

UCM Stage Configuration Redesign (Admins Only)

The Workflow Template has been reorganized to make it easier to use **Stage Configuration**.

Please refer to your **UCM Login Page** for [Instructions to clear your browser cache](#) before starting with this enhancement. You must clear your cache to activate this update!

The Old Stage Configuration Layout

Whenever you, as an Admin, needed to setup Assignees for a Stage, you used the drop-down menu on the left side of the Stage Configuration screen. To access this screen, you opened the **Workflow Template Administration** grid, then either clicked on the *Assignee(s) icon*  -- or clicked on a *Workflow Template Name*, then clicked on the  button.



Stage Configuration

Workflow Template Name: Standard WF

Stage: Active

Include in Enterprise Ribbon:

Set Approvals:

Individual User(s): *Hold Ctrl Key To Select Multiple Items*

Owner

Primary

Secondary

Tertiary

Adam Fried

Al B. Seenya

Role Model(s): *Hold Ctrl Key To Select Multiple Items*

Accountants

Executives

Facilities

Gee Whiz this is a TEST Role M

Many Users

RACERS

Field Group(s): *Hold Ctrl Key To Select Multiple Items*

Common Contract Fields

Contractors

Employee Contracts

IT Purchases

Nurse Contracts

Patient Insurance Forms

Stage	Individual Users	Role Models	Field Groups	Notes?	Include in Enterprise Ribbon	Set Approvals
Draft	Owner, Primary, Secondary, Tertiary			No	Yes	No
Budget Review	Peter Jones			No	Yes	No
Department Review	Ian Goodenough			No	Yes	No
Other Party Signatures	Owner			No	No	No
Internal Signatures	Owner			No	Yes	No
Executed	Owner			No	Yes	No
Active	Owner	Executives		No	Yes	No
Terminated	Peter Jones, Owner			No	No	No

For Include in Enterprise Ribbon setting, change ALL Stages to:

The New Stage Configuration Layout

This enhancement allows the Stage Configuration to be much more efficient to setup. Both the *Workflow Template Administration* Grid's Stage Configuration icon  (formerly "Assignees") and the *Workflow Template Name's*  button will access the same Stage Configuration screen as shown below.

 **Stage Configuration** Click on stage to change parameters

Stage	Individual Users	Role Models	Field Groups	Notes	In Enterprise Ribbon	Set Approvals	Skip Stage
Draft	Owner, Primary, Secondary, Tertiary			No	Yes	No	No
Department Review	Peter Jones, Mary Roberts, Jason Bourne, Pat Myers			No	Yes	No	No
Other Party Signatures	Owner			Yes	Yes	No	No
Internal Signatures	Primary, Secondary, Tertiary			No	Yes	No	No
Executed	Peter Jones, Mary Roberts, Jason Bourne, Primary			No	Yes	No	No
Terminated	Owner, Primary, Secondary, Tertiary	Executives		No	Yes	No	No

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

Stage

Instead of a drop-down box, now you simply click on the Stage Name you want to add Assignees (Individual Users, and/or Role Models) and Field Groups. You also have options for the stage such as "Set Approvals" or "Skip Stage". Clicking on the Stage Name displays the *Stage Assignee Configuration*.

Stage Assignee Configuration

Workflow Template Name: Standard WF
 Stage: Internal Signatures

Individual User(s): Hold Ctrl Key To Select Multiple Items

- Primary
- Secondary
- Tertiary
- Alison Dolomanuk
- Benjamin Pierce

Role Model(s): Hold Ctrl Key To Select Multiple Items

- Accountants
- Executives
- RACERS
- TEST RM

Field Group(s): Hold Ctrl Key To Select Multiple Items

- Common Contract Fields
- Employee Contract Fields
- IT Contractor Fields
- Medical Staff Contract Fields
- Nurse Contract Fields
- Patient Insurance Fields

Include in Enterprise Ribbon:
 Set Approvals:
 Skip Stage:

Click **Save** to update any changes to that Stage, or click **Exit** to leave the Stage Configuration screen.

Notes column

Click on “No” to add Stage Notes or “Yes” to edit any existing Stage Notes. There are no changes to the Stage Notes function.

For “in Enterprise Ribbon” setting, change ALL Stages to:

Click “No” or “Yes” to modify this setting for ALL stages.

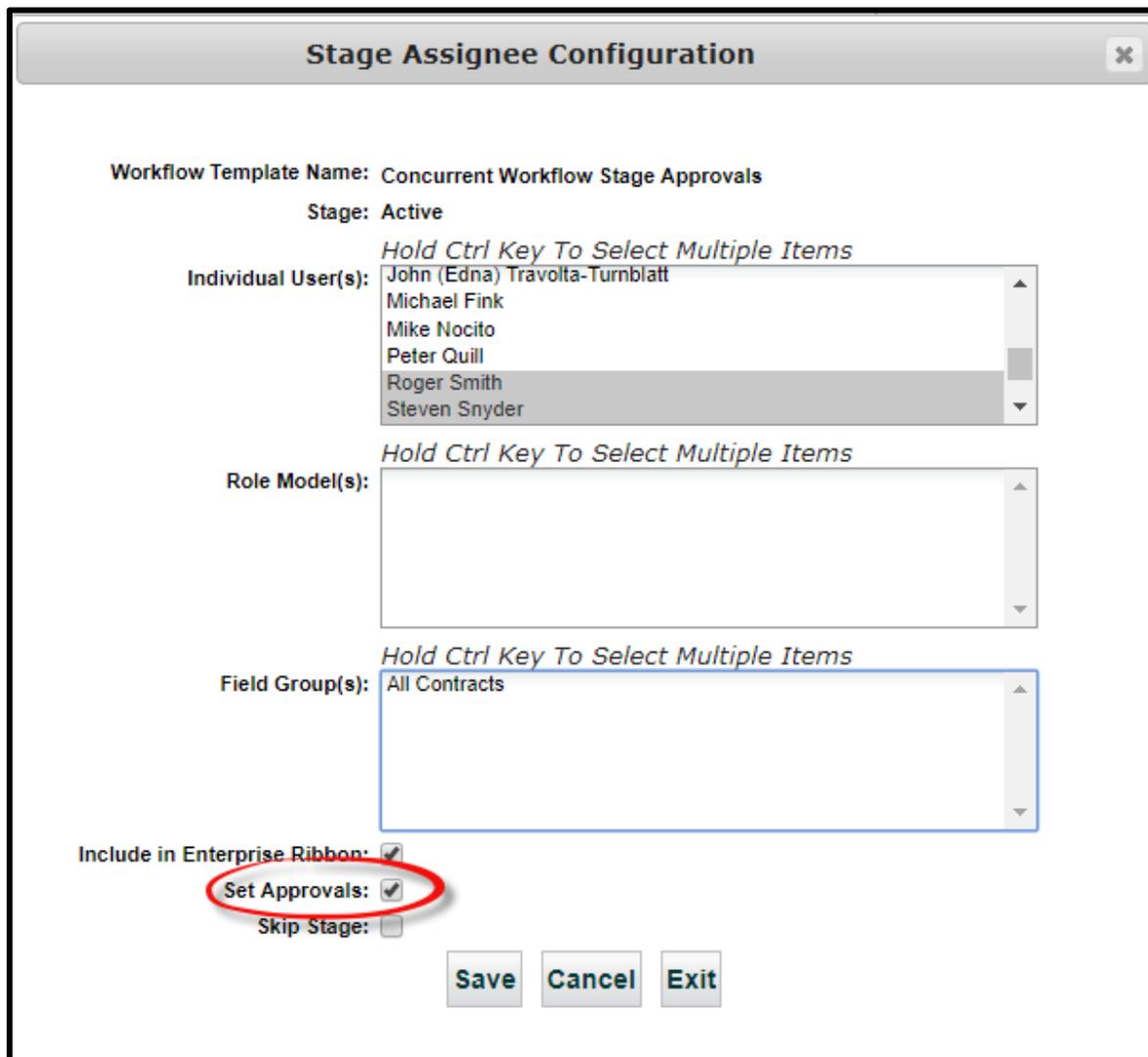
Concurrent Stage Reviews

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

Setting Up Stage Approvals

While you assign Users to Concurrent Stage Reviews, by making them Assignees, you must also activate the feature. In the **Workflow Template Administration**, select **Stage Configuration**. Choose the Stage, then Individual User(s) and/or Role Model(s), and click the checkbox to activate “**Set Approvals**”.

Click **Save** when finished. You can repeat this process for multiple Stages, if necessary.



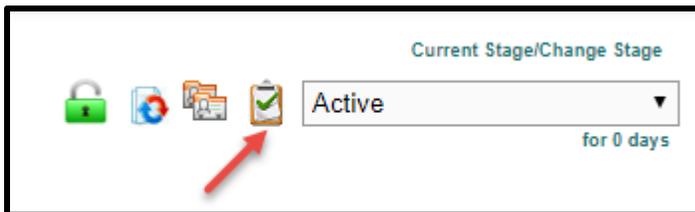
The screenshot shows a dialog box titled "Stage Assignee Configuration" with a close button in the top right corner. The dialog contains the following fields and options:

- Workflow Template Name:** Concurrent Workflow Stage Approvals
- Stage:** Active
- Individual User(s):** A list box containing the following names: John (Edna) Travolta-Turnblatt, Michael Fink, Mike Nocito, Peter Quill, Roger Smith, and Steven Snyder. A blue highlight is visible over the "Roger Smith" entry. Above the list is the text "Hold Ctrl Key To Select Multiple Items".
- Role Model(s):** An empty list box. Above it is the text "Hold Ctrl Key To Select Multiple Items".
- Field Group(s):** A list box containing "All Contracts". Above it is the text "Hold Ctrl Key To Select Multiple Items".
- Include in Enterprise Ribbon:**
- Set Approvals:** (This checkbox is circled in red in the original image.)
- Skip Stage:**

At the bottom of the dialog are three buttons: "Save", "Cancel", and "Exit".

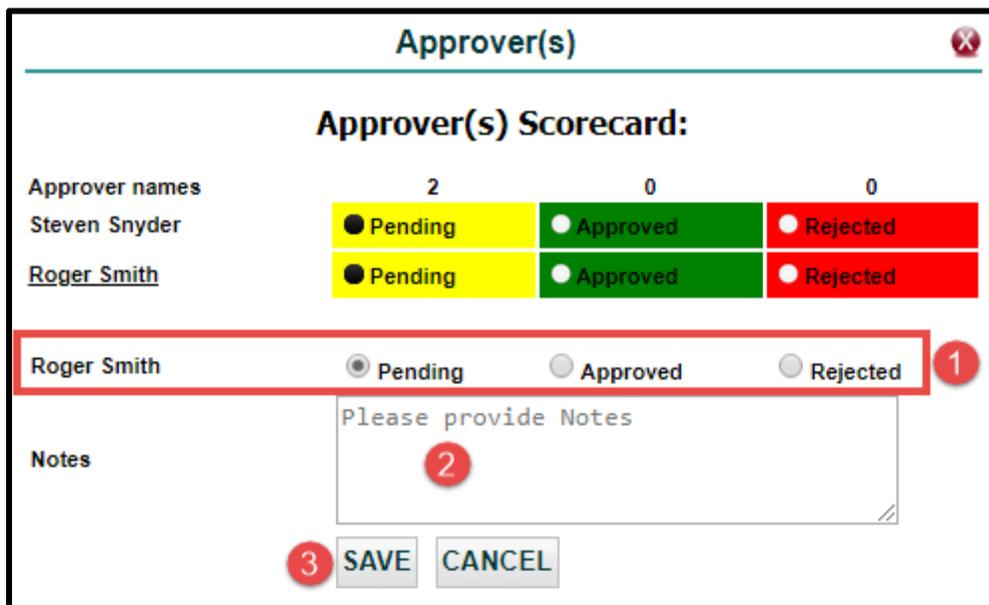
Using Concurrent Stage Approvals

Workflow Stages are advanced from one Stage to the next as you would within any Contract Container. Any Stage that has been setup for “*Set Approvals*” will display a new icon in front of the Current Stage drop-down.



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

The Review Process is as follows:



A screenshot of the 'Approver(s) Scorecard' interface. The title is 'Approver(s)' with a close button. Below it is 'Approver(s) Scorecard:'. There are three columns of status indicators: '2' (Pending), '0' (Approved), and '0' (Rejected). The names 'Steven Snyder' and 'Roger Smith' are listed. Below the names are three columns of status indicators: 'Pending', 'Approved', and 'Rejected'. The 'Roger Smith' row is highlighted with a red box and a red circle with the number '1'. Below the names is a 'Notes' section with a text box containing 'Please provide Notes' and a red circle with the number '2'. At the bottom are 'SAVE' and 'CANCEL' buttons, with a red circle with the number '3' next to the 'SAVE' button.

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

Approvals

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

Approver(s)

Approver(s) Scorecard:

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

Steven Snyder Pending Approved Rejected

Notes
Everything appears in order.

Rejections

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

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

Approver(s)

Approver(s) Scorecard:

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

Roger Smith Pending Approved Rejected

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

Email Notifications

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

iContracts: Workflow Stage Approval/Rejection

 iContracts Admin
11:37 AM

To: steve.snyder.work@gmail.com

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

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

Approver(s) Scorecard:

Approver names	0	2	0	Notes
Steven Snyder	<input type="radio"/> Pending	<input checked="" type="radio"/> Approved	<input type="radio"/> Rejected	Everything appears in order.
Roger Smith	<input type="radio"/> Pending	<input checked="" type="radio"/> Approved	<input type="radio"/> Rejected	The Effective Date has been corrected.

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

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

Automatically Advancing Stages

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

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

Warning Messages

Advancing A Stage Before All Assignees Approve

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

This Workflow's current Stage has not been approved by all Assignee(s). Approval required by all Assignee(s) to move to next Stage.

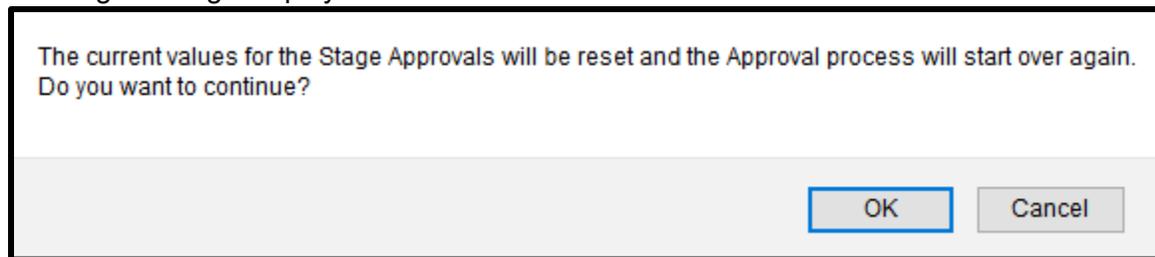
After All Assignees Approve

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



Moving a Stage Backwards After All Assignees Approved

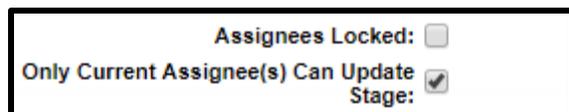
For whatever reason, if an Approved Stage must be retracted and moved backwards, this warning message displays.



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

Non-Assignees Trying to Advance a Stage

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



Non-assignees will see this message:

Stage can only be changed by Assignee for Current Stage in Workflow

History and Note Tabs Updated

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

The Notes tab also displays a record of each transaction.

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