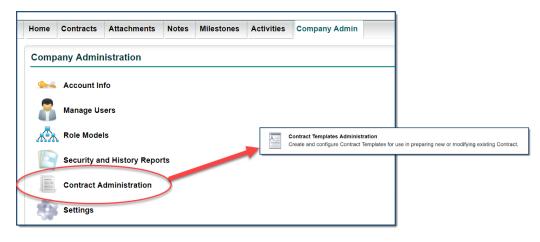# Templates:
Admin Set-Up

Set-Up:

Setting up a Template is done entirely from within UCM using a word processor similar to Word. However, if you already have a form created, or find Word easier to work in, you can create a general design that you can copy and paste into the Template Editor. Not all formatting will persist, and some additional editing may be required.

Admin Location:

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

Template Creation:

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

Template Creation:

- **(A) Template Name:** Give your Template a name. Each time you use the Template, you'll still be able to give the individual document its own name.
- **(B) Contract Type:** You can select any of your existing Contract Types, however, your Users can still adjust the final Contract Container type if needed.
- **(C) Description:** Optional description box that both Admins and End-Users can see
- **(D) All Users able to Edit Preview:** Having this checked allows your users to edit the Template file itself when making the document. Has no relationship to the data being entered into the Template from, or alongside, a Contract Container.
- **(E) Default Save Data:** Having this box checked will have it so, by default, all of the fields that are a filled in with the Template will also appear in the Contract Container.
- **(F) Associated Field Group:** 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 Template. Without selecting them, you'll have free-floating fields.
- **(G) Insert Field:** This dropdown allows you to select the field you want to insert into your Template below. Make sure you already selected the area with your cursor where your field will end up. By default, fields are entered into the template **bolded**, and will appear in brackets. You can highlight the fields and format them to a limited degree with the options available in the editor.
- **(H) Template Content:** Here is where you will create your Template Document (*or Copy and Paste your Word Document if going that route*). There are basic edit features that will allow you to customize your Template, but not as much as a true word processor. Before using *(G) Insert Field*, make sure your cursor is in the place you want the field to be inserted in the document.
- **(I) Create Template:** Final step and your Template will be live for your Users to use.

Template Creation (cont.):

New Contract Template

A — Template Name: [   ]

B — Contract Type: [Purchasing   ▼]

C — Description: [   ]

D — All Users able to Edit Preview? ☑

E — Default Save Data? ☑

Hold Ctrl to Select Multiple Items or **CLICK HERE**

Contracted Party Information
General Information
Monetary Information
Purchasing Information
Requester Information

F — Associated Field Groups:

G — Insert Field: [Select Any Field to Insert in document   ▼]

Template Content

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Employee Name:	Department:	Total Contract Value:
[Employee Name]("Employee Name")	[Employee Department]("Employee Department")	[Total Contract Value]("Total Contract Value")

Requested Reason:

[Requested Reason]("Requested Reason")

H

Contract Start Date:	Expiration Date:	BAA Required:	COI Required:
[Contract Start Date]("Contract Start Date")	[Expiration Date]("Expiration Date")	[BAA Required] ("BAA Required")	[COI Required] ("COI Required")

Renewal – Termination Information:

[Renewal-Termination Information]("Renewal-Termination Information")

I — **Create Template** **Cancel**