



UCM Full-Access Manual

A Guide to Universal Contract Manager (UCM)

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iContracts Mission Statement

***iContracts* is a leading provider of contract, compliance, and revenue management solutions for a variety of industries including Life Sciences, Healthcare, and Education.**

***iContracts'* comprehensive suite of fully integrated cloud-based solutions helps companies improve collaboration, expand visibility, reduce costs, stop revenue leakage, and optimize performance.**

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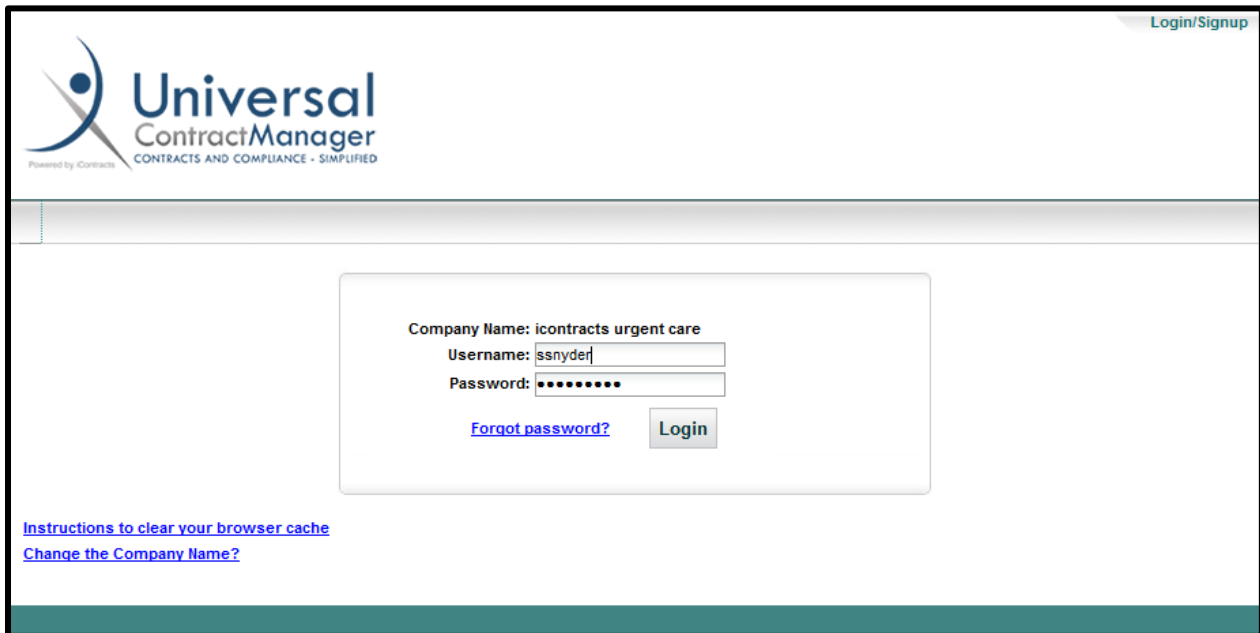
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Logging Into iContracts UCM

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

<https://ucm.iContracts.com>

Bookmark this URL! Your system administrator sets up your account in UCM. This generates an email, with a hyperlink to create your initial password. Click on the link to setup your new password. After setting your password, any new users are then redirected to the UCM Login Screen where they enter their newly-created password to sign into the system. Future logins are done from this page (see the URL above). Did we mention to bookmark this URL?

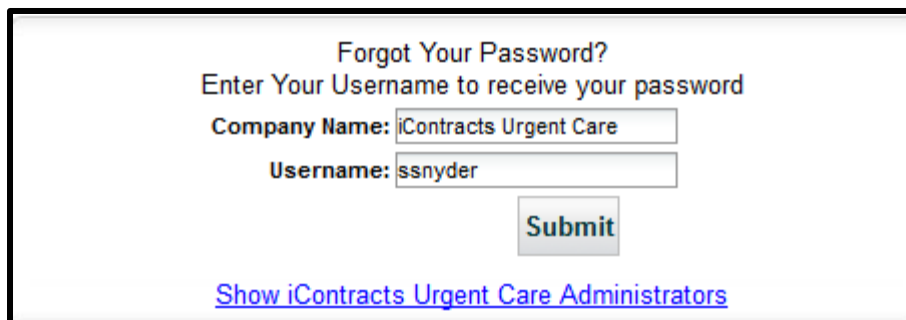
The image shows the login screen for Universal ContractManager. At the top left is the logo with the text "Universal ContractManager" and "CONTRACTS AND COMPLIANCE - SIMPLIFIED". At the top right is a "Login/Signup" link. In the center is a login form with fields for "Company Name: icontracts urgent care", "Username: ssnyder", and "Password: *****". Below the password field are links for "Forgot password?" and a "Login" button. At the bottom left are links for "Instructions to clear your browser cache" and "Change the Company Name?".

Universal ContractManager
CONTRACTS AND COMPLIANCE - SIMPLIFIED

Company Name: icontracts urgent care
Username: ssnyder
Password: *****
[Forgot password?](#)

[Instructions to clear your browser cache](#)
[Change the Company Name?](#)

Forgot Your Password?

The image shows a "Forgot Your Password?" form. It has a title "Forgot Your Password?" and a subtitle "Enter Your Username to receive your password". There are two input fields: "Company Name: iContracts Urgent Care" and "Username: ssnyder". Below these is a "Submit" button. At the bottom is a link "Show iContracts Urgent Care Administrators".

Forgot Your Password?
Enter Your Username to receive your password
Company Name: iContracts Urgent Care
Username: ssnyder

[Show iContracts Urgent Care Administrators](#)

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

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

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

How to Display Your UCM Administrators – An Optional Feature

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

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

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

OK

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

Updating your User Profile

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

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

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

Email Signature Setting

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

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

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

The image shows two screenshots of the 'My Profile' page in the UCM interface. The top screenshot displays the 'Support Center' section with links for 'Download Full-Access Manual [09/2017]', 'Training Video Links', 'Show System Admin Directory', and 'Edit In Cloud Plugin'. Below this is the 'Account Information' section with fields for 'Username: rbalboa', 'User Type: Full-Access User', and 'Default Time Zone: (GMT-05:00) Eastern Time (US & Canada)', along with 'Save' and 'Cancel' buttons. The bottom screenshot shows the 'Email Signature Setting' section, which is highlighted with a red box. It contains a large text area for 'Email Signature:' and 'Save'/'Cancel' buttons. Below this is the 'Personal Information' section with fields for 'First Name: Rocky', 'Last Name: Balboa', and 'Title:'.

Signature is saved Successfully.

Shared Views Setting

Also, in this area, you can select to Ignore Shared Views from other Users. This can be helpful if your organization has a large number of Users. If you select, a list of Users appears.

To select multiple Users, hold down the CTRL key.

The screenshot displays the UCM settings interface. The 'Shared Views' section is highlighted with a red box, showing a checkbox for 'Ignore Shared Views' and a list of users: Alfonso Rodriguez, Another Test-User, Betty Alpha, and Bruce Beta. Below this is a 'Save' button. The 'AutoCreate Activity settings' section has a checkbox for 'AutoCreate Activities' and 'Save'/'Cancel' buttons. The 'AutoCreate Milestone settings' section has a checkbox for 'AutoCreate Milestone' and 'Save'/'Cancel' buttons. The 'Last Container Accessed Size Setting' section is highlighted with a red box, showing a dropdown menu for 'Last Accessed Container Size' with options: Select, 5, 10, 15, 20, 25, and 30. Below this is a 'Save' button. The 'Change Password' section is highlighted with a blue box, showing 'Password:' and 'Confirm Password:' input fields and 'Save'/'Cancel' buttons.

Last Container Accessed Size Setting

Once you Select your Container Size, click the Save button. Your user default is now locked in, regardless of whatever the company default has for a value. You can change your user setting at any time, your selection will always take precedent over the company default selection.

Changing your Password

At the bottom of this screen is an area where you may change your current password. This is the *only* area in UCM where a non-Admin user can change their own password. Otherwise, your UCM Administrator can send you a special email with a Password Reset link.

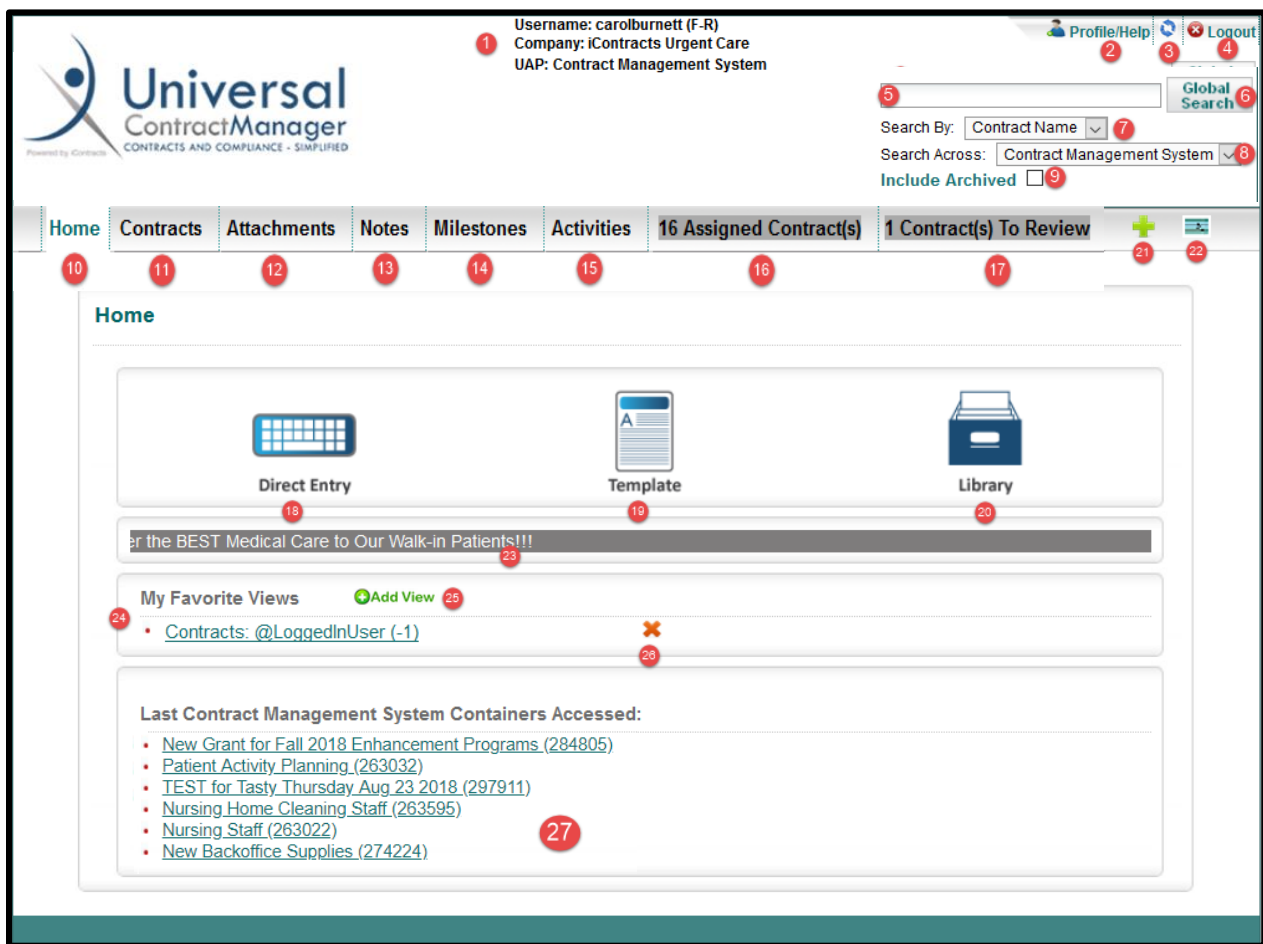
Each company can set their Password Rules but generally:

- Passwords must be at least six characters in length,
- Contain at least one Uppercase letter,
- Contain at least one number, and
- Must not be identical to the previous password (*but can be identical to any other previous passwords*)

✎ The Save button beneath this area pertains only to *Change Password*. All other areas on this screen have their own Save buttons.

🔒 Companies configured for **Active Directory** or **Single Sign On** will NOT have access to this Change Password option in My Profile.

The Enterprise Ribbon: Home Screen



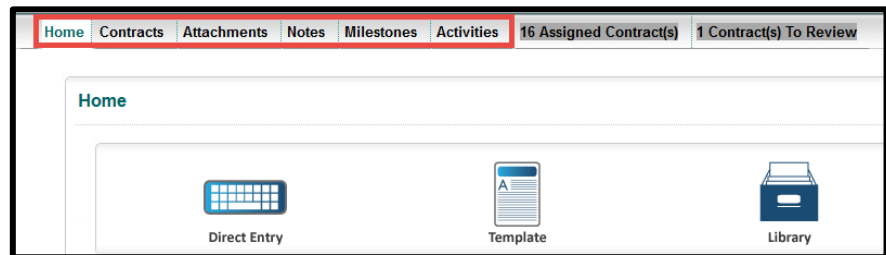
- | | |
|--|---------------------------------------|
| 1. Login Information (Username/Co/Object) | 15. Activities Tab Button |
| 2. Profile/Help | 16. Assigned Contract(s) Tab Button |
| 3. Refresh User Permissions (the "dolphins") | 17. Contract(s) To Review Tab Button |
| 4. Logout Icon | 18. Direct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

Navigating Inside of UCM

Navigating and using iContracts UCM is extremely straightforward, logical, and simple.

Across the top of each page is the **Enterprise Navigation Ribbon**.

By clicking on any tab on the Enterprise Ribbon, you can navigate through different areas inside the system, based on your access rights set by UCM Administrators.



For example, by clicking on the **Contracts tab**, you will navigate to the area you can see your full listing of Contracts. This is also, where you will create your own on-screen views of contract data. You can create as many custom ad hoc and saved reports as needed.

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

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

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

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

Adding Favorite Views

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



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

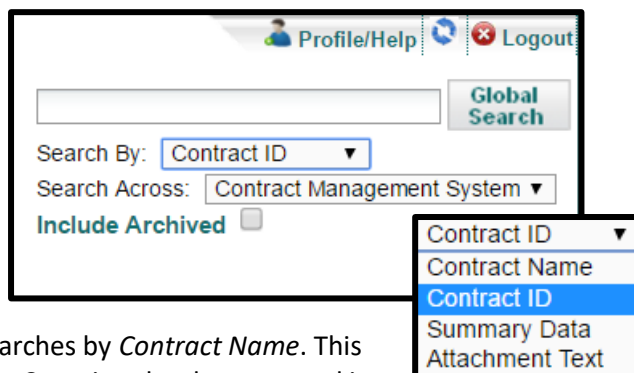
Note: Before you can Add a Favorite View, you must first create a Contract View (or Attachments, Activities, or Milestones View) beforehand. These steps are covered in later sections of this manual.

Finding a Contract with the Global Search

UCM offers robust and easy-to-use searching capabilities through the **Global Search** function.

Using the Global Search, you can find Containers in the system by:

- Contract Name
- Contract ID
- Summary Data
- Attachment Text



The Global Search will work for partial or full word searches by *Contract Name*. This field will allow you to search by whatever the Contract Container has been named in your system.

Contract ID will direct you to the container without the need to pick the correct Contract from a list of matches. The Contract ID is unique to each contract.

Summary Data allows you to search on any field data that is tracked in your system. This could be a date, a User's name, document name, or anything else that shows up on the Summary Data page within the Container.

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

Search Across

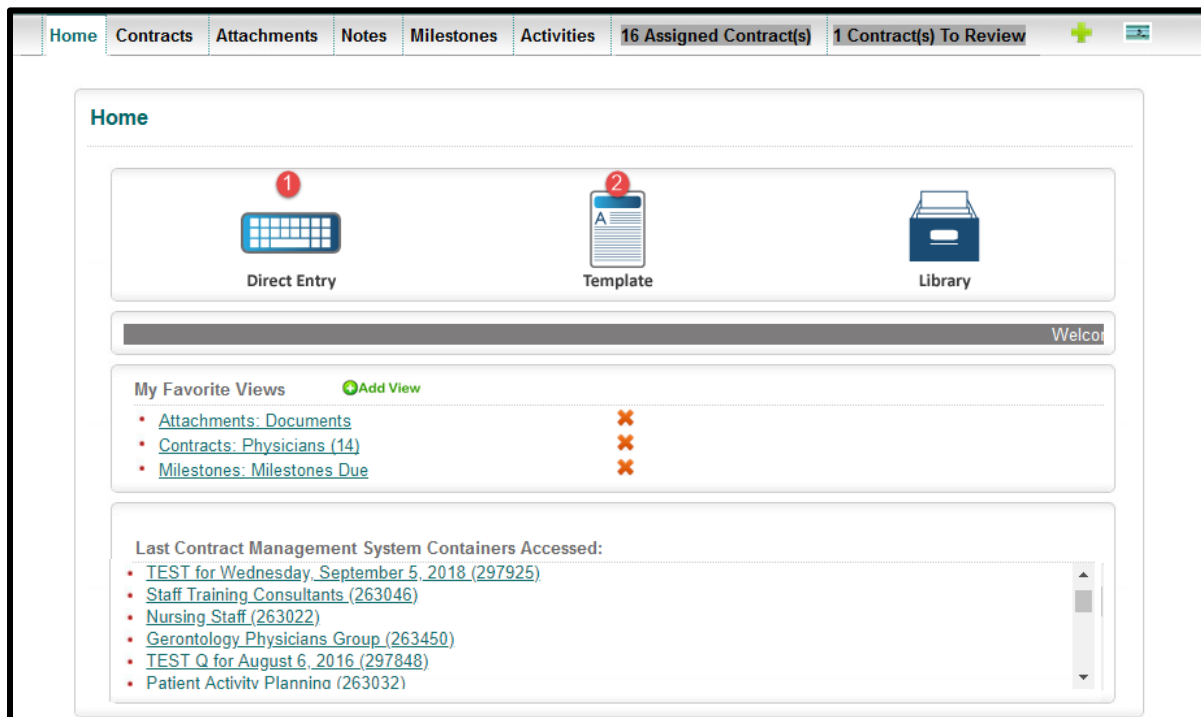
Search Across allows organizations with multiple objects to search through those different modules. If this option does not appear, you may not have another module at your organization, or you may not have access to the other module(s).

Include Archived

If the Container you are looking for is in the Archive, you will need to select *Include Archived* in order for it to show up in the search results.

Archived Contracts are not listed in the regular search results, nor do they show up in Views (unless this option is selected there as well), nor in the regular Contracts grid.

The Home Tab: Entering Contracts into UCM



There are two methods for creating new contracts within UCM.

1. Direct Entry
2. Templates

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

Direct Entry

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

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

The 'Upload New Contract' form is divided into three main sections. The first section, outlined in red and labeled 'Required section', contains fields for Contract Name, Contract Type, Assign Workflow Template, Initial Workflow Stage, Contract Description, Owner, Responsible Parties, and Folder Name. The second section, outlined in blue and labeled 'Optional', contains fields for Document Title, Document Category, Document State, File, Primary Document?, and Document Description. The third section, outlined in green and also labeled 'Optional', contains a 'Related Contract' section with dropdowns for 'Related To Is Archived?', 'What Contract Type?', and 'Which Contract?'. The form ends with 'Continue...' and 'Cancel' buttons.

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

Using a Template



Use **Template** to create a contract using predefined “boilerplate” documents loaded ahead of time, which are created by UCM System Administrators. When predefined Templates are used, upload accuracy is nearly flawless.

Click on the Template button, select a Template by clicking on the “FillAndDownload” link, and use the form construction tool to complete your document. This can be saved as either a Word or PDF document. This column can be positioned anywhere in the grid.

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

Templates							Report
Records Per Page:	10 records	Contracts Type:	--Select All--				Clear
FillAndDownload	Template Name	Contract Type	Description	Created On	Updated On	Created By	
Click to fill Fields	BAA	Physician Agreements	NONE	03/12/2015	06/12/2015	Matt	
Click to fill Fields	Contract Request Form	Contract Request	Contract request worksheet	03/12/2015	11/13/2015	Matt	
Click to fill Fields	Our Standard Contract	Clinical	NONE	03/12/2015	03/12/2015	Prac	
Click to fill Fields	Contract Review Form	Purchasing	NONE	05/12/2015	09/08/2015	Matt	
Click to fill Fields	Physician Contract Request	Attachment Library	NONE	11/30/2015	11/30/2015	Matt	
Click to fill Fields	Vendor Evaluation	Service	NONE	12/14/2015	12/14/2015	Matt	

Contract : Contract Request Form

Template Name: Contract Request Form

Contract Type: Contract Request

Description: Contract request worksheet

☒ Create new Contract Container: 1

☐ Add to existing Contract Container: 2

☐ Do not associate with any Contract Container: 3

Contract Name:

Contract Type:

Assign Workflow Template: ☐

Initial Workflow Stage: Active

Contract Description:

Owner: Matthew Robinson

Responsible Parties:

Folder Name:

Option 1: Create new Contract Container

Selecting this method brings up the standard fields to fill out a new Contract Container (like Direct Entry) before creating the boilerplate document, as well as entering some of the Contract Container fields.

Option 2: Add to existing Contract Container

Selecting this method attaches the template document to a pre-existing Contract Container in the system. Users are prompted for which *Contract Name* should be associated with this and will be asked if the template is the Primary Document so that you can define if it is the main document, such as a final version, or as a supporting document, such as a BAA or Exhibit Document where a main contract is already in place, as well as entering some of the Contract Container fields.

☐ Create new Contract Container:

☒ Add to existing Contract Container:

☐ Do not associate with any Contract Container

Contract Name:

Document Title:

Document Category:

Document State:

Primary Document?: ☒

Document Description:

Document Folder:

To choose an existing Contract that your new Contract is Related To, please choose

Option 3: Do not associate with any Contract Container

Selecting this option will merely give the user the option of filling out values for fields and then downloading an editable .doc for further alteration, or a more “locked down” PDF to the desktop as a local file.

☐ Create new Contract Container:

☐ Add to existing Contract Container:

☒ Do not associate with any Contract Container

Purpose of Contract:

Entering Defined Contract Fields

Information entered against the fields listed here will go directly into the Contract Template anywhere they had been previously set up and defined by the UCM System Administrator. Each field that has data entered will be filled out with that information anywhere it was defined at the setup. *Any of the fields that have been checked off will automatically be entered on the Contract Summary with the information entered here when using either of the first two options at the top of the page.* The **Contract Preview** area (Template Content) is a live editing area and can be altered on a document-by-document basis without the concern of overwriting the original template. In order to change the Template, an Administrator must go back to the Contract Templates Administration and make changes there for anything permanent.

1. After completing the Contract Container and Attachment information when using Options 1 or 2, click on the **Fill Values** button to enter the variable data fields that populate the document. Option 3 will not require filling out any information for the Contract Container. The *Check / Uncheck All Fields* checkbox may not be selected by default; select if you want these fields also added to the Contract Container's Summary tab in addition to the Template.
2. Click on either the (Open in) **Word** or (Open in Acrobat) **PDF icon**, depending on how you would like to generate your document and place it in the **Attachments** section of the newly created Contract Container.
3. *Available only with Option 1:* After generating the document first, using either the **Word** or **PDF** buttons, click on the third icon to navigate you to the **Summary Tab** of the new Contract and generate the default fields for the Contract Container.

Note: You won't even see this icon if using the 2nd or 3rd Options to create contracts from Templates.

The screenshot displays the 'Contract : Contract Request Form' interface. The top section, 'Contract Container', includes fields for Template Name, Contract Type, Description, and various workflow stages. The 'Fill values' section, marked with a red circle 1, contains a table for entering contract details. The 'Template Content' section, marked with a red circle 2, shows the 'Contract Request Form' template with a red circle 3 highlighting the 'Fill values' button. The bottom section, 'Summary Tab', provides a detailed overview of the contract information.

Enter Contract values	
Purpose of Contract	Purchase of new materials
Responsible Party	Carl Leinbach
Vendor Name	Healthy-RLU
Item or Product	Granola
Annual Cost	15000
Total Cost	45000
New Contract	<input checked="" type="checkbox"/>
Amendment	<input type="checkbox"/>
Termination	<input type="checkbox"/>
Renewal	<input type="checkbox"/>
Effective Date	3/15/2016
Contract Term	3 Years
Termination Notice in Days	60
Other Information	
Reviewed By	Legal
Legal Approval	<input checked="" type="checkbox"/>
Attorney	Vincent Gambino
Approver	Tom Williams

Template Content

Contract Request Form

The company appreciates your assistance in providing the following detailed information for purposes of approving a contract with a vendor. If you have questions, please call 855-432-0921.

All fields in the Contract Request Form **MUST** be filled out, or marked "N/A" if not applicable.

I. SCOPE AND PURPOSE OF PROPOSED CONTRACT:

1. Describe contract, background, and scope of services and/or obligations: Purchase of new materials
2. Responsible party: Carl Leinbach
3. Legal name of vendor: Healthy-RLU
4. Describe in detail products to be purchased: Granola
5. What is the cost of the product or service yearly? 15000
6. What is the cost of the contract over its life span? 45000

II. TYPE OF DOCUMENT REQUESTED: Please check all that apply:

New Contract: ☒ True

Amendment to Existing Contract: ☐ False

Termination: ☐ False

Renewal: ☐ False

III. CONTRACT DATES:

A. Effective date of contract: 3/15/2016

B. Duration/term of contract if other than for an indefinite period: 3 Years

C. Days required for termination notice: 60

D. OTHER IMPORTANT CONSIDERATIONS, IF ANY, PERTAINING TO THE PROPOSED CONTRACT: Other Information

IV. REVIEW AND APPROVAL

Reviewed By: Legal

Requires Legal Approval: ☒ True

Legal Review Performed by: Vincent Gambino

Contract Approved by: Tom Williams

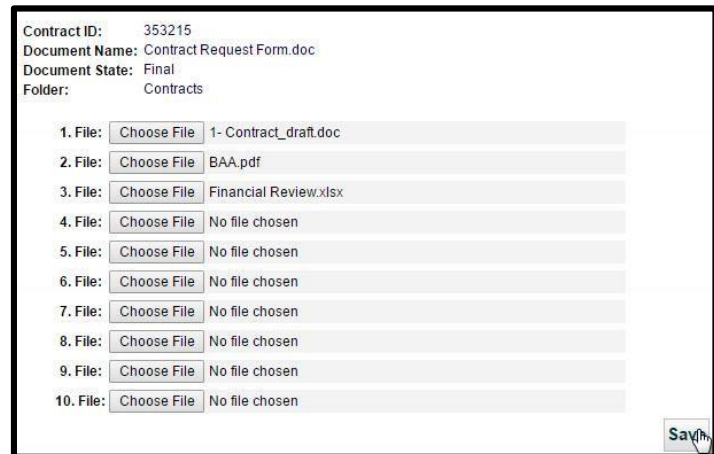
Adding Additional Documents

If you select Option 1, and after creating the document and clicking the button adjacent to create a new Container in the system, you will be directed to a page to add up to 10 additional documents and their category to the container.

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


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

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



Contract ID: 353215
Document Name: Contract Request Form.doc
Document State: Final
Folder: Contracts

1. File:	<input type="button" value="Choose File"/>	1-Contract_draft.doc
2. File:	<input type="button" value="Choose File"/>	BAA.pdf
3. File:	<input type="button" value="Choose File"/>	Financial Review.xlsx
4. File:	<input type="button" value="Choose File"/>	No file chosen
5. File:	<input type="button" value="Choose File"/>	No file chosen
6. File:	<input type="button" value="Choose File"/>	No file chosen
7. File:	<input type="button" value="Choose File"/>	No file chosen
8. File:	<input type="button" value="Choose File"/>	No file chosen
9. File:	<input type="button" value="Choose File"/>	No file chosen
10. File:	<input type="button" value="Choose File"/>	No file chosen



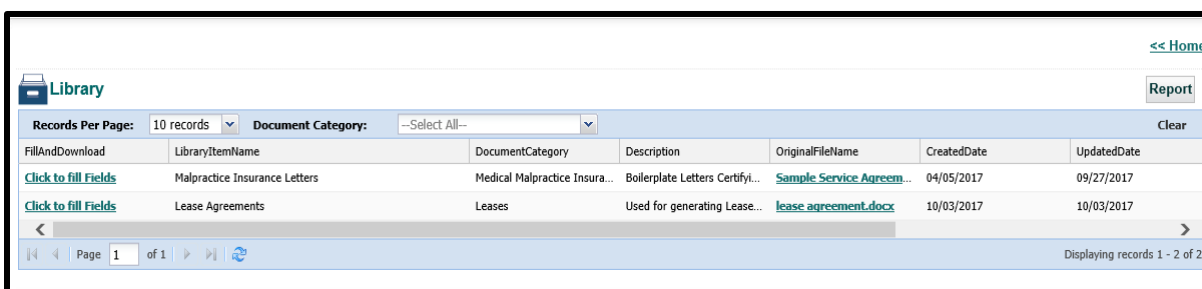
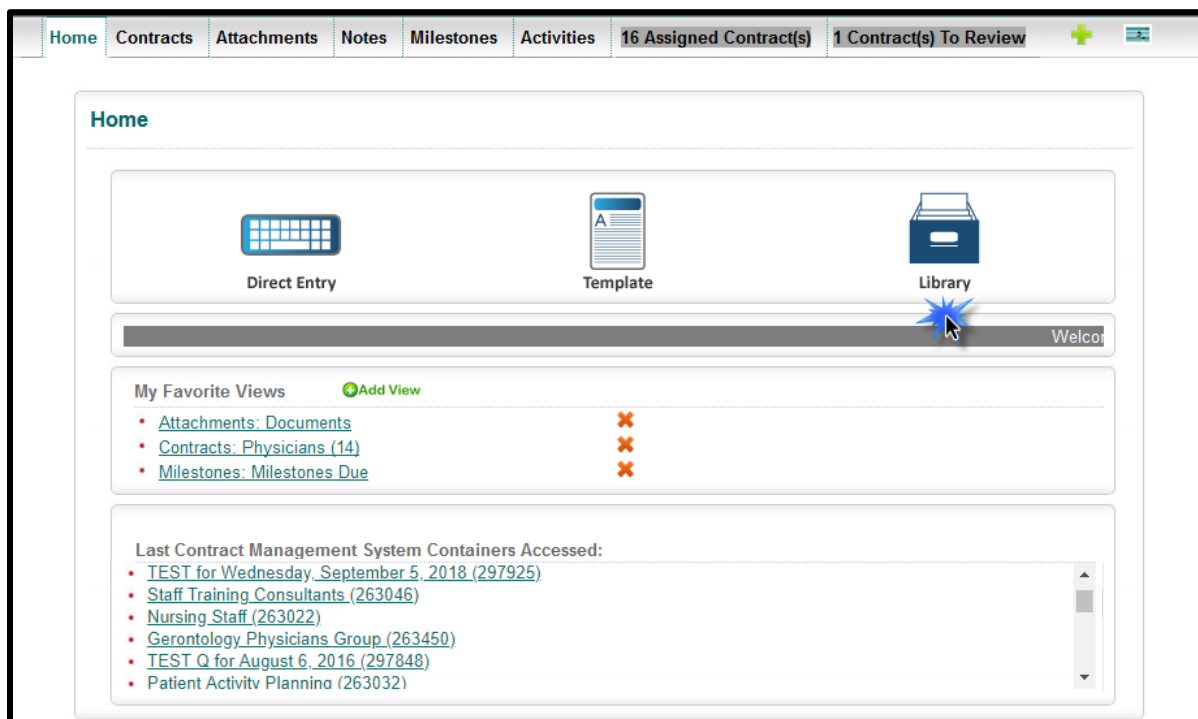
Successfully uploaded 3 Documents

Contract ID: 353215
Document Name: Contract Request Form.doc
Document State: Final
Folder: Contracts

1. File:	<input type="button" value="Choose File"/>	1-Contract_draft.doc
2. File:	<input type="button" value="Choose File"/>	BAA.pdf
3. File:	<input type="button" value="Choose File"/>	Financial Review.xlsx
4. File:	<input type="button" value="Choose File"/>	No file chosen
5. File:	<input type="button" value="Choose File"/>	No file chosen
6. File:	<input type="button" value="Choose File"/>	No file chosen
7. File:	<input type="button" value="Choose File"/>	No file chosen
8. File:	<input type="button" value="Choose File"/>	No file chosen
9. File:	<input type="button" value="Choose File"/>	No file chosen
10. File:	<input type="button" value="Choose File"/>	No file chosen

Document Library

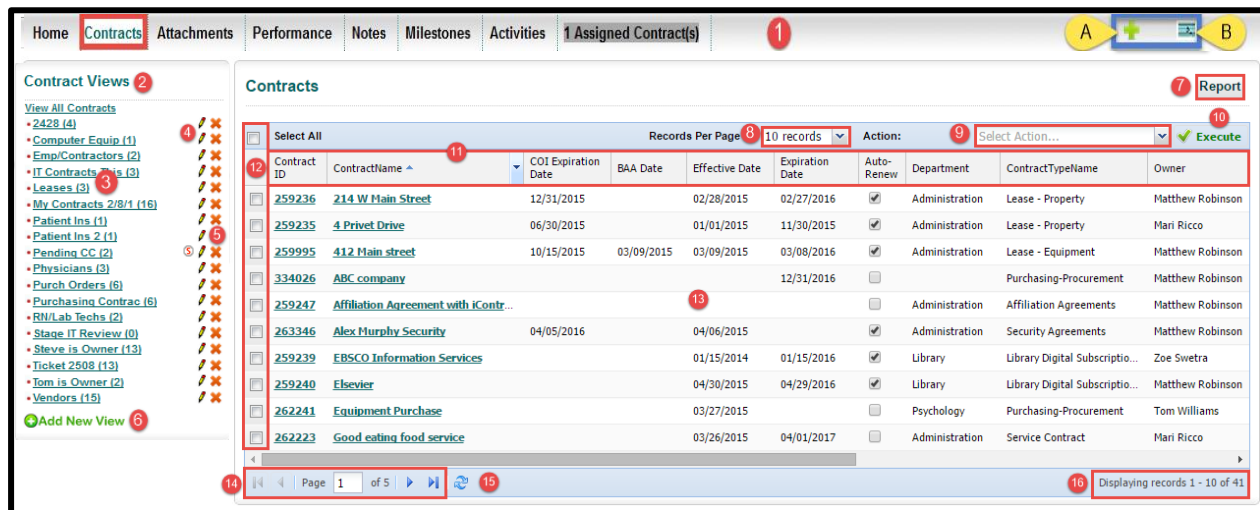
If the UCM System Administrators have allowed access to the **Library**, this is an area in which you can find *Boilerplate Forms* for your organization. You can then download these directly from the Library and open them in their native format locally on your machine.



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

The “**Fill and Download**” procedures are similar to those in [Using a Template](#). Click this link to refer back to the Templates section.

The Enterprise Ribbon: Contracts Tab



1. Enterprise Ribbon

The items visible in this area depend on permissions given to you by your Administrators.

2. Contract Views Area

3. Saved Views

4. Edit View

5. Delete View

6. Add New View

7. Report Button

8. Records Per Page DropDown

9. Contract Actions DropDown

You will only see this if given permissions by your Administrators (most of these functions are reserved for Admins anyway).

10. Execute Command Button (see #9 above)

11. Contract Grid Column Headings

12. Select Contract Checkbox (see #9 above)

13. Contracts Grid Area

14. Contracts Grid Page Navigation Buttons

15. Refresh Grid Button

16. Displaying Records/Total Records

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

A. Add Contract Icon

B. View Activities Icon

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

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

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

Working with the Grids

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

Records Per Page 10 records ▾							
Contract ID	ContractName	ContractTypeName	StageName	Owner	Description	CreatedOn	U
308051	214 West Main Street	Lease Agreements	Fully Executed	Joe Deluccia		08/10/2015	0
308057	22 South North Blvd.	Lease Agreements	Fully Executed	Joe Deluccia		08/10/2015	0
308056	5322 N south ave	Lease Agreements	Fully Executed	Joe Deluccia		08/10/2015	0
294281	Abby Lockhart	Employment Agreement	Employee Sign Off	Marilyn Rivera	Employment Agreement f...	06/23/2015	0
294275	Bonnie Dimmick - RNP	Employment Agreement	Employee Sign Off	Marilyn Rivera	Employment Agreement f...	06/23/2015	0
198261	EMR Software Agreement	Software Agreements	Final	Brian Potenski		03/13/2014	0
260602	HAL 9000 Computer System	IT	IT Review	Brian Potenski	Agreement for the purcha...	03/12/2015	0
265623	HAL 9000 Computer System Upg...	IT	Other Party Signature	Brian Potenski	Purchasing system upgrad...	04/15/2015	0
260571	Harris Neil MD	Physician Agreements	Fully Executed	Brian Potenski		03/12/2015	0
302543	Hawkeye Lease	Lease Agreements	Legal Review	Matthew Robinson	Lease for Dr. Pierce to ren...	07/17/2015	0
Page 1 of 2							
Displaying records 1 - 10 of 19							

Arranging the Grid

Use the drop-down list to select the number of records showing per page.



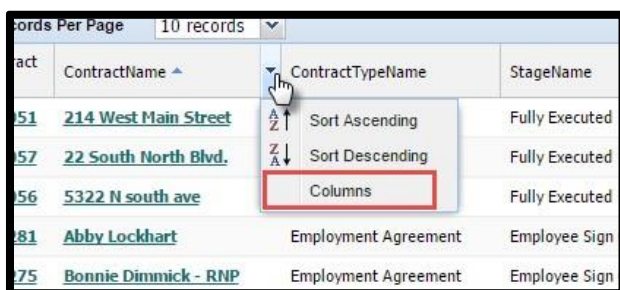
Click and drag between column headings to resize the column width. Double-click to auto size.

Records Per Page 10 records ▾		
Contract ID	ContractName	ContractTypeName
308051	214 West Main Street	Lease Agreements
308057	22 South North Blvd.	Lease Agreements
308056	5322 N south ave	Lease Agreements
294281	Abby Lockhart	Employment Agreement

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

Records Per Page 10 records ▾				
Contract ID	ContractName	ContractTypeName	StageName	Owner
308051	214 West Main Street	Lease Agreements	Fully Executed	ContractName
308057	22 South North Blvd.	Lease Agreements	Fully Executed	Joe Deluccia
308056	5322 N south ave	Lease Agreements	Fully Executed	Joe Deluccia
294281	Abby Lockhart	Employment Agreement	Employee Sign Off	Marilyn Rivera

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

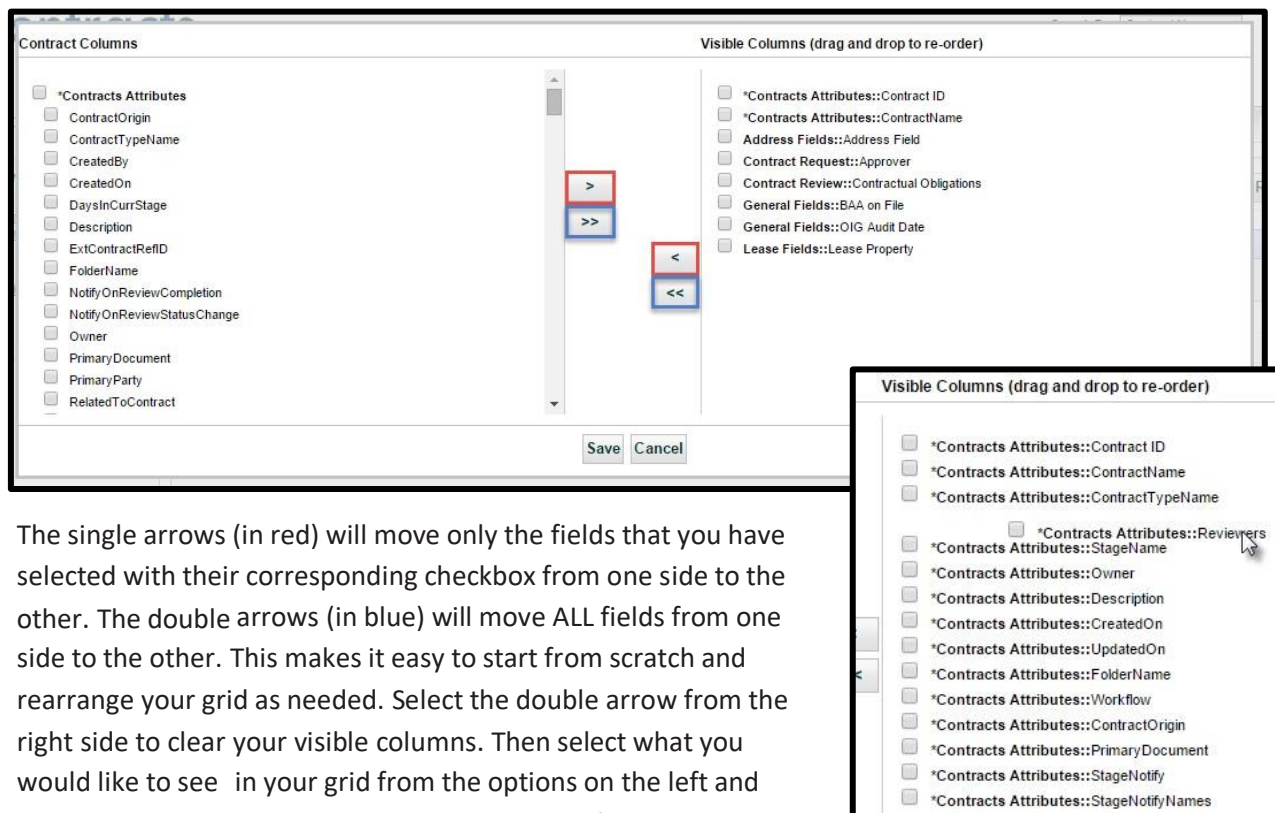


The third option on this list is *Columns*. This will bring up an area where you can decide what data fields will display as your column headings in the grid.

In this new pop-up (sometimes referred to as the LRT Device), listed on the left are all the fields that are available for selection. ***Contract Attributes** at

the top of this list contains the “out-of-the-box” fields that come with our software. Beneath these fields, are all of the custom fields set up for your system by your UCM System Administrators. See the image below for an example.

On the right side, the fields that appear as column headings on the grid will show, in which top-to-bottom appear as left-to-right in the grid. Clicking and dragging vertically will change the order of appearance in the grid. If you select a large number of fields for your grid, dragging a field up or down will cause the list to auto-scroll. This makes it very easy to move fields from the far right of your grid to the left.



The single arrows (in red) will move only the fields that you have selected with their corresponding checkbox from one side to the other. The double arrows (in blue) will move ALL fields from one side to the other. This makes it easy to start from scratch and rearrange your grid as needed. Select the double arrow from the right side to clear your visible columns. Then select what you would like to see in your grid from the options on the left and move them over using the single arrow on the left.

When you are finished making changes, click the **Save** button. If you do not want to change anything in this area, click **Cancel** and you will be brought back to your unchanged grid.

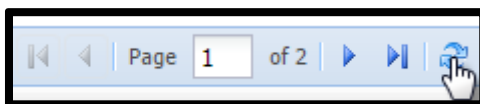
Clicking on any column heading will sort the grid based on the data in that column in ascending order or by clicking a second time in descending order. Any visible column can sort the grid by using this method. A darkened shade and a small triangular arrow pointing upward showing ascending sorting or downward for descending sorting indicate the column is sorting the contracts in your grid.

Records Per Page 10 records ▾			
Contract ID	ContractName ▲	ContractTypeName	StageN
308051	214 West Main Street	Lease Agreements	Fully Ex
308057	22 South North Blvd.	Lease Agreements	Fully Ex
308056	5322 N south ave	Lease Agreements	Fully Ex

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



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



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



Contract Actions

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

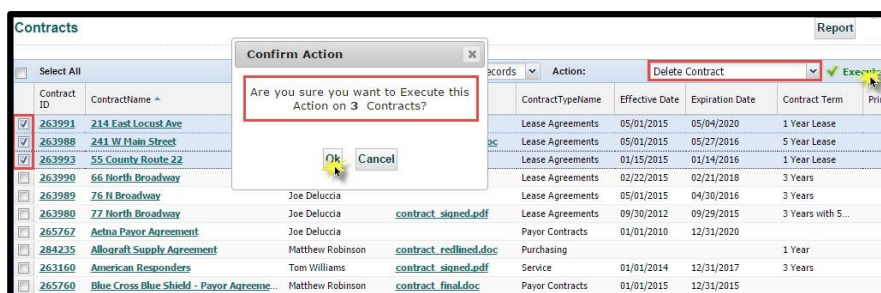


Delete Selected

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

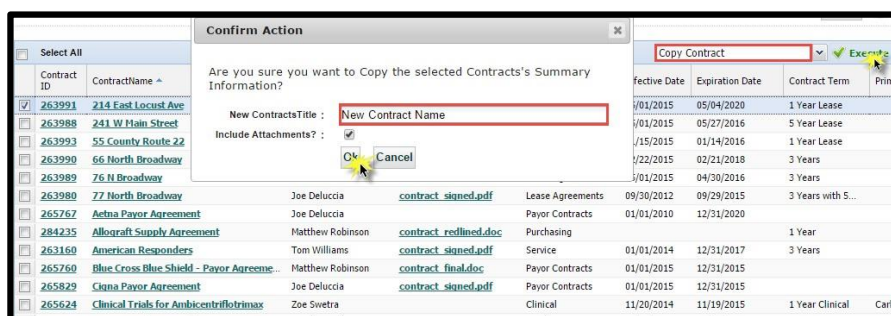
To delete a contract, select the contract(s) that you would like permanently removed from your system. Then choose the drop-down indicator in the *Contract Actions* area at the top right of the grid. Select **Delete Contract** from the list of available Contract Actions. Then click to **Execute** the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

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



Copy Contract

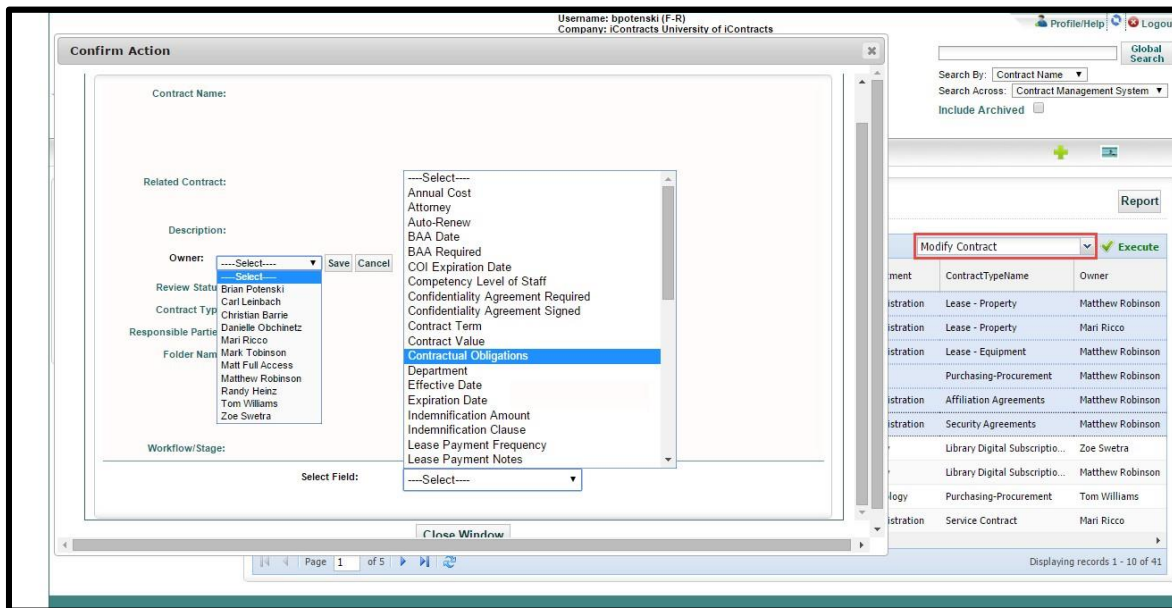
Select the Copy Contract Action from the list of available Actions to copy the data from one contract to create a new record in the system. You also have the option to copy the documents from the original contract.



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

Modify Contract

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



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

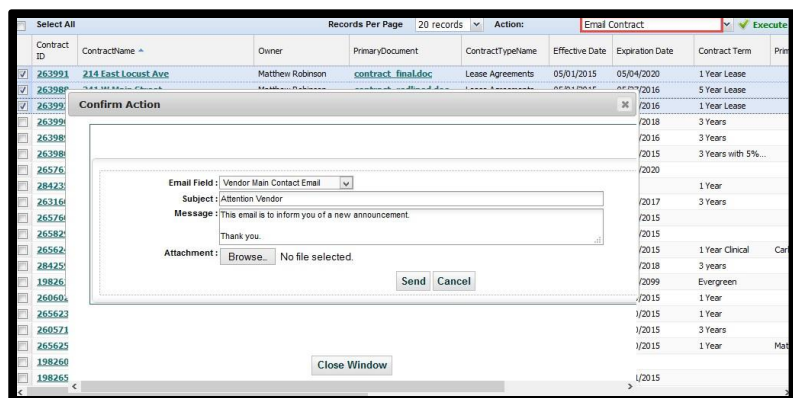
From the Modify Contract interface, select the data you are going to change across all the contracts selected in your grid. When finished, select the **Close Window** button at the bottom of the window.

Email Contract

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

Create Corresponding X Records

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



Creating a View

Username: jdeluccia (F)
Company: iContracts Healthcare
UAP: Contract Management System

Search By: Contract Name
Search Across: Contract Management System
Include Archived ☐

Home Contracts Attachments Notes Milestones Activities

Contract Views

Filter Views

Contract Views

View All Contracts

- Computer Equip (1)
- Emp/Contractors (2)
- Leases (3)
- My Contracts 2/8/1 (12)
- Patient Ins (1)
- Patient Ins 2 (1)
- Pending CC (2)
- Physicians (1)
- Purch Orders (4)
- Purchasing Contract (4)
- RN/Lab Techs (2)
- Stage IT Review (1)
- Steve is Owner (11)
- Ticket 2508 (10)
- Tom is Owner (2)
- Vendors (14)

Add New View

Physician Contracts

Select All	Contract ID	ContractName	ContractType	StageName	Owner	Description	CreatedOn
<input type="checkbox"/>	198260	Hoskins Steven MD	Physician Agreements	Employee Sign Off	Lead Attorney		03/13/2014
<input type="checkbox"/>	198266	Singleton Derrick MD DO	Physician Agreements	Signature - Internal	Lead Attorney		03/13/2014
<input type="checkbox"/>	198325	Laden Scott OS	Physician Agreements	Fully Executed	Danielle Obchinetz		03/14/2014
<input type="checkbox"/>	198326	Skarzynski David OS	Physician Agreements	Fully Executed	Mister iContracts		03/14/2014
<input type="checkbox"/>	199213	McGinley Michael DO	Physician Agreements	Contract Negotiation	Assigned Attorney		03/26/2014
<input type="checkbox"/>	260571	Harris Neil MD	Physician Agreements	Return to Contract Manager	Chief Executive Officer		03/12/2015
<input type="checkbox"/>	261377	Leonard McCoy	Physician Agreements	Verify Data and Documents	Danielle Obchinetz		03/19/2015
<input type="checkbox"/>	261378	Hawkeye Peirce MD	Physician Agreements	Fully Executed	Rick Sanchez	Dr. Pierce's main agreeme...	03/19/2015
<input type="checkbox"/>	308310	Potenski Brian MD DO	Physician Agreements	Verify Data and Documents	Mister iContracts		08/11/2015
<input type="checkbox"/>	319125	Doc Smith	Physician Agreements	Background Check	Alison Dolomanuk		10/01/2015

Page 1 of 2

Displaying records 1 - 10 of 12

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

Keep in mind when working with Views:

- To display a Saved View, click on its name in the list.
- To edit a Saved View, click on the pencil icon to the right of the view's name.
- To delete a Saved View, click on the **X** to the right of the view's name.
- The (#) next to the Saved View's name shows the number of matching contracts.
- The icon to the right of a View's Name indicates that it is a View created by another user and **Shared** by them to you. If you delete a Shared View (intentionally or not), the originating user will still be able to see and re-share their View with you again. If you hover your mouse pointer over the icon, you can see who is the view's author.

If YOU are the author of a View and Share the View, you will **not** see this icon.

- To create a report, or export data to a spreadsheet, click on the **Report** button on the top of the header and a CSV file will be downloaded to your desktop for formatting and further detailed analysis or graphing, using the default program (Excel).
- Use **Advanced Search** (explained later in this section) to use parentheses to combine multiple "and/or" search criteria.

There are three main areas on the screen to create/modify a View:

1. Choose which field(s) you would like to run a query on and the *criteria for that search* (including Archived contracts if desired),
 - Click **+ Add Criteria** to expand the criteria list for additional fields.
2. Decide what *columns should show and where*, when the View is run,
3. Define a *sort order* for the Contracts in your View.
 - You also have the option to add *Additional Statistics* to your Views (*Sum* and *Average*) based on any numeric fields.
 - If you would like to keep this View in your listing of Views, check the box to **Save this View** and enter a name.

The screenshot shows the 'Create/Modify Contracts View' interface. It includes a title bar, a search bar with an 'Advanced Search' link, and several sections for configuring the view. Red numbered callouts are placed over specific elements: 1 points to the 'Select Fields' dropdown; 2 points to the 'Default Fields And Sequence' table; 3 points to the 'Default Sort Order' section; and 4 points to the 'Advanced Search' link. The 'Additional Statistics' section is highlighted with a red box, and the 'Save this View' checkbox and 'Run'/'Cancel' buttons are also highlighted with a red box.

Create/Modify Contracts View

Get Contracts that match the following criteria:

1. **Select Fields** (dropdown menu)

Add Criteria (button) ☐ Include Archived

Default Fields And Sequence (table)

Contract ID	ContractName	ContractTypeName	StageName	Owner	Description	CreatedOn

Default Sort Order

Fields: **Select Fields** (dropdown menu) ☐ Ascending Order (A-Z) ☐ Descending Order (Z-A) **Add** (button)

Fields	Sort Order	Delete

Additional Statistics

Select (dropdown menu) **Select Fields** (dropdown menu) **Reset** (button) ☐ Display Count **Add Function** (button)

☐ Save this View **Run** (button) **Cancel** (button)

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

Viewing Contracts that Match the Following Criteria

You can use any of the fields in your system to find subsets of contracts that match the criteria you set up. You can also use any of the system-created fields (i.e. *Contract Attributes*). This is called a **Simple Search**.

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

The screenshot shows the 'Create/Modify Contracts View' interface. At the top, it says 'Get Contracts that match the following criteria:'. Below this, there is a dropdown menu for 'Expiration Date' (labeled 1) and a dropdown for the modifier 'is within the next X' (labeled 2). To the right of the modifier dropdown is a text box containing the value '30'. To the left of the dropdown menu is a green button with a plus sign and the text 'Add Criteria'. Below the dropdown menu is a list of 'Default Fields' including 'Contract ID', 'Expiration Date', 'Funding Amount', 'Grant Award Date', 'Grant Funding Source', 'Grant Type', 'Hotel Arrangements', 'Hourly Payrate', 'Item or Product', 'Lease Payment Frequency', 'Lease Payment Notes', 'Lease Term', 'Legal Approval', 'Lessee Name', and 'Lessor Name'. To the right of the modifier dropdown is a checkbox labeled 'Include Archived'. Below the 'Default Fields' list is a section for 'Default Sort Order' with a dropdown menu. At the bottom, there is a table with columns for 'Name', 'StageName', and 'Owner', and a 'Sort Order' column. The table is currently empty.

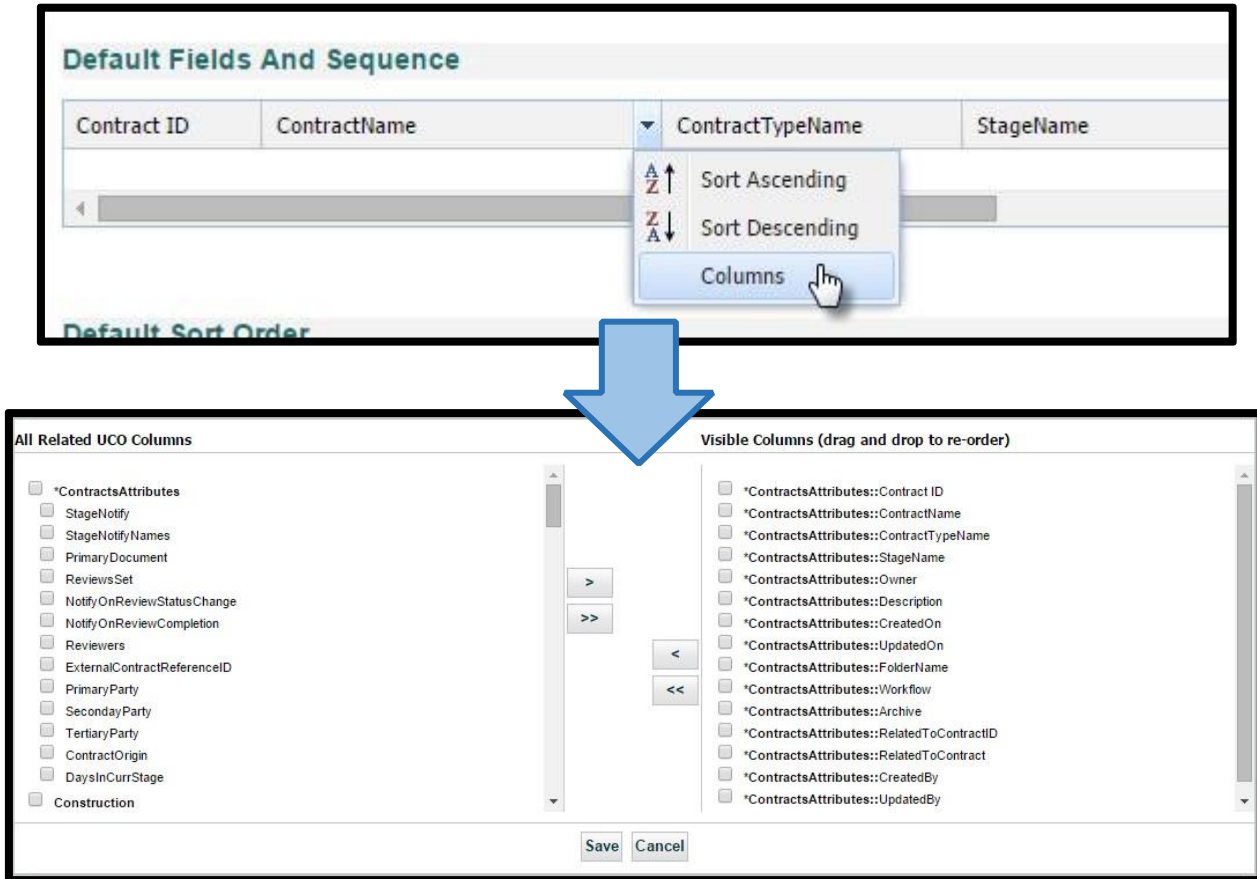
Some modifiers will prompt you for more information. For instance, “is within the last/next X days” will have another area open to the right of the modifier so you may tell the system how many days you would like to run the query on. Text searches (such as “contains”) open an area to enter the search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

If you would like to narrow your search even more, click on the green “Add Criteria” link and add another line of criteria to query. Choose “and” to show the contracts which have **both** conditions true. Choose “or” to show the contracts which have either condition true.

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

Defining Default Fields and Sequences

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



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

Arranging Grid Columns

Click on the line in between Columns to get the desired width for a Column. Since the grid is "Saved" in a View, you must change your columns and widths from this area. Otherwise, changes made to the grid will not be remembered by UCM the way they are in areas like the Contracts tab.



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

Create/Modify Contracts View

Get Contracts that match the following criteria:

ContractTypeName

contains

Purchasing

and

Annual Cost

>=

150000

remove

Add Criteria

Include Archived

Default Fields And Sequence

Contract ID	ContractName	Increase tied to CPI	Total Contract Value	Contract Term	Expiration Date	Invoice Number	Owner	Date Processed	PrimaryDocument

Default Sort Order

Fields

----Select Fields----

Ascending Order (A-Z)

Descending Order (Z-A)

Add

Fields	Sort Order	Delete
Contract Management System::Expiration Date	Ascending	

Additional Statistics

--Select--

----Select Fields----

Reset

Display Count

Add Function

Save this View

Default View

*View Name: Purchasing Agreements

Share With Other Users

Schedule This View

Save and Run

Cancel

Note: 18 characters of your View Name will show in Contracts Views, but the whole View Name will show on hover-over

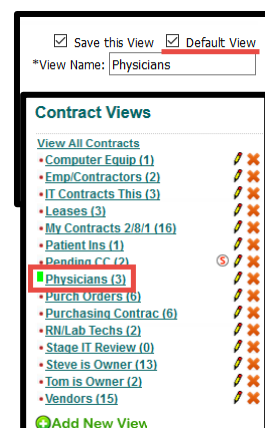
You will use this same screen to edit your Views. If you choose, you can quickly create other similar Views by choosing the *Edit View* option after running a View, changing the criteria/fields and saving the View with a new name. For instance, this View will show all Purchasing contracts at least \$150,000; if you were to change the criteria for Annual Cost to \$75,000 and give it a new name, you would have a completely separate View *in addition to* this one.

Default Views

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

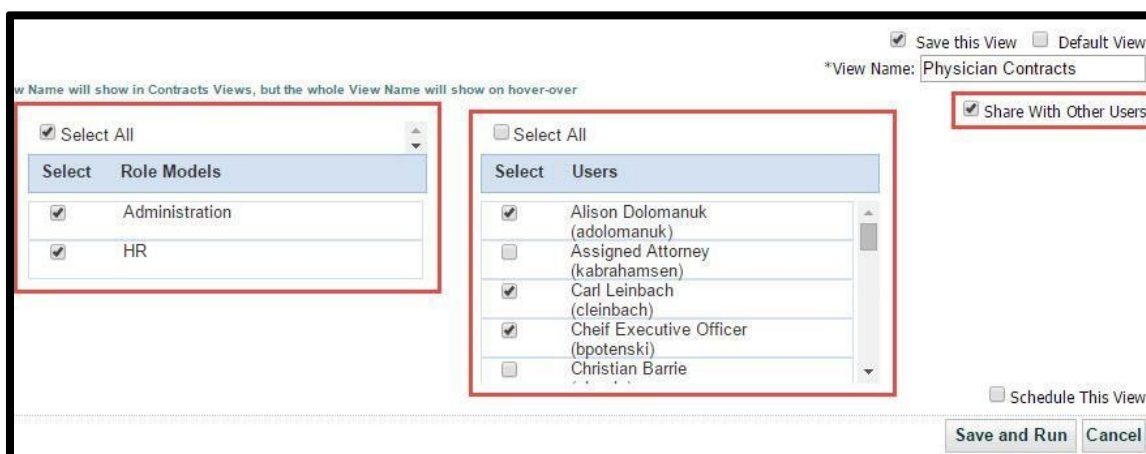
Your Default View will have a **green** square next to it instead of a **red** dot to indicate that this is your Default View.

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



Share Views

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



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

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

Scheduling Views

If you would like to schedule a View to be sent as a CSV file by email on a certain schedule, check on the option to *Schedule This View*. This will attach the same report you would create from the **Report** button in a Grid to an Email and send it to the User(s) you assigned. Keep in mind that Users receiving these reports will get **your version** of the

report since this is attaching the report based on **your** Security Profile. This means, that some users may see contracts that they normally may not have folder permissions to view in their own Contract Views.

To Schedule a View:

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

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

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

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

Editing Views

The screenshot shows the 'Filter Views' interface with the 'Matts Contracts' view selected. The 'Edit View' button is highlighted with a red box. The table below shows the data for this view.

Contract ID	ContractName	ContractTypeName	StageName	Owner	Description
263156	JJL Consulting	Service	Draft	Matthew Robinson	
265625	Healthy-R-U Inc.	Purchasing	Draft	Matthew Robinson	
284235	Allograft Supply Agreement	Purchasing	Internal Signature	Matthew Robinson	
288699	McKesson Master Agreement	Service	Fully Executed	Matthew Robinson	
288704	McKesson Product Agreement	Purchasing	Fully Executed	Matthew Robinson	
288706	McKesson Pharma	Purchasing	Budget Review	Matthew Robinson	
302517	Document Library	Attachment Library	Attachments Library	Matthew Robinson	This contract container is ...
302543	Hawkeye Lease	Lease Agreements	Legal Review	Matthew Robinson	Lease for Dr. Pierce to ren...

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

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

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

Get Contracts that match the following criteria:

Owner contains Jason

or PrimaryParty contains Jason remove

or SecondaryParty contains Jason remove

or TertiaryParty contains Jason remove

☒ Add Criteria ☒ Include Archived


Default Fields And Sequence

Archive	Contract ID	ContractName	Owner	PrimaryParty	SecondaryParty	TertiaryParty	Expiration Date

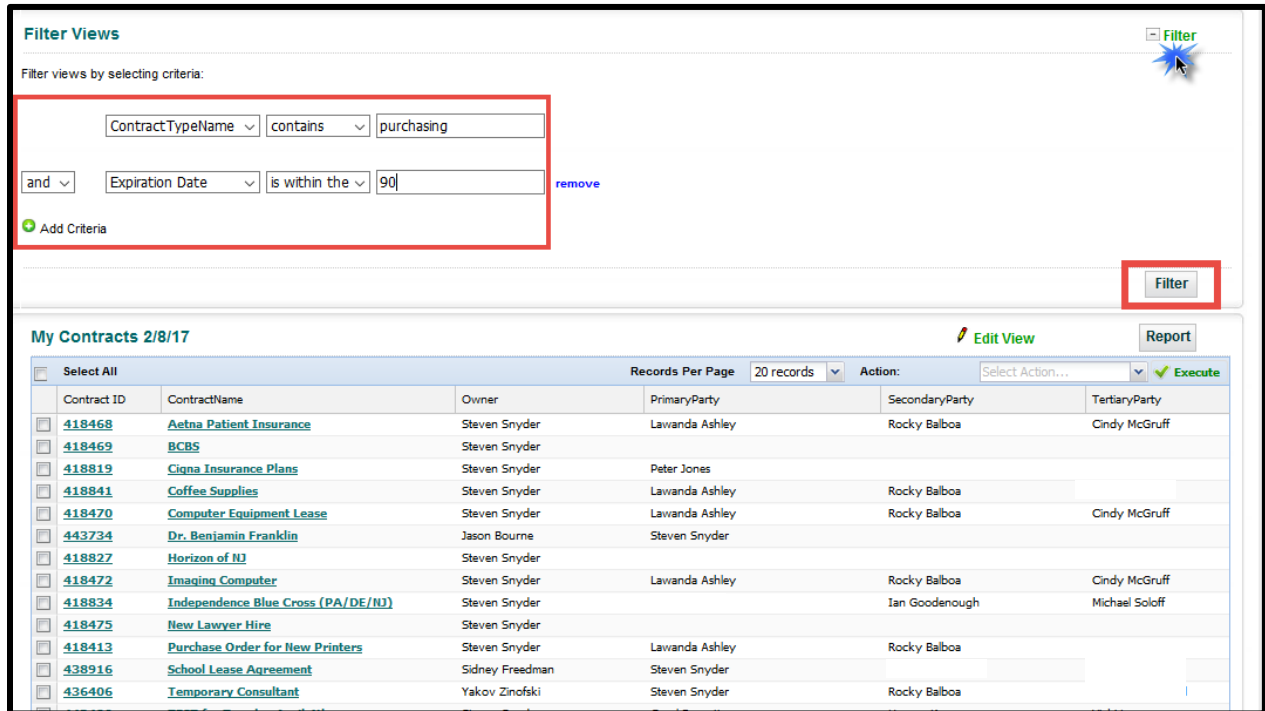
Once you have finished editing the view, give this view a **new name** (delete the current View Name and type in a new View Name). This will create another view in addition to the one you already have saved. If you simply want to edit the current view, leave the View Name as is and the current view will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

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

Filter Views

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


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



The screenshot displays the 'Filter Views' interface. At the top, there's a 'Filter Views' header with a 'Filter' button. Below it, a section titled 'Filter views by selecting criteria:' contains two criteria: 'ContractTypeName contains purchasing' and 'Expiration Date is within the 90'. An 'Add Criteria' button is at the bottom left of this section. A 'Filter' button is at the bottom right. Below the filter section, there's a table titled 'My Contracts 2/8/17' with columns: Contract ID, ContractName, Owner, PrimaryParty, SecondaryParty, and TertiaryParty. The table lists 17 contracts. At the top right of the table, there are buttons for 'Edit View' and 'Report', and a 'Records Per Page' dropdown set to '20 records'.

Contract ID	ContractName	Owner	PrimaryParty	SecondaryParty	TertiaryParty
418468	Aetna Patient Insurance	Steven Snyder	Lawanda Ashley	Rocky Balboa	Cindy McGruff
418469	BCBS	Steven Snyder			
418819	Cigna Insurance Plans	Steven Snyder	Peter Jones		
418841	Coffee Supplies	Steven Snyder	Lawanda Ashley	Rocky Balboa	
418470	Computer Equipment Lease	Steven Snyder	Lawanda Ashley	Rocky Balboa	Cindy McGruff
443734	Dr. Benjamin Franklin	Jason Bourne	Steven Snyder		
418827	Horizon of NJ	Steven Snyder			
418472	Imaging Computer	Steven Snyder	Lawanda Ashley	Rocky Balboa	Cindy McGruff
418834	Independence Blue Cross (PA/DE/NJ)	Steven Snyder		Ian Goodenough	Michael Soloff
418475	New Lawyer Hire	Steven Snyder			
418413	Purchase Order for New Printers	Steven Snyder	Lawanda Ashley	Rocky Balboa	
438916	School Lease Agreement	Sidney Freedman	Steven Snyder		
436406	Temporary Consultant	Yakov Zinofski	Steven Snyder	Rocky Balboa	

Advanced Searches

 This is considered an **Advanced UCM feature**, and therefore may not be suitable for all audiences, but available for your use should the need arise. If you're having trouble getting your *Contract Views* to give you the intended results, contact iContracts Support for additional help.

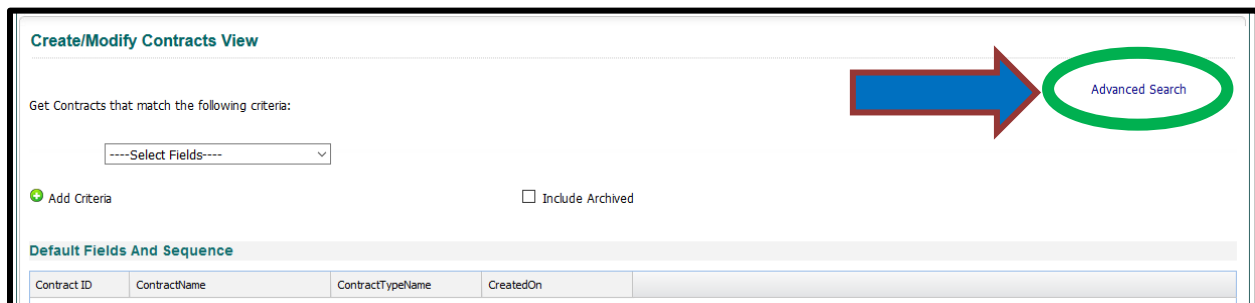
In a Simple Search, if you create your Contract View and want to use both ANDs and ORs as “connectors” within the same View, you might get “other than expected” (what some would consider flat-out-wrong) results since the system wasn't interpreting your criteria correctly.

Using left and right parentheses in an Advanced Search, you can *help* the system understand how it should interpret what you're really asking it to show. Like in mathematics, any equation surrounded by parentheses are calculated first, and in a group.

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

If you do have a need to use this [Advanced Search](#) function, then you'll find the words “Advanced Search” to the right of where you will setup your Create/Modify Contracts View.

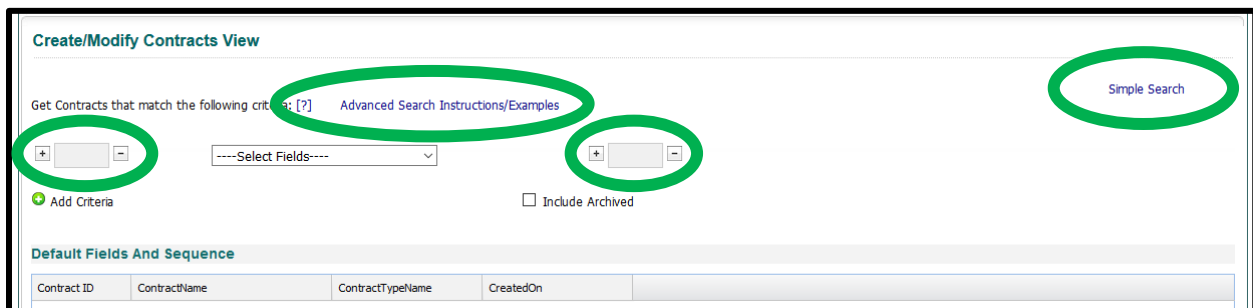
On any Contracts View, this link toggles the screen from Simple Search:



The screenshot shows the 'Create/Modify Contracts View' interface. At the top, it says 'Get Contracts that match the following criteria:'. Below this is a dropdown menu labeled '----Select Fields----'. There is a green plus icon and the text 'Add Criteria' on the left, and a checkbox labeled 'Include Archived' on the right. A large blue arrow with a red outline points from the right side of the interface to a green oval containing the text 'Advanced Search'.

To Advanced Search:

and back again to a Simple Search.



The screenshot shows the 'Create/Modify Contracts View' interface. At the top, it says 'Get Contracts that match the following criteria:'. Below this is a dropdown menu labeled '----Select Fields----'. There is a green plus icon and the text 'Add Criteria' on the left, and a checkbox labeled 'Include Archived' on the right. A green oval highlights the text 'Advanced Search Instructions/Examples' with a question mark icon. Another green oval highlights the text 'Simple Search' on the right. A third green oval highlights the search criteria input area, which contains a plus icon, a minus icon, and a dropdown menu labeled '----Select Fields----'.


Did you notice the [\[?\]](#) which you can click for more information on what the Advanced Search is meant for and a clickable “[Advanced Search Instructions/Examples](#)” link that will open a PDF document for your review in a new tab on your web browser.

If you need to add one or more ('s to the beginning of one of your criteria, you'll click the + on the left side of one of the boxes.

If you need to add one or more)'s to the end of one of your criteria, you'll click the + on the left side of one of the boxes.

You may click the + multiple times if you need more than one (or).

Likewise, the - will take away one or more ('s or)'s that you no longer need.

 See the example on the next page.

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

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

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

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

	ContractTypeName	▼	contains	▼	Construction
or ▼	ContractTypeName	▼	contains	▼	Lease
or ▼	ContractTypeName	▼	contains	▼	Service

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

	StageName	▼	contains	▼	Active
or ▼	StageName	▼	contains	▼	Executed

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

	Owner	▼	=	▼	My Name
or ▼	PrimaryParty	▼	=	▼	My Name

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

The screenshot displays a search interface with three distinct groups of criteria, each enclosed in a purple rounded rectangle. Each group contains two criteria connected by an 'or' operator. The groups are connected to each other by 'and' operators, which are circled in red. The first group contains criteria for 'ContractTypeName' containing 'Construction' and 'Lease'. The second group contains criteria for 'StageName' containing 'Active' and 'Executed'. The third group contains criteria for 'Owner' containing 'My Name' and 'PrimaryParty' containing 'My Name'. Each criterion is represented by a dropdown menu, a 'contains' operator, and a text input field. The first and last criteria of each group are enclosed in a green box with a '+' on the left and a '-' on the right. The first group's opening parenthesis is also enclosed in a green box. The last group's closing parenthesis is also enclosed in a green box. A 'remove' link is present to the right of each criterion.

Group 1:

- ContractTypeName contains Construction
- or
- ContractTypeName contains Lease

Group 2:

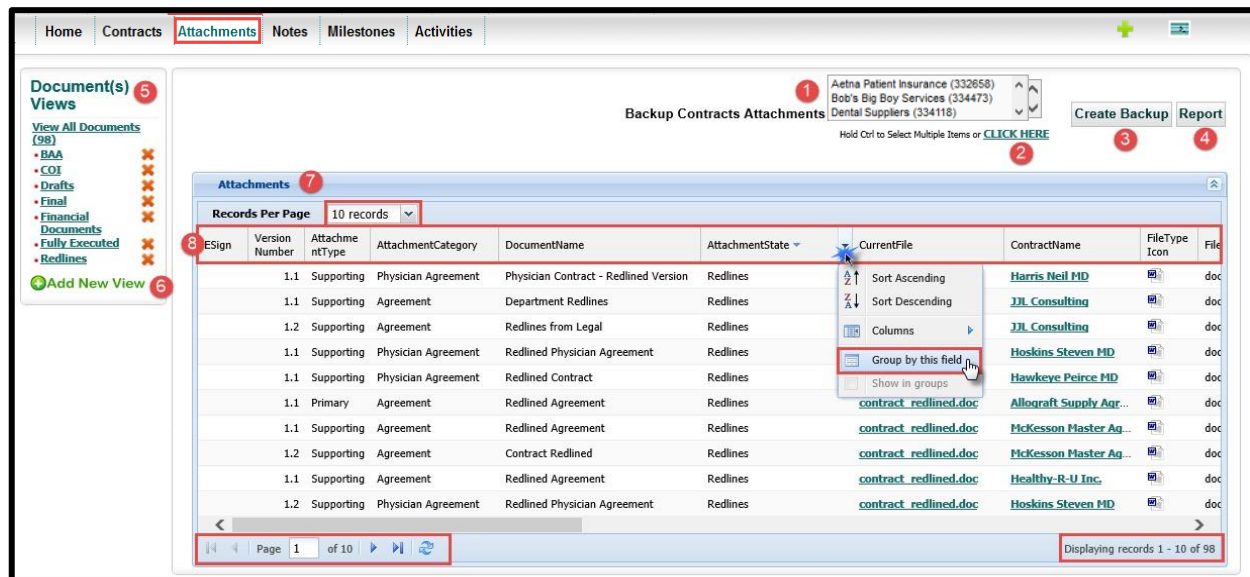
- StageName contains Active
- or
- StageName contains Executed

Group 3:

- Owner contains My Name
- or
- PrimaryParty contains My Name

Just like a mathematical equation, the criteria inside each set of parentheses are searched first AND then combined as one set of results in your Contract View.

The Enterprise Ribbon: Attachments Tab



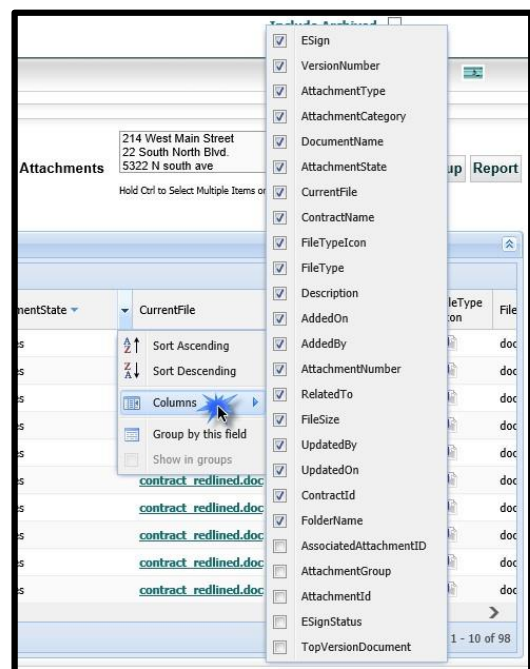
1. Backup Contracts Attachments Area
2. Backup Contracts Selector
3. Create Backup Button
4. Report Grid Contents Button
5. Document Views Area
6. Add New View Button
7. Attachments Grid
8. Attachments Columns

The **Attachments** tab will allow you to view all of the contract documents available to you in your system. This area is useful for tracking the status of documents across multiple Contract Containers in your system at the same time. You can also create custom Views in this area to report on different subsets on documents. For instance, this screen show a View called *BAA's*. That View shows all the documents listed as a BAA in this system.

Working with the Attachments Grid


Notice that the grid in this area works differently than it does on the Contracts tab. The *Columns* option lists the available data points in checkboxes rather than in the side-by-side interface. This is because there are no custom fields in this area. However, the values are configurable.

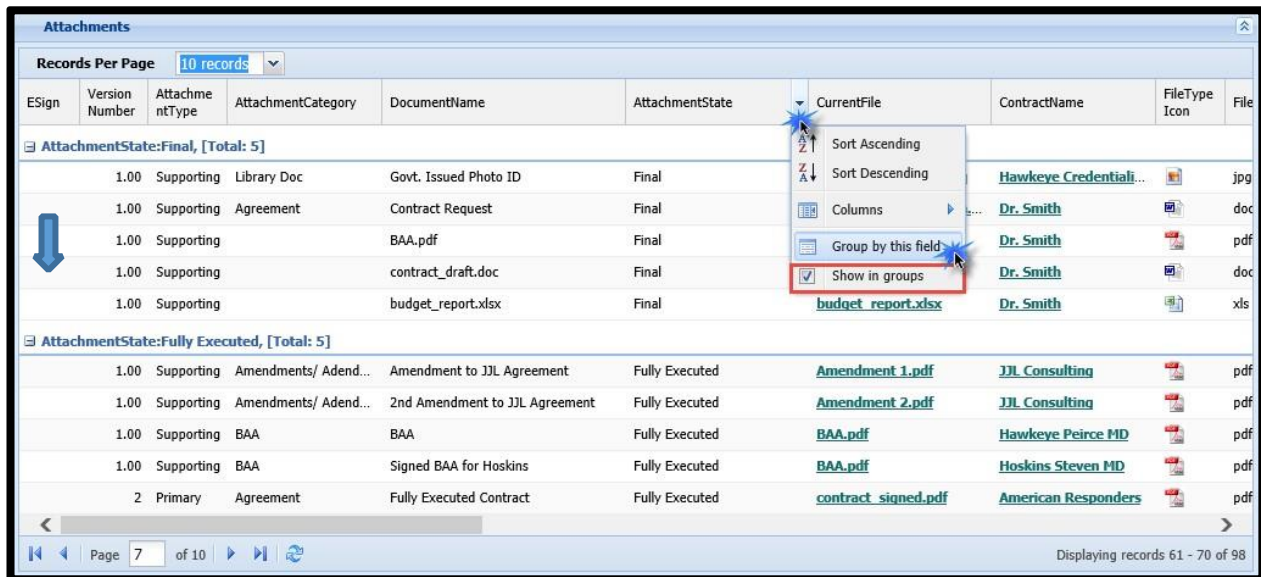
Uncheck any areas that you do not want showing in your grid and drag-and-drop column headings to a desired location.



Group by this Field

The biggest difference in working with the Attachment tab grid is the ability to *Group by this Field*. This option will allow you to view your attachments in groupings based on the data in those fields.

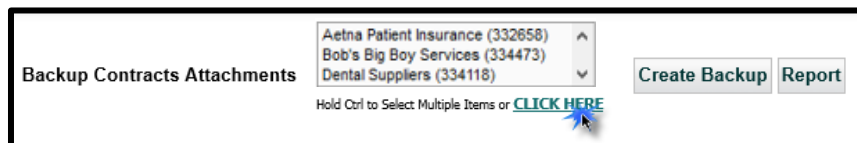
The individual groups are collapsible by clicking on the  icon (see blue arrow inside image). This will allow you to hide unnecessary documents.



You may remove groupings altogether by unchecking the option for "Show in Groups."

Backup Contract Attachments from Attachments Tab

To create a Backup of all the available documents for selected Contract Containers, simply navigate to the Backup Contract Documents area.



Use the window or the [Click Here](#) link to select which Contract Containers you would like to backup. Using the [CLICK HERE](#) option will show all the available contracts in a side-by-side interface with the selections you have made. When finished selecting Contracts, click on the *Create Backup* button.

You are about to create a backup .ZIP file of all of the Attachments in this Contracts Container. Would you like to continue?

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

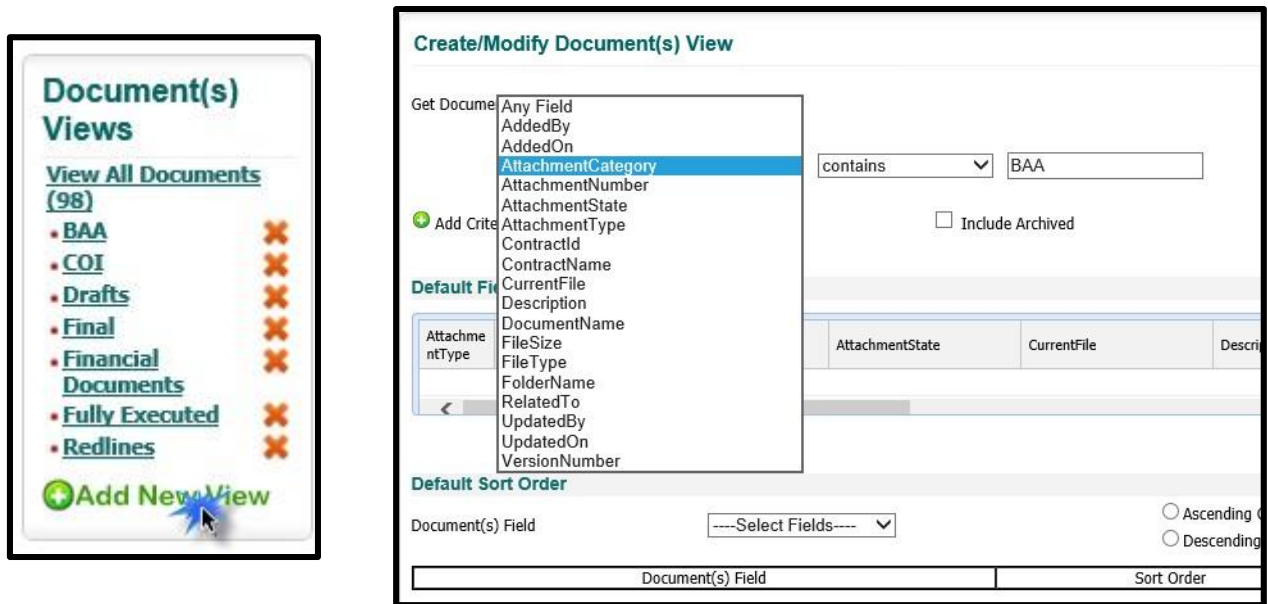
Click the "Download Backup" link and then "Save As" to save .ZIP file.
☐ Prevent this page from creating additional dialogs

Create Backup [Download Backup](#) Report

Click this button to download your Zip file.

Attachment Views

From this area, you can create on-screen Views of subsets of Attachments based on any of the data points from the Attachments Tab. Attachment State and Attachment Category will be particularly useful here. The explanation for creating Views is available in the chapter titled [Creating a View](#).



By clicking on **Add New View**, you are directed to the View creation screen where you would then list the criteria for the View you would like to *Run*. You have the ability to create as many Saved and Ad Hoc Views as you like.

From inside a view you can also choose to Group by a field using the Sort Indicator. This grouping will be applied to your View every time you run it. To remove the grouping, you will have to edit the View and deselect the option to *Show in Groups*.



When saving and running the view, the Grouping defined in the Default Fields and Sequence area of the View persists. However, if you ever want to change this grouping, you can always edit the view and choose another field to group by or uncheck the *Show in Groups* option.

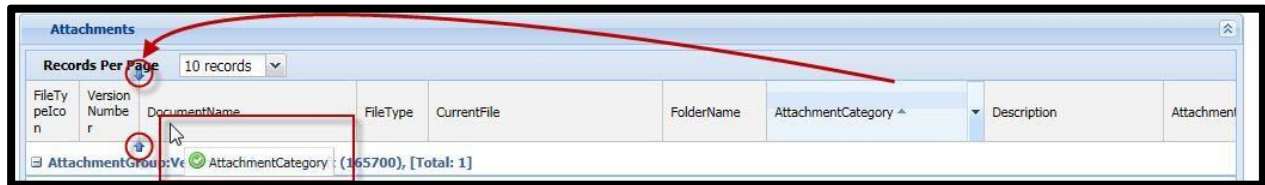
Tips and Tricks for Making the Attachments Tab Work for You

This section will cover Tips for setting up the Attachments Tab to make it useful for you. Setting up Columns, using groupings by field, and creating Views are a few.

Several Views in this area will be extremely useful for finding the documents you need to see. To see all of your Yearly Contract Reviews at the same time, to keep an eye on all of your BAA's, or to see all of your Final/Fully Executed contracts, you can create views to access these documents quickly and easily.

Tip: Rearrange Your Columns

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

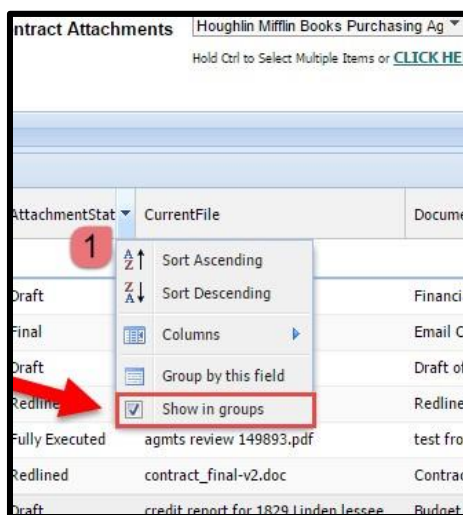


Tip: Group Attachments by Category, Contract, or State

When navigating the Attachments Tab, try grouping by Category, Contract name, or by document State. This way you will see all of the documents in your system in a way that is both clear and useful. You can do this by choosing the Sort Indicator from any Column Heading and choosing *Group by this field*.

Tip: Turn off Grouping for a cleaner looking grid

If you want a cleaner look in your grid to see your documents listed in the usual manner, simply choose the Sort Indicator from any of the column headings again and uncheck the option to *Show in groups*.



Examples of Practical Use:

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

All BAA's grouped by Category

To create this View, look for all Attachment Types that contain your wording for BAA's. Then, arrange your grid to show you the information you would like to see. In this example, we chose Attachment Category and Grouped by that field. When this is done, you will see the field name you selected showing in blue just below the Grid Preview. Do not forget to Save the View by giving it a name; click *Save and Run* when you are finished.

The screenshot shows the 'Create/Modify Document(s) View' interface. The criteria section is set to 'AttachmentType' contains 'BAA'. The 'Default Fields And Sequence' section shows a table with columns: Version Number, DocumentName, ContractName, AttachmentCategory, AttachmentType, AttachmentState, CurrentFile, and Description. The 'AttachmentCategory' field is highlighted in blue, and a dropdown menu is open showing options: 'Columns', 'Group by this field', and 'Show in groups'. The 'Default Sort Order' section shows 'Document(s) Field' set to '---Select Fields---' and 'Sort Order' set to 'Ascending Order (A-Z)'. The 'Save and Run' button is visible at the bottom right.

Yearly Contract Reviews (by Category)

To create this View, follow the same formula for creating the BAA View, but change the criteria to find your Yearly Contract Reviews. You may also choose to Add Criteria to this report to find only the documents uploaded between certain date ranges. In this example, we are including any Contract Reviews added 2015.

The screenshot shows the 'Create/Modify Document(s) View' interface. The criteria section is set to 'AttachmentType' contains 'Review'. The 'Default Fields And Sequence' section shows a table with columns: Version Number, DocumentName, ContractName, AttachmentCategory, AttachmentType, AttachmentState, and CurrentFile. The 'AttachmentCategory' field is highlighted in blue, and a dropdown menu is open showing options: 'Columns', 'Group by this field', and 'Show in groups'. The 'Default Sort Order' section shows 'Document(s) Field' set to '---Select Fields---' and 'Sort Order' set to 'Ascending Order (A-Z)'. The 'Save and Run' button is visible at the bottom right.

All Final or Signed (by State)

Another useful View may be for all of your Final and/or Signed Contracts grouped by State. Again, this would follow the same set up as the other Views mentioned here. However, you would instead define criteria that searches for all of your Final or Signed Contracts.

Create/Modify Document(s) View

Get Documents that match the following criteria:

AttachmentState contains Final

or AttachmentState contains Signed

Add Criteria ☐ Include Archived

Default Fields And Sequence

AttachmentType	Version Number	DocumentName	AttachmentState	AttachmentCategory	CurrentFile	Description	ContractName
AttachmentState, [Total: 1]							

Default Sort Order

Document(s) Field: ----Select Fields----

☐ Ascending Order (A-Z) ☐ Descending Order (Z-A) **Add**

In this example, we grouped the documents by *Attachment State* to show all of the Final, but not signed Contracts/Agreements in one group and All of the signed ones in another group. If you have partially executed stages defined in your system as well, you may also want to include these in your View.

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

Edit, Delete, or Clone Attachments

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

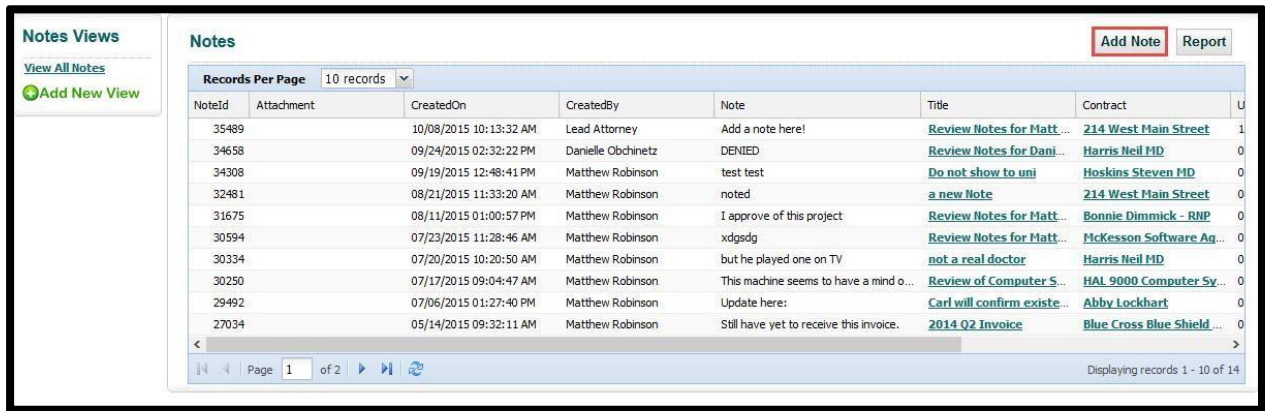
Editing a document is modifying the Document Title, Version, Category, State, Description, or Promote/Demote to Primary or Supporting. You are *not* editing the contents of a document.

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

Edit	Delete	Clone	AttachmentType	FileType	DocumentName	AttachmentState	eSign	CurrentFile	Description
			Primary	docx	The Force is Strong With This One	Fully Executed	<input type="checkbox"/>	Sample Invoice.docx	
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is
			Primary	pdf	Next Next Next Version	Partially Executed by Vend...	<input type="checkbox"/>	contract_signed.pdf	
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is
			Primary	pdf	Generic Contract Doc.pdf	Final	<input type="checkbox"/>	Generic Contract Doc.pdf	This is

Page 1 of 276 | Displaying records 1 - 10 of 2756

The Enterprise Ribbon: Notes Tab



The screenshot shows the 'Notes' tab interface. On the left, there's a sidebar with 'Notes Views' and options like 'View All Notes' and 'Add New View'. The main area displays a table of notes with columns: NoteId, Attachment, CreatedOn, CreatedBy, Note, Title, and Contract. The table lists 10 records. At the top right, there are 'Add Note' and 'Report' buttons. At the bottom, there's a pagination bar showing 'Page 1 of 2' and 'Displaying records 1 - 10 of 14'.

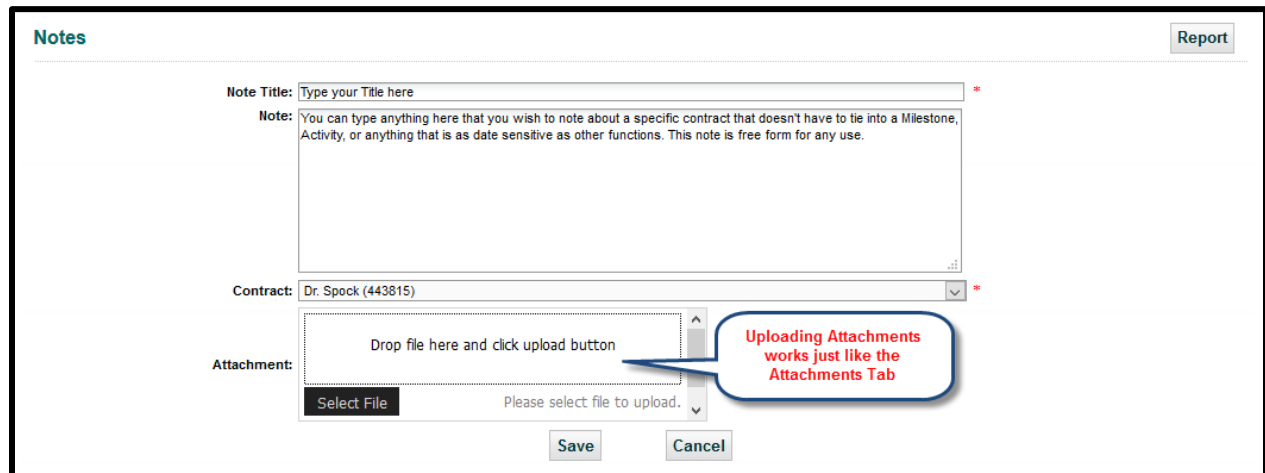
NoteId	Attachment	CreatedOn	CreatedBy	Note	Title	Contract	U
35489		10/08/2015 10:13:32 AM	Lead Attorney	Add a note here!	Review Notes for Matt...	214 West Main Street	1
34658		09/24/2015 02:32:22 PM	Danielle Obchinetz	DENIED	Review Notes for Dani...	Harris Neil MD	0
34308		09/19/2015 12:48:41 PM	Matthew Robinson	test test	Do not show to unj	Hoskins Steven MD	0
32481		08/21/2015 11:33:20 AM	Matthew Robinson	noted	a new Note	214 West Main Street	0
31675		08/11/2015 01:00:57 PM	Matthew Robinson	I approve of this project	Review Notes for Matt...	Bonnie Dimmick - RNP	0
30594		07/23/2015 11:28:46 AM	Matthew Robinson	xdgsdg	Review Notes for Matt...	McKesson Software Ag...	0
30334		07/20/2015 10:20:50 AM	Matthew Robinson	but he played one on TV	not a real doctor	Harris Neil MD	0
30250		07/17/2015 09:04:47 AM	Matthew Robinson	This machine seems to have a mind o...	Review of Computer S...	HAL 9000 Computer Sv...	0
29492		07/06/2015 01:27:40 PM	Matthew Robinson	Update here:	Carl will confirm existe...	Abby Lockhart	0
27034		05/14/2015 09:32:11 AM	Matthew Robinson	Still have yet to receive this invoice.	2014 Q2 Invoice	Blue Cross Blue Shield...	0

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

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

Creating a Note




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



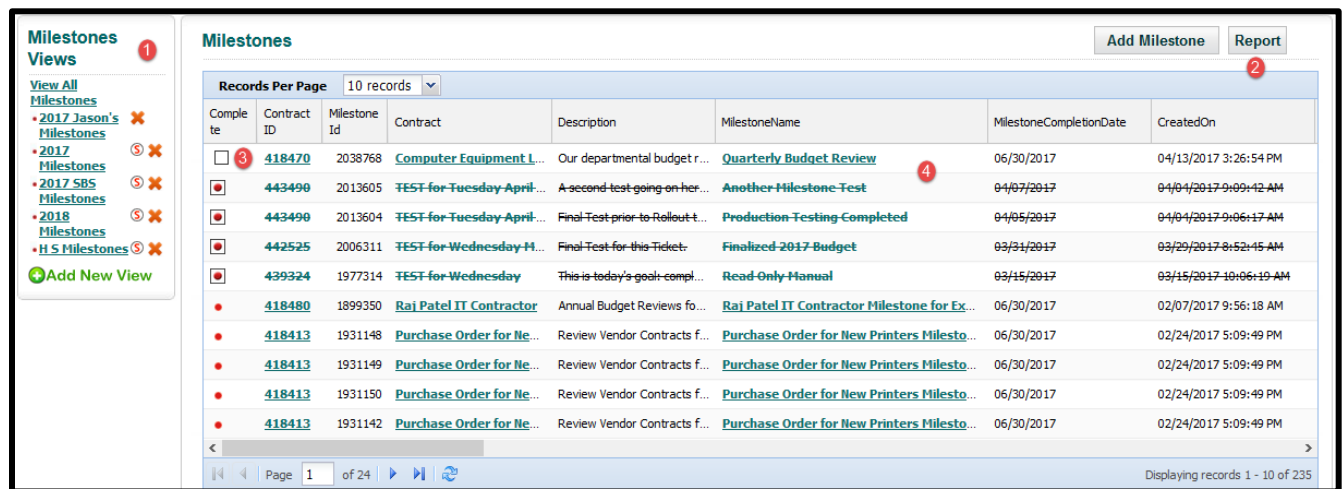
The screenshot shows the 'Add Note' form. It has fields for 'Note Title' (with a placeholder 'Type your Title here'), 'Note' (a large text area with instructions), 'Contract' (a dropdown menu with 'Dr. Spock (443815)' selected), and 'Attachment' (a file selection area with a 'Select File' button). A callout bubble points to the 'Attachment' section, stating 'Uploading Attachments works just like the Attachments Tab'. At the bottom, there are 'Save' and 'Cancel' buttons.

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

Editing or Deleting a Note

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

The Enterprise Ribbon: Milestones Tab



Complete	Contract ID	Milestone ID	Contract	Description	MilestoneName	MilestoneCompletionDate	CreatedOn
<input type="checkbox"/>	418470	2038768	Computer Equipment L...	Our departmental budget r...	Quarterly Budget Review	06/30/2017	04/13/2017 3:26:54 PM
<input checked="" type="checkbox"/>	443490	2013605	TEST-for-Tuesday-April...	A second test going on her...	Another Milestone Test	04/07/2017	04/04/2017 9:09:42 AM
<input checked="" type="checkbox"/>	443490	2013604	TEST-for-Tuesday-April...	Final Test prior to Rollout t...	Production Testing Completed	04/05/2017	04/04/2017 9:06:17 AM
<input checked="" type="checkbox"/>	442525	2006311	TEST-for-Wednesday-M...	Final Test for this Ticket:	Finalized 2017 Budget	03/31/2017	03/29/2017 8:52:45 AM
<input checked="" type="checkbox"/>	439324	1977314	TEST-for-Wednesday	This is today's goal: compl...	Read-Only Manual	03/15/2017	03/15/2017 10:06:19 AM
<input checked="" type="checkbox"/>	418480	1899350	Raj Patel IT Contractor	Annual Budget Reviews fo...	Raj Patel IT Contractor Milestone for Ex...	06/30/2017	02/07/2017 9:56:18 AM
<input checked="" type="checkbox"/>	418413	1931148	Purchase Order for It...	Review Vendor Contracts f...	Purchase Order for New Printers Milesto...	06/30/2017	02/24/2017 5:09:49 PM
<input checked="" type="checkbox"/>	418413	1931149	Purchase Order for It...	Review Vendor Contracts f...	Purchase Order for New Printers Milesto...	06/30/2017	02/24/2017 5:09:49 PM
<input checked="" type="checkbox"/>	418413	1931150	Purchase Order for It...	Review Vendor Contracts f...	Purchase Order for New Printers Milesto...	06/30/2017	02/24/2017 5:09:49 PM
<input checked="" type="checkbox"/>	418413	1931142	Purchase Order for It...	Review Vendor Contracts f...	Purchase Order for New Printers Milesto...	06/30/2017	02/24/2017 5:09:49 PM

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

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

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

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

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

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

Working with Milestones

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

To Create a Manual Milestone

All entries with * are required.

1. Name the Milestone.
2. Choose the Completion Date from the calendar.
3. Select the Contract from the drop-down list.
4. Type instructions for the Milestone.
5. Choose the Person to be notified via drop-down list.
6. Choose how many days **Before** Completion Date (0-4000) to Notify

The screenshot shows a web form for creating a manual milestone. The form includes the following fields and controls:

- Milestone Name:** A text input field with a red circle 1 and an asterisk.
- Completion Date:** A date picker with a red circle 2 and an asterisk.
- Contract:** A dropdown menu with a red circle 3 and an asterisk.
- Description:** A text area with a red circle 4.
- Responsible Person:** A dropdown menu with a red circle 5 and an asterisk.
- Notification Method:** Radio buttons for "Email" (selected) and "Text Message" with a red circle 7.
- Notify Before:** A text input for days with a red circle 6 and an asterisk.
- Also Notify:** A list box with a red circle 8. The list includes "Owner", "Primary", "Secondary", "Tertiary", "Andi McDoogle", "Benjamin Pierce", "BJ Honeycutt", and "Carol Brady". A note above says "Hold Ctrl key to select multiple items".
- Notification Method:** Radio buttons for "Email" (selected) and "Text Message" with a red circle 10.
- Repeat Email Notifications:** A checkbox with a red circle 11.
- Notify On Completion:** A checkbox with a red circle 12.
- Completed:** A checkbox with a red circle 13.
- Fields:** A link labeled "Configure Fields" with a red circle 13.
- Buttons:** "Save" (red circle 14) and "Cancel".

– OR –

Choose how many days afterwards (-1 to -4000).

7. Email Checkbox remains unchecked until you select a Responsible Person (#5). Currently, you cannot use the "Text Message" option for notifications.
8. Select if any other Users should be included in **Also Notify**. Hold [Ctrl] to select multiple users.
9. Choose how many days before (or after) using the same rules as listed with #6 above.
10. Email Checkbox remains unchecked until you select Also Notify (#8). Currently, you cannot use the "Text Message" option for notifications.
11. Decide if these people should continue to receive **daily notifications** until the Milestone is marked completed in the system.
12. Select if and which User to be notified (by email) upon completion of the Milestone.
13. Select what data points should be included with the Milestone Email Notification using the Configure Fields button (see Configure Fields for more detail).
14. Click the **Save** button to generate the Milestone. The **Cancel** button will abandon everything you just did on this screen.

You are notified of your success.

The screenshot shows a table titled "Milestones" with buttons "Add Milestone" and "Report". Below the table, a green banner displays the message "Milestone added successfully" with a red 'X' icon on the right.

Example Milestone Entries are shown

New Milestone

1 Milestone Name: *

2 Completion Date: *

3 Contract: *

4 Description:

5 Responsible Person: *

6 Notification Method: ☒ Email ☐ Text Message *

7 Also Notify:

- Alison Dolomanuk
- Assigned Attorney
- Carl Leinbach
- Chief Executive Officer
- Christian Barrie
- Contract Manager
- Danielle Obchinetz
- General Council

8 Notification Method: ☒ Email ☐ Text Message

9 Repeat Email Notifications: ☐

10 Notify On Completion: ☒

- Joe Deluccia
- Lead Attorney
- Leigh Powell
- Mari Ricco
- Matthew Robinson
- Mister iContracts
- Practice Manager
- Practice Manager

11 Completed: ☐

Fields: [Configure Fields](#) 12

13 Notify Before: Days *

14 Notify Others Before: Days

Contract: *

Description:
 214 West Main Street (308051)
 22 South North Blvd. (308057)
 241 W Main Street (308313)
 5322 N south ave (308056)
 55 County Route 22 (308317)
 66 North Broadway (308315)
 76 N Broadway (308314)
 77 North Broadway (308312)
 Abby Lockhart (294281)
 ABC Company (336030)
 Aetna Payor Agreement (265767)
 Allgraph Supply Agreement (284235)
 American Responders (263160)
 Blue Cross Blue Shield - Payor Agreement (265760)
 Bonnie Dimmick - RHP (294275)
 Cigna Payor Agreement (265829)
 Clinical Trials for Ambicentrifricmax (265624)
 Doc Smith (319125)

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

Configure Fields

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

Editing a Milestone

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

The Enterprise Ribbon: Activities Tab

The **Activities Tab** will show you all future, present and past Activities in the system for the contracts you are able to see. You can create Views for the Activities in this area and save them into the area on the left of the Activities Grid. The setup and maintenance of these Views is similar to that of the Contract Views. You can add or modify an unlimited number of saved searches that contain criteria such as alterable sorting, page layouts, and the ability to filter on any combination of activity data. Remember, the Report button will export the data from the associated grid to an Excel readable file.

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

Activity yID	Complete	Contract	ActivityName	AssignedToName	CompletedOn	AssignedOthersName	StartDateTime	EndDateTime
134846	<input checked="" type="checkbox"/>	GE Healthcare Trophon	Yearly Review	Matthew Robinson	06/25/2015 02:00:23 PM		05/02/2024 08:00:00 AM	05/02/2024 10:00:00 AM
134845	<input checked="" type="checkbox"/>	GE Healthcare Trophon	Yearly Review	Matthew Robinson	08/20/2015 03:36:36 PM		05/04/2023 08:00:00 AM	05/04/2023 10:00:00 AM
134844	<input type="checkbox"/>	GE Healthcare Trophon	Yearly Review	Joe Deluccia			05/05/2022 08:00:00 AM	05/05/2022 10:00:00 AM
134843	<input type="checkbox"/>	GE Healthcare Trophon	Yearly Review	Joe Deluccia			05/06/2021 08:00:00 AM	05/06/2021 10:00:00 AM
134842	<input checked="" type="checkbox"/>	ABC Company	Yearly Review	Matthew Robinson			05/07/2020 08:00:00 AM	05/07/2020 10:00:00 AM
134841	<input checked="" type="checkbox"/>	YZ Company	Yearly Review	Matthew Robinson			05/02/2019 08:00:00 AM	05/02/2019 10:00:00 AM
134840	<input checked="" type="checkbox"/>	---	Yearly Review	Matthew Robinson	04/23/2015 03:31:50 PM		05/03/2018 08:00:00 AM	05/03/2018 10:00:00 AM
134839	<input checked="" type="checkbox"/>	---	Yearly Review	Matthew Robinson	04/23/2015 03:31:43 PM		05/04/2017 08:00:00 AM	05/04/2017 10:00:00 AM
134838	<input checked="" type="checkbox"/>	---	Yearly Review	Matthew Robinson	06/03/2015 03:30:10 PM		05/05/2016 08:00:00 AM	05/05/2016 10:00:00 AM
134837	<input checked="" type="checkbox"/>	HR Test	Yearly Review	Matthew Robinson	06/25/2015 02:00:06 PM		05/07/2015 08:00:00 AM	05/07/2015 10:00:00 AM

Note: You can arrange Column Headings to your liking – Some columns shown above may not be seen on your screen, depending on your permissions setup by UCM Administrators.


- ✓ **Activities Views** are found at the upper left of the screen.
- ✓ The **Activities Grid** is displayed in the center of the screen.
- ✓ Above the Activities Grid on the right side of the screen is the **Report button**.
- ✓ In the Activities Grid the column for *Complete* shows the **Activity Status Indicators**.

Creating a New Activity

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

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


Setting Up a Recurring Activity

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

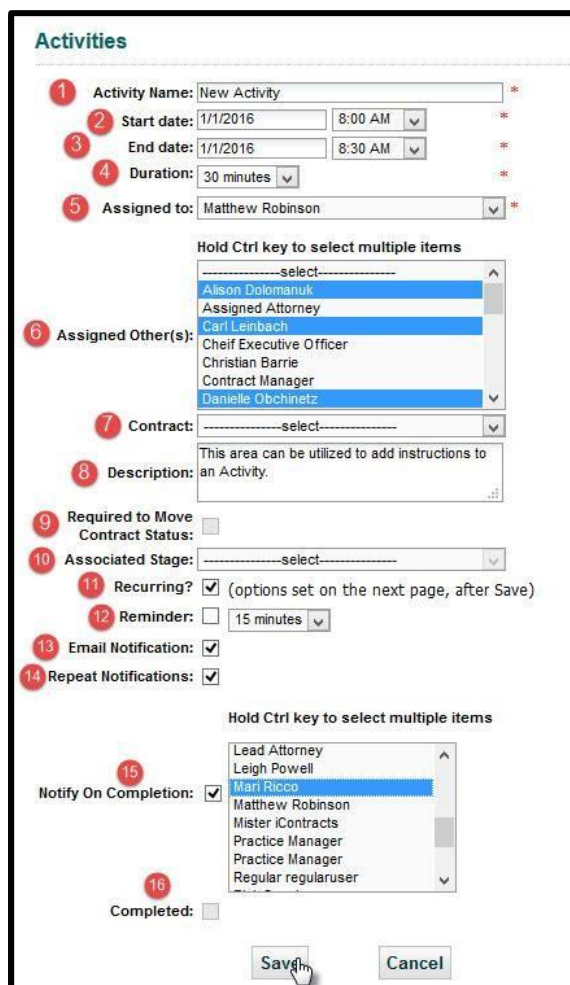
Once in the **Recurring Scheduler**, fill in the four main areas:

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

To Edit a Recurring Activity

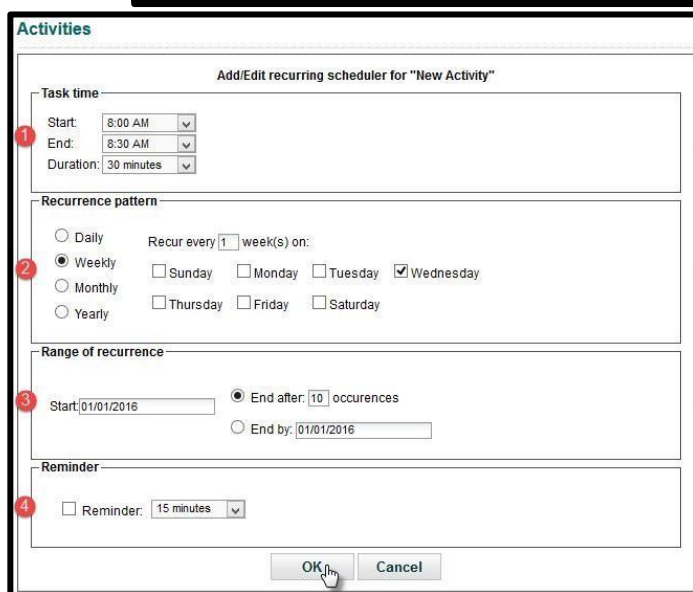
Click on the  icon in the Activities grid and repeat these 4 procedures from the previous paragraph. – OR –

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



The screenshot shows the 'Activities' form with the following fields and callouts:

- 1. Activity Name: New Activity *
- 2. Start date: 1/1/2016 8:00 AM *
- 3. End date: 1/1/2016 8:30 AM *
- 4. Duration: 30 minutes *
- 5. Assigned to: Matthew Robinson *
- 6. Assigned Other(s): List of users including Alison Dolmanuk, Assigned Attorney, Carl Lembach, Chief Executive Officer, Christian Barrie, Contract Manager, and Danielle Obchinetz.
- 7. Contract: *
- 8. Description: This area can be utilized to add instructions to an Activity.
- 9. Required to Move Contract Status: *
- 10. Associated Stage: *
- 11. Recurring? ☒ (options set on the next page, after Save)
- 12. Reminder: ☐ 15 minutes
- 13. Email Notification: ☒
- 14. Repeat Notifications: ☒
- 15. Notify On Completion: ☒
- 16. Completed: ☐




The screenshot shows the 'Recurring Scheduler' form with the following fields and callouts:


- 1. Task time: Start: 8:00 AM, End: 8:30 AM, Duration: 30 minutes
- 2. Recurrence pattern: ☒ Weekly, Recur every 1 week(s) on: ☐ Sunday, ☐ Monday, ☐ Tuesday, ☒ Wednesday, ☐ Thursday, ☐ Friday, ☐ Saturday
- 3. Range of recurrence: Start: 01/01/2016, End after: 10 occurrences
- 4. Reminder: ☐ 15 minutes

Working with Activities

You can find Activities **Assigned To You** listed in the *Activities grid* five different ways. You may also receive email notifications regarding an Activity which you have been assigned.

1. The **Activity Window** Button – Upon login, any Activities “Assigned to You” that are due or overdue will appear in this pop-up window. This window can be retrieved at any time by clicking on this button (that looks like a tiny “AMEX” credit card). Any “Assigned to Others” users *do not see this window*.

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

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

2. Click on the *Assigned To You* (or *Created By You*) link.
3. Create an *Activities View* that identifies you as the Assigned To person.
4. The *Complete* checkbox ☐ (only activities assigned to you will be clickable, otherwise they show up as a Red dot • and the square outline indicates the activity has been completed by someone else).
5. You are listed in the *Assigned To* Column.

After you locate the Activity you wish to Complete:

Read Documents (ID: 143153)

Mark As Completed

Created By: Matthew Robinson

Start Date: 8/25/2015 8:00:00 AM

End Date: 8/25/2015 8:30:00 AM

Assigned To: Matt ReadOnly

Assigned Other(s):

Completed On: Not Yet Completed

Contract: [55 County Route 22](#)

Description:

Required to Move: No

Contract Status:

Associated Stage: --

Recurring:

Reminder: Not set

Email Notification: ☐

Repeat Notification: ☐

Notify On Completion: --

Activities

Report

[All](#) [Assigned To You](#) [Created By You](#)

ActivityID	ActivityName	Complete	AssignedOthersName	AssignedToName	CompletedOn	Contract	CreatedByName
143154	Review with Contract Admin	<input type="checkbox"/>		Matt ReadOnly		214 West Main Street	Matthew Robinson
143153	Read Documents	<input type="checkbox"/>		Matt ReadOnly		55 County Route 22	Matthew Robinson
142901	Activity for MattReadOnly			Carl Leinbach		214 West Main Street	Matthew Robinson

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

Read Documents (ID: 143153)

Reactivate Activity

Created By: Matthew Robinson

Start Date: 8/25/2015 8:00:00 AM

End Date: 8/25/2015 8:30:00 AM

Assigned To: Matt ReadOnly

Assigned Other(s):

Completed On: 8/28/2015 10:03:45 AM

Contract: [55 County Route 22](#)

Description:

Required to Move: No

Contract Status:

Associated Stage: --

Recurring:

Reminder: Not set

Email Notification: ☐

Repeat Notification: ☐

Notify On Completion: --

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

The Contract Ribbon: Inside the Contract Container

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

Tabs displaying a **blue dot with a number** on the Contract Ribbon are “*Tab Indicator Dots*” which means that there is data (and how many) within those tabs. For the image below, there are 8 Attachments, 16 Notes, 1 Collaboration, 19 Milestones, and 1 Activities. Email and History tabs don’t display Tab Indicator Dots. No Related Contracts, no dot displays. The blue dots can accommodate up to 9999.

Summary Tab

(480030) Bacon Walnut Pistachio Ice Cream Vendor 1

180 Day(s) Until Expiration Date, on 10/31/2018 2

Description: Doing the Testing Thing. How fun is that? Lots of taste testing, but how does it really taste? This ... [Read More](#) 3

Owner: Steven Snyder 4

Contract Type: Vendor Management 5

Alert Configuration: ☒ Alert (3) Remaining 6

Current Stage/Change Stage 9: Active for 2 days 10

Summary 8 **Attachment(s)** 16 **Notes** 1 **Related Contract** **Email** 1 **Collaboration** 19 **Milestones** 1 **Activities** **History**

Show Contract Attributes 11 **Expand All** 12 **Sorting** Field Name Asc **Collapse All** **Add Fields**

A Contract Name: Bacon Walnut Pistachio Ice Cream Vendor **K Review Status:** 0 left to review, 2 Approved, 0 Rejected

B Related Contract: Office Supplies (418478)

C Notify on Stage Update: Bing Crosby, Charlie Chaplin, Ginger Rogers, Mike Nocio J

D Responsible Parties: E Albert Administrator F Danielle Smi G Jane Doe

H Primary Document: Amendment 1.pdf Edit in Cloud I

Expiration Date (Date) 10/31/2018 15 16 17

Holiday Schedules (Table) 14

TEST JKL (SingleLine)

Vendor Contracts (Field Group) Enter ID V0030 Auto Sync ☒

Folder Name: iContracts Urgent Care/Contract Management System/Executive/Accounting & Finance/Vendor Management/TEST Vendors 18 **Contract Origin:** User 20 **ContractID:** 480030 22

Created On: 08/18/2017 11:19:51 AM **Updated On:** 05/04/2018 08:38:56 AM

Created By: Carol Burnett 19 **Updated By:** Rocky Balboa 21 23

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

Common Contract Fields (Field Group) 14

Auto-Renew Contract: ☐

BAA Required: No

BAA Date:

COI Required: Yes


COI Expiration Date: 05/31/2021

Contract Value: 1,000,000

Effective Date: 06/01/2015

Expiration Date: 06/30/2018

Termination Notice in Days:

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

The **Summary** data page within a Contract Container is where you will find all of the data surrounding the Contract. At the top of this screen, you will still see the *Enterprise Ribbon*, which is used for navigating through different areas of the system for **all** records. In this screen, you will see that there is another navigation ribbon; this one is called the **Contract Ribbon**. This ribbon allows you to navigate across the different areas of the particular Contract Container you are viewing.

The **Contract Ribbon** gives users in search of specific contracts the ability to quickly access information, evaluate potential actions, and effectively manage its near and long-term lifecycle and performance. Key information regarding the **Contract Container** will be available by clicking on the **Summary Tab**.

Summary information includes the contract title or name, description, owner, contract type, and other pertinent *Contract Attribute* information created upon entry into the system, as shown in the picture above. Other tabs will indicate that they have content with a blue *Tab Indicator Dot*. These will only show if there is content in the Attachments, Notes, Related Contract, Collaboration, Milestone, or Activities Tabs. We also show users how many items are within each group. These counts are dynamic; that is, if you delete an Attachment or Activity, the number in the blue dot updates immediately.

 **If activated by an admin, the *Countdown for Tracking 'X' Date* appears on all Contract Ribbon Tabs.**

The organization's custom fields, created by your UCM Administrators, are also available on this screen. They will always show directly below the *Contract Attributes*.

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

Use the **+** to expand or **-** to collapse individual Field Groups (or stand-alone fields).

Below all Fields and Field Groups are the Folder Name, Created On and Created By information, as well as Contract Origin (Direct Entry, Bulk Loader, Template, Library, or Copy), Update Information, Contract ID, and finally, the Archived On Date for only those Contract Containers moved into the Archived stage.

Editing Data in the Summary Tab


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

Summary Tab Items of Interest

Workflow

In the upper right-hand corner of the Contract Summary tab is a DropDown containing *Workflow Stages* that can be assigned to a contract. The Workflow Stages are company-specific, as well as contract-type specific and are created by Administrator users. The box on the Contract Container shows the current Stage the Contract is in at that time (e.g., Active). The two icons to the left are Workflow and Manage Assignees. You can change the Workflow and/or which users are notified after a stage change. Click on this link "**Concurrent Stage Warning Messages**" to redirect you if a Contract is in this Stage for longer period than it should be, as determined by your UCM Administrator(s). See **Workflow Stage Reminders and Escalation Emails** for additional information.

Fields

In addition to the Contract Attributes, specific data points related to the contract (Fields) are listed underneath the Contract Attributes. You can view specific fields directly on the Contract Summary tab, as long as you are granted the proper Permissions by your Administrators. By clicking the *Expand All* button, all of the added fields associated with the contract will expand to show the associated data. The user can also see all History associated with any Field by clicking on its History icon .

(Note: Fields are described in more detail in a later section)

Countdown for Tracking X Date

UCM can display a countdown on the contract *Summary Tab* in **red text**, based on a date field within that container. When the date passes, the message changes from "**x days until ...**" to "**x days after ...**". Administrators define *which* Date field to use for all Summary Tab countdowns.

Alerts

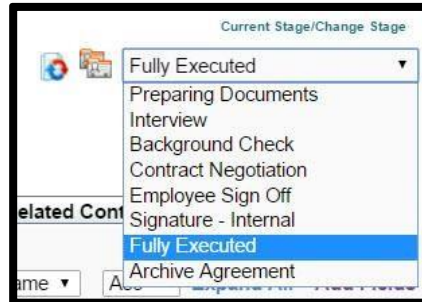
This specialized alert is set on a monthly cycle (every 1 month, 3 months, 6 months, 12 months, etc.) and for a preset number of times (0-999). This is different from Manual Milestones and Activities, which can repeat notifications daily until someone marks them as Complete. Alerts do not have daily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

Workflow

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

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

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

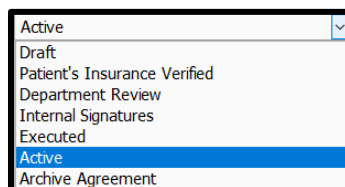


You can change a Contract's Workflow locally by clicking on the Red and Blue arrow button to the left of the Stage name (that is, **if** you are given permission to override workflows). This will show you a preview of the Stages in each Workflow available here. Choose your new Workflow Template from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

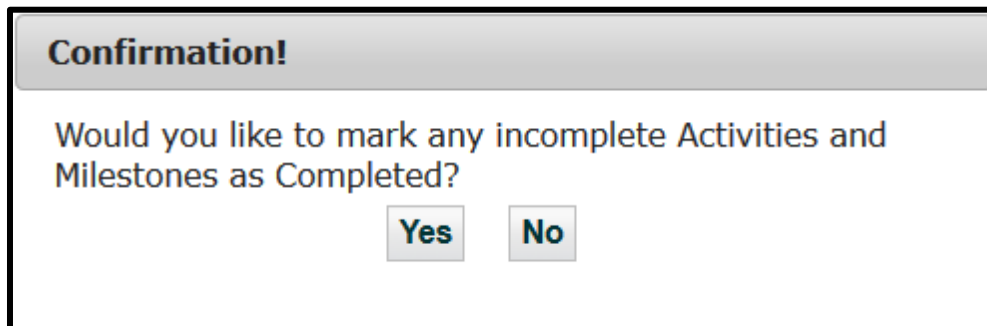


Archive Agreement

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



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

A confirmation dialog box with a grey header bar containing the text "Confirmation!". Below the header, the text "Would you like to mark any incomplete Activities and Milestones as Completed?" is displayed. At the bottom, there are two buttons: "Yes" and "No".

Confirmation!

Would you like to mark any incomplete Activities and Milestones as Completed?

Yes **No**

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

A form for entering a comment. It has a label "Comment:" followed by a text input field. Below the input field are two buttons: "Archive" and "Cancel".

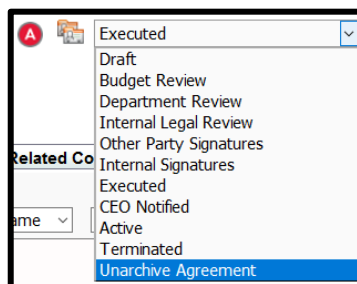
Comment: This contract has not been renewed because the building has been sold. |

Archive **Cancel**

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

Unarchive Agreement

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

A dropdown menu showing various stages. The "Unarchive Agreement" option is highlighted in blue. The stages listed are: Executed, Draft, Budget Review, Department Review, Internal Legal Review, Other Party Signatures, Internal Signatures, Executed, CEO Notified, Active, Terminated, and Unarchive Agreement.

A Executed

Draft

Budget Review

Department Review

Internal Legal Review

Other Party Signatures

Internal Signatures

Executed

CEO Notified

Active


Terminated

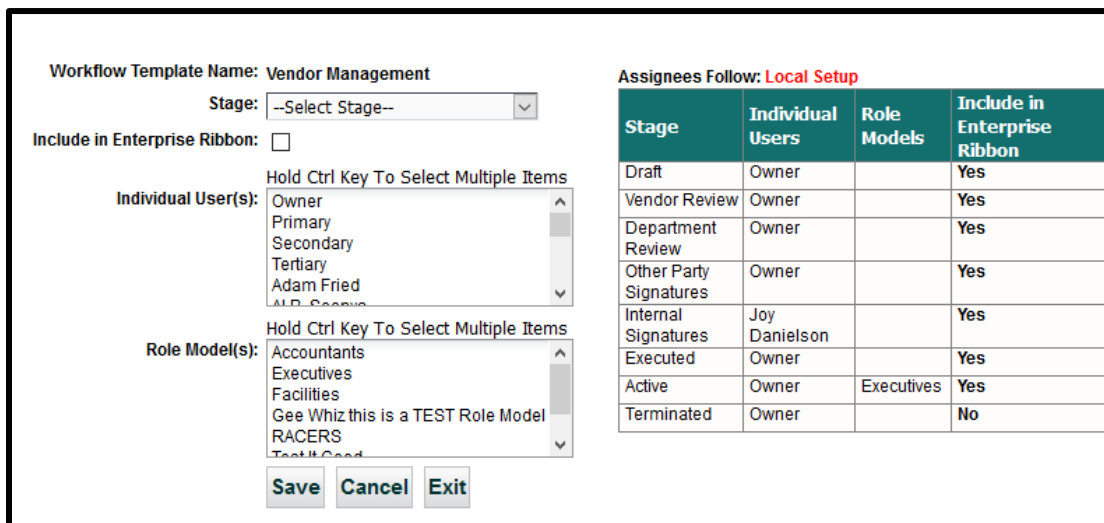
Unarchive Agreement

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

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

Viewing Assignees

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



Workflow Template Name: Vendor Management

Stage: --Select Stage--

Include in Enterprise Ribbon: ☐

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

- Owner
- Primary
- Secondary
- Tertiary
- Adam Fried
- A.D. Cooper

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

- Accountants
- Executives
- Facilities
- Gee Whiz this is a TEST Role Model
- RACERS
- Test It Good

Assignees Follow: Local Setup

Stage	Individual Users	Role Models	Include in Enterprise Ribbon
Draft	Owner		Yes
Vendor Review	Owner		Yes
Department Review	Owner		Yes
Other Party Signatures	Owner		Yes
Internal Signatures	Joy Danielson		Yes
Executed	Owner		Yes
Active	Owner	Executives	Yes
Terminated	Owner		No

Save Cancel Exit

Managing Assignees

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

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



Workflow Template Name: Employment WF

Stage: Interview

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

- Leigh Po
- Mari Rick
- Matthew
- Mister iC
- Practice

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

- Administration
- HR

Assignees Follow: Admin Setup

ucm.icontracts.com says:

Successfully updated Assignee(s).

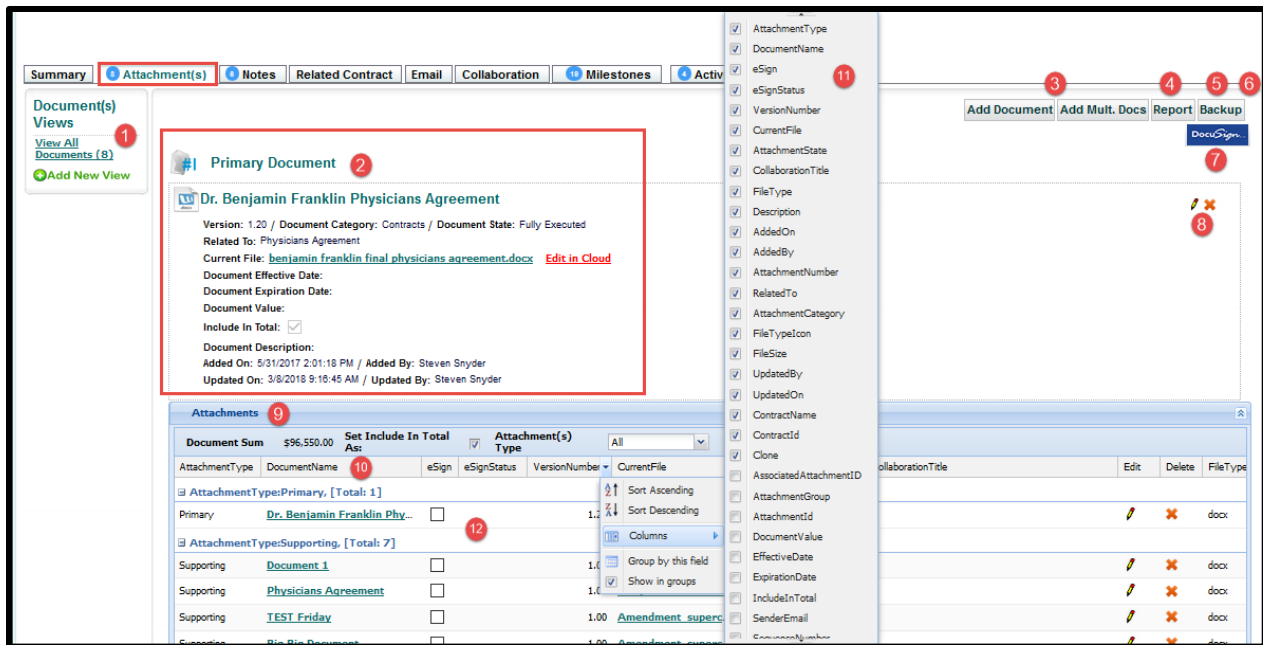
OK

Role Models
HR
HR
HR
HR, Administration
HR

Save Cancel Exit

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

The Contracts Ribbon: Attachments Tab



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

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

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

Navigating the Attachments Tab

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

You may notice that this area has the same functionality to *Show in Groups* and create Views that you have in the Attachments tab at the Enterprise level. However, the Views here will only apply to the specific Contract Container from which they are created. For more on Views, see the chapter for [Creating a View](#).

Adding Documents

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

The screenshot shows the 'Upload Attachment' form with the following elements highlighted by numbered red circles:

- 1. Document Title: Fully Executed Contract
- 2. Document Category: Agreement
- 3. Document State: Fully Executed
- 4. Drop file here and click upload button
- 5. Select File button
- 6. Document Description: Physician Agreements
- 7. Document Folder: Physician Agreements
- 8. Make this the Primary Document checkbox (checked)

1. Document Title (mandatory field)
2. Document Category
3. Document State
4. Drag and Drop Document

The screenshot shows the 'Upload Attachment' form with a blue box highlighting the following fields:

- Document Effective Date:
- Document Expiration Date:
- Document Value:
- Include In Total: checkbox

5. Browse to Select File Button
6. Document Description
7. Document Folder (Explorer mode only)
8. Primary Document Checkbox

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


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

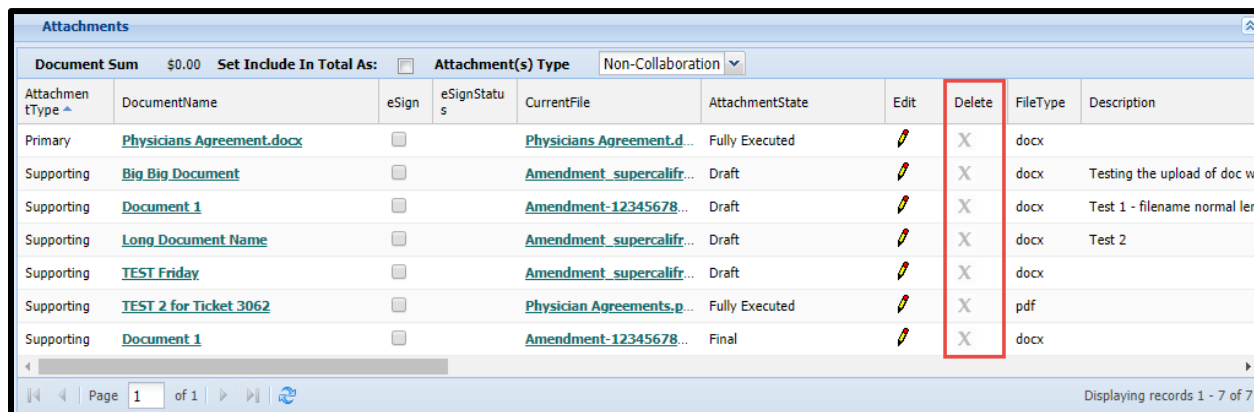
- 🚫 Scanned (PDF) documents should be 200 dpi gray-scaled to keep the file size within acceptable limits to make uploading and downloading attachments less prone to system errors.

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

The screenshot shows a confirmation message: "File Uploaded." above a text box containing the filename "benjamin franklin final physicians". Below the text box is a "File:" label and a small red asterisk.


Deleting A Document

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



AttachmentType	DocumentName	eSign	eSignStatus	CurrentFile	AttachmentState	Edit	Delete	FileType	Description
Primary	Physicians Agreement.docx	<input type="checkbox"/>		Physicians Agreement.d...	Fully Executed			docx	
Supporting	Big Big Document	<input type="checkbox"/>		Amendment_supercalifr...	Draft			docx	Testing the upload of doc wi
Supporting	Document 1	<input type="checkbox"/>		Amendment-12345678...	Draft			docx	Test 1 - filename normal len
Supporting	Long Document Name	<input type="checkbox"/>		Amendment_supercalifr...	Draft			docx	Test 2
Supporting	TEST Friday	<input type="checkbox"/>		Amendment_supercalifr...	Draft			docx	
Supporting	TEST 2 for Ticket 3062	<input type="checkbox"/>		Physician Agreements.p...	Fully Executed			pdf	
Supporting	Document 1	<input type="checkbox"/>		Amendment-12345678...	Final			docx	

Contract Ribbon Showing Access Denied for this User

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

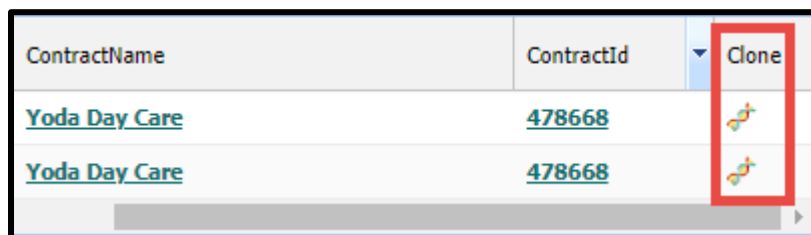
ucm.icontracts.com says
 This action cannot be undone. Do you want to continue?

ucm.icontracts.com says
 Record deleted successfully.

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

Cloning an Attachment

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



ContractName	ContractId	
Yoda Day Care	478668	Clone
Yoda Day Care	478668	

Explorer Mode

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

If this should be the [Primary Document](#) for the Container, check the box to “*Make this the Primary Document*”. Click **Save** when you are finished and the document will be loaded into the Container.

Document Description: You have the option of adding a descriptive statement to the metadata for the document. This can be done from this screen, or added later on using the edit pencil.

Document Folder: Physician Agreements

- iContract Healthcare
 - Archived
 - BAA
 - Cert. of Insurance
 - 2012
 - 2013
 - 2014

Document Description: You have the option of adding a descriptive statement to the metadata for the document. This can be done from this screen, or added later on using the edit pencil.

Document Folder: Physician Agreements

☒ Make this the Primary Document

Save **Cancel**

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

Is this a version of an attachment which has already been stored?

Yes **No**

Document Versions

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

Using “Add Mult. Docs” will not prompt you for Document Versions.

Assign Version For Attachment

Attachment Version (0.00-999.99) : 2.20

OK **Cancel**

Editing Document Data

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

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

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

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

Document Title:

Version: 1.00

Related To: --

Document Category:

Document State:

Document Effective Date:

Document Expiration Date:

Document Value:

Include In Total: ☒

Document Description:

Promote to Primary Document: ☐

Edit Version

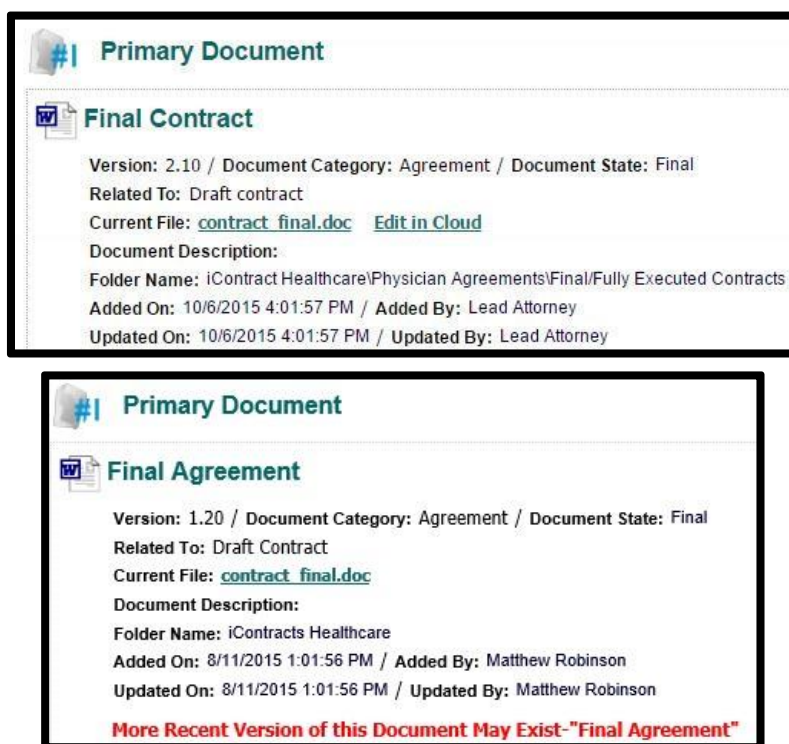
Save

Cancel

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

Primary Document

The *Primary* or main document listed for a Contract by Full-Access or Administrative users will show in a large area above the Attachments Grid. This depends on your organization, but it is often used to point you towards the governing document for a Contract. For any document on the Attachments tab, you can download the document by clicking on the **Current File** name (depending on permissions) or edit the document online if this is the most recent version of the document (see the “**Edit in Cloud**” section below).



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

Edit in Cloud

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

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

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

Summary | **Attachment(s)** | 1 Notes | Related Contract | Email | Collaboration | 5 Milestones | 2 Activities | History

Show Contract Attributes ☒ Expand All ☒ Sorting: Field Name | Asc | Collapse All | Add Fields

Contract Name: Physicians Agreement Review Status: [0 left to review.](#)
[1 Approved.](#)
[0 Rejected.](#)

Related Contract: ---

Notify on Stage Update:

Responsible Parties:

Primary Document: [Physicians Agreement.docx](#) [Edit in Cloud](#) ←

Common Contract Fields (Field Group)

Auto-Renew Contract:	<input type="checkbox"/>	
BAA Required:	No	
BAA Date:		
COI Required:	Yes	
COI Expiration Date:	05/31/2021	
Effective Date:	03/05/2018	
Expiration Date:	12/31/2019	
Contract Value:	1,000,000.00	

The Summary Tab

Add Document | Report | Backup

| Primary Document

Dr. Benjamin Franklin Final Physicians Agreement

Version: 1.10 / Document Category: Contracts / Document State: Final
 Related To: Physicians Agreement
 Current File: [benjamin franklin final physicians agreement.docx](#) [Edit in Cloud](#)
 Document Description: Final Physicians Agreement with all Signatures
 Added On: 4/21/2017 8:41:04 AM / Added By: Jason Bourne
 Updated On: 4/21/2017 8:41:04 AM / Updated By: Jason Bourne

Attachments

eSign	Edit	Delete	Attachment Type	FileType	DocumentName	VersionNumber	AttachmentState	CurrentFile
			Primary	docx	Dr. Benjamin Franklin Final Phys...	1.10	Final	benjamin franklin fin...
			Supporting	docx	Physicians Agreement	1.00	Redlines	Sample Medical Servi...

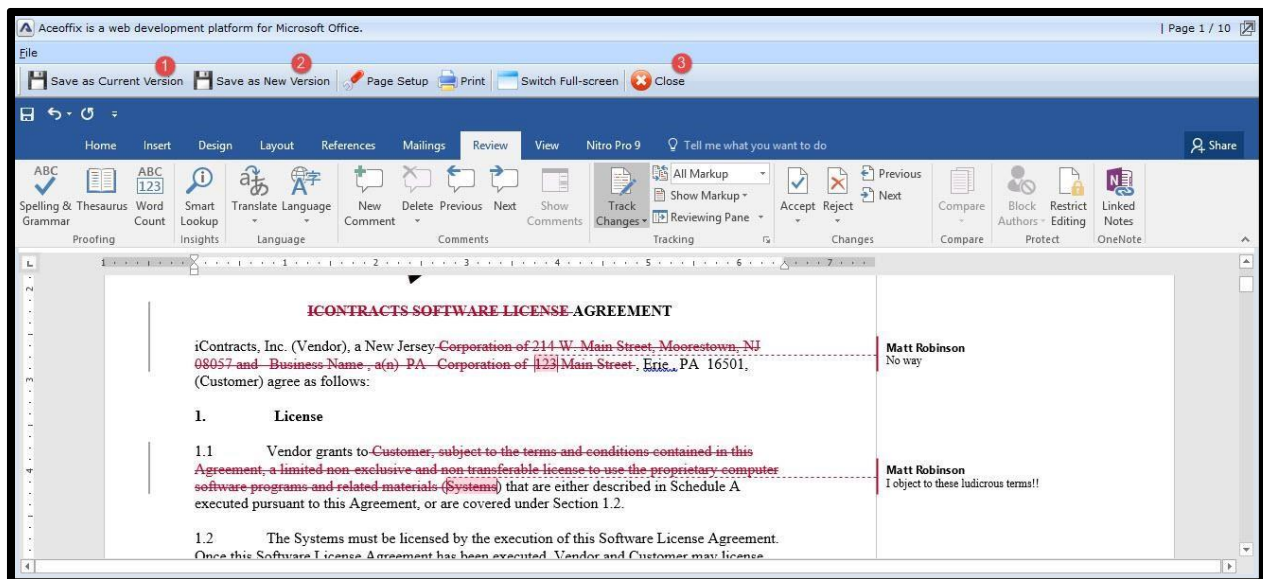
Page 1 of 1 | Displaying records 1 - 2 of 2

The Attachment(s) Tab

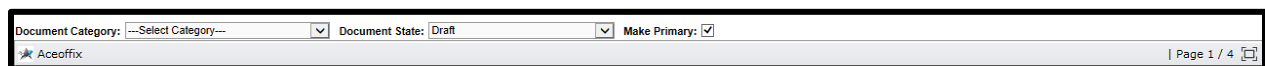
This will initiate a popup asking if you want to edit this document online. Click the **OK** button to continue.

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

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



1. Notice the **Save** buttons along the top of the Window?
This is the **Save as Current Version** button.
2. **Save as a New Version** will increase the document's current version number by **.10**.
3. You will close the Window with the **Close** button (preferred method) or the **X** in the window's corner.



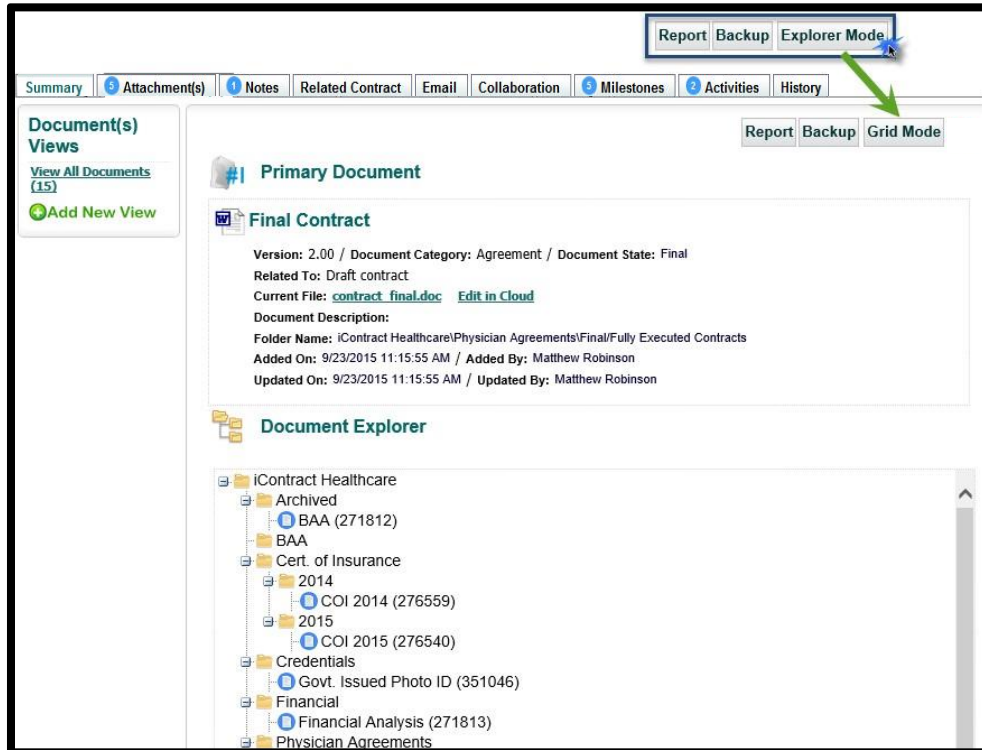
The top of the plug in allows you to update the *Document Category*, *State*, or change if the *Primary document*. Each of these drop-downs are optional, as it the option to change whether or not to Make Primary. If you change any of these options, it is recommended that you *Save as New Version* before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

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

Explorer Mode – An Optional Feature

This option is only available to you if your Administrators have decided that it is something they would like turned on. This option allows you to see your Attachments tab in a different way. This will replace the grid with a Windows Explorer-type *Folder structure* that may be different for each Contract.

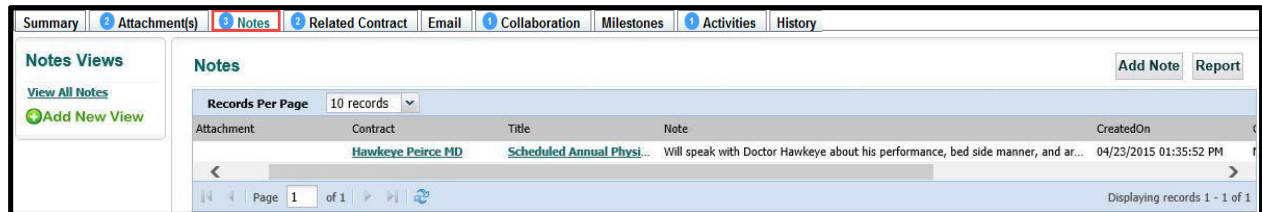
If this option is enabled, click on the **Explorer Mode** button at the top-right above the grid. Once you do so you will see the grid replaced and the *Explorer Mode* button now says *Grid Mode*. You can toggle the views back and forth as needed.



The Contract Ribbon: Notes Tab

The **Notes Tab** within the Contract Container is an area to keep Notes associated with a Contract Container. This is a great area to keep track of collaborations about the contract in an organized and chronological manner. System Administrators and Full Access Users can copy and paste from emails or add notes because their access permissions are set by default. If a document is attached to a Note, it will also appear within the *Attachments tab* with the same name as the Note Title.

To learn more about working with the notes, go to the chapter in this manual on [Creating a Note](#).

A screenshot of the 'A New Note' form. The 'Title' field contains 'A New Note'. The 'Note' text area contains the text: 'I can write my note here!' followed by a paragraph: 'I can even associate a document with this note. This would work great for documenting correspondence with a vendor... I could just save the file from outlook as an MSG file and upload it right here.' Below the text area, an 'Attachment' section shows a file named 'Correspondence with Vendor.msg' with a size of '30.00 kb'. A 'File Uploaded.' message is displayed above the attachment. At the bottom are 'Save' and 'Cancel' buttons.

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

The Contract Ribbon: Related Contract Tab

You can also look at relationships between Contract Containers in the system by navigating to the **Related Contract Tab**. Here you can view a list of all of the contracts that are pointing to the currently displayed contract. There is no limit to how many contracts can point to another contract.

When looking at a Contract Summary tab, users can specify a parent contract to which you want to relate the current contract. Each contract in the system can specify another contract to which it is related.

The top screenshot shows the 'Related Contract' tab for a contract titled '(542181) Radiologist on Staff'. The tab is highlighted in red. Below the tab, there is a table of related contracts. The table has columns: Contract ID, ContractName, ContractTypeName, StageName, Owner, Description, CreatedOn, UpdatedOn, and Auto. The table contains two rows of data. A blue arrow points from the 'Dr. Benjamin Franklin' link in the first row to the bottom screenshot.

Contract ID	ContractName	ContractTypeName	StageName	Owner	Description	CreatedOn	UpdatedOn	Auto
443734	Dr. Benjamin Franklin	Physic		Steven Snyder	Used this Physician's CC to...	04/05/2017 02:37PM	06/19/2017 06:02PM	
567271	Dr. Benjamin Jeckyll-Hyde	Physicians	Active	Steven Snyder	Used this Physician's CC to...	07/19/2018 03:08PM	08/02/2018 04:22PM	

The bottom screenshot shows the details of the selected contract, 'Dr. Benjamin Franklin'. The 'Related Contract' attribute is highlighted in a red box, showing 'Radiologist on Staff (542181)'. The 'Contract Name' is 'Dr. Benjamin Franklin'. The 'Review Status' is '2 left to review, 0 Approved, 0 Rejected'. The 'Primary Document' is 'Sample Medical Services Agreement.docx'.


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

The Contract Ribbon: Email Tab

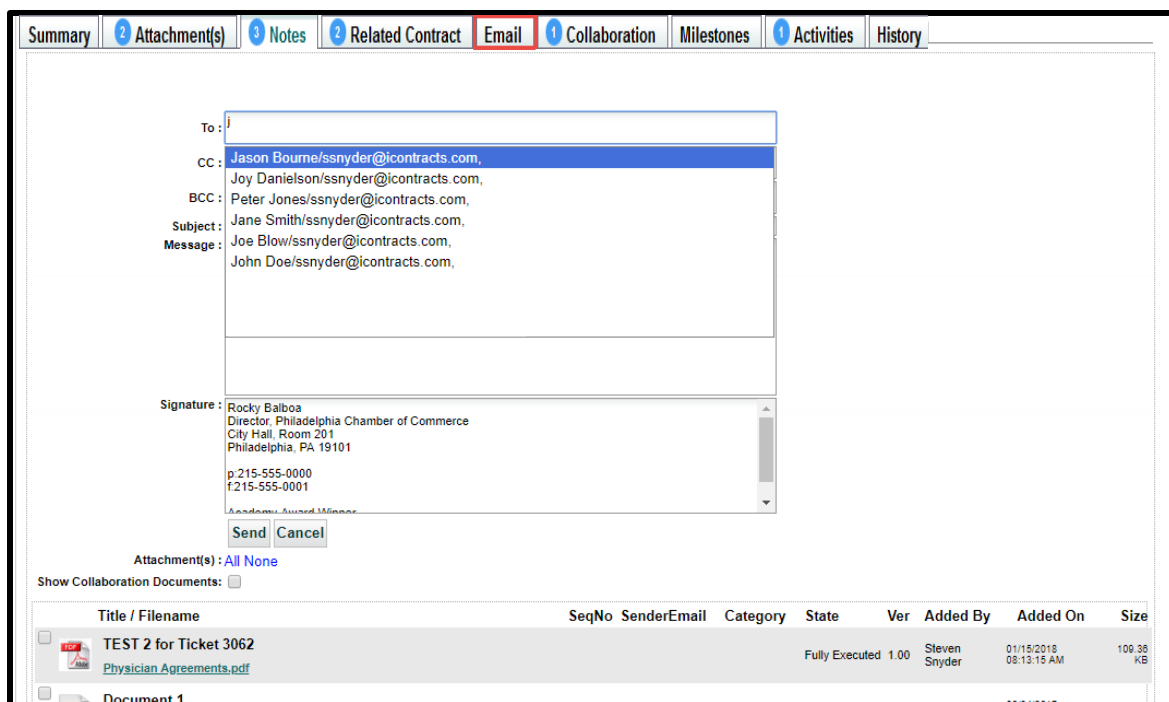
The Contract **Email Tab** allows users to communicate directly from within UCM. Email supports internal and external addresses To:, Cc:, and Bcc: -- in addition to Subject, and an area for the message to the recipients. Please note that your email address *may not* be displayed on the CC: line because the option to “*Automatically CC Sender*” is set by your UCM Administrator.

Don’t know the recipient’s email address? Just type a letter, like “J” and all names/email addresses with a J will list for you. These users must be Active Users though.

All outgoing email messages are logged in the History Tab. Email replies, however, are not logged in UCM, but in the corporate email application (e.g., Outlook) you are using outside UCM.

While typing the message, the “*Insert Link to Container*”  icon appears to the left of the Message box, allowing you, where your cursor is currently positioned, to insert a hyperlink to the Contract Container’s **Summary Tab**.

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



Title / Filename	SeqNo	SenderEmail	Category	State	Ver	Added By	Added On	Size
TEST 2 for Ticket 3062				Fully Executed	1.00	Steven Snyder	01/15/2018 08:13:15 AM	109.38 KB
Physician Agreements.pdf								
Document 1								

Email Attachments

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

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

The Contract Ribbon: Milestones Tab

The **Milestones** associated with a Contract Container are notifications assigned by system administrators associated with a contract's *date field* (for example, Expiration Date), and number of days before (or after) an event, such as 90, 60, 30 days. You will receive email notifications at the intervals before, on, or after the set trigger date(s). The email will include a link that takes you to the Milestone within the Contract Container.

If you are assigned to a Milestone, you can click on the Milestone Name in the grid and see the details of the Milestone, and upon task completion, click the *Mark As Completed* box in the Milestone. If you have editing rights, set by UCM Administrators, you can also click on the edit pencil icon to edit the Milestone.

The screenshot shows the 'Milestones' tab selected in the Contract Ribbon. The interface includes a sidebar with 'Milestones Views' and an 'Add New View' button. The main area displays a table of milestones. The table has columns: 'Complete', 'Contract ID', 'Milestone ID', 'ContractName', 'Description', 'MilestoneName', 'MilestoneCompletionDate', and 'CreatedOn'. There are 6 records displayed. The first three records are marked as completed (checked boxes). The last three records are not completed (unchecked boxes). The 'Milestones' tab is highlighted in the ribbon.

Complete	Contract ID	Milestone ID	ContractName	Description	MilestoneName	MilestoneCompletionDate	CreatedOn
<input checked="" type="checkbox"/>	542181	4798227	Radiologist-on Staff	renewing-contracts	Radiologist-Contract-Milestone-for-Expir...	07/31/2018 12:00:00 AM	03/26/2018 11:49:30 PM
<input checked="" type="checkbox"/>	542181	4798228	Radiologist-on Staff	renewing-contracts	Radiologist-Contract-Milestone-for-Expir...	07/31/2018 12:00:00 AM	03/26/2018 11:49:30 PM
<input checked="" type="checkbox"/>	542181	4798226	Radiologist-on Staff	renewing-contracts	Radiologist-Contract-Milestone-for-Expir...	07/31/2018 12:00:00 AM	03/26/2018 11:49:30 PM
<input type="checkbox"/>	542181	5748843	Radiologist on Staff	System-created Milestone	Radiologist on Staff Milestone for End Of ...	09/30/2018 12:00:00 AM	08/03/2018 2:18:43 PM
<input type="checkbox"/>	542181	5748844	Radiologist on Staff	System-created Milestone	Radiologist on Staff Milestone for End Of ...	09/30/2018 12:00:00 AM	08/03/2018 2:18:43 PM
<input type="checkbox"/>	542181	5748842	Radiologist on Staff	System-created Milestone	Radiologist on Staff Milestone for End Of ...	09/30/2018 12:00:00 AM	08/03/2018 2:18:43 PM

In addition, you can click on the *Complete* box in the grid without first displaying the Milestone. If your UCM Administrators have activated the “*Milestone Completion Note Administration*”, they you will also be required to supply a Milestone Note based on rules set by your company (free form text and/or a drop-down selection).

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

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

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

The Contract Ribbon: Activities Tab

The Contract **Activities Tab** provides you with a View of past, present, or future Activities associated with the Contract Container. You can add or modify an unlimited number of saved searches (Views) that contain criteria such as alterable sorting, page layouts, and the ability to filter on any combination of Activity data. Any view of Contract Activities may also be exported (to Excel by default) by simply clicking on the *Report* button. For more information in Views, please see [Creating a View](#) by clicking the link.

ActivityID	Complete	ActivityName	AssignedToName	AssignedOthersName	StartDateTime	EndDateTime	CompletedOn
311894	<input checked="" type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Steven Snyder, Danielle O...	08/06/2018 09:30:00 AM	08/06/2018 10:30:00 AM	08/03/2018 03:02:5
311895	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	08/20/2018 09:30:00 AM	08/20/2018 10:30:00 AM	
311896	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	09/03/2018 09:30:00 AM	09/03/2018 10:30:00 AM	
311897	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	09/17/2018 09:30:00 AM	09/17/2018 10:30:00 AM	
311898	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	10/01/2018 09:30:00 AM	10/01/2018 10:30:00 AM	
311899	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	10/15/2018 09:30:00 AM	10/15/2018 10:30:00 AM	
311900	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	10/29/2018 09:30:00 AM	10/29/2018 10:30:00 AM	
311901	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	11/12/2018 09:30:00 AM	11/12/2018 10:30:00 AM	
311902	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	11/26/2018 09:30:00 AM	11/26/2018 10:30:00 AM	
311903	<input type="checkbox"/>	Weekly Staff Meeting	Rocky Balboa	Ian Goodenough, Albert A...	12/10/2018 09:30:00 AM	12/10/2018 10:30:00 AM	

If an Activity has been assigned to you, review the task, then you can mark it as completed either by clicking on the Activity name and clicking the *“Mark As Completed”* button in the top right of the Activity window or, if the checkbox for *Complete* is visible in the grid, simply check the box. The grid updates, showing completed Activities crossed out.

Review Contract (ID: 145115) **Mark As Completed**

Created By: Matthew Robinson
Start Date: 3/6/2016 8:00:00 AM
End Date: 3/6/2016 8:30:00 AM
Assigned To: Matt ReadOnly
Assigned Other(s):
Completed On: Not Yet Completed
Contract: [Hawkeye Peirce MD](#)
Description:
Required to Move: No
Contract Status:
Associated Stage: --
Recurring: ☒
Reminder: Not set
Email Notification: ☐
Repeat Notification: ☐
Notify On Completion: --

Click on the “AMEX” icon to view your Activities. You may also receive notifications by email for Activities. These will provide a link that you can follow that will take you directly to this screen. If you are the “Assigned To” recipient, there may be a *“Click to Complete Activity”* button (explained later in this section) as well, if activated by you UCM Administrators.

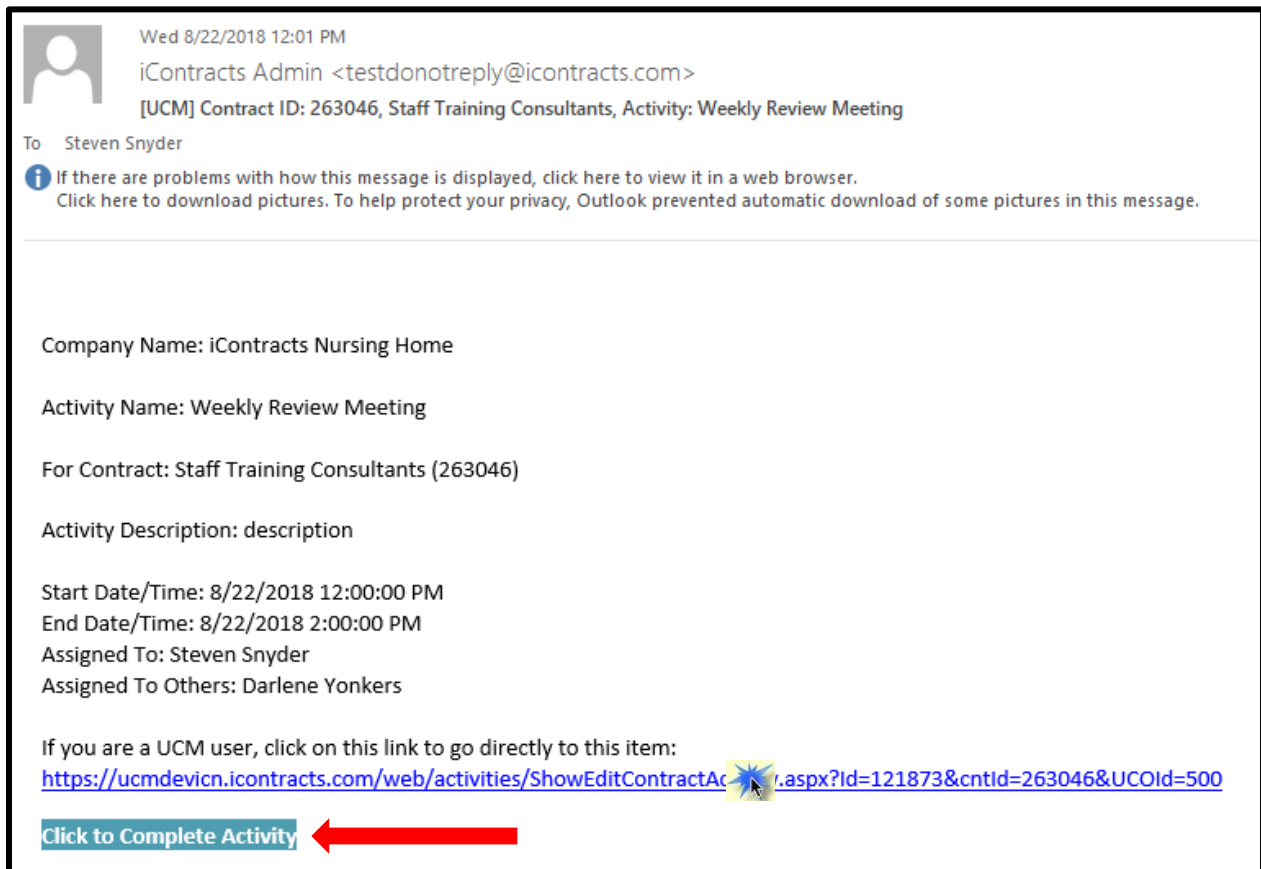
To create new Activities for this Contract, click on the **Add Activity** button at the top right of the grid. You can learn more about this in the section for [Creating a New Activity](#).

Receiving Activity Notification Emails

Assigned To Users


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

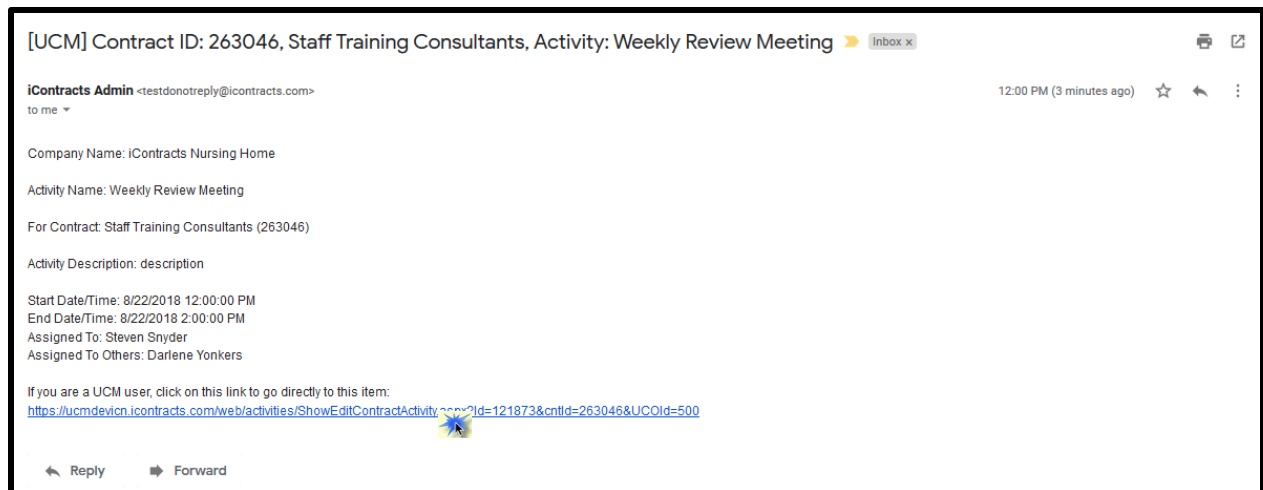
There is also a link to the Activity itself within the Contract Container. Clicking on this link in the email directs the user to UCM, where they can log into the system to access this Activity.



Assigned To Others

Users setup as “Assigned To Others” receive their Notification Email without the “Click to Complete Activity” button at the bottom of the email (see illustration on the next page). Instead, these users have just the link to direct them to UCM, where they can log into the system to access the Activity for that Contract Container.

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



Completing an Activity via Email Button

Whether or not you are logged into UCM prior to clicking the “**Click to Complete Activity**” button, you will be taken to a landing page that looks like this:



The *Activity Name* appears as part of the UCM message. You will always see **[Activity Name] is completed successfully**. You can also click on the “**Login/Signup**” link in the upper-right corner to log into UCM or simply close the page. You can still click on the UCM link in the email to log into UCM and be taken directly to the Container. However, if you click the “*Click to Complete Activity*” button again, you will get another message, stating the **[Activity Name] is already completed**.

The Contract Ribbon: History Tab

The Contract **History Tab** provides you with a view of changes made to a contract since the contract was entered into the system. You **cannot** configure which columns will display, only what order they will display (from left-to-right), as well as which column will sort your grid (History Date by default). There are only five columns and all of them display in the grid. History serves as an audit trail so that anyone with access can see when Contract Fields and Attachments were added, edited, and deleted. The UCM Administrators control whether a Full-Access user can Show All History, or only for the current user.

Comments	Field	FieldComment	HistoryDate	ModifiedBy
Contract Management System: 443734 Contract was accessed at 04/21/2017 8:31:44 AM		Contract Management System: 443734 Contract was accessed at 04/21/2017 8:31:44 AM	04/21/2017 8:31:44 AM	Jason Bourne
Contract Management System: 443734 Attachment was accessed at 04/21/2017 8:33:33 AM		Contract Management System: 443734 Attachment was accessed at 04/21/2017 8:33:33 AM	04/21/2017 8:33:33 AM	Jason Bourne
Viewed in Cloud(Attachment), Attachment Name: Dr. Benjamin Franklin Final Physicians Agreement, File Name: benjamin franklin final physicians agreement.docx, Attachment Id: 698919		Viewed in Cloud(Attachment), Attachment Name: Dr. Benjamin Franklin Final Physicians Agreement, File Name: benjamin franklin final physicians agreement.docx, Attachment Id: 698919	04/21/2017 10:37:11 AM	Jason Bourne
Viewed in Cloud(Attachment), Attachment Name: Dr. Benjamin Franklin Final Physicians Agreement, File Name: benjamin franklin final physicians agreement.docx, Attachment Id: 698919		Viewed in Cloud(Attachment), Attachment Name: Dr. Benjamin Franklin Final Physicians Agreement, File Name: benjamin franklin final physicians agreement.docx, Attachment Id: 698919	04/21/2017 10:31:08 AM	Jason Bourne

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

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

Click the **Report** button to export the history to an external application (such as Excel).

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

Date	User	Action
Friday 04/21/2017 10:37:11 AM	Jason Bourne	Viewed in Cloud(Attachment), Attachment Name: Dr. Benjamin Franklin Final Physicians Agreement, File Name: benjamin franklin final physicians agreement.docx, Attachment Id: 698919
Friday 04/21/2017 10:31:08 AM	Jason Bourne	Viewed in Cloud(Attachment), Attachment Name: Dr. Benjamin Franklin Final Physicians Agreement, File Name: benjamin franklin final physicians agreement.docx, Attachment Id: 698919
Friday 04/21/2017 8:42:02 AM	Jason Bourne	Assignees Email sent for Stage changed from Pending to HR Review for WorkflowTemplate HR Review
Friday 04/21/2017 8:42:02 AM	Jason Bourne	Stage changed from Pending to HR Review after 0 days

A Closer Look at Contract Fields

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

Annual Cost (Numeric, 2)	250,000.00
Annual Salary (Numeric, 2)	65,324.25
Approver (SingleLine)	Mark Tobinon
Attorney (DropDown)	Ally McBeal

However, most fields are contained within *Field Groups*. Increasing efficiency, these groups consolidate all of the fields into a compact area when closed, as shown below:

General (Field Group) [Edit] [Close] [+]

Speaker Arrangements (Field Group) [Edit] [Close] [+]

Physician Agreements (Field Group) [Edit] [Close] [-]

First Name:	Benjamin
Last Name:	Peirce
Address Field:	Crabapple Cove Maine
Salary:	253,425.38
Increase Clause:	15% if autorenewed and 300 + days worked per year
Attorney:	Vincent Gambini
Background Check Completed:	<input checked="" type="checkbox"/>
Requires Compliance Review:	<input checked="" type="checkbox"/>
Budgeted:	<input checked="" type="checkbox"/>
Specialty:	Trauma Surgery
Department Manager:	Mari Ricco
Annual Contract Review and Assessment:	<input checked="" type="checkbox"/>

Physician Credentialing (Field Group) [Edit] [Close] [-]

Govt Issued Picture ID Received:	<input checked="" type="checkbox"/>
Medicaid Number:	<input type="checkbox"/>
Completed Credentialing Application Uploaded:	<input type="checkbox"/>
Diploma Uploaded:	<input type="checkbox"/>
State Licenses Uploaded:	<input type="checkbox"/>
Federal DEA and State Controlled Certificates Obtained:	<input type="checkbox"/>
Certificates of Insurance Uploaded:	<input type="checkbox"/>
COLI Expiration Date:	12/25/2015
ECFMG Certificate Uploaded:	<input type="checkbox"/>
CV or Resume Uploaded:	<input type="checkbox"/>
NPI Number:	

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

Adding Fields to the Contract Container

The main interface shows a contract container for "214 East Locust Ave (308316)". The "Summary" tab is active, and the "Add Fields" link is highlighted in the ribbon. Below the ribbon, the "Contract Name" is "214 East Locust Ave" and the "Contract Origin" is "Bulk Loader".

Regular Field Listing

-----Choose Field Group to add-----
-----Choose Field Group to add-----
Common Contract Fields
Contractors
Employee Contracts
Nurse Contracts
Patient Insurance Forms
Physician Contracts
Vendor Contracts
-----Choose Field to add-----
Annual Contract Review
Auto-Renew Contract
BAA Date
BAA Required
COI Expiration Date
COI Required
Contract Term
Contract Type
Contract Value
Contractor Address, City, Zip
Contractor Available Weekends?

Choosing a Field Category (optional)

Select Category
General Fields
-----All Fields-----
Address Fields
Admin Checklist
CCFMG
Contract Request
Contract Review
Food Services
General Fields
Grant Fields
Lease Fields
Licensing
Physician Agreements
Purchasing Fields
Software Contract Fields
Stark Checklist

Field List Limited to Field Category

Annual Contract Value
Annual Cost
Attorney
BAA Date
BAA on File
BAA Required
BOD Approval
CEO Approval
Comments
Contract Signed Date
Contract Term
Department
Department Approval
Department Manager
Effective Date
Expiration Date
Facility Location
Internal Contract Number
IT Approval
-----Choose field to add-----

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

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

Contract Field Types

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

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

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

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

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

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

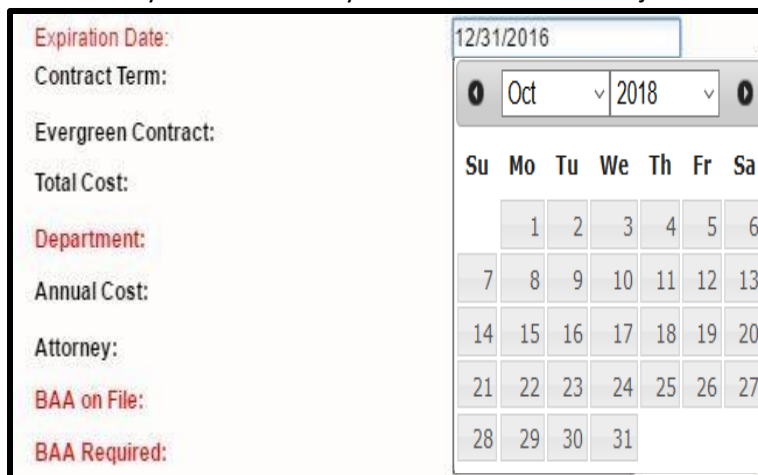
Checkbox Fields

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



Date Field

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



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

DropDown List Field

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

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



MultiLine, MultiSelect, & Numeric Fields

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

Options for Early Termination: Early termination can only occur if there is a documented grievance and Lessor does not provide a resolution for 180 days.

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

Entity: Hold Ctrl to Select Multiple Items or [CLICK HERE](#)

Entity 1
Entity 2
Entity 3
Entity 4

Save Cancel Exit

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

Annual Cost: 425638.22

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

SingleLine Field

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

Contract Term: Evergreen

Table Fields

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

Holiday Schedules (Table)

Import csv

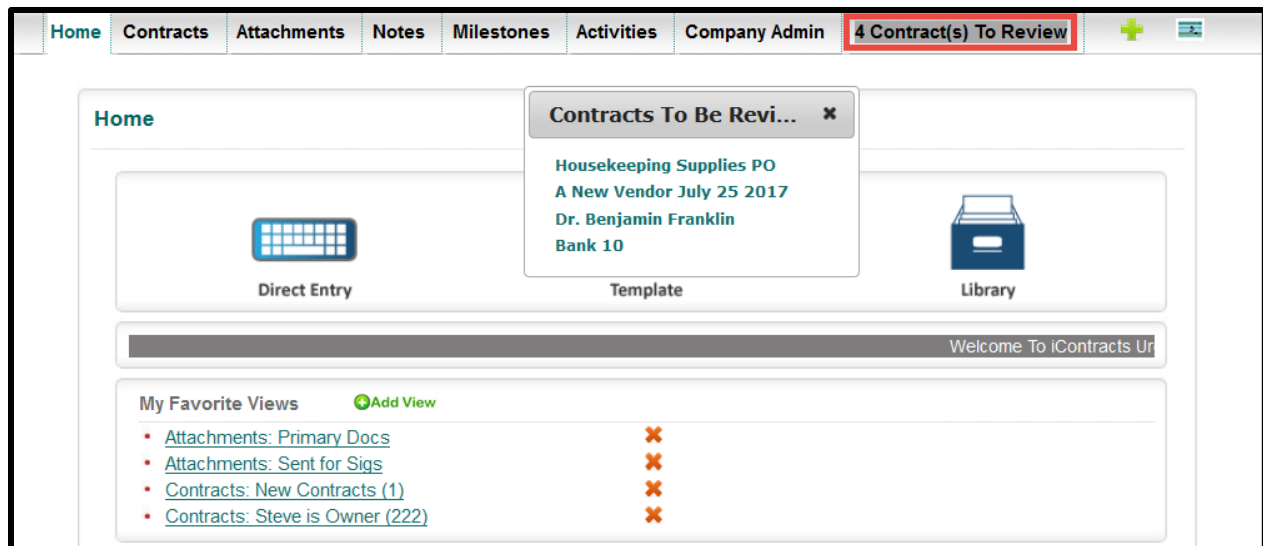
	Company_Holiday	Holiday_Name	Date
	<input checked="" type="checkbox"/>	New Years Day	01/01/2018
	<input type="checkbox"/>	Martin Luther King Day	01/15/2018
	<input checked="" type="checkbox"/>	Presidents Day	02/19/2018
	<input checked="" type="checkbox"/>	Memorial Day	05/28/2018
	<input checked="" type="checkbox"/>	Independence Day	07/04/2018
	<input checked="" type="checkbox"/>	Labor Day	09/03/2018
	<input type="checkbox"/>	Columbus Day	10/08/2018
	<input type="checkbox"/>	Halloween	10/31/2018
	<input type="checkbox"/>	Veterans Day	11/12/2018
	<input checked="" type="checkbox"/>	Thanksgiving Day	11/22/2018
	<input checked="" type="checkbox"/>	Christmas Day	12/25/2018
	<input type="checkbox"/>		

Displaying records 1 - 11 of 11

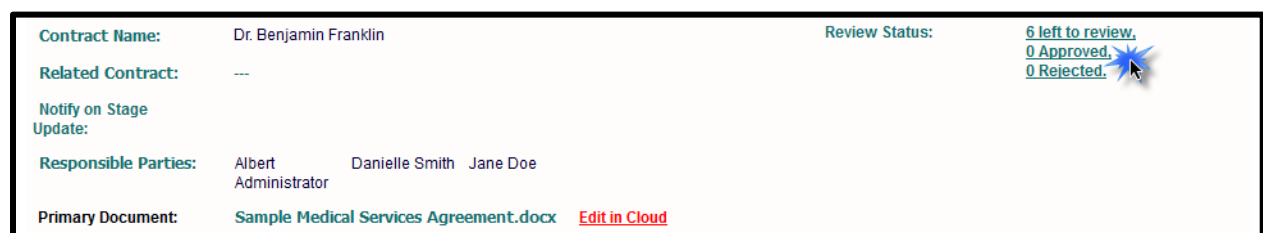
Save Cancel

Contract Reviewers

Contract Review allows cooperation among multiple users in the system. UCM will alert users if they have a contract or document to review by the notification, located on the *Enterprise Ribbon*, to the far right, even when not on the Home Screen. The user can see the name of the Contract Container(s) when they click on the notification, and then proceed to the review process from there, as seen on the following page. Reviewers are defined when a Contract Container is created and can also be defined in the Contract *Summary tab* by clicking on the *Review Status* link (if you have access).



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



The Reviewers Scorecard

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

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

Reviewers

Total of 6 reviewers

Reviewer names	6	0	0
Steven Snyder	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Albert Administrator	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Mary Holman	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Test N.L. User	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Danielle Smith	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Jane Doe	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected

Steven Snyder

☒ Not Reviewed ☐ Approved ☐ Rejected

SAVE

CANCEL

EXIT

Step 2: Add Reviewer's Notes (Required)

Note: You will type your Approval or Rejection Notes here. There is plenty of space here to type. The lower-right corner has been designed to allow you to stretch out the size of this text box if necessary. If you type more text than space allows, scroll bars appear.

SAVE NOTE

You must enter and Save a Note to complete the Review.

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

Adding Reviewers to a Contract

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

Contract Name:	New Vendor Contract	Review Status:	4 left to review. 0 Approved. 0 Rejected.
Related Contract:	---		
Notify on Stage Update:			
Responsible Parties:	Danielle Smith Albert Administrator --		
Primary Document:	Sample Invoice.docx Edit in Cloud		

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

SET CONTRACT REVIEW

Select Reviewers:

Hold Ctrl key to select multiple items or [CLICK HERE](#)
Albee Seenya
Alberto Test-User
Alfonso Rodriguez
Another Test-User
Betty Alpha
Bruce Beta
Carlos Santos-Leinbach
Danielle Obchinetz

Notify On Status Change:

Hold Ctrl key to select multiple items or [CLICK HERE](#)
Roger Smith
Steven Snyder
Test User6
Testme Again
Testme User
Tom Williams
Victor Yurikovchieski

Notify On Review Completion:

Hold Ctrl key to select multiple items or [CLICK HERE](#)
Carlos Santos-Leinbach
Danielle Obchinetz
Darlene Yonkers
Donna Vernick
Ian Test-User9
iContracts Admin
John McWonderman
Michael Fink

SAVE

CANCEL

RESET REVIEWERS

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

ucm.icontracts.com says

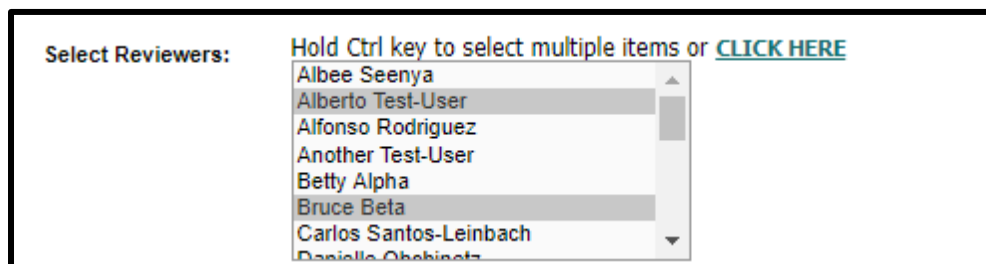
Reviewers are about to reset (to null) all of the settings for this particular Contract Container. Do you want to continue?

OK

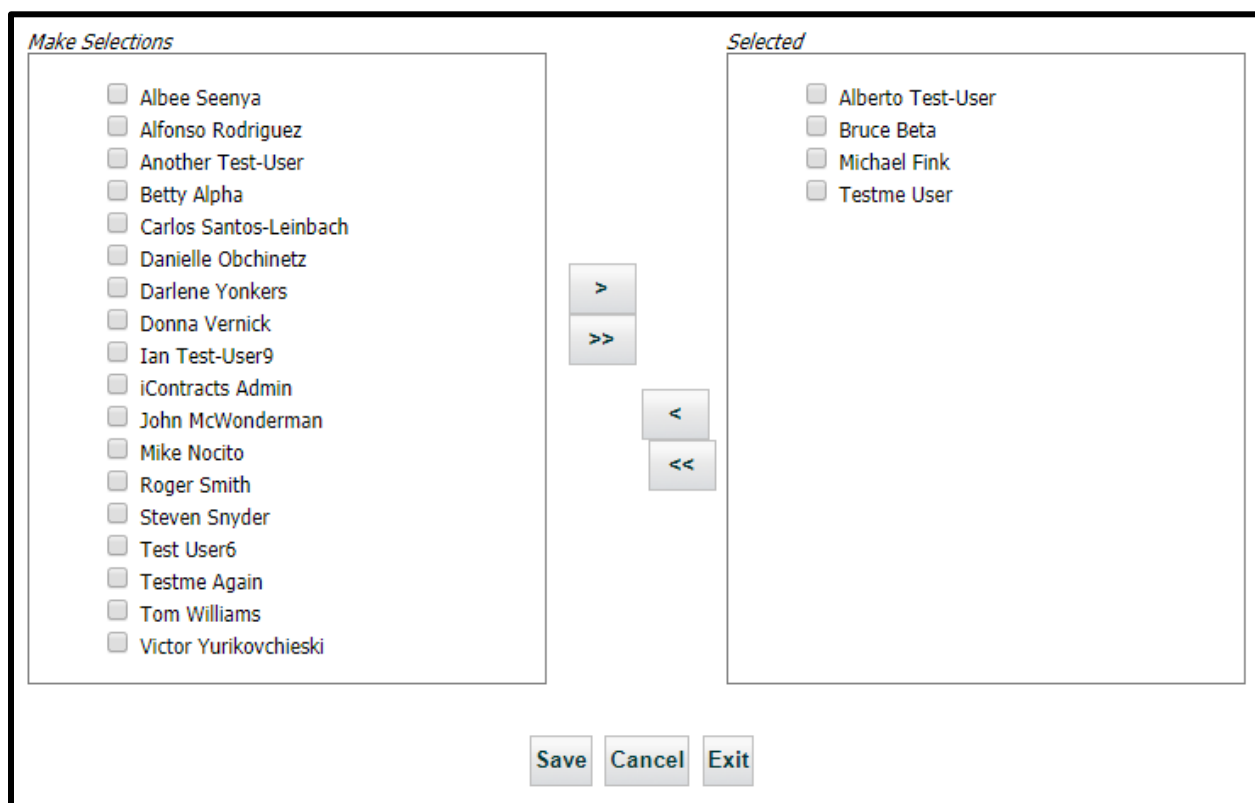
Cancel

Setting Contract Reviewers with “Click Here”

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



For additional assistance with these L-R-T columns, click this link to see the section on [Using LRT Columns](#) (using side-by-side columns).



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

Appendix A –Default Contract Fields (Attributes)

The lists of fields shown below are system-provided “out-of-the-box” **Contract Attributes**, indicated by the *. These are available for query purposes and always appear at the top of any list of available fields for reporting.

- **Contract ID**
A Unique Number assigned by UCM that is associated with a Contract Container. This unique number is listed in parenthesis in front of the Contract Name when inside the Contract Container.
- **Contract Name**
The name given for a Contract Container.
- **Contract Origin**
How the Contract was entered into the system. The choices are Bulk Loader, User, and Template.
- **Contract Type**
The type of Contract as provided by the User.
- **Created By**
The User that created the Contract.
- **Created On**
The date the Contract was entered into the system.
- **Days in Current Stage**
The number of days since the Contract entered its current Workflow Stage. This number is displayed inside the Contract Container under the current Workflow Stage in the Workflow Stage indicator drop-down.
- **Description**
Extra information detailing the nature of a Contract Container in the system.
- **Ext Contract Reference ID**
A reference to a record located in another external system used for linking the two systems together. (This functionality that is not standard and requires a custom API from our developers.)
- **Folder Name**
The name of the folder in which the Contract resides for security and access permissions.
- **Notify on Review Completion**
The User Specified for notification when a Review has been completed by all Users specified for the Review.
- **Notify on Review Status Change**
The User specified for notification after all the Reviews have been completed for a Contract.

☐ *Contracts Attributes

- ☐ Contract ID
- ☐ ContractName
- ☐ ContractOrigin
- ☐ ContractTypeName
- ☐ CreatedBy
- ☐ CreatedOn
- ☐ DaysInCurrStage
- ☐ Description
- ☐ ExtContractRefID
- ☐ FolderName
- ☐ NotifyOnReviewCompletion
- ☐ NotifyOnReviewStatusChange
- ☐ Owner
- ☐ PrimaryDocument
- ☐ PrimaryParty
- ☐ RelatedToContract
- ☐ RelatedToContractID
- ☐ Reviewers
- ☐ ReviewsSet
- ☐ SecondaryParty
- ☐ StageName
- ☐ StageNotify
- ☐ StageNotifyNames
- ☐ TertiaryParty
- ☐ UpdatedBy
- ☐ UpdatedOn
- ☐ Workflow

- **Owner**
The User responsible for the Contract in the System.
- **Primary Document**
The attachment designated to be the main document, or perhaps the latest version of a document.
- **Primary Party**
An area for entering a user in addition to the Owner that may be responsible for the Contract.
- **Related Contract**
Lists the Contract specified that the current Contract is Related to.
- **Related contract ID**
Lists the Contract ID specified that the current Contract is Related to.
- **Reviewers**
Lists the Users specified in the Review module to Review a Contract.
- **Reviews Set**
Denotes if a Contract has been assigned for a Review.
- **Secondary Party**
Another area to designate a responsible user.
- **Stage Name**
Lists the name of the current Workflow Stage for the Contract.
- **Stage Notify**
Denotes if a User has been specified to receive notifications for a change in the Workflow Status of a Contract.
- **Stage Notify Names**
The Users specified to be notified when the Workflow Status of a Contract has changed.
- **Tertiary Party**
Another area to designate a responsible user.
- **Updated By**
Lists the last User that modified the Contract.
- **Updated On**
The date the most recent changes to a Contract Container were made.
- **Workflow**
The name of the assigned Workflow Template for a Contract.

Contract Attributes Not Shown

- Archive
- Archived On

The following Attributes are displayed only if “Alerts” are activated for your company:

- **Alert-Configured Fields**
A View hyperlink that displays any Configured Fields appearing in the Alert email notifications.
- **Alert-Description**
Text or instructions entered into an Alert Configuration setup.
- **Alert-End After Y Times**
The number of months this Alert repeat.
- **Alert-Notification Date**
The date an Alert is triggered.
- **Alert-Notify Days in Advance**
The number of days prior to the next notification date.
- **Alert-Notify Users**
Users set to be notified when the Alert is triggered.
- **Alert-Recurs Every X Months**
The number of months this Alert is set to repeat.

Appendix B – Glossary of Terms

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

Term	Definition
Field Groups	A logical grouping of input fields in the Contract Summary tab of UCM. Field Groups minimize the effort and space required for entering data as they can be assigned to specific Contract Types, making it easier to modify and manage your Fields.
Folder Permissions	A set of criteria that allow a user to modify or view contracts or documents contained in a specific folder.
Global Search	A search that occurs over the entire set of Contracts, documents, or object areas in UCM.
History/Audit Trail	A record containing the date, time, user, and other information relevant to any change made in UCM, these records are un-editable and cannot be deleted.
Interface	The viewing area of a computer program used for the purpose of viewing and inputting data.
Internal Contract	A contract that was originated internally (within a company) as the starting point for an agreement with a vendor or trading partner Templates are often used for this purpose in UCM.
Legacy System	Software systems that are currently or previously used by a company/entity.
Milestones	Date driven benchmarks that are generally associated with a contract or other activity related to a contract that would be beneficial to track. Approaching milestones are often communicated to interested personnel via email or text message.
Multi-Line (Field Type)	A data field that is used to capture long strings of text over 80 characters. Can be sentences, paragraphs, or entire pages of text.
Multi-Select (Field Type)	A data field used for selecting one or more values from a list.
Notes	An organized area for notations pertaining to each Contract Container.
Numeric (Field Type)	A field that contains numeric values of a prescribed size, including decimal precision.
Numeric-Calc (Field Type)	A Numeric field whose value is determined by a mathematical equation/calculation rather than the input of a specific value.
OCR	Optical Character Recognition, OCR examines a scanned document, evaluates the letters and words in the document and converts them to words that can then be saved for searching in UCM.
Owner	The person (user) responsible for a Contract Container.

Term	Definition
Parent-Child Relationship	The linking of a record or object with another record or object, in UCM, any Contract may be associated with its “parent”, which enables users to easily find other Contracts related to the same parent and vice-versa.
Password	The input area on the login screen for a unique user’s “key”.
Permissions	Role or user-based security settings providing access or denial of access to view, modify, or delete contracts, documents, or other information.
Policies	Rules within an organization.
Primary Document	The main document for a Contract Container, designated by Full-Access or Admin Users.
Records	One or more rows of data (some combination of fields) within a database.
Related Contract	A record in the system that has been linked to another, often used for parent-child contract.
Reports	Specific contract, activity, milestone, performance, history or other information contained within UCM that is generated in report form and immediately available in Excel accessible format for eligible users.
Responsible Parties	An area for designating up to three additional users as responsible for a Contract (in addition to the Owner).
Role Models	Security profile/permissions that is associated with a “Role” rather than an individual. Individual users may then be associated with a Role, providing the benefit of then being able to modify permissions for a role to affect the permissions of many users rather than having to maintain permissions for each user.
Single-Line (Field Type)	A field that can contain up to 80 characters, used for short pieces of text to be entered and tracked.
Stages	The steps that must be followed to progress through a Workflow in UCM.
States	A status that an attached document is in, such as Draft, Final, or Signed.
Template	An area for filling out web-forms that can be used to create a document on a new Contract Container or a stand-alone document (depending on permissions).
Train-the-Trainer	The approach we take at iContracts in which we train and aid the main system administrator(s) in the setup, implementation, and use of our system, and they, in turn, train their users.

Term	Definition
UCM	Universal Contract Manager
Username	The administrator-assigned login identity operators of the UCM system.
Views	Saved, filtered, sorted ways in which to examine and evaluate Contract, Milestone, Activity, and other information in UCM. These are also referred to as Ad-Hoc reports or searches.
Workflow	The ordered process and steps of a Workflow used to manage the lifecycle of a contract.

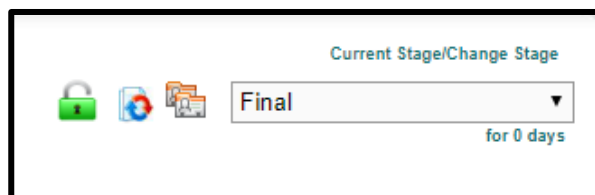
Appendix C – Supplemental Help for Latest Enhancements

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

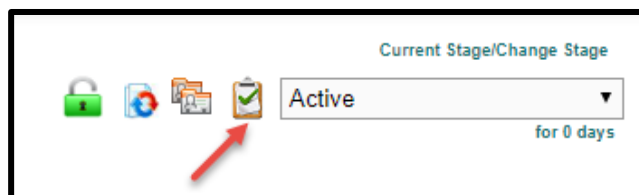
Not all enhancements are available to all UCM Users if either disabled by their Administrators, or not purchased by your company.

Concurrent Stage Reviews

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



No Stage Review Needed (set by Admin)



Stage Review Required (set by Admin)

Using Concurrent Stage Approvals

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

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

A screenshot of the 'Approver(s) Scorecard' interface. At the top, it says 'Approver(s)' with a close button. Below that, 'Approver(s) Scorecard:' is displayed. There is a table with columns for 'Approver names', 'Pending', 'Approved', and 'Rejected'. The table has two rows for 'Steven Snyder' and 'Roger Smith'. Below the table, there is a section for 'Roger Smith' with radio buttons for 'Pending', 'Approved', and 'Rejected'. A red box highlights the 'Pending' radio button. Below this, there is a text box labeled 'Notes' with the placeholder text 'Please provide Notes'. At the bottom, there are 'SAVE' and 'CANCEL' buttons. Red numbers 1, 2, and 3 are placed near the 'Pending' radio button, the 'Notes' text box, and the 'SAVE' button respectively.

The Review Process is as follows:

1. AFTER reviewing the Contract, you either click “**Approved**” or “**Rejected**” (as you can see from the image, the scorecard begins with *Pending*).
2. Enter your **Notes** in the provided text box. This is a free-form text box so type away.

3. Click the **Save** button. Three things happen next: an email is generated to all approvers with your results, the Notes tab adds your approval/rejection comments, and the History tab updates with all of your information.

Approvals

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

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.

SAVE

CANCEL

Rejections

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

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

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.

SAVE

CANCEL

Email Notifications

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

iContracts: Workflow Stage Approval/Rejection

IA

iContracts Admin
11:37 AM

To: steve.snyder.work@gmail.com

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

Contract Name :

New Grant for Summer Enhancement Programs (284805)

Workflow Name :

Concurrent Workflow Stage Approvals

Stage Name :

Active

Days In Current Stage :

0

Status :

Approved

By User :

Roger Smith

Additional Notes :

The Effective Date has been corrected. . Contract will be moving to Executed

Approver(s) Scorecard:

Approver names	0	2	0	Notes
Steven Snyder	<div><div></div>Pending</div>	<div><div></div>Approved</div>	<div><div></div>Rejected</div>	Everything appears in order.
Roger Smith	<div><div></div>Pending</div>	<div><div></div>Approved</div>	<div><div></div>Rejected</div>	The Effective Date has been corrected.

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

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

Automatically Advancing Stages

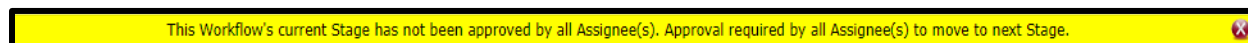
If anyone has Rejected a Stage, the stage will not advance. Once all assignees have Approved the stage, the Stage then automatically advances to the next stage in the Workflow.

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

Concurrent Stage Warning Messages

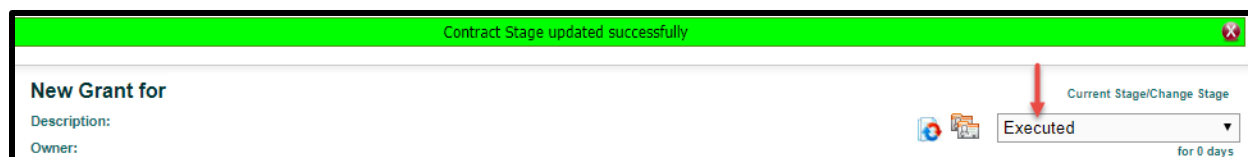
Advancing A Stage Before All Assignees Approve

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



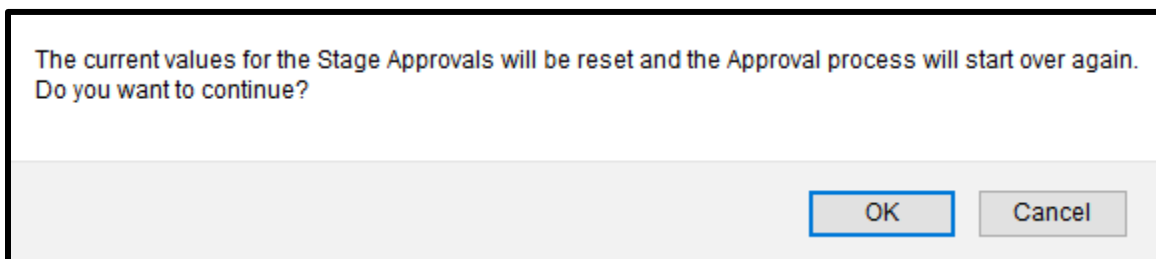
After All Assignees Approve

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



Moving a Stage Backwards After All Assignees Approved

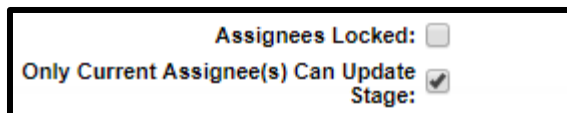
For whatever reason, if an Approved Stage must be retracted and moved backwards, this warning message displays.



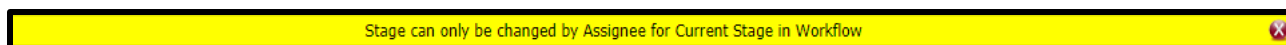
If you click **OK** the entire Approval process will start all over again and each Stage Assignee will have to review and approve the Workflow Stage once again to automatically move the Stage forward.

Non-Assignees Trying to Advance a Stage

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



Non-assignees will see this message:



History and Note Tabs Updated

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

The Notes tab also displays a record of each transaction.

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

Configuring Contract Alerts

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

Activating the Alerts in a Contract Container

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

Purchasing Agreement with Staples for Office Supplies (329452)
Description: This is for all locations for 2015-2016 -- Any Office Supplies under our contract
Owner: Tom Williams
Contract Type: *Purchasing
Alert Configuration: ☐ Alert (0) Remaining

Alert Configuration ✕

Next Notification On:
 Day(s) prior to: Recurs Every month(s), Ends After time(s), and notifies the following: [Click Here](#)

Description/Instructions:
Configure Fields: [Click Here](#)

☐ Clear Alert Configuration Save Cancel

Alert Configuration ✕

Next Notification:
Recurs Every (n) Month(s):
End After Time(s):
Description:
Notify Users:
Notify In Advance (Days):
Manage Fields: [Click Here](#)

Cancel

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

Using Alert Configuration

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

The screenshot shows the 'Alert Configuration' dialog box for a 'Purchasing Agreement with Staples for Office Supplies (329452)'. The dialog is titled 'Alert Configuration' and contains the following fields and controls:

- Next Notification On:** A date field set to '03/15/2018'. A blue arrow points from the 'Alert (0) Remaining' text in the main contract view to this field. A calendar widget is open, showing the month of February 2018, with the date 28 selected. A blue star icon is next to the calendar.
- Recurs Every:** A field set to '1' month(s).
- Ends After:** A field set to '12' time(s).
- and notifies the following:** A link labeled 'Click Here'.
- Description/Instructions:** A text area with the placeholder 'Please enter your Instructions here.' and a 'Configure Fields: Click Here' link. A blue star icon is next to this link.
- Clear Alert Configuration:** A checkbox at the bottom left.
- Save** and **Cancel** buttons at the bottom right. A blue star icon is next to the 'Save' button.

Enter how often you want this Alert to *recur* (monthly), and *how many* times.

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

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

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

The Countdown on the Contract Container

Once you Save your Alerts, the *Summary Tab* keeps a running counter of Alerts Remaining.

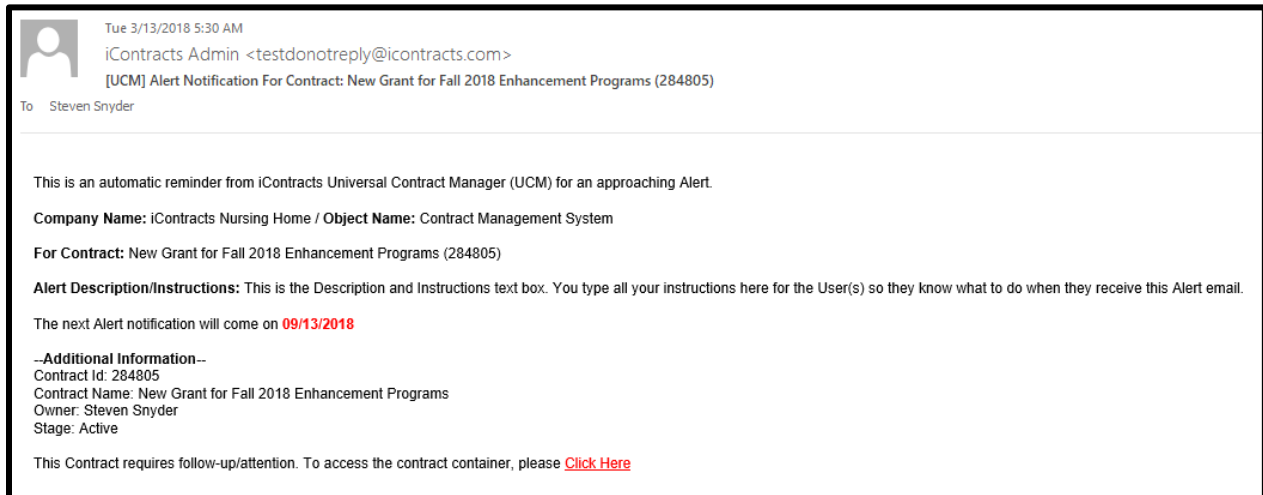
The screenshot shows the 'Purchasing Agreement with Staples for Office Supplies (329452)' summary tab. The contract details are as follows:

- Description:** This is for all locations for 2015-2016 -- Any Office Supplies under our contract
- Owner:** Tom Williams
- Contract Type:** *Purchasing
- Alert Configuration:** ☐ Alert (12) Remaining

The 'Alert Configuration' section is highlighted with a red box.

Receiving the Alert

When the Alert is triggered, users get an email. The **Subject** line notifies the user(s) that this is an *Alert Notification for Contract: X*. This should help distinguish this alert from other UCM emails, such as Stage movement, Milestones, or Activities. In addition, there are **Alert Description/Instructions** and **Additional Information** fields to help users understand what needs to be done when they receive alerts.



The Alert counter will then be reduced by one if it repeats. Repeating Alerts display in the email: *“The next Alert notification will come on mm/dd/yyyy”*.

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

Viewing Alert Attributes in Contract Views

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

The screenshot shows the 'Contract Views' dialog box with the 'Filter Views' tab selected. The 'All Related UCO Columns' list on the left contains various fields, with a red box highlighting the 'Alert' fields. The 'Visible Columns (drag and drop to re-order)' list on the right shows the selected fields being added to the view. The 'Save' button is visible at the bottom of the dialog.

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

Filter Views Filter

Owner Contracts Edit View Report

Select All Records Per Page: 50 records Action: Select Action... Execute

	Contract ID	ContractName	Alert-NotificationDate	Alert-Notify Days In Advance	Alert-End After Y Times	Alert-Notify Users	Alert-Recurs Every X Months
<input type="checkbox"/>	263024	APDX Food Services	08/31/2018	5	1	Darlene Yonkers	0
<input type="checkbox"/>	263046	Staff Training Consultants	07/31/2018	0	60	Danielle Obchinetz, Bruce Be...	6
<input type="checkbox"/>	274224	New Backoffice Supplies	09/30/2018	2	2	Steven Snyder, Michael Fink, ...	6
<input type="checkbox"/>	284805	New Grant for Fall 2018 Enhanc...	09/13/2018	0	998	Steven Snyder, Tom Williams	6
<input type="checkbox"/>	290418	TEST for Hump Day June 27, 20...	07/31/2018	0	30	Roger Smith, Michael Fink, Da...	12
<input type="checkbox"/>	291767	TEST for Monday, July 1, 2018	07/31/2018	14	60	Steven Snyder, Carlos Santo...	6

Page 1 of 1 Displaying records 1 - 6 of 6

Using Alert Fields in Contract Search Criteria

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

-----Select Fields-----

- Alert-Description
- Alert-End After Y Times
- Alert-NotificationDate
- Alert-Notify Days In Advance
- Alert-Notify Users
- Alert-Recurs Every X Months

Search By: Contract Name
Search Across: Contract Management System
Include Archived ☐

Owner = @LoggedInUser

Add Criteria ☐ Include Archived

Default Fields And Sequence

Contract ID	ContractName	ContractTypeName	StageName	DaysInCurrStage	Description	Owner
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For example, you can search for contracts where the Owner is @LoggedInUser AND the Alert-Notification Date is within the next 30 days.

Create/Modify Contracts View View Name:

Get Contracts that match the following criteria:

Owner = @LoggedInUser

and Alert-NotificationDate is within the next X 30 remove

Add Criteria ☐ Include Archived

Default Fields And Sequence

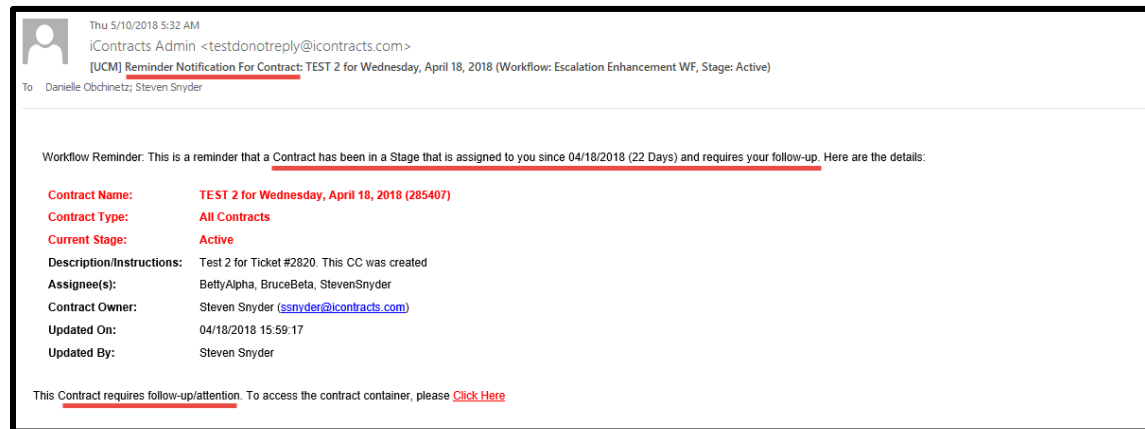
Contract ID	ContractName	Owner	Alert-NotificationDate	Alert-Notify Users
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Workflow Stage Reminders and Escalation Emails

Another UCM Enhancement that now allows Admins to create an alert to notify user(s) by email if a Workflow Stage has not moved on after a set number of days. Admins can then set a warning message to the Stage Assignee and then notify another user(s), like a Manager or Legal Counsel, if the stage has still not advanced after another set number of days. This escalation email can be repeated every *X days*, until the Stage finally advances (or moves to a previous stage).

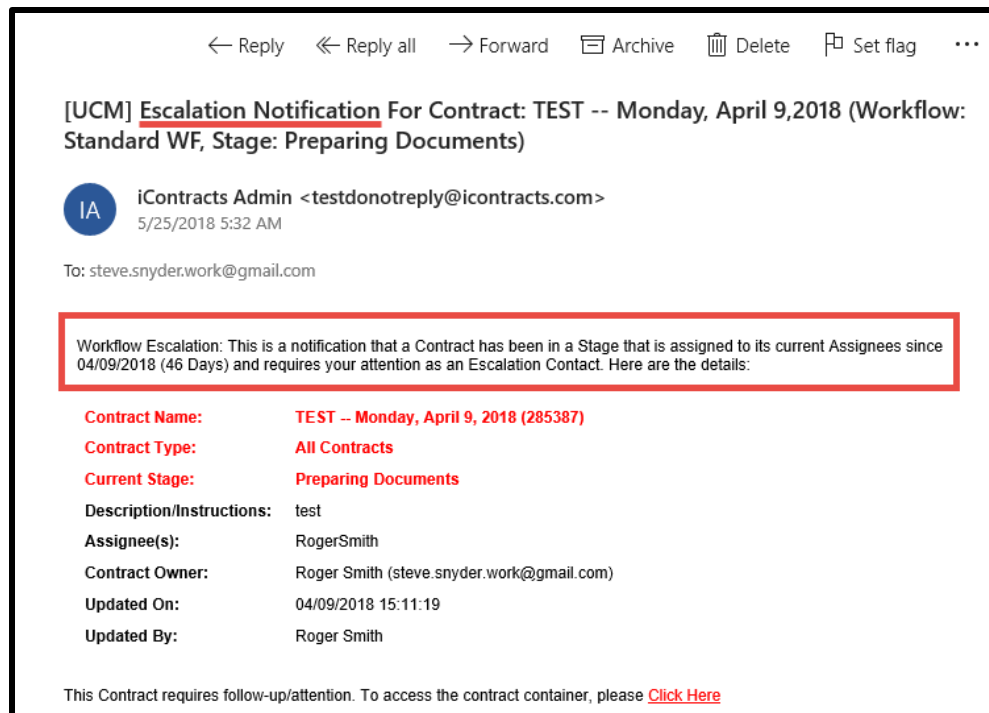
Email Notifications

You've got mail. If a Contract has been at the Stage configured for a *Reminder Email*, the Assignee(s) will receive an email similar to the following example:



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:

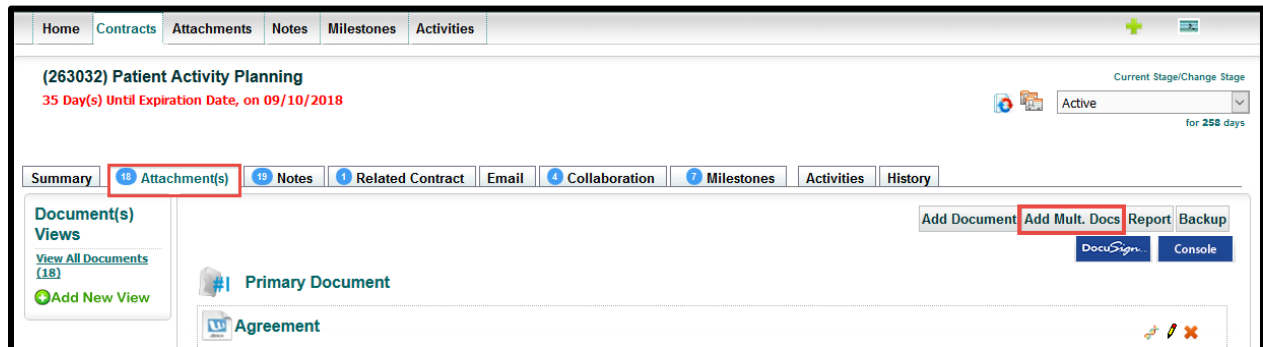


Uploading Multiple Documents

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

Uploading Multiple Attachments via Drag and Drop

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



Click the “Add Mult. Docs” button.

Drag and drop your files from your **Explorer Window** into the “Drop file here to upload” section.

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

A screenshot of the 'Upload Multiple Attachments' form. The form has a title 'Upload Multiple Attachments' in blue. It contains several input fields: 'Document Category: ---Select Category---', 'Document State: ---Select State---', 'Document Effective Date:', 'Document Expiration Date:', 'Document Value:', and 'Include In Total:'. Below these is a large text area with the text 'Drop file here to upload.' and a blue star icon. To the left of this area is the label 'File:'. Below the text area is a 'Select File' button. To the right of the 'Select File' button is the text 'Please select file(s) to upload.' Below the 'Drop file here to upload.' area is a 'Verify' button, which is highlighted with a red box. To the left of the 'Verify' button is the text 'Click Verify button to check files, then click Save'. Below the 'Verify' button is a 'Document Description:' label and a text input field. At the bottom of the form are 'Save' and 'Cancel' buttons.

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

Upload Multiple Attachments

Document Category: ---Select Category---

Document State: ---Select State---

Document Effective Date:

Document Expiration Date:

Document Value:

Include In Total: ☐

Select File 7 file(s) in queue.

File:	Size	Status	Action
Amendment 1.docx	214.96 kb	(pending)	Remove
Amendment 2.docx	18.59 kb	(pending)	Remove
Amendment 3.docx	1.06 MB	(pending)	Remove
Attachment 4.docx	69.02 kb	(pending)	Remove
driversed.docx	17.93 kb	(pending)	Remove
A Contract for Speaking Fees.docx	28.01 kb	(pending)	Remove

Click Verify button to check files, then click Save

Verify

Document Description:

Save **Cancel**

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

Amendment 1.docx	214.96 kb	(Verified)
Amendment 2.docx	18.59 kb	(Verified)
Amendment 3.docx	1.06 MB	(Verified)
Attachment 4.docx	69.02 kb	(Verified)
driversed.docx	17.93 kb	(Verified)
A Contract for Speaking Fees.docx	28.01 kb	(Verified)
A Contract for Testing.docx	28.01 kb	(Verified)

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

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

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

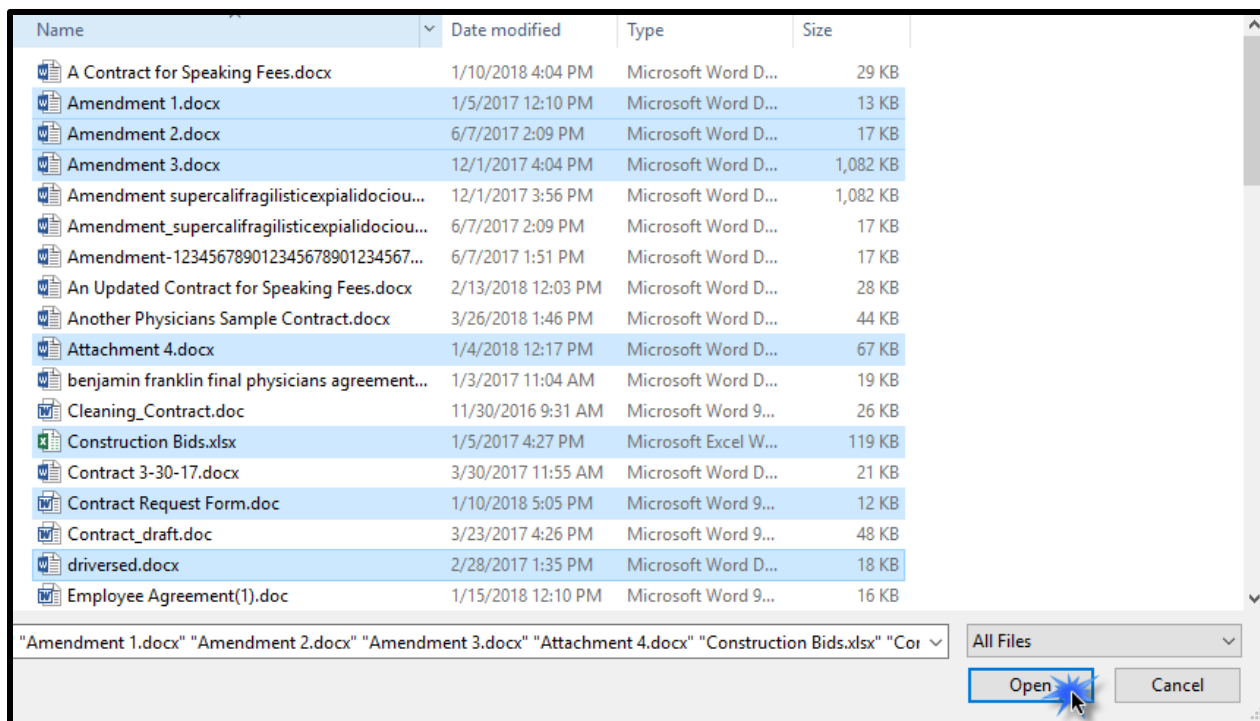
Documents added successfully.

Add Document Add Mult. Docs Report Backup

DocuSign Console

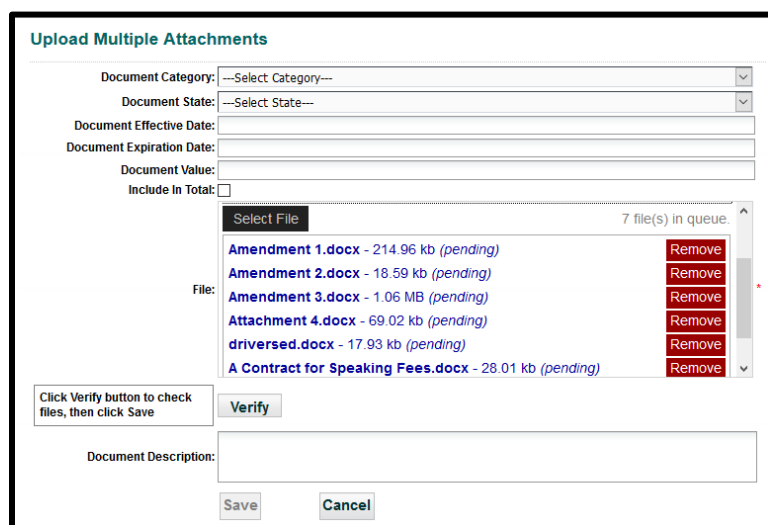
Uploading Multiple Documents Without Using Drag and Drop

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



Click **Open** to populate the document list screen.

Each document has its own “**Remove**” button if you change your mind or selected the wrong document.



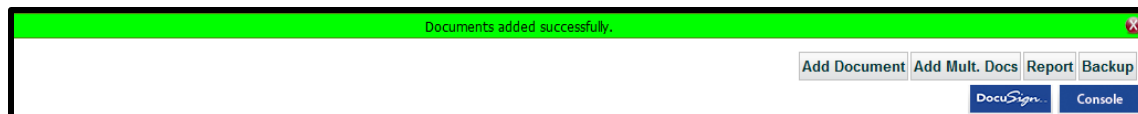
Click **Verify** to make sure all selected files meet the upload requirements.

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

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

Click **Save** to complete the process.

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

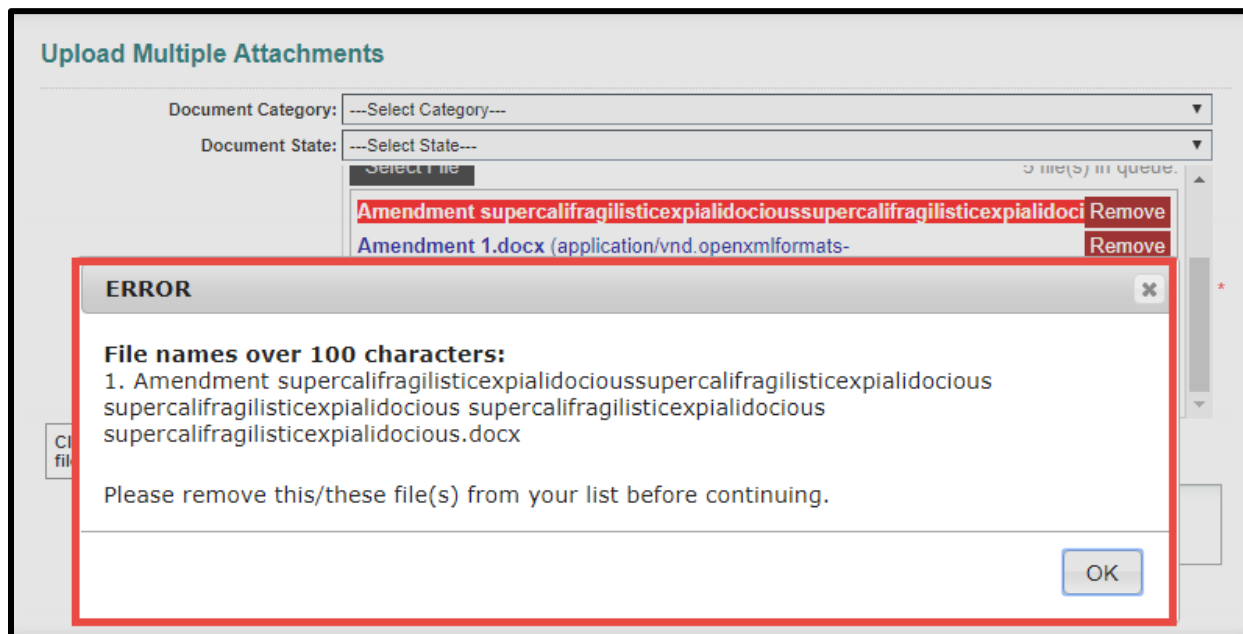


The Attachments grid displays the uploaded Supporting documents.

Attachments						
Document Sum		\$62,543.75		Set Include In Total As: <input type="checkbox"/>		
Edit	Delete	AttachmentType	DocumentName	AttachmentState	VersionNumber	CurrentFile
CollaborationTitle:, [Total: 7]						
		Supporting	Captain Mercer		1.00	Captain Mercer.jpg
		Supporting	Employee Agreement(2)		1.00	Employee Agreement(2).doc
		Supporting	Employee Agreement		1.00	Employee Agreement.docx
		Supporting	Geek Doctor Agreement Letter		1.00	Geek Doctor Agreement Letter.docx
		Supporting	Construction Bids		1.00	Construction Bids.xlsx
		Supporting	Employee Agreement(1)		1.00	Employee Agreement(1).doc
		Primary	TEST Primary Contract Tuvok	Partially Execute...	1.00	A Contract for Speaking Fees.docx

Selecting Invalid File Types

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



Removing Invalid Files

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

Email Responses to Activities

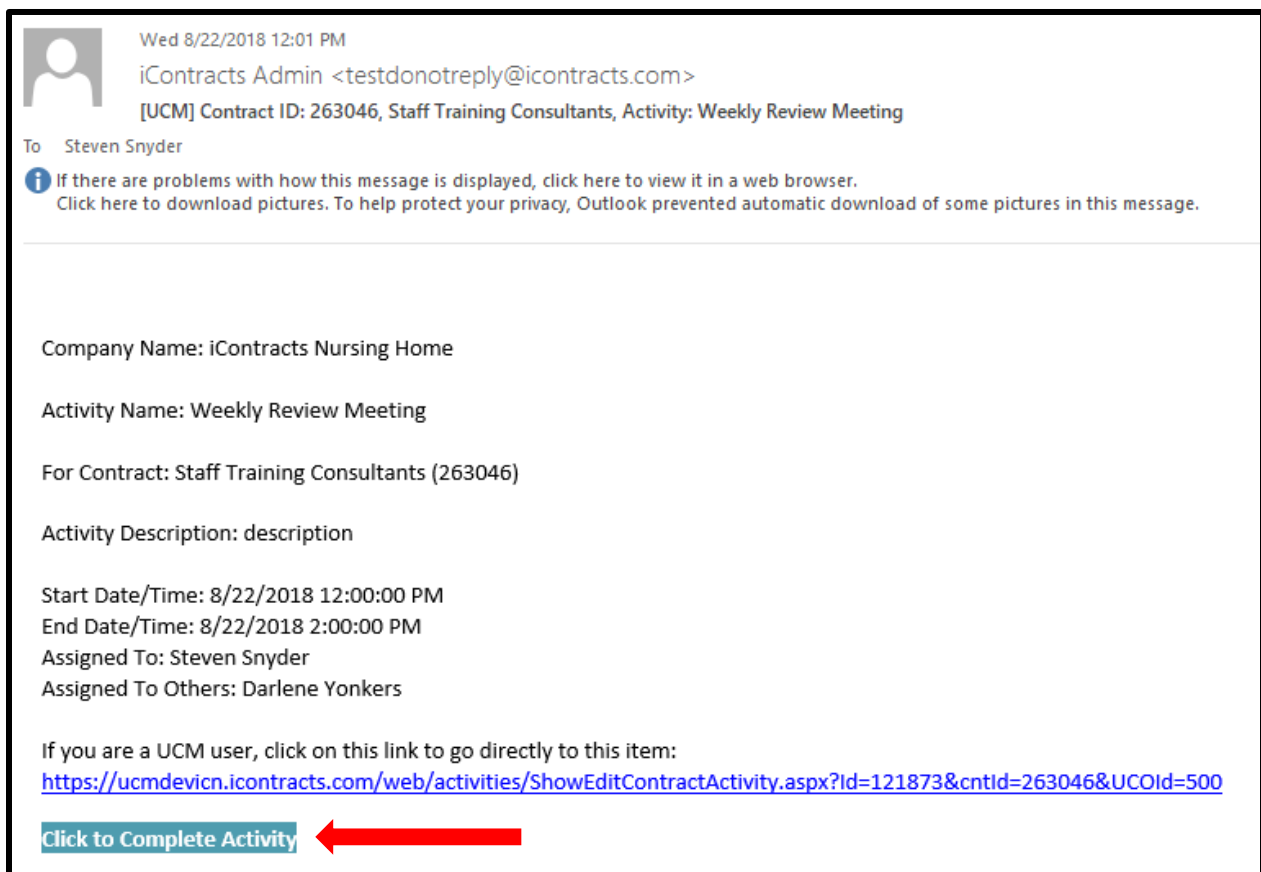
We have introduced a new feature in the *Activities notification email* which allows the “**Assigned To**” users, *including No Log-In Users*, to **Complete the Activity** directly from within the email. This change requires that a separate email is sent to each user associated with an individual activity. Therefore, we are adding the names of the “*Assigned To*” and “*Assigned To Others*” users to the email message. Previously, the “*Assigned To*” user was on the **To** line and “*Assigned Others*” were on the **CC** line within one email.

Only the “*Assigned To*” user will be able to Complete the Activity directly from the email. Regardless of User-Type – Admin, Full-Access, Read-Only, or No-Login – this user will see a blue button at the bottom of their notification email. Any user set as an “Assigned Other(s)” will **NOT** have this functionality, just the email link to the Container. Both Assigned To drop-down lists still include Owner, Primary, Secondary, or Tertiary users, as well as individual active users.

Receiving the Activity Notification Emails

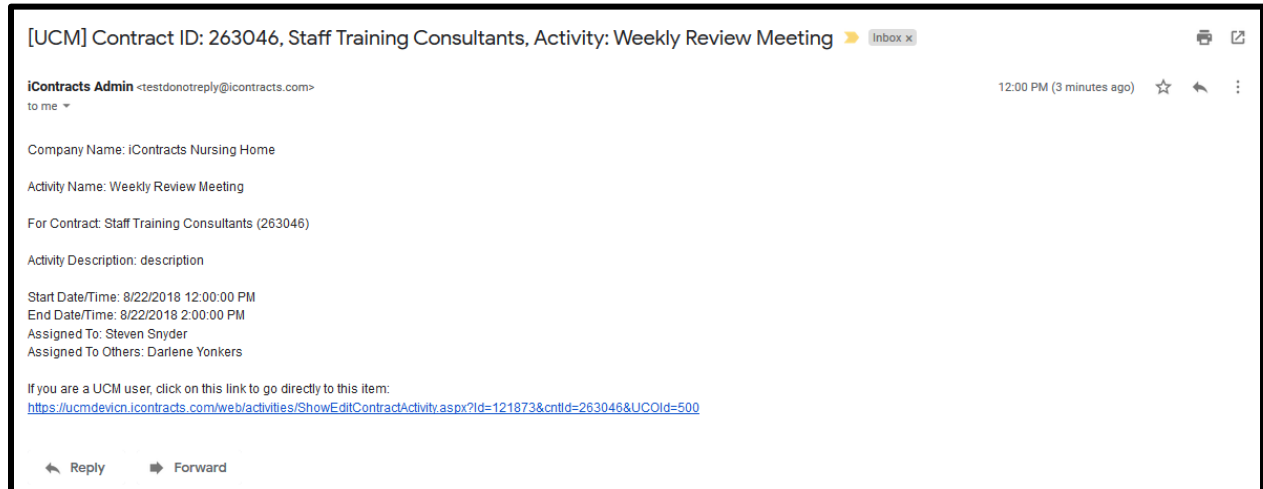
Assigned To Users

Users setup as “*Assigned To*” receive their Notification Email with a blue “**Click to Complete Activity**” button at the bottom of the email.



Assigned To Others

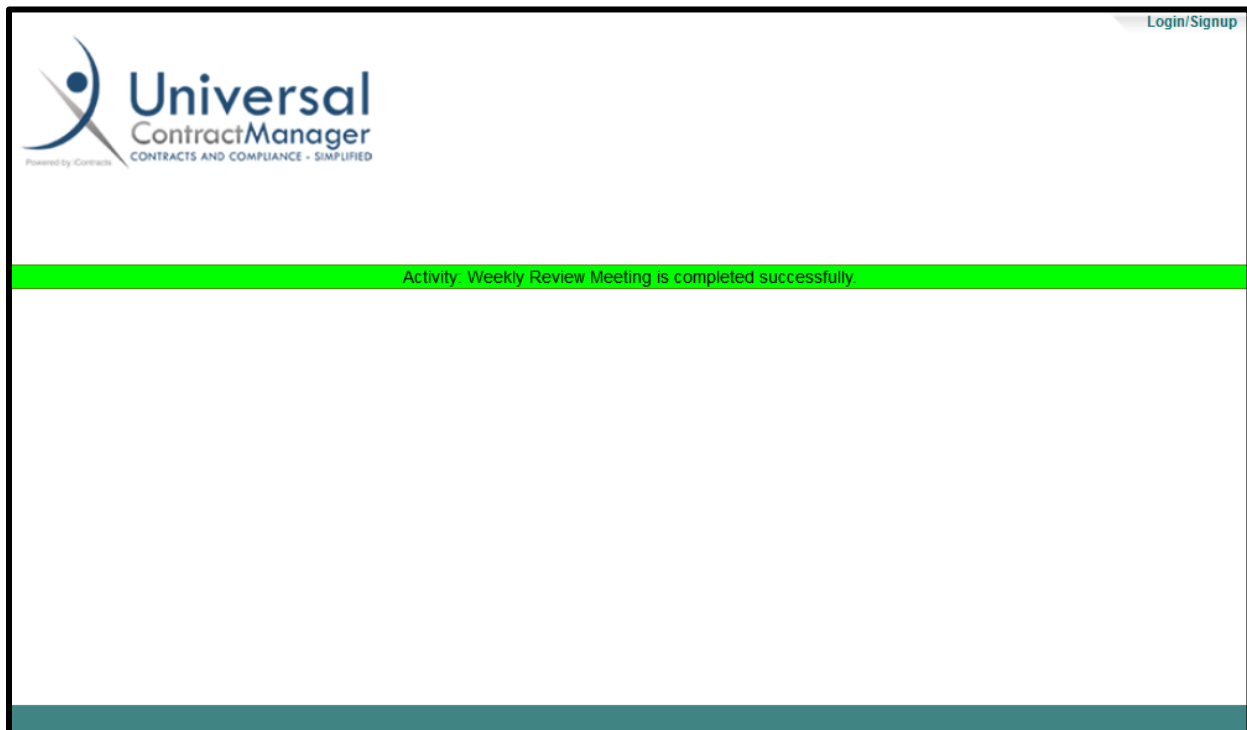
Users setup as “*Assigned To Others*” receive their Notification Email without the “Click to Complete Activity” button at the bottom of the email. Instead, these users have just the link to direct them to UCM, where they can log into the system to access the Activity for that Contract Container.



Completing Activity via Email Button

Whether or not you are logged into UCM prior to clicking the “**Click to Complete Activity**” link, you will be taken to a landing page that looks like this:

The *Activity Name* appears as part of the UCM message. You will always see **[Activity Name] is completed successfully**. You can also click on the “**Login/Signup**” link in the upper-right corner to log into UCM or simply close the page. You can still click on the UCM link in the email to log into UCM and be taken directly to the Container. However, if you click the “*Click to Complete Activity*” button again, you will get another message, stating the **[Activity Name] is already completed**.





FULL-ACCESS MANUAL