Enhancement for Contract Ribbon Email Tab

When sending emails from within the Contract Container, you now have more assistance in locating the correct email address for a user. The system will provide suggestions with the user's name and email address based on the first character(s) you type into the To: or CC: or BCC: fields. The system will search First Names, Last Names, and Email addresses.

As in the past, the search only looks for those who have a UCM account in your system.

Sending an Email

The process of using the Contract Ribbon Email tab to generate an email within the Contract Container has not changed.
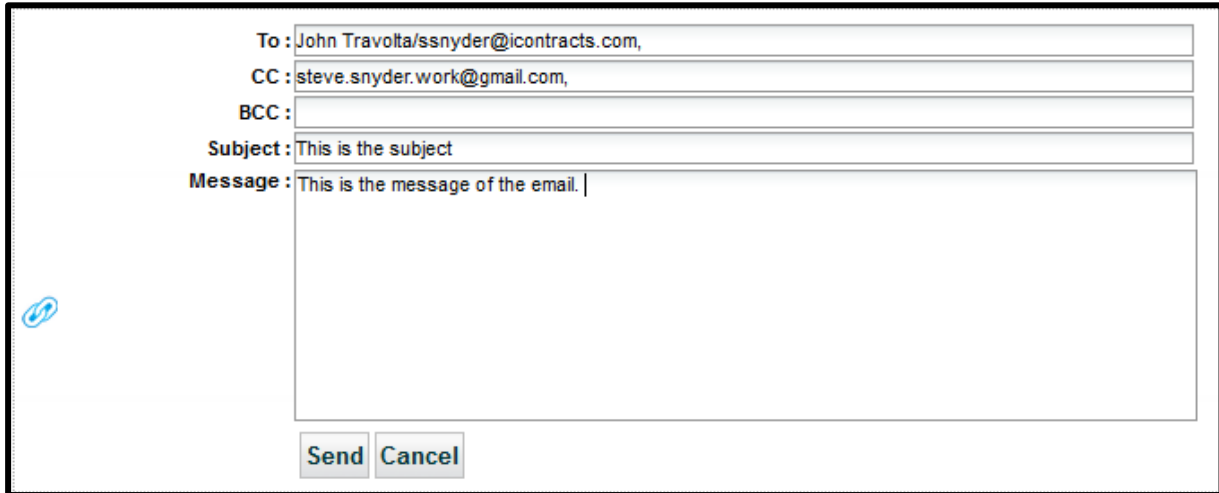
Click on the Email tab.

When you click in the To:/CC:/Bcc: box and start typing the first few letters of a user's First Name, Last Name, or Email address, the matching names/email addresses will appear.

Select the name/email address from the list.

To :	John Travolta/ssnyder@icontracts.com,
CC :	steve.snyder.work@gmail.com,
BCC :	
Subject :	This is the subject
Message :	This is the message of the email.

Send Cancel

Type the Subject and Message and click Send when finished.

Displaying Contract View Names When Editing

When Contract Views are edited, you can now see the View Name at the top of the Create/Modify Contracts View screen.

> Please refer to your **UCM Login Page** for *Instructions to clear your browser cache*
> before starting with any new Feature.

Editing a Contract View

Click on the Edit Pencil next to the Contract View or the "Edit View" from within a Contract View.

The Contract View Name appears when editing. You must first create and save a view to have a View Name display when editing.

Using the Bulk Loader to Pair or Update Contract Containers with Related Contracts

This is a new feature where you can now use the Bulk Loader to pair new Contracts or update existing contracts with their Related Contract on the Summary Tab.

Bulk Loader

A new CSV column header was created for this function. The header is **Contract::RelatedContractID** and this header can be located in any column.

When updating existing Contracts with Related Contract information, you will *manually* enter the column header and the Related Contract IDs, as illustrated below.

	A	B	C
1	Contract::ID	Contract::RelatedContractID	
2	262833	262832	
3	258166	262832	
4	260118	#NULL	
5	262947	262832	
6	262946	262832	
7	259732	262832	
8	259733	262832	
9	262948	262832	
10	262945	262832	
11	262832	#NULL	

As with all Update functions, the Contract::ID is always required to be the first column.
You can use the **#NULL** function to remove entries from the Related Contract attribute in the Contract Containers, as well.

If you are using the Bulk Loader to upload **new** contracts into UCM, simply add **Contract::RelatedContractID** to your other headers used for uploading new contracts.

Summary Tab Updated

After the Bulk Loader has completed, you will now see the Related Contract display in the Summary Tab.

Updated Warnings When Deleting Field Groups

Deleting Field Groups from your UCM System is not a common occurrence. Therefore, when the need arises, we want to make sure our Warning Messages are as clear as possible to

explain the repercussions of performing such tasks.

Once you verify that you *really* want to delete this Field Group, click the **OK** button.
This is your **final warning!** Once you click **Yes**, that field group is now Scheduled to be Deleted from UCM (within 30 minutes). The other option, clicking **No**, will delete the field group and leave the fields formerly in that group "strung out" as individual fields in the Summary Tab (which is why this is NOT recommended).
There is **NO UNDO** function.

Updated Warnings When Deleting Fields from Field Groups

Deleting a field from a Field Group may be necessary at some point. Keep in mind that the Field still exists on its own. To avoid confusion, warning messages have been updated for clarity.

Once you verify that you *__really__* want to delete this Contract Field, click the **OK** button.

This next message is your final warning!

Once you click **OK**, that field is now a lone Field on the Summary Tab.

Click the **Save** button to update the Contract Field Group administration page.

Company Administration Settings (Enhancement)

We've added a new feature to the Company Settings where Administrators can now turn off/on the list of Assigned Contracts notification on the Enterprise Ribbon.

Select "*Enable Assigned Contracts Counts*". By default, the checkbox is checked ON. This means that all company users will have the Enterprise Ribbon display the number of Assigned Contracts for each user.

Uncheck the checkbox and click the "**Update**" button to remove the Contracts Count Ribbon. Once you navigate to another tab, the Contracts Count Ribbon disappears.
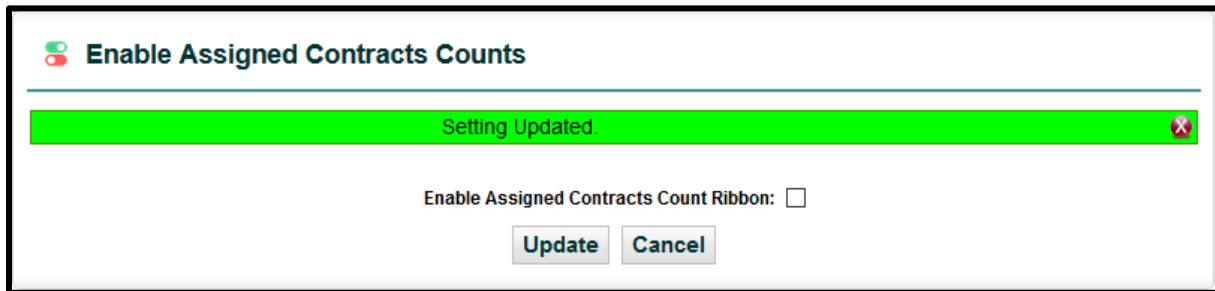
To re-add the Assigned Contracts count to the Enterprise Ribbon, Administrators can check the checkbox and click the "**Update**" button again.

Adding Field Groups to Workflow Assignees

Administrator Function

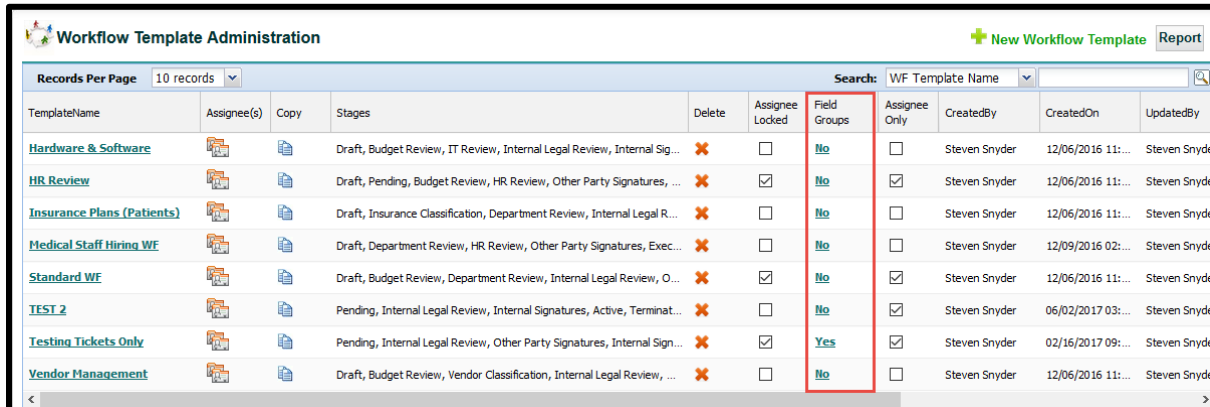We can now add Field Groups to a Workflow Stage such that when the Workflow is changed to that Stage the Field Group(s) is/are added to the Contract Container and highlighted for the new Assignees to encounter/edit after they receive their Assignee notification via email.
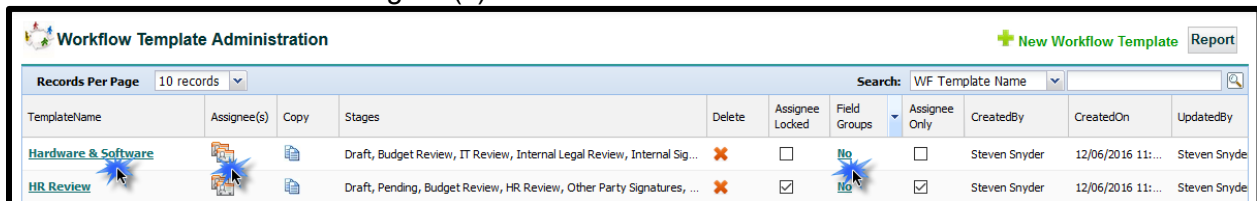

Accessing the Manage Workflow Assignees Screen
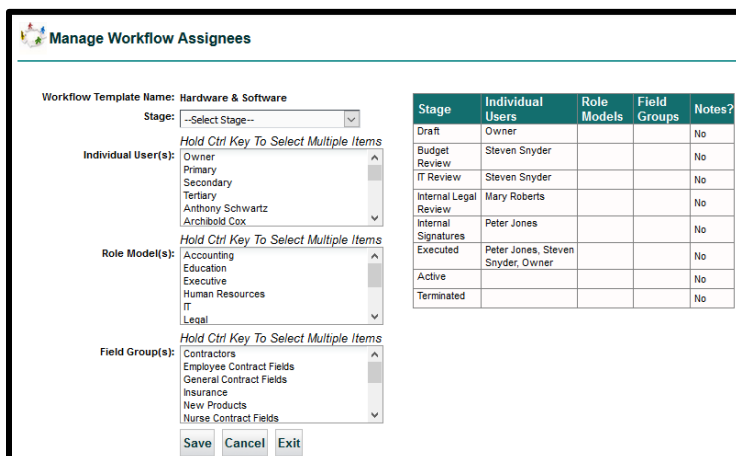
There are now three ways to access the Manage Workflow Assignees screen. As you can see from the image above, there is a new column, named "*Field Groups*", that contains a Yes or No link.

Click on the Yes or No for that Template Name, or click on the actual Template Name, or click on the icon under the Assignee(s) column.

Clicking on either the Yes/No in the Field Groups column, **or** the Assignee(s) icon displays the *Manage Workflow Assignees* screen.

Clicking on Template Name takes you to this screen. You will need to click on the **Workflow Assignees & Field Groups** button to view the *Manage Workflow Assignees* screen.

Adding Field Groups to Manage Workflow Assignees
The Individual Users and Role Models assigned to each stage can now have one or more Field Group assigned to them as an optional process.

Click on the **Save** button to update the Assignees.

Repeat this for each Stage that you want to modify.

Stage	Individual Users	Role Models	Field Groups	Notes?
Preparing Documents	Owner			No
Final	Albee Seenya			No
Active	Owner		Admin Review	No
Terminated	Marsha Clark, Owner			No

Logged into System as the Assignee

When you are an Assignee who has a Field Group assigned to your Workflow Stage, you will see a green bar to indicate that you are responsible for a new set of data in this Contract Container.

Contract Name:	Albee Seenya Consulting Services
Contract Origin:	Bulk Loader
Contract ID:	258024
Related Contract:	--
Description:	This is a test for strange things in bulk loading
Owner:	Ian Goodenough

Notify on Stage Update: ☐

Responsible Parties:	-- -- --
Review Status:	No Reviewers Set for this Contract Container
Contract Type:	Concerts & Speakers
Folder Name:	Boston College\Contract Management System\IT
Created On:	02/28/2017 01:59:28 PM
Updated On:	06/26/2017 11:01:19 AM
Created By:	Steven Snyder
Updated By:	Steven Snyder

Admin Review   (Field Group)   NEW

TEST field X:	[⌄]
Text Field - single:	The day never really begins until I have two cups of coffee.
ITS Director:	Tucker [⌄]

Save Cancel

If you are responsible for this new field group, click on the *Edit Pencil* to open up the fields so that you can add the data. Click the **Save** button when finished. You can then continue with whatever you need to do with this Contract Container, including moving the Stage to the next level.

Note: Only users who are currently assigned to the current Stage will see the green banner with New on it, and only when no data has been entered into this Field Group (that is, when it's new and when data hasn't been added to it, yet).