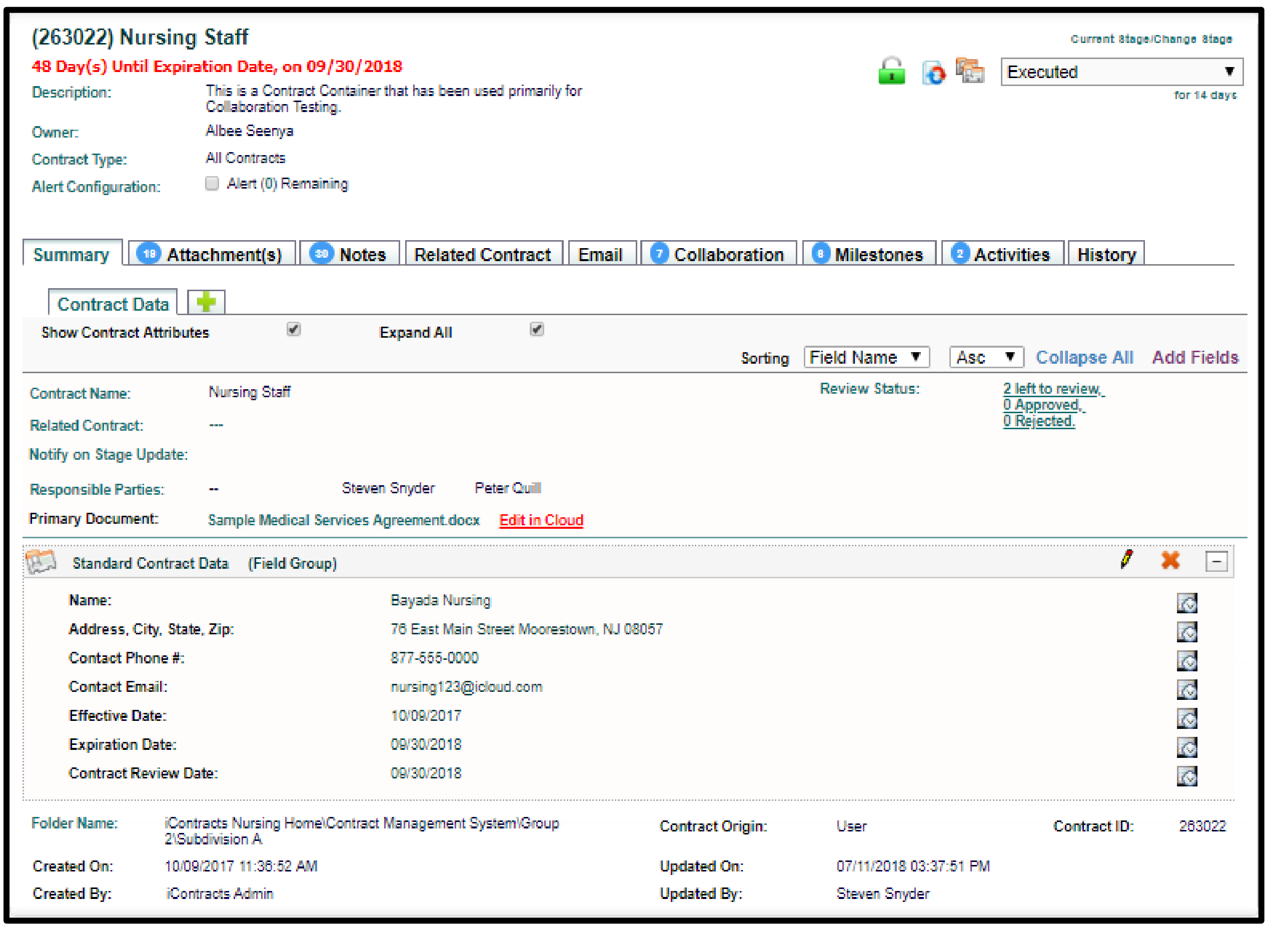


Displaying Tables on the Summary Tab

Companies that have Tables enabled see a second row of tabs below the **Contract Ribbon**. The original Summary tab now displays your custom fields and fields, as well as attributes, under the "*Contract Data*" tab.

Contract Data Tab

As the default tab, all your **Summary data** appears here. Nothing has changed in appearance, other than the new sub-tab below the Contract Ribbon and now the green plus (+) to add your tables.

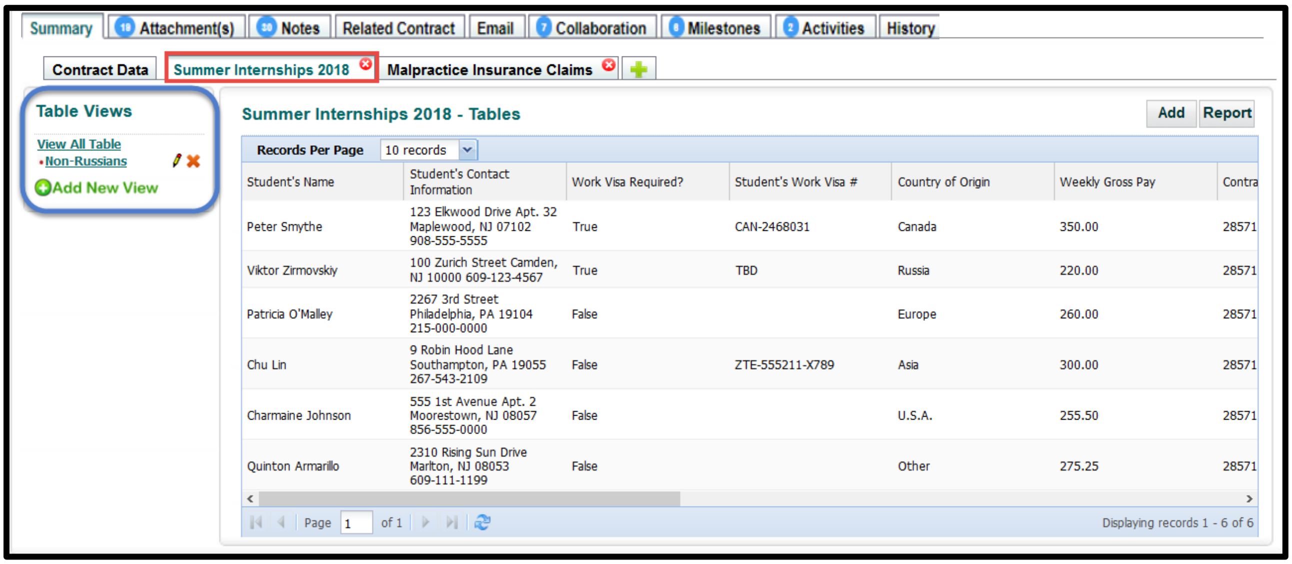


Using Table Tabs

Remember: Table fields are separate from your Contract Data. When you access a Table Tab, you will not see *any* Contract Data here except the **Contract Name** (and Contract ID) at the top of the screen. You can always toggle between tabs.

The Table tab also displays a **Table Views** area to the left, where you can create, edit and view different Table views just like a Contract View. The Table grid is adjustable as with any other grid setup (such as which columns are displayed, where the columns are located, and the column sort order).

We will explain how to use *Table Views* in a later section.



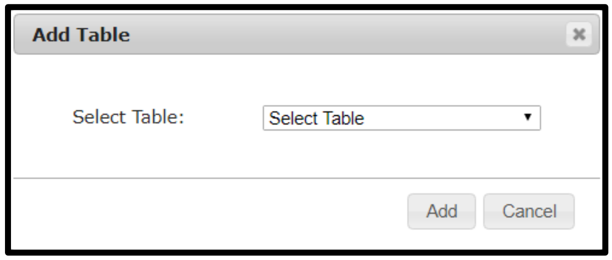
Student's Name	Student's Contact Information	Work Visa Required?	Student's Work Visa #	Country of Origin	Weekly Gross Pay	Contra
Peter Smythe	123 Elkwood Drive Apt. 32 Maplewood, NJ 07102 908-555-5555	True	CAN-2468031	Canada	350.00	28571
Viktor Zirmovskiy	100 Zurich Street Camden, NJ 10000 609-123-4567	True	TBD	Russia	220.00	28571
Patricia O'Malley	2267 3rd Street Philadelphia, PA 19104 215-000-0000	False		Europe	260.00	28571
Chu Lin	9 Robin Hood Lane Southampton, PA 19055 267-543-2109	False	ZTE-555211-X789	Asia	300.00	28571
Charmaine Johnson	555 1st Avenue Apt. 2 Moorestown, NJ 08057 856-555-0000	False		U.S.A.	255.50	28571
Quinton Armarillo	2310 Rising Sun Drive Marlton, NJ 08053 609-111-1199	False		Other	275.25	28571

Adding Tables to the Summary Tab

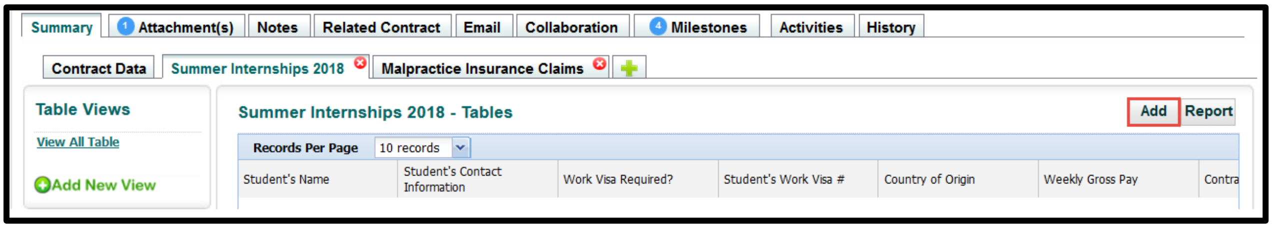
Click on the ➕ to add a Table.

Select Table from drop-down list.
Click the **Add** button.

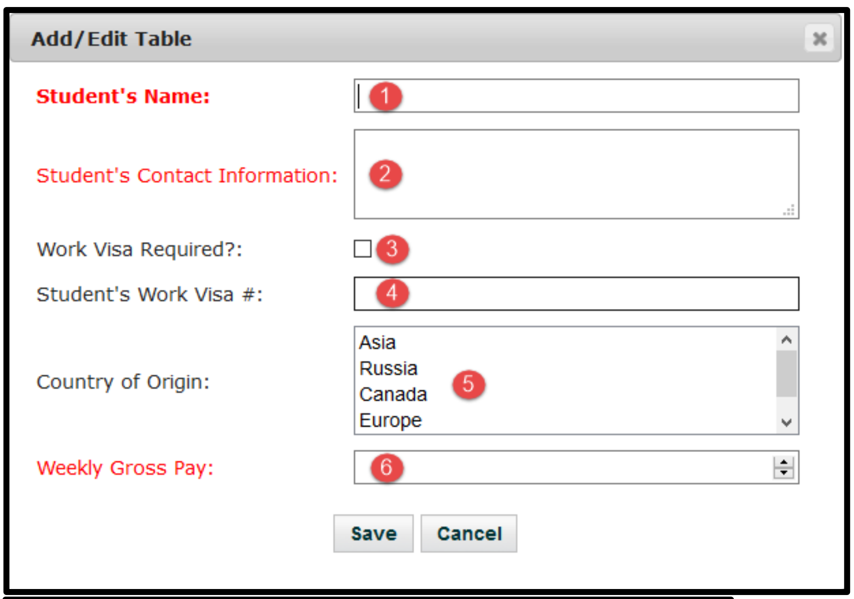
If you are adding multiple tables, repeat these steps until you finished adding tables. The *Contract Data* tab is displayed again after each new table is created.



Click on a **Table Tab**. Each will have a ✖ to delete the tab. Deleting a tab will prompt you with a WARNING!!! Pop-up box as this action is not reversable.
Click the **Add** button on the right-side of the Table window to add fields (only visible if permission granted).



The fields are listed in a separate window. *Red* fields are requested, **red bold** fields mandatory.



Field 1 is an example of a Single-Line field. This data is mandatory.

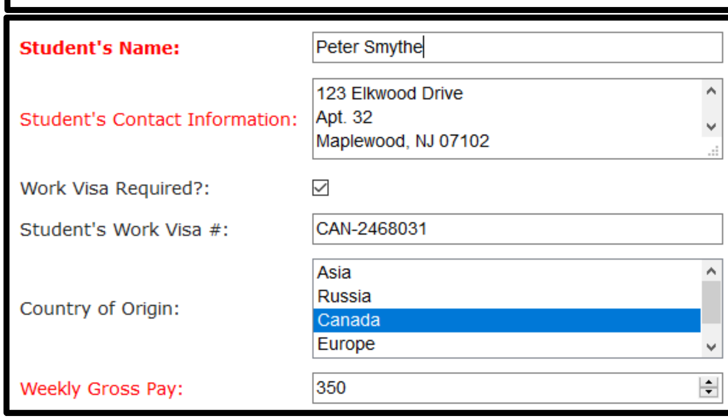
Field 2 is a Multi-Line field. This data is requested.

Field 3 is a Checkbox field.

Field 4 is a Single-Line field.

Field 5 is a Multi-Select field. Notice the scroll bar arrows on the right-end of the field?

Field 6 is a Numeric field. Notice the double-arrow on the right end of this field?



Here is an example of a completed Table with field data entered into the table.

Click **Save** to update the Table fields. Missing fields in **bold red** or red give you a Warning Error pop-up just like regular field groups do on the Summary tab.

Click the **Add** button again to repeat these steps for any additional sets of data to be entered within the same Table tab.

Each set is listed in rows in a table format. You can rearrange the grid column order, as well as Edit and Delete a set of information. The *Edit Pencil* and Delete **X** columns default to being on the right.

Summer Internships 2018 - Tables | Add | Report

Records Per Page: 10 records

Student's Name	Student's Contact Information	Work Visa Required?	Student's Work Visa #	Country of Origin	Weekly Gross Pay	Record
Peter Smythe	123 Elkwood Drive Apt. 32 Maplewood, NJ 07102 908-555-5555	True	CAN-2468031	Canada	350.00	8
Viktor Zirmovskiy	100 Zurich Street Camden, NJ 10000	True	TBD	Russia	220.00	9
Patricia O'Malley	2267 3rd Street Philadelphia, PA 19104	False		Europe	260.00	10
Chu Lin	9 Robin Hood Lane Southampton, PA 19055	False	ZTE-555211-X789	Asia	300.00	11

Page 1 of 1 — Displaying records 1 - 4 of 4

Records Per Page: 10 records

ontractId	ContractName	TableId	RecordId	CreatedBy	CreatedOn	UpdatedBy	UpdatedOn	Edit	Delete
35713	HR: Summer Internship Program	25	8	Steven Snyder	05/30/2018 04:22PM	Steven Snyder	05/31/2018 08:47AM		
35713	HR: Summer Internship Program	25	9	Steven Snyder	05/30/2018 04:29PM	Steven Snyder	05/31/2018 08:49AM		
35713	HR: Summer Internship Program	25	10	Steven Snyder	05/30/2018 04:31PM	Steven Snyder	05/31/2018 08:47AM		
35713	HR: Summer Internship Program	25	11	Steven Snyder	05/30/2018 04:32PM	Steven Snyder	05/31/2018 08:49AM		
35713	HR: Summer Internship Program	25	12	Steven Snyder	05/31/2018 08:46AM	Steven Snyder	05/31/2018 08:51AM		
35713	HR: Summer Internship Program	25	13	Steven Snyder	05/31/2018 08:53AM	Steven Snyder	05/31/2018 08:53AM		

Page 1 of 1 — Displaying records 1 - 6 of 6

Note: *Table ID and Record ID columns are available to help identify specific sets of data within tables.*

Running Reports

As with any grid displayed in UCM, there is a **Report** button to generate an Excel spreadsheet from your grid data. All user types with access to the Report function will be able to run a report.

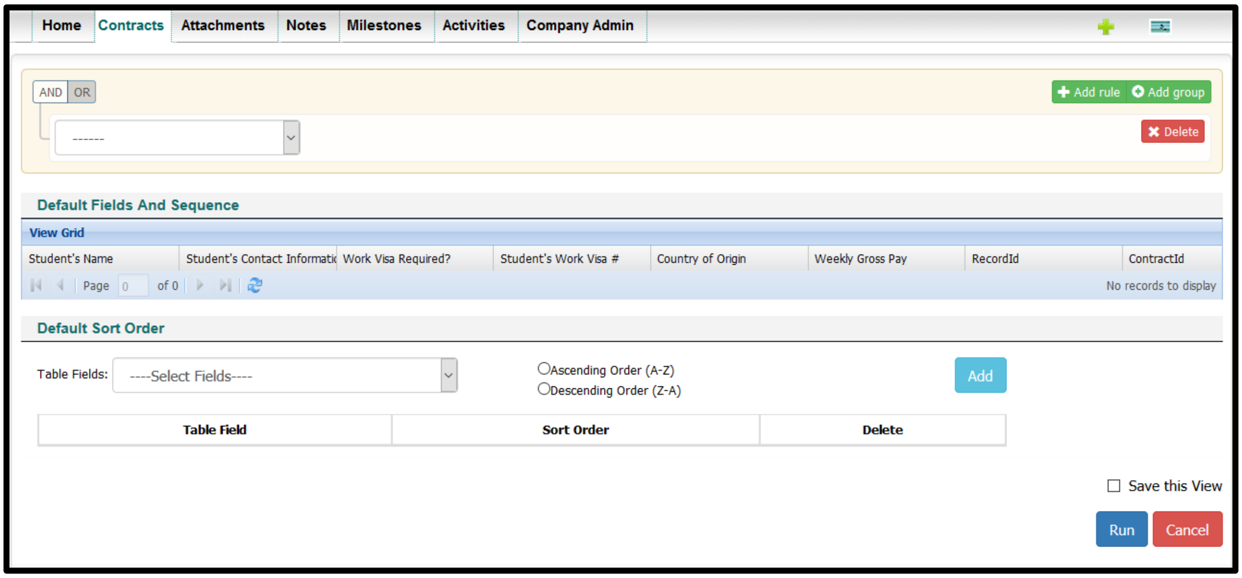
	A	B	C	D	E	F	G	L	O
1	Student's Name	Student's Contact Information	Work Visa Required?	Student's Work Visa #	Country of Origin	Weekly Gross Pay	RecordId	CreatedOn	
2	Peter Smythe	123 Elkwood Drive Apt. 32 Mapl	TRUE	CAN-2468031	Canada	350	8	05/30/2018 04:22PM	
3	Viktor Zirmovskiy	100 Zurich Street Camden, NJ 1C	TRUE	TBD	Russia	220	9	05/30/2018 04:29PM	
4	Patricia O'Malley	2267 3rd Street Philadelphia, PA	FALSE		Europe	260	10	05/30/2018 04:31PM	
5	Chu Lin	9 Robin Hood Lane Southampto	FALSE	ZTE-555211-X789	Asia	300	11	05/30/2018 04:32PM	
6									

Once you export the data into Excel, you then edit and format this data using regular Excel functions.

Using or Adding Table Views

The **Add New View** setup is different from other views such as Contract Views, Attachment Views, etc. The search criteria, columns displayed, and default sort order settings are still there, as is the Save this View checkbox, but the look is brand new. We hope to incorporate this new appearance in those other areas in the future.

Clicking on *Add New View* displays the following screen:



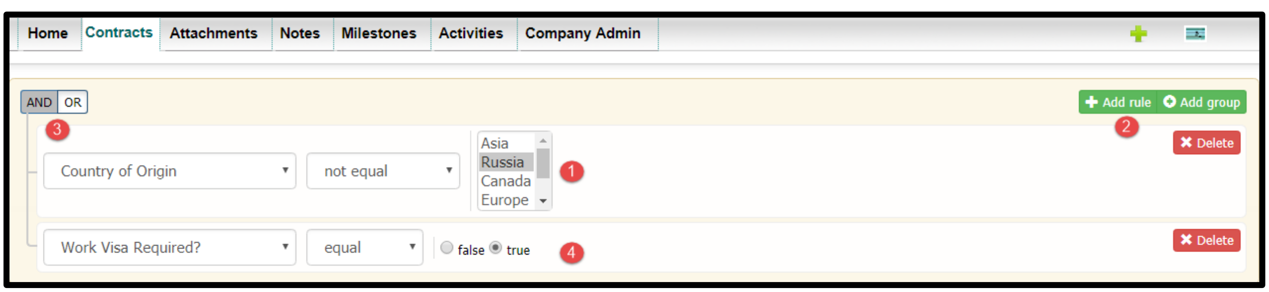
Step 1: Select your search criteria. *This is the only required step; the others are optional.*

Step 2: Click "**Add rule**" to create additional search criteria.

Step 3: Click "**AND**" or "**OR**" to select Search Type.

Step 4: Select your next criteria.

Repeat **Steps 2-4** for each additional search.
Use "*Add group*" to created advanced search criteria.
Use "*Delete*" to remove the criteria row associated with the Delete button.

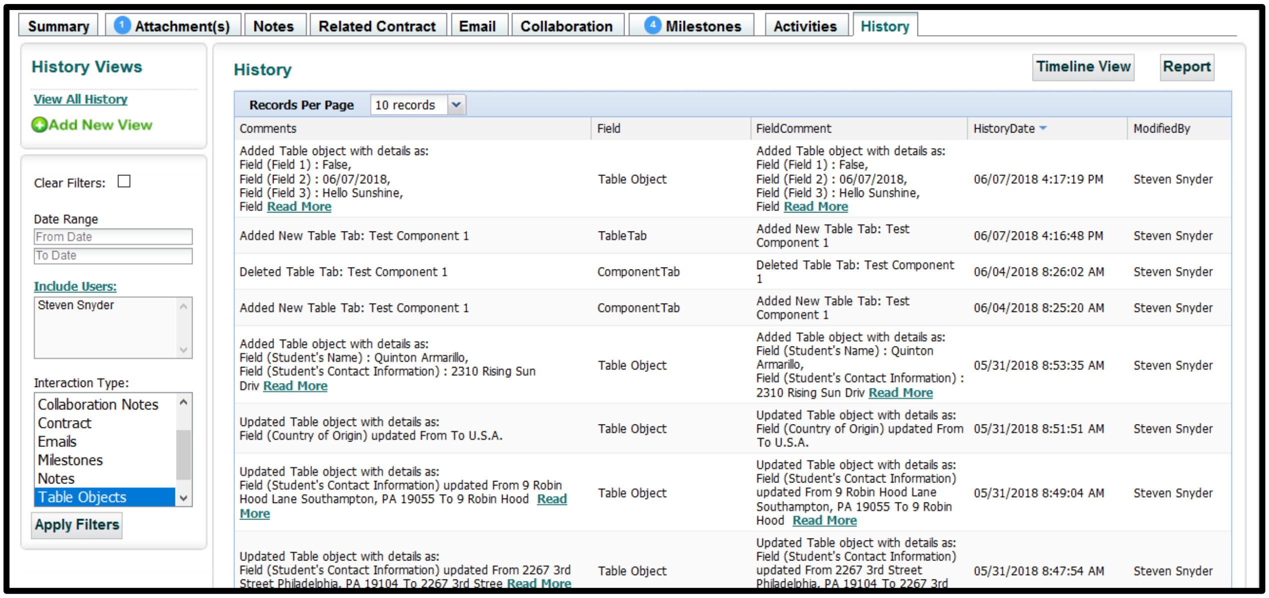


Setup the *Default Fields And Sequence* and *Default Sort Order* if necessary.

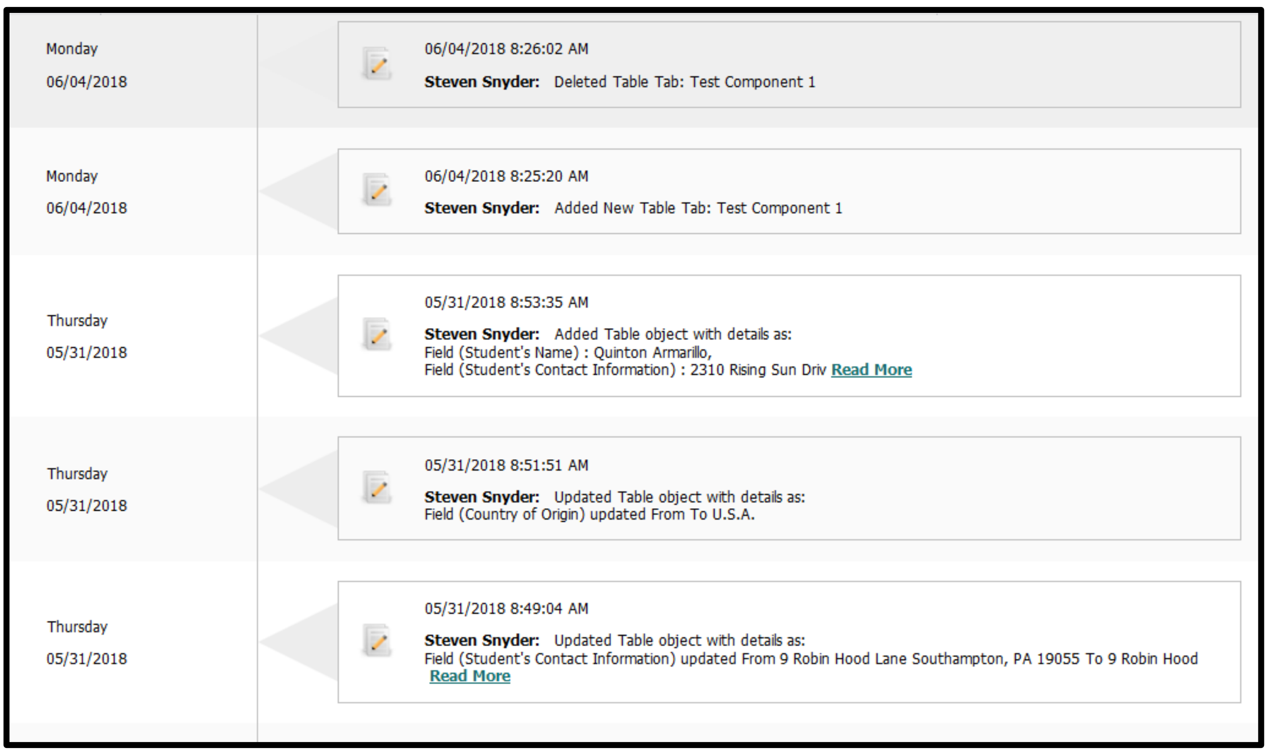
Click the **Run** button – *or* - Check the "*Save this View*" box.
Provide a *View Name* if you Save this View; then click the **Save and Run** button.
You can also click the Edit Pencil under the "*Table Views*" section to modify a view using the same steps as shown above.

Showing Tables in the History Tab

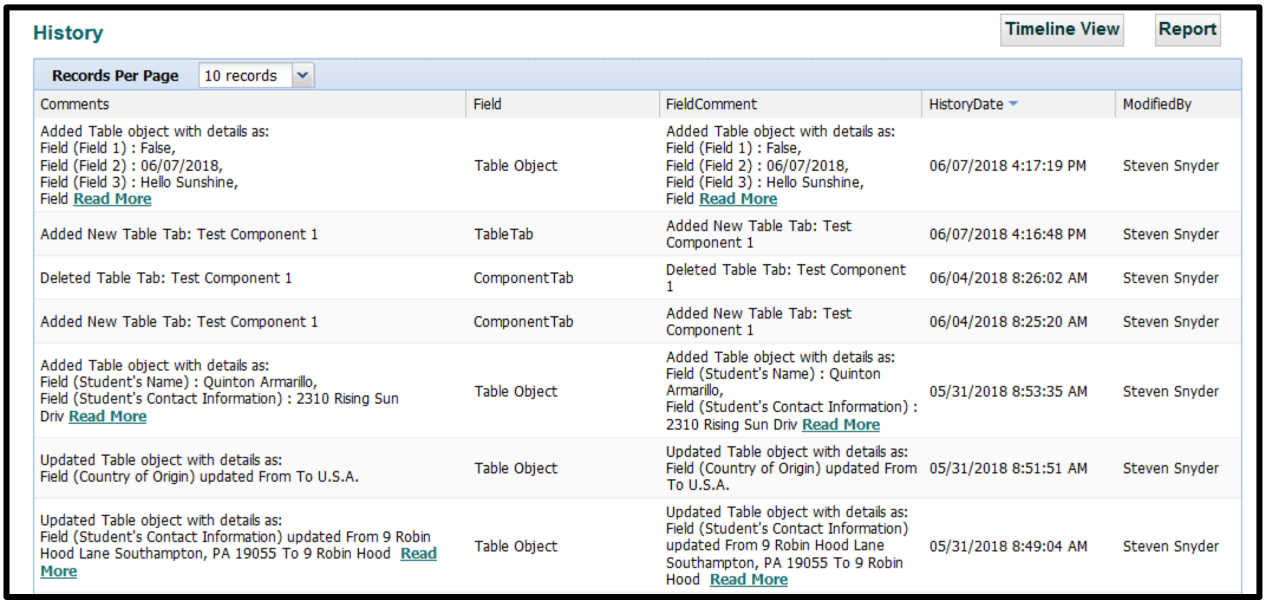
All your tasks done with Table Tabs and Table Fields are recorded in the Contract Container's *History Tab*. These tasks can be filtered with the History Filter settings as well as via *Interaction Type*.



You can change to the **Timeline View**.



You can switch back to **History View**.



History

Timeline View | Report

Records Per Page: 10 records

Comments	Field	FieldComment	HistoryDate	ModifiedBy
Added Table object with details as: Field (Field 1) : False, Field (Field 2) : 06/07/2018, Field (Field 3) : Hello Sunshine, Field Read More	Table Object	Added Table object with details as: Field (Field 1) : False, Field (Field 2) : 06/07/2018, Field (Field 3) : Hello Sunshine, Field Read More	06/07/2018 4:17:19 PM	Steven Snyder
Added New Table Tab: Test Component 1	TableTab	Added New Table Tab: Test Component 1	06/07/2018 4:16:48 PM	Steven Snyder
Deleted Table Tab: Test Component 1	ComponentTab	Deleted Table Tab: Test Component 1	06/04/2018 8:26:02 AM	Steven Snyder
Added New Table Tab: Test Component 1	ComponentTab	Added New Table Tab: Test Component 1	06/04/2018 8:25:20 AM	Steven Snyder
Added Table object with details as: Field (Student's Name) : Quinton Armarillo, Field (Student's Contact Information) : 2310 Rising Sun Driv Read More	Table Object	Added Table object with details as: Field (Student's Name) : Quinton Armarillo, Field (Student's Contact Information) : 2310 Rising Sun Driv Read More	05/31/2018 8:53:35 AM	Steven Snyder
Updated Table object with details as: Field (Country of Origin) updated From To U.S.A.	Table Object	Updated Table object with details as: Field (Country of Origin) updated From To U.S.A.	05/31/2018 8:51:51 AM	Steven Snyder
Updated Table object with details as: Field (Student's Contact Information) updated From 9 Robin Hood Lane Southampton, PA 19055 To 9 Robin Hood Read More	Table Object	Updated Table object with details as: Field (Student's Contact Information) updated From 9 Robin Hood Lane Southampton, PA 19055 To 9 Robin Hood Read More	05/31/2018 8:49:04 AM	Steven Snyder

Appendix I – UCM and Active Directory

LDAP Setup

- Active Directory Server, entry that looks like: https://abcdef.ghi.edu
- Active Directory Port, it's defaulted to ***636 for SSL protocol***
- Domain (looks like ***CN=iContracts LDAP Authentication,OU=Service***
  - ***Accounts,DC=abcdef,DC=ghi,DC=edu***)
- Certificate, applied to production server to allow .NET Framework communication with Client's Active Directory needs to be applied to any server where it will be used
  - Test Account to use for integration (this account will be created by client in AD system and by iContracts in UCM system)

CAS Setup

- CAS domain – this is the link to the Client's CAS Server, it should look like: https://cas-abcdef.ghi.edu/cas//login but could add **?service=return URL** to be used in error message on UCM login page to get the user through CAS login
  - Test accounts to use for integration setup (these accounts will be created by client in CAS system and by iContracts in UCM system)

Here's how it's done

- We configure the iContracts-side with settings provided from our customer. The same Users that are in Active Directory (AD) need to be created in UCM, though passwords are not regarded in UCM -- any dummy one can be put into UCM since it will not be used (AD will perform authentication).
- Users will go to UCM login page and put in their AD credentials. UCM "knows" by company that it has to execute AD authentication, so it connects to Client's AD through TCP-IP protocol using .Net AD connector. We do not need to get the User's profile as we only perform "binding" and once it is successful we let user into the UCM system.

☞ Companies configured for **Active Director** or **Single Sign On** will NOT have access to this Change Password option for Full-Access and Read-Only Users in the Profile/Help area. Administrators can change their passwords, however, to have access to the Bulk Loader application.

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