UCM Stage Configuration Redesign (Admins Only)

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

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

The Old Stage Configuration Layout

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

The New Stage Configuration Layout

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

Stage

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

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

Notes column

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

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

Click "No" or "Yes" to modify this setting for ALL stages.
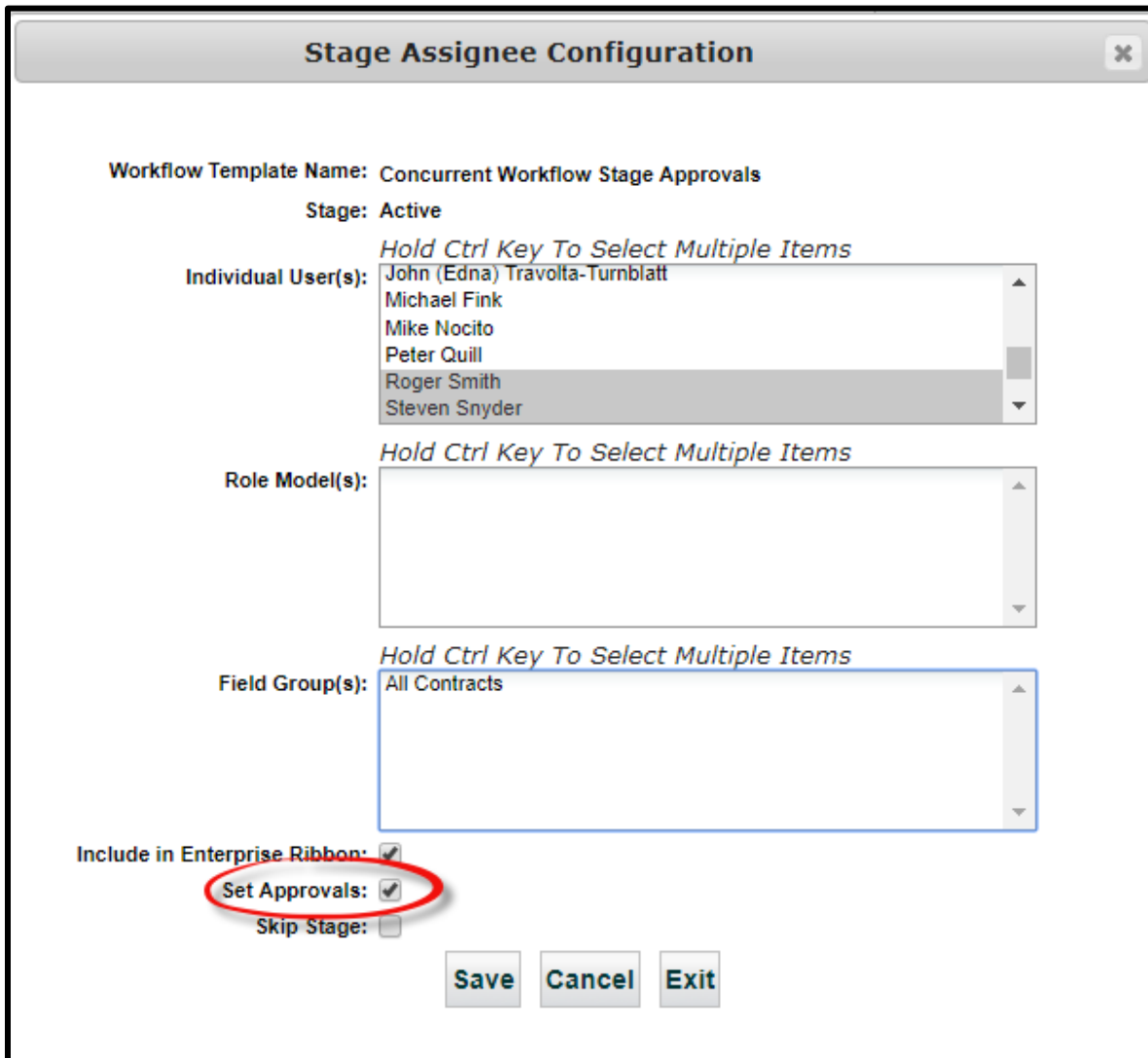
Concurrent Stage Reviews

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

Setting Up Stage Approvals

While you assign Users to Concurrent Stage Reviews, by making them Assignees, you must also activate the feature. In the **Workflow Template Administration**, select *Stage Configuration*. Choose the Stage, then Individual User(s) and/or Role Model(s), and click the checkbox to activate "*Set Approvals*".
Click **Save** when finished. You can repeat this process for multiple Stages, if necessary.

Using Concurrent Stage Approvals

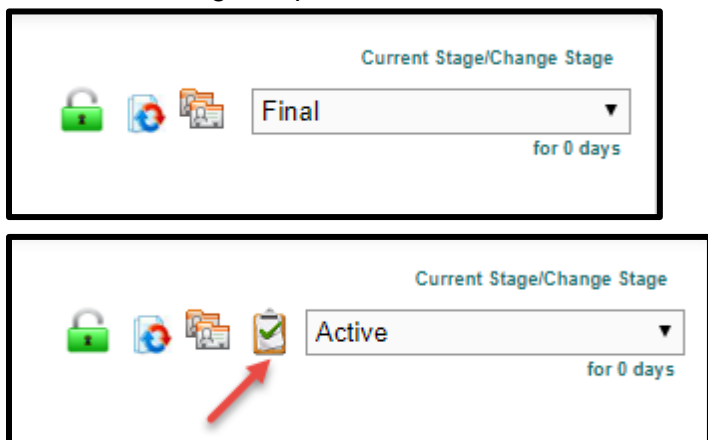**Workflow Stages** are advanced from one Stage to the next as you would within any Contract Container. Any Stage that has been setup for "*Set Approvals*" will display a new icon in front of the Current Stage drop-down.

Approvers (who also receive an email) will click on this new icon to display the **Approver(s) Scorecard**.
The Review Process is as follows:

1. AFTER reviewing the Contract, you either click "**Approved**" or "**Rejected**" (as you can see from the image, the scorecard begins with *Pending*).

2. Enter your **Notes** in the provided text box.

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

Approvals

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

Rejections

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

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

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.

Automatically Advancing Stages

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

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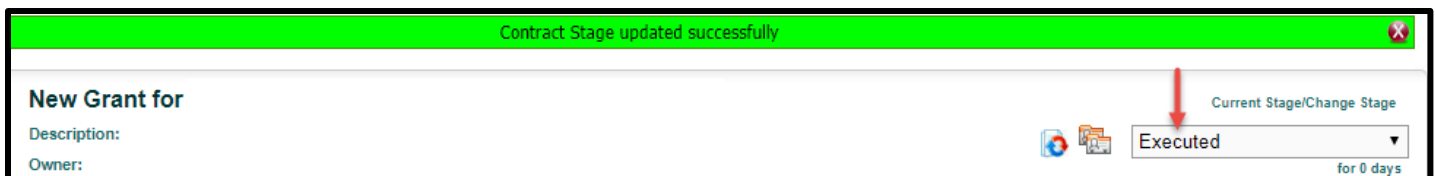
Warning Messages

Advancing A Stage Before All Assignees Approve

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

> This Workflow's current Stage has not been approved by all Assignee(s). Approval required by all Assignee(s) to move to next Stage. ⊗
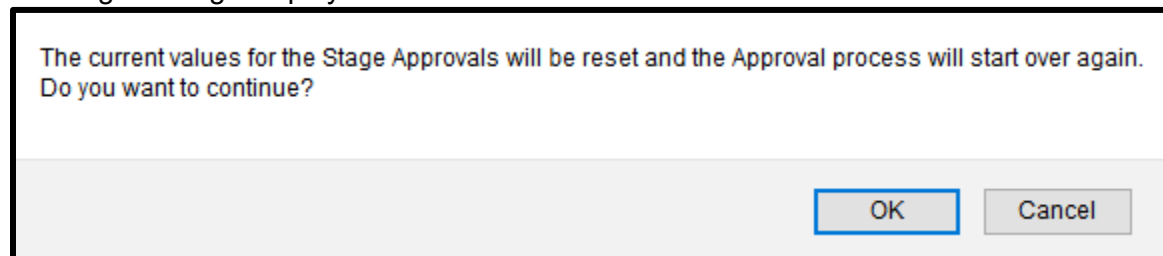
After All Assignees Approve

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

Contract Stage updated successfully ⊗

New Grant for
Description:
Owner:

Current Stage/Change Stage
Executed ▼
for 0 days

Moving a Stage Backwards After All Assignees Approved
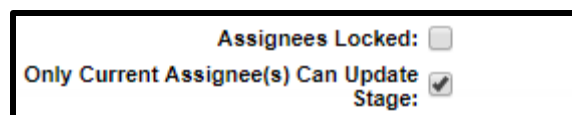
For whatever reason, if an Approved Stage must be retracted and moved backwards, this warning message displays.

> The current values for the Stage Approvals will be reset and the Approval process will start over again. Do you want to continue?
>
> OK   Cancel

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

Non-Assignees Trying to Advance a Stage

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

> Assignees Locked: ☐
> Only Current Assignee(s) Can Update Stage: ☑

Non-assignees will see this message:

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

History and Note Tabs Updated

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

The Notes tab also displays a record of each transaction.

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