

## 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 screenshot shows the 'Happy Hippo Toy Store (262852)' contract interface. At the top right, there is a 'Current Stage/Change Stage' dropdown menu set to 'Active' for 14 days. Below this is a ribbon with tabs: Summary, Attachment(s), Activities, Milestones (selected), Notes, History, Email, Collaboration, and Related Contract. The 'Email' tab is active, displaying a form with fields for To:, CC:, BCC:, Subject:, and Message:. The CC: field contains the email address 'steve.snyder.work@gmail.com'. At the bottom of the form are 'Send' and 'Cancel' buttons.

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

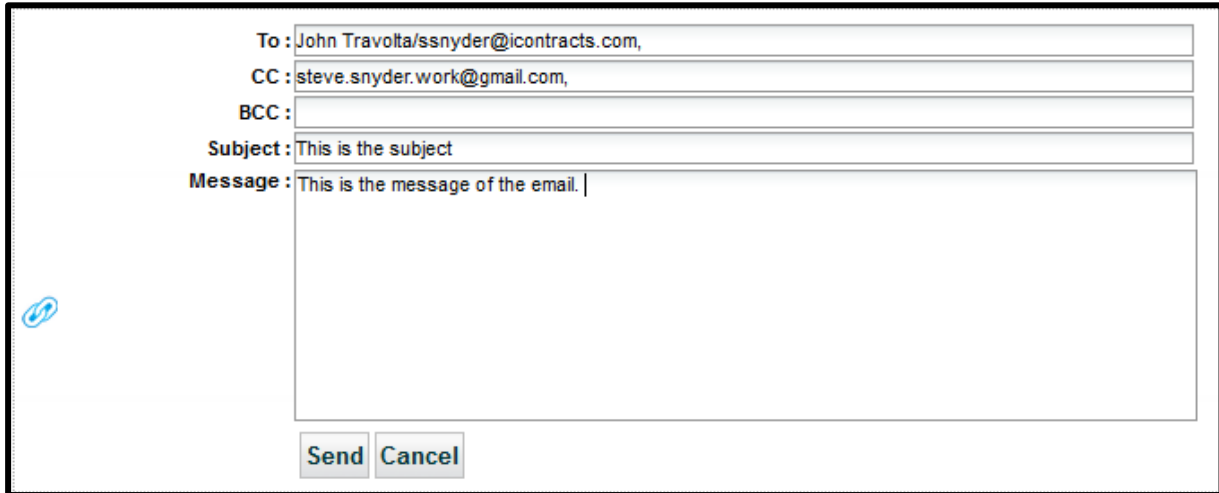
Click on the Email tab.

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.

The screenshot shows the email composition interface with the 'To:' field active. A list of suggestions is displayed below the field, starting with 'J'. A red arrow points from a callout box to the list. The callout box contains the text: 'Typing "J" listed all these users.' The suggestions list includes:

- Jessica Rabe/ssnyder@icontracts.com,
- Judy Jetson/ssnyder@icontracts.com,
- Peter Jones/ssnyder@icontracts.com,
- Jason Bourne/ssnyder@icontracts.com,
- Joan Collins/ssnyder@icontracts.com,
- Joy Danielson/ssnyder@icontracts.com,
- Joe Blow/ssnyder@icontracts.com,
- Joanne Hurst/steve.snyder.work@gmail.com,
- John Travolta/ssnyder@icontracts.com,
- Josephine Baker/steve.snyder.work@gmail.com,

Select the name/email address from the list.



The screenshot shows an email composition window. On the left is a vertical list of contacts, with a blue circular icon at the top. The main area contains the following fields:

- 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. |

At the bottom right are two buttons: **Send** and **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 screenshot shows the 'Create/Modify Contracts View' interface. At the top, there is a header bar with 'Create/Modify Contracts View' on the left and 'View Name: Physicians' on the right, which is highlighted with a red rectangular box. Below the header, there is a search criteria section with the text 'Get Contracts that match the following criteria:'. It includes a dropdown menu for 'ContractTypeName', a dropdown for 'contains', and a text input field with 'physician'. There is also a link for 'Advanced Search' and a checkbox for 'Include Archived'. Below this is a section titled 'Default Fields And Sequence' which contains a table with the following columns: Contract ID, ContractName, Description, RelatedToContract, Effective Date, Expiration Date, Physician Salary Per Pay, and Owner. At the bottom of the table is a horizontal scrollbar.

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.

**Dr. Mary Richards D.O. (262947)**

Current Stage/Change Stage

Department Review

for 0 days

Summary

Attachment(s)

Activities

Milestones

Notes

History

Email

Collaboration

Related Contract

Show Contract Attributes

Expand All

Sorting

Field Name

Asc

Expand All

Add Fields

Contract Name:

Dr. Mary Richards D.O.

Contract Origin:

Copy

Contract ID:

262947

Related Contract:

---

Description:

Doctor's Agreement

Owner:

Steven Snyder

Notify on Stage Update:

Responsible Parties:

Calvin Klein

Bob Macke

Patti LaBelle

Review Status:

No Reviewers Set for this Contract Container

Contract Type:

Physician

Primary Document:

Sample Contract Form.docx

Edit in Cloud

Folder Name:

Steven Snyder Consulting\Contract Management System\Medical\Physicians

Created On:

09/08/2017 10:09:28 AM

Updated On:

09/08/2017 10:09:28 AM

Created By:

Steven Snyder

Updated By:

Steven Snyder

## 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.

**Dr. Mary Richards D.O. (262947)**

Current Stage/Change Stage: Department Review (for 0 days)

Summary | Attachment(s) | Activities | Milestones | Notes | History | Email | Collaboration | Related Contract

Show Contract Attributes ☒ Expand All ☐

Sorting: Field Name Asc Expand All Add Fields

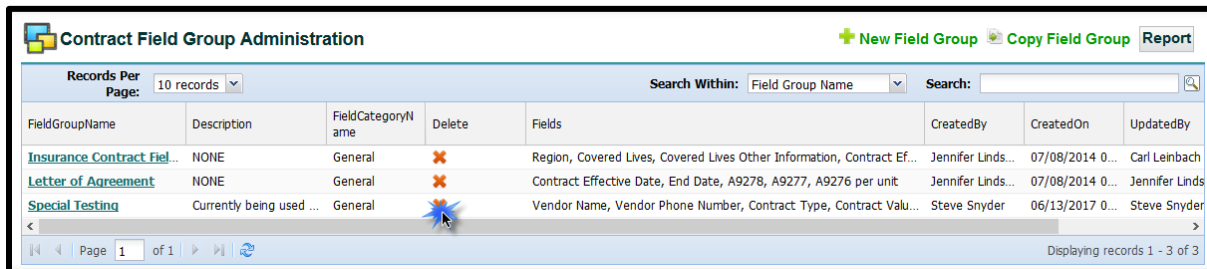
Contract Name: Dr. Mary Richards D.O.  
Contract Origin: Copy  
Contract ID: 262947  
**Related Contract: Master Physicians Contract (262832)**

Description: Doctor's Agreement  
Owner: Steven Snyder  
Notify on Stage Update: ☐

Responsible Parties: Calvin Klein Bob Macke Patti LaBelle  
Review Status: No Reviewers Set for this Contract Container  
Contract Type: Physician  
Primary Document: Sample Contract Form.docx [Edit in Cloud](#)  
Folder Name: Steven Snyder Consulting\Contract Management System\Medical\Physicians  
Created On: 09/08/2017 10:09:28 AM Updated On: 09/08/2017 10:39:06 AM  
Created By: Steven Snyder Updated By: Steven Snyder

## 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



FieldGroupName	Description	FieldCategoryName	Delete	Fields	CreatedBy	CreatedOn	UpdatedBy
<a href="#">Insurance Contract Field...</a>	NONE	General	X	Region, Covered Lives, Covered Lives Other Information, Contract Ef...	Jennifer Linds...	07/08/2014 0...	Carl Leinbach
<a href="#">Letter of Agreement</a>	NONE	General	X	Contract Effective Date, End Date, A9278, A9277, A9276 per unit	Jennifer Linds...	07/08/2014 0...	Jennifer Linds
<a href="#">Special Testing</a>	Currently being used ...	General	★	Vendor Name, Vendor Phone Number, Contract Type, Contract Valu...	Steve Snyder	06/13/2017 0...	Steve Snyder

Are you sure you want to delete this Field Group?  
This operation is NOT reversible!

We recommend that you create a View containing the Contract::ID and Fields in this Field Group and then Report/export as a file in "Bulk Loader" format prior to the deletion of any Field Group containing data.

OK Cancel

explain the repercussions of performing such tasks.

**\*Final Check\***

**This Field Group exists on 1 record(s).**

**Are you sure you want to remove this Field Group and its associated fields?**

**We strongly recommend that you create a View and Report/export the data as a back-up, first – include the Contract::ID and all of the Fields contained in this Field Group.**

**Click "No" below if you'd like to break this Field Group's Fields into individual Fields on the Summary (NOT recommended).**

**Click "Yes" to delete the Field Group and its Fields and data entirely for these records.**

**If in doubt, click "Cancel" and contact iContracts Support before proceeding.**

Yes No Cancel

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.

#	FieldName	Field Type
1.	Vendor Name	SingleLine
2.	Vendor Creation Date	Date
3.	Vendor Address City State Zip	MultiLine
4.	Vendor Main Contact	SingleLine
5.	Vendor Email	SingleLine
6.	Vendor Phone	SingleLine
7.	Vendor Type	DropDown
8.	Vendor Next Review Date	Date
9.	Vendor Approved for Govt Funding?	CheckBox
10.	Vendor Term	MultiLine
11.	TEST JKL	SingleLine
12.	TEST TUV	Numeric

Are you sure you want to delete this Field?

OK Cancel

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

This next message is your final warning!

Deleting this Field from the Field Group will result in a stand-alone Field on Summary tabs currently using this Field Group.

Are you sure you want to continue?

OK Cancel

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.

TEST JKL (SingleLine)


This field is now alone and no longer part of any Field Group.


## 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.


 **Settings**


---


 **Email Administration**  
Email Settings


 **Company Access Administration**  
Company Access Settings


 **Password Setting Administration**  
Company Password Settings


 **Company Timeout Administration**  
Company Timeout Settings


 **Announcement Text Administration**  
Announcement Text Settings


 **Home Page Settings**  
User Default for Last Containers Accessed


 **Document Explorer Administration**  
Document Explorer Settings

 **Document Additional Attributes Administration**  
Document Additional Attribute Settings

 **Edit Document In Cloud View Administration**  
Edit Document In Cloud Settings

 **Edit Primary/Secondary/Tertiary Party Administration**  
Edit Primary/Secondary/Tertiary Party Settings

 **Collaboration Administration**  
Collaboration Administration

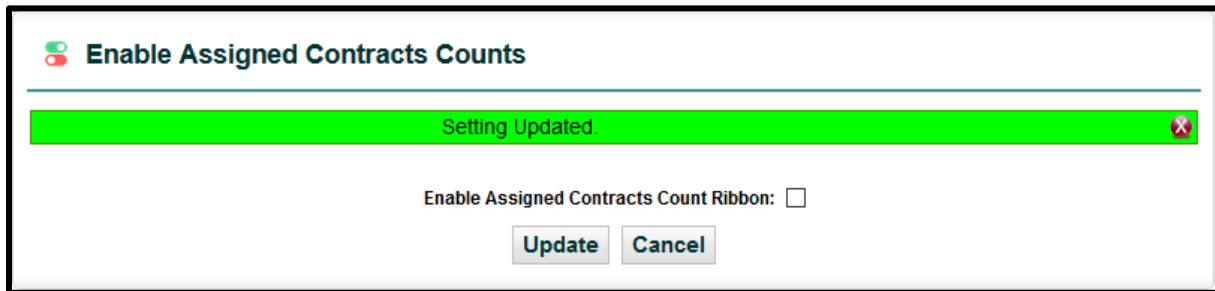
 **Enable Assigned Contracts Counts**  
Enable Assigned Contracts Counts



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.



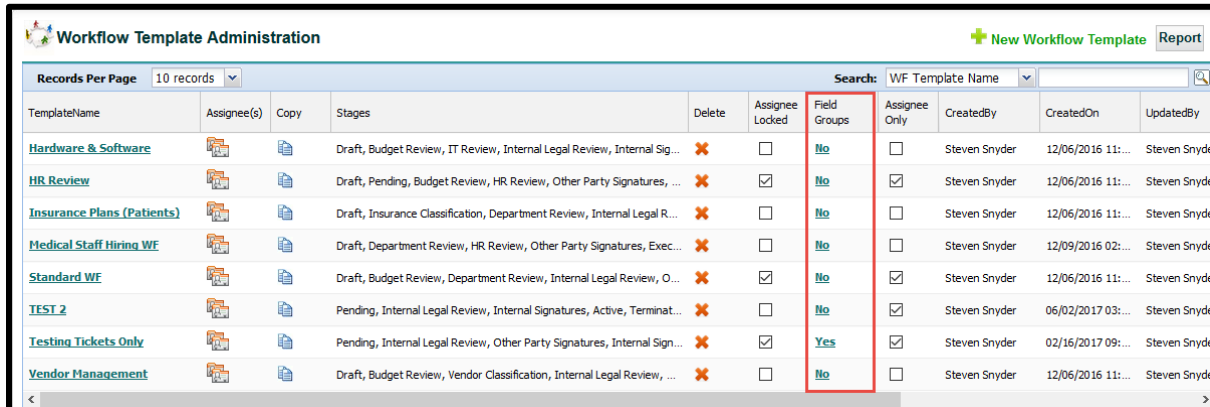
To re-add the Assigned Contracts count to the Enterprise Ribbon, Administrators can check the checkbox and click the “**Update**” button again.



# 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.

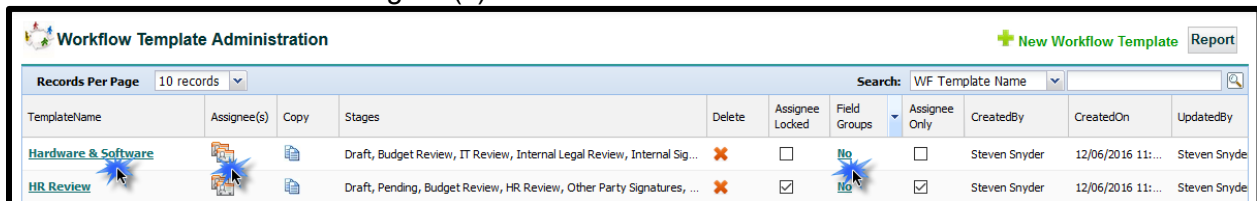


Template Name	Assignee(s)	Copy	Stages	Delete	Assignee Locked	Field Groups	Assignee Only	Created By	Created On	Updated By
<a href="#">Hardware &amp; Software</a>			Draft, Budget Review, IT Review, Internal Legal Review, Internal Sig...		<input type="checkbox"/>	No	<input type="checkbox"/>	Steven Snyder	12/06/2016 11:...	Steven Snyder
<a href="#">HR Review</a>			Draft, Pending, Budget Review, HR Review, Other Party Signatures, ...		<input checked="" type="checkbox"/>	No	<input checked="" type="checkbox"/>	Steven Snyder	12/06/2016 11:...	Steven Snyder
<a href="#">Insurance Plans (Patients)</a>			Draft, Insurance Classification, Department Review, Internal Legal R...		<input type="checkbox"/>	No	<input type="checkbox"/>	Steven Snyder	12/06/2016 11:...	Steven Snyder
<a href="#">Medical Staff Hiring WF</a>			Draft, Department Review, HR Review, Other Party Signatures, Exec...		<input type="checkbox"/>	No	<input type="checkbox"/>	Steven Snyder	12/09/2016 02:...	Steven Snyder
<a href="#">Standard WF</a>			Draft, Budget Review, Department Review, Internal Legal Review, O...		<input checked="" type="checkbox"/>	No	<input checked="" type="checkbox"/>	Steven Snyder	12/06/2016 11:...	Steven Snyder
<a href="#">TEST 2</a>			Pending, Internal Legal Review, Internal Signatures, Active, Terminat...		<input type="checkbox"/>	No	<input checked="" type="checkbox"/>	Steven Snyder	06/02/2017 03:...	Steven Snyder
<a href="#">Testing Tickets Only</a>			Pending, Internal Legal Review, Other Party Signatures, Internal Sig...		<input checked="" type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	Steven Snyder	02/16/2017 09:...	Steven Snyder
<a href="#">Vendor Management</a>			Draft, Budget Review, Vendor Classification, Internal Legal Review, ...		<input type="checkbox"/>	No	<input type="checkbox"/>	Steven Snyder	12/06/2016 11:...	Steven Snyder

## Accessing the Manage Workflow Assignees Screen

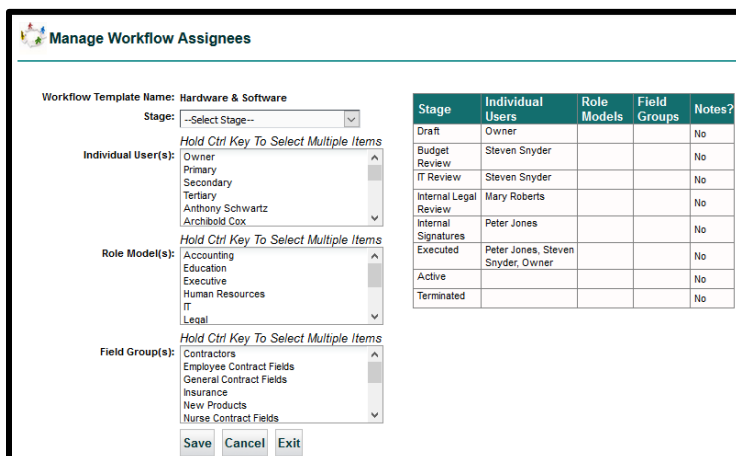
There are now three ways to access the Manage Workflow Assignees screen. As you can see from the image above, there is a new column, named "*Field Groups*", that contains a Yes or No link.

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.



Template Name	Assignee(s)	Copy	Stages	Delete	Assignee Locked	Field Groups	Assignee Only	Created By	Created On	Updated By
<a href="#">Hardware &amp; Software</a>			Draft, Budget Review, IT Review, Internal Legal Review, Internal Sig...		<input type="checkbox"/>	No	<input type="checkbox"/>	Steven Snyder	12/06/2016 11:...	Steven Snyder
<a href="#">HR Review</a>			Draft, Pending, Budget Review, HR Review, Other Party Signatures, ...		<input checked="" type="checkbox"/>	No	<input checked="" type="checkbox"/>	Steven Snyder	12/06/2016 11:...	Steven Snyder

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



Workflow Template Name: Hardware & Software

Stage: --Select Stage--

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

- Owner
- Primary
- Secondary
- Tertiary
- Anthony Schwartz
- Archibald Cox

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

- Accounting
- Executive
- Human Resources
- IT
- Legal

Field Group(s): *Hold Ctrl Key To Select Multiple Items*

- Contractors
- Employee Contract Fields
- General Contract Fields
- Insurance
- New Products
- Nurse Contract Fields

Stage	Individual Users	Role Models	Field Groups	Notes?
Draft	Owner			No
Budget Review	Steven Snyder			No
IT Review	Steven Snyder			No
Internal Legal Review	Mary Roberts			No
Internal Signatures	Peter Jones			No
Executed	Peter Jones, Steven Snyder, Owner			No
Active				No
Terminated				No

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.

**Workflow template : Hardware & Software**

Workflow Template Name:

Assignees Locked: ☐

Only Current Assignee(s) Can Update Stage: ☐

Stage Sequence: [+ Add new](#)

Drag Stage Numbers Up/Down to Re-sequence

1	Draft	✗
2	Budget Review	✗
3	IT Review	✗
4	Internal Legal Review	✗
5	Internal Signatures	✗
6	Executed	✗
7	Active	✗
8	Terminated	✗

**NOTE:**  
If you modify a Workflow Stage which is currently in use in one or more Contracts, the Contracts' Workflow will move back 1 Stage in its sequence.

**Workflow Assignees & Field Groups**

**Workflow Notes**

## 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.

**Manage Workflow Assignees**

Workflow Template Name:

Stage:

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

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

Field Group(s): [Hold Ctrl Key To Select Multiple Items](#)

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

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:**

**ITS Director:**

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).