

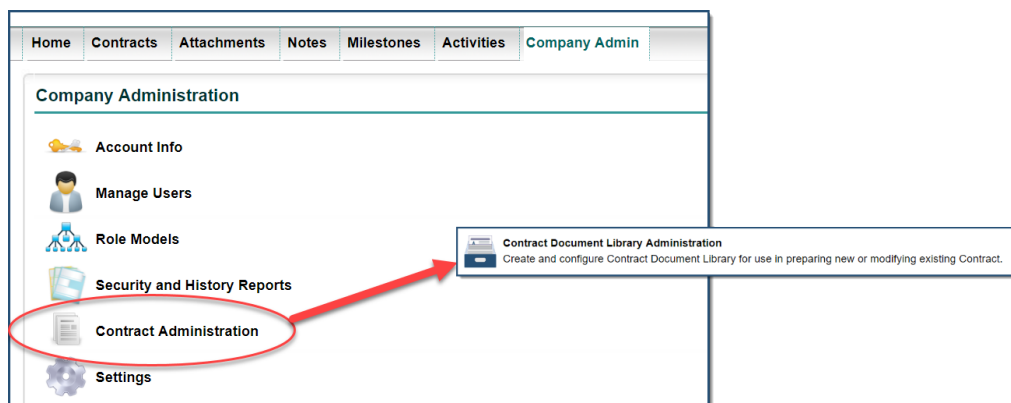
Library Templates: Admin Set-Up

Set-Up:

Setting up a Library Template is done primarily in a word processor, like Word, and then uploaded to UCM. There is some pre-set up that can be done inside of the System, however with a little basic HTML Knowledge, any member of your organization can create a Library Template and submit it to an Administrator for uploading into the System.

Set-Up Location:

- Library Templates are set up by going to:
 - **Company Admin → Contract Administration → Contract Document Library Administration**



Library Template Creation:

On the next four pages, you'll get a detailed list and screenshot of all the options available to you when you create a Library Template inside of UCM.

Library Template Creation:

- **(A) Item Name:** Give your new Library Template a name. The Document name can be set each time the Library Template is used.
- **(B) Document Category:** Since Library items do not *need* to be Templates, you can set a default Document Category for your Document.
- **(C) Description:** Optional description box that both Admins and End-Users can see
- **(D) Active:** Having this box enabled will make it appear for all you users with access to the Library in your system. You can pre-load Library Templates into the system by leaving this box unchecked.
- **(E) File:** Select the *Choose File* box to the right to browse your PC and select the pre-made Library Template File. *Instructions on how to pre-make the file is on the following pages.*
 - **(EE) FileName:** If you are editing a pre-existing Template, the current file's name will appear here.
- **(F) Use as a Library Template:** If you leave this box unchecked, you won't see any of the options below. The Library in UCM can also store documents that do not use Template features, so not all will use this feature. To create a Template though, check this box.
- **(G) All Users able to Edit Preview:** Having this checked allows your users to edit the Library Template file itself when making the document. Has no relationship to the data being entered into the Library Template from, or alongside, a Contract Container.
- **(H) Default Save Data:** Having this box checked will have it so, by default, all of the fields that are a filled in with the Library Template will also appear in the Contract Container.
- **(I) Associated Field Groups:** You'll want to select any Field Groups that are NOT a part of your intended Contract Type that have fields being included in your Library Template. Without selecting them, you'll have free-floating fields.
- **(J) Configure Fields:** Since Library Templates are created in Word and then uploaded to the system, there are two options to help you set up your Library Template Document and end-user experience.
 - **(K) Manage Fields:** Here, you can set the order that your Users will fill in the template information. This is also where you'll decide which fields will be a part of your Template. *More details on Page 4*
 - **(L) Insert Fields:** A list of the Fields you selected in **Manage Fields** in the appropriate Library Template brackets for easier copy and pasting into your Document File. *More details on Page 4*
- **(M) Save:** As soon as you save, if **Active** is enabled, then your Library Template will be live for all Users who have permission.

Template Creation (cont.):

New Library Item

A Item Name:

B Document Category:

C Description:

D Active

E File: No file chosen

EE FileName:

F Use as a Library Template?

G All Users able to Edit Preview?

H Default Save Data?

I Associated Field Groups: CLICK HERE"/>
Contracted Party Information
General Information
Monetary Information
Purchasing Information
Reseller Information

J Configure Fields: [Manage Fields](#) [Insert Fields](#)

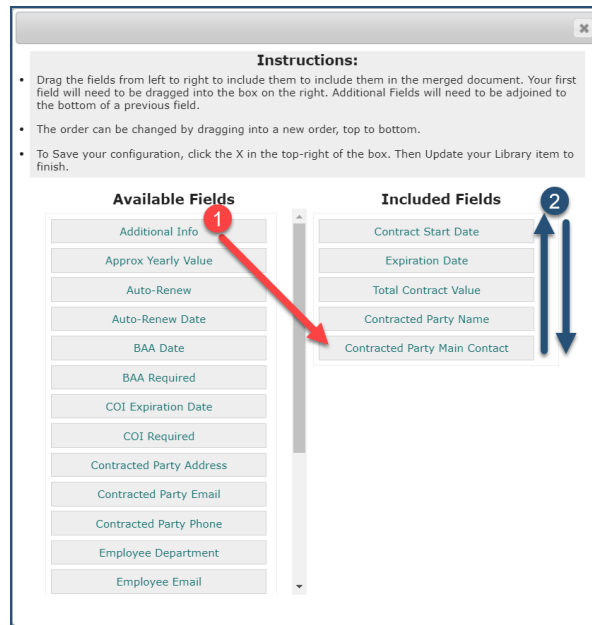
K

L

M

Manage Fields:

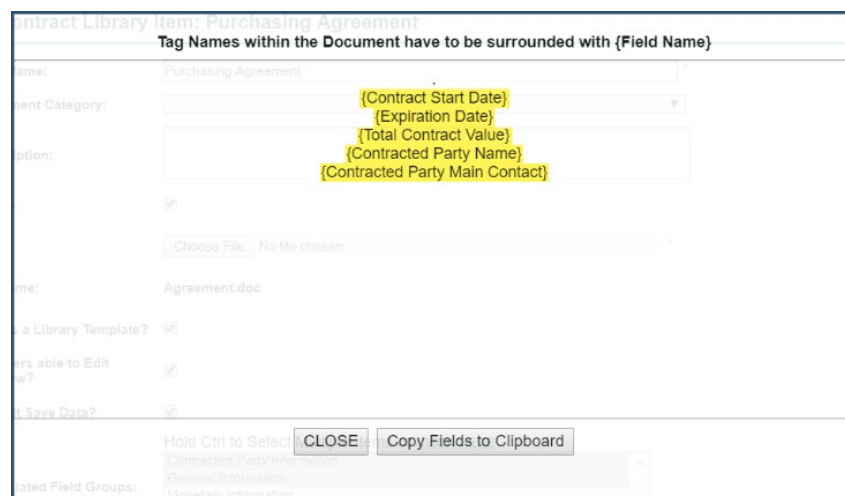
When you select **Manage Fields**, you get a pop out that lists all of the custom fields in your system. Since your Library Template is made in a word processor, all you are doing here is selecting the fields you want to be included in your Template by dragging from the left to the right side (1). You can then drag those fields that you've selected up and down (2), to put them in the order you want your users to fill them out when using the Library Template.



Insert Fields:

After you've selected your Fields in *Manage Fields*, you can use **Insert Fields** to get a list of all the Fields you want included in your Library Template, already formatted in the correct brackets. You don't have to use this, and can simply type the name of your field into your Library Template document with the `{ }` brackets.

On the next page you can see what these bracketed fields look like in your document.



Document Creation:

Now that you have your fields in their brackets, you can simply copy and paste them into your document. Any formatting you want the inserted field to have, **Bold**, *Italics*, Underline, **Color**, etc. can be applied by simply highlighting the entire field, brackets included, and give it the format you want.

SAMPLE AGREEMENT

This Agreement is entered into as of {Contract Start Date}, between iContracts (“the Committee”) and {Contracted Party Name} (“the Contractor”).

1. Independent Contractor. Subject to the terms and conditions of this Agreement, the Committee hereby engages the Contractor as an independent contractor on {Contract Start Date} to perform the services set forth herein, until {Expiration Date}, and the Contractor hereby accepts such engagement.



SAMPLE AGREEMENT

This Agreement is entered into as of 7/1/2019, between iContracts (“the Committee”) and ABC Vendors (“the Contractor”).

1. Independent Contractor. Subject to the terms and conditions of this Agreement, the Committee hereby engages the Contractor as an independent contractor on 7/1/2019 to perform the services set forth herein, until 7/1/2020, and the Contractor hereby accepts such engagement.

Library Templates can even be applied to headers and footers.

By: _____

NAME: Bryan Gilliss

DATE: {Contract Start Date}

By: _____

NAME: {Contracted Party Main Contact}

COMPANY: {Contracted Party Name}

DATE: {Contract Start Date}

{Contracted Party Name} SAMPLE AGREEMENT 123.45.67890