

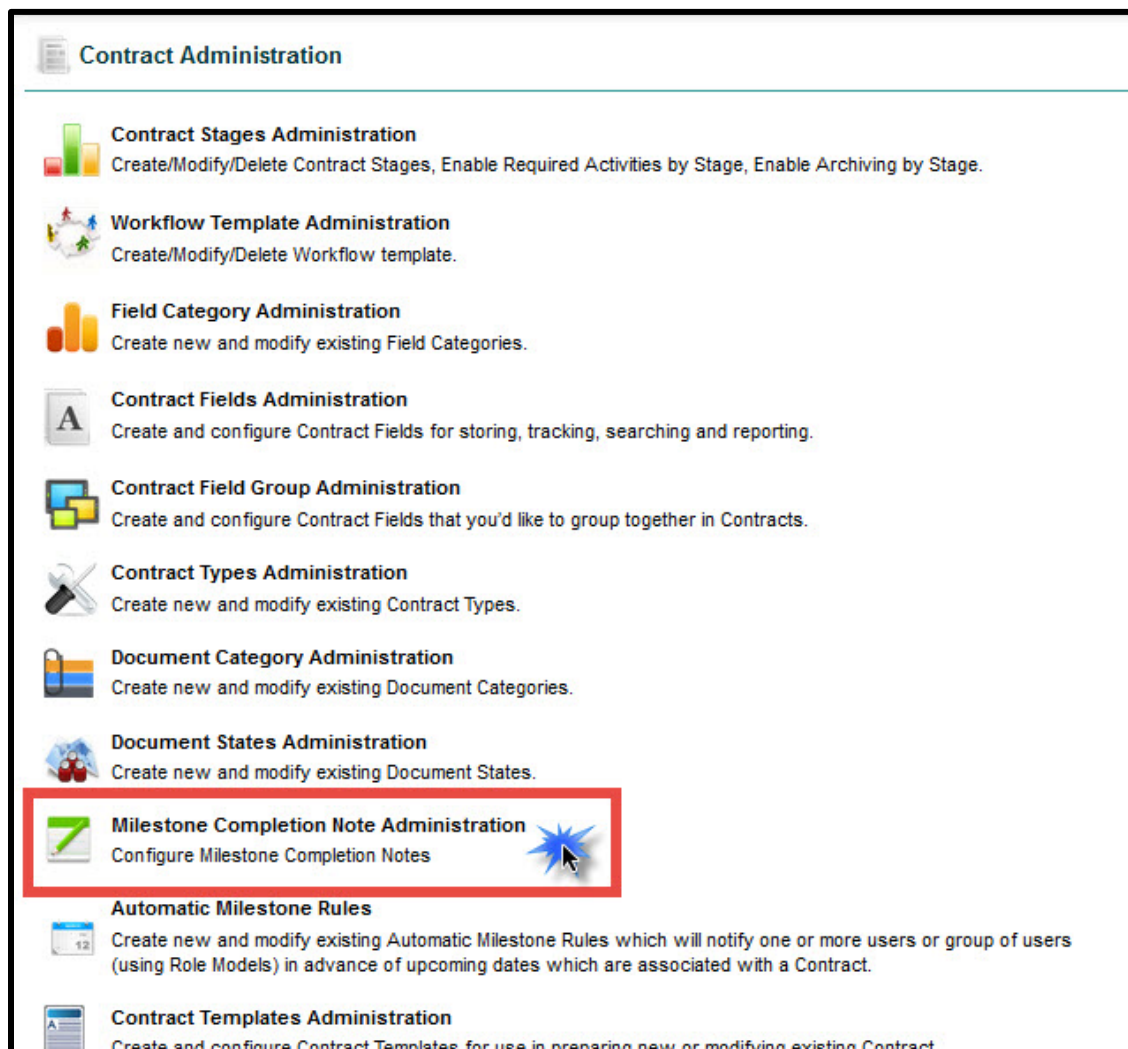
Adding Notes to a Completed Milestone (for Administrators)

When Milestones are flagged as Completed, you now have an option to enter specific Notes into UCM about the Completed Milestone. This new feature is available whether you click the Complete checkbox, or display the Milestone detail page by clicking on the Milestone name in the Milestone grid.

In addition to adding Notes, you may have the ability to select a pre-configured response from a drop-down list. Any completed milestone Notes you enter, or select from the drop-down, are added to the contract's History.

UCM Administrators

To setup Milestone Notes, admins use **Company Admin: Contract Administration: Milestone Completion Note Administration** to activate and configure their list of prepared responses.



Once you Enable Milestone Notes, you have several options to use these completed milestone notes.

The screenshot shows the 'Milestone Completion Note Administration' window. At the top, there is a title bar with a green icon and the title. Below the title bar, there are two checkboxes: 'Enable Milestone Notes?' and 'Always Required?'. The 'Enable Milestone Notes?' checkbox is unchecked and is marked with a red circle containing the number 1. The 'Always Required?' checkbox is also unchecked and is marked with a red circle containing the number 2. Below these checkboxes is a yellow box with the title 'Milestone Completion Notes' and the instruction 'Drag up/down in the margins to reorder'. Inside this box, there is a green plus icon followed by the text 'Add new', which is marked with a red circle containing the number 3. At the bottom of the window, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is marked with a red circle containing the number 4.

1. Enable Milestone Notes?

Click checkbox to activate. This checkbox can also be unchecked to turn off this feature.

2. Always Required?

If checked, you must have at least one type of note: free-form text, or pre-configured responses setup with **"Add new"**.

3. Add new

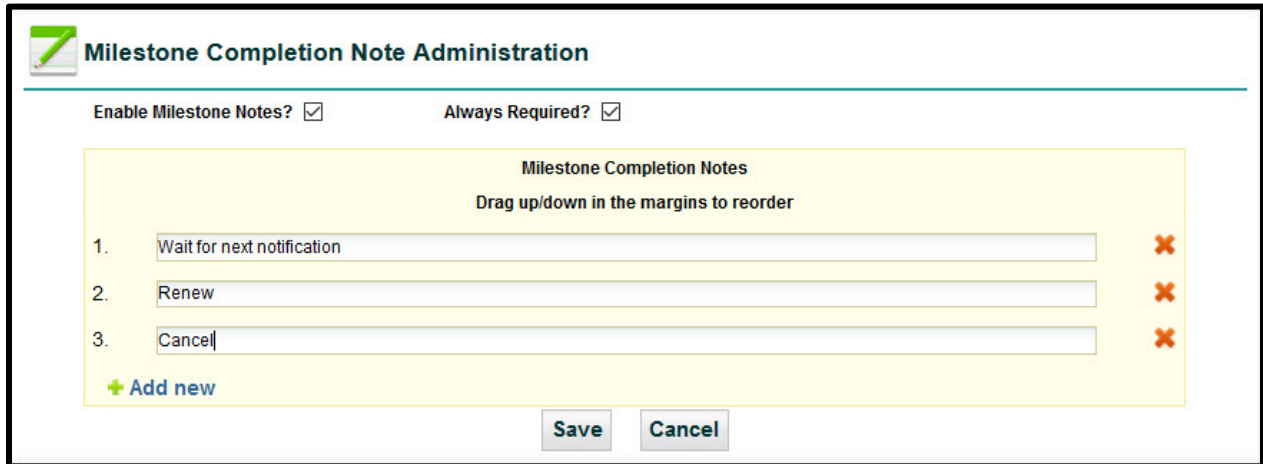
Click to enter your responses. For example, "Wait for next notification", "Renew", or "Cancel". See images below.

4. Save

Saves your Milestone Completion Notes.

This screenshot shows the same 'Milestone Completion Note Administration' window, but with the 'Enable Milestone Notes?' checkbox checked. The 'Always Required?' checkbox remains unchecked. The yellow box for 'Milestone Completion Notes' is still present, with the 'Add new' link. The 'Save' and 'Cancel' buttons are at the bottom.

You can have many responses set up, whether your completed Milestone Notes will use them now or later.






The screenshot shows the 'Milestone Completion Note Administration' window. At the top left is a green notepad icon. The title 'Milestone Completion Note Administration' is in bold. Below the title are two checkboxes: 'Enable Milestone Notes?' (checked) and 'Always Required?' (checked). The main area is a yellow box titled 'Milestone Completion Notes' with the instruction 'Drag up/down in the margins to reorder'. It contains a list of three notes: 1. 'Wait for next notification', 2. 'Renew', and 3. 'Cancel'. Each note is in a text input field with an orange 'X' icon to its right. At the bottom left of the yellow box is a '+ Add new' link. At the bottom of the window are 'Save' and 'Cancel' buttons.

Milestone Completion Note Administration

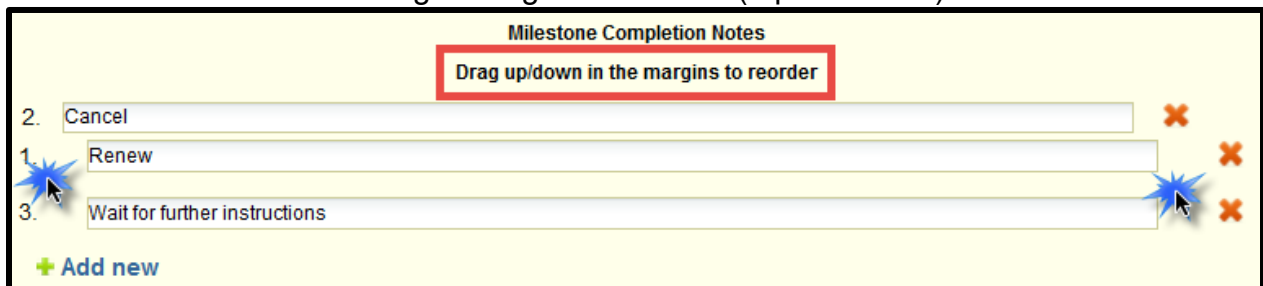
Enable Milestone Notes? ☒ Always Required? ☒

Milestone Completion Notes
Drag up/down in the margins to reorder

1. 
2. 
3. 




[+ Add new](#)

Once you **Save** your Milestone Completion Notes, you can then click and drag the notes from either the left or right margins to reorder (top to bottom).



This screenshot shows the 'Milestone Completion Notes' section after saving. A red box highlights the instruction 'Drag up/down in the margins to reorder'. The list of notes is now: 2. 'Cancel', 1. 'Renew', and 3. 'Wait for further instructions'. Blue starburst icons with mouse cursors are positioned at the left and right margins of the first and third notes, indicating they are being dragged to reorder the list. The '+ Add new' link is at the bottom left.

Milestone Completion Notes
Drag up/down in the margins to reorder

2. 
1. 
3. 

[+ Add new](#)

History Tab

Completed Milestone Notes are added to the contract's History Tab.

History

Timeline View

Report

Records Per Page 20 records					
Comments	Field	FieldComment	HistoryDate	ModifiedBy	
Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001)	Milestone	Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001)	03/16/2017 9:40:00 AM	Steven Snyder	
Created (Note) Milestone Completion Note	Milestones	Milestone Completion Note Created - Enter Your Free-Form Notes Here. There are no drop-down options in this dialog box.	03/16/2017 9:40:00 AM	Steven Snyder	

The Completed Milestone Notes will also appear in the History Tab's **Timeline View**.

Timeline

History ViewReport

Records Per Page100 records

Thursday
03/16/2017

16

03/16/2017 9:40:00 AM

Steven Snyder: Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001)

Thursday
03/16/2017

03/16/2017 9:40:00 AM

Steven Snyder: Milestone Completion Note Created - Enter Your Free-Form Notes Here. There are no drop-down options in this dialog box.

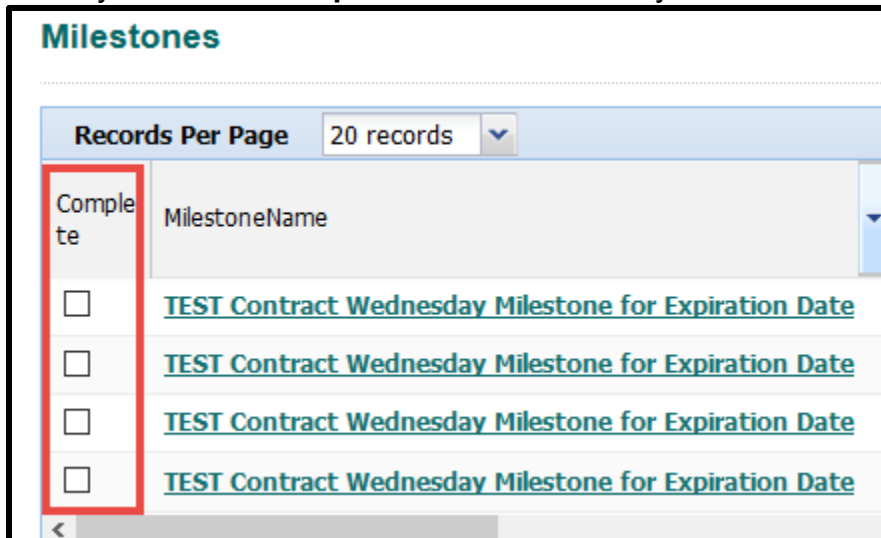
Adding Notes to a Completed Milestone (for Users)

When Milestones are flagged as Completed, you now have an option to enter specific Notes into UCM about the Completed Milestone. This new feature is available whether you click the Complete checkbox, or display the Milestone detail page by clicking on the Milestone name in the Milestone grid.

In addition to adding Notes, you may have the ability to select a pre-configured response from a drop-down list. Any completed milestone Notes you enter, or select from the drop-down, are added to the contract's History.

UCM Users

When you have a **Completed Milestone** and you click the Complete checkbox:

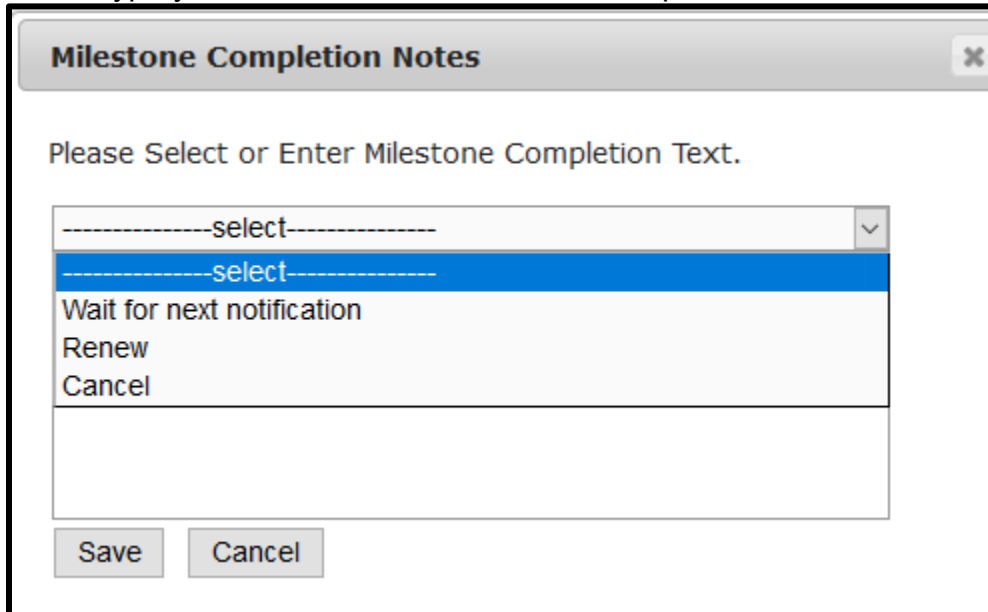


- OR -

When you display the Milestone Detail page by clicking on the milestone name in the grid and then clicking on the **"Mark As Completed"** button:



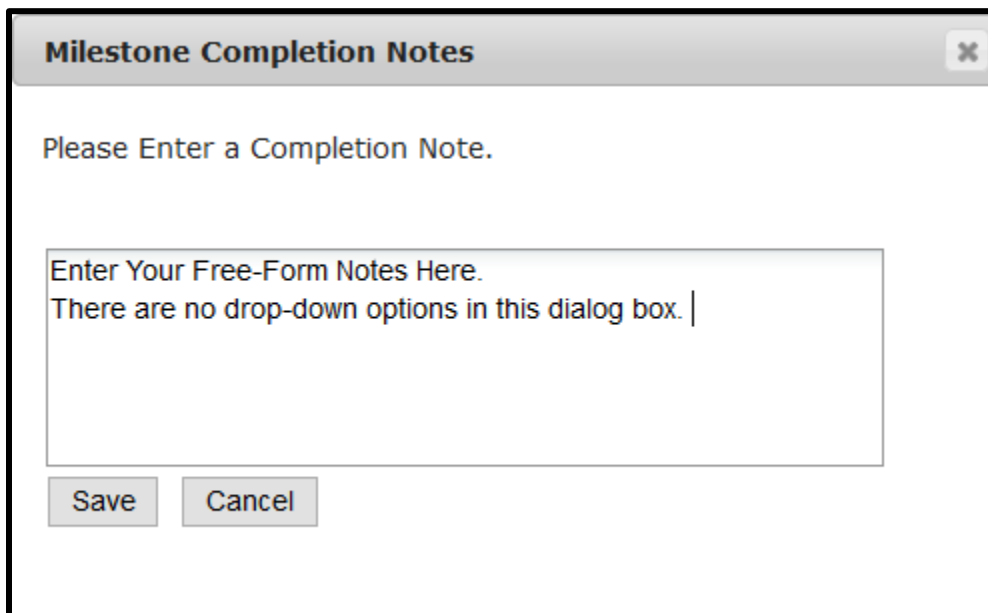
The **Milestone Completion Notes** dialog box will display any pre-configured notes that the UCM Administrators have created. Select one of these items from the drop-down and/or type your free-form notes below the drop-down items.



The screenshot shows a dialog box titled "Milestone Completion Notes" with a close button (X) in the top right corner. Below the title bar, the text "Please Select or Enter Milestone Completion Text." is displayed. A dropdown menu is open, showing a list of options: "-----select-----", "-----select-----" (highlighted in blue), "Wait for next notification", "Renew", and "Cancel". Below the dropdown menu is a large text input area. At the bottom of the dialog box are two buttons: "Save" and "Cancel".

Without any pre-selected text created by admins, you will see a **Completion Note** box only.

Type your notes in this section.



The screenshot shows a dialog box titled "Milestone Completion Notes" with a close button (X) in the top right corner. Below the title bar, the text "Please Enter a Completion Note." is displayed. A large text input area is present, containing the text "Enter Your Free-Form Notes Here." and "There are no drop-down options in this dialog box. |". At the bottom of the dialog box are two buttons: "Save" and "Cancel".

Click the **Save** button to record your Milestone Completion Notes into UCM.

Tip: Clicking **Save** will also finalize the Milestone as completed. You can still Reactivate the milestone later if necessary. If you click **Cancel**, you not only exit this dialog box, but you also cancel the Complete Milestone process.

You *may* be able to click **Save** without entering any notes.

🔍 If “*Always Required?*” was checked by the Admin (on the back end) and you do not enter any notes or select from the drop-down list, you will see an error message after clicking the **Save** button.

Milestone Completion Notes

Please Select or Enter Milestone Completion Text.

-----select-----

Textbox cannot be blank

Save Cancel

If you get this message, then either select a note from the drop-down list, enter a note in the box, or both and click the Save button to update and complete your Milestone.

History Tab

Completed Milestone Notes are added to the contract’s History Tab.

History						Timeline View	Report
Records Per Page		20 records					
Comments	Field	FieldComment	HistoryDate	ModifiedBy			
Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001)	Milestone	Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001)	03/16/2017 9:40:00 AM	Steven Snyder			
Created (Note) Milestone Completion Note	Milestones	Milestone Completion Note Created - Enter Your Free-Form Notes Here. There are no drop-down options in this dialog box.	03/16/2017 9:40:00 AM	Steven Snyder			

The Completed Milestone Notes will also appear in the History Tab's **Timeline View**.

Timeline

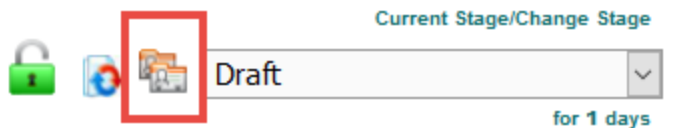
History ViewReport

Records Per Page100 records


Thursday 03/16/2017	<div><div>16</div><div>03/16/2017 9:40:00 AM</div><div>Steven Snyder: Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001)</div></div>
Thursday 03/16/2017	<div><div></div><div>03/16/2017 9:40:00 AM</div><div>Steven Snyder: Milestone Completion Note Created - Enter Your Free-Form Notes Here. There are no drop-down options in this dialog box.</div></div>

Adding Primary/Secondary/Tertiary Users to Workflow Stage Assignees (User-side)

From within the *Summary tab* of the Contract Container, use *Manage Assignees* to create or edit Individual Users who receive an email when workflow stages change, to now include either Primary, Secondary, and/or Tertiary Users. Owner is already available, as are the actual active user names.

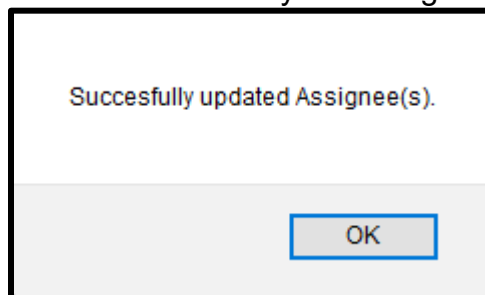


Designating Workflow Assignees in the Contract Container

Click on the  icon before changing the current stage.
Select the Stage from the drop-down list.
Select the Individual User(s).

A screenshot of a software interface showing a 'Stage' dropdown menu and a list of 'Individual User(s)'. The 'Stage' dropdown menu is set to 'Budget Review'. Below it, there is a text prompt 'Hold Ctrl Key To Select Multiple Items'. The 'Individual User(s)' list is open, showing a scrollable list of users: 'Owner', 'Primary' (highlighted in blue), 'Secondary', 'Tertiary', 'Anthony Schwartz', and 'Archibold Cox'.

Click **Save** to save your changes for that Stage.



Click the **OK** button to continue.

Repeat the above steps for each Stage within the Workflow.

Click the **Exit** button when finished with all the stage assignees.

Once you save changes to the workflow assignees, or the next time you click on the *Manage Assignees* button (same contract or another one), you will notice the **Assignees Follow** heading shows “*Local Setup*”, while the default usually displays **Assignees Follow: Admin Setup**

Assignees Follow: Local Setup ←	
Stage	Individual Users
Draft	Owner
Budget Review	Primary,Secondary,Tertiary
Pending	Owner
IT Review	Steven Snyder
Internal Signatures	Peter Jones
Internal Legal Review	Mary Roberts
Executed	Secondary, Tertiary
CEO Notified	Sidney Freedman

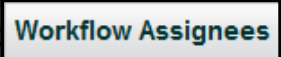
This is how you can track *where* the workflow stage assignees are setup. If the admin didn't assign individuals on the “back end” (Company Admin settings), then you will see “None Setup” as the default.

Assignees Follow: None Setup		
Stage	Individual Users	Role Models
In Process		
Final		

Adding Primary/Secondary/Tertiary Users to Workflow Stage Assignees (Administrator-side)

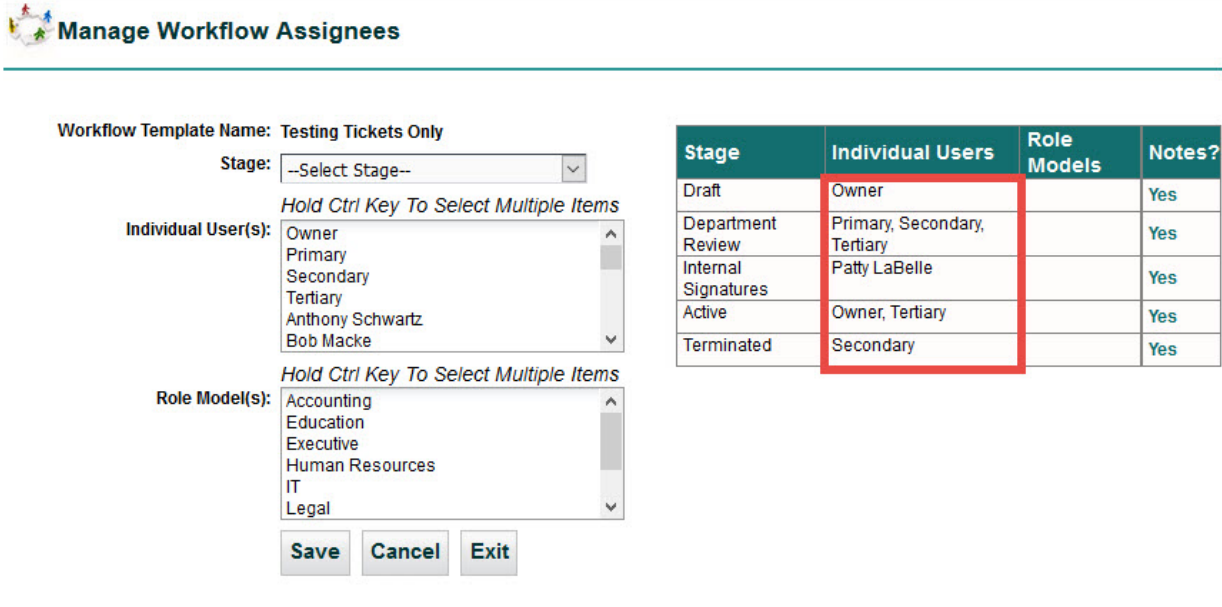
Administrator Settings

Use *Manage Workflow Assignees* to create or edit Individual Users to now include either Primary, Secondary, and/or Tertiary Users. Owner is already available, as are the actual active user names.

- Select the Workflow Template Name from the list of Workflows
- Click on the Workflow Assignees button, located towards 

- or -

- Click on the  icon (Manage Assignees) for the specific Workflow Template.

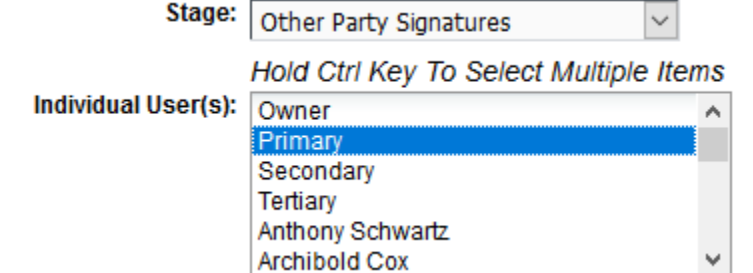


The screenshot shows the 'Manage Workflow Assignees' interface. On the left, there are two selection lists: 'Individual User(s)' and 'Role Model(s)'. The 'Individual User(s)' list includes Owner, Primary, Secondary, Tertiary, Anthony Schwartz, and Bob Macke. The 'Role Model(s)' list includes Accounting, Education, Executive, Human Resources, IT, and Legal. To the right of these lists is a table with columns: Stage, Individual Users, Role Models, and Notes?. The table contains data for various stages, with a red box highlighting the 'Individual Users' column. Below the lists are 'Save', 'Cancel', and 'Exit' buttons.

Stage	Individual Users	Role Models	Notes?
Draft	Owner		Yes
Department Review	Primary, Secondary, Tertiary		Yes
Internal Signatures	Patty LaBelle		Yes
Active	Owner, Tertiary		Yes
Terminated	Secondary		Yes

Select the Stage from the drop-down list.

Select the Individual User(s).



This screenshot shows a close-up of the 'Individual User(s)' selection list. The 'Stage' dropdown is set to 'Other Party Signatures'. The list includes Owner, Primary (highlighted in blue), Secondary, Tertiary, Anthony Schwartz, and Archibold Cox.

Click on **Save** to save your changes.

Repeat above steps for each Stage within the Workflow.

Click on **Exit** when finished setting up all the Workflow Stages.

*If still in a Workflow Template, click **Save** to update the template and this will return you to the list of Workflow Templates.*

Workflow Stage Changes Recorded in History Tab

When the Stage changes, the users assigned as Primary, Secondary, or Tertiary users receive the email and the stage change and emails sent are recorded in the History Tab.

History				
Records Per Page		20 records		
Comments	Field	FieldComment	HistoryDate	ModifiedBy
Email sent to following Assignees: Neil Anderson, Mary Goldberg, Joanne Hurst	Assignee Email Sent	Assignees Email sent for Stage changed from Draft to Department Review for WorkflowTemplate Testing Tickets Only. Stage Notes = This is the Dept. Review Stage!	02/16/2017 10:19:00 AM	Steven Snyder
Stage updated to Department Review	Stage	Stage changed from Draft to Department Review after 0 days	02/16/2017 10:19:00 AM	Steven Snyder

Enhancements With MultiSelect and DropDown Fields

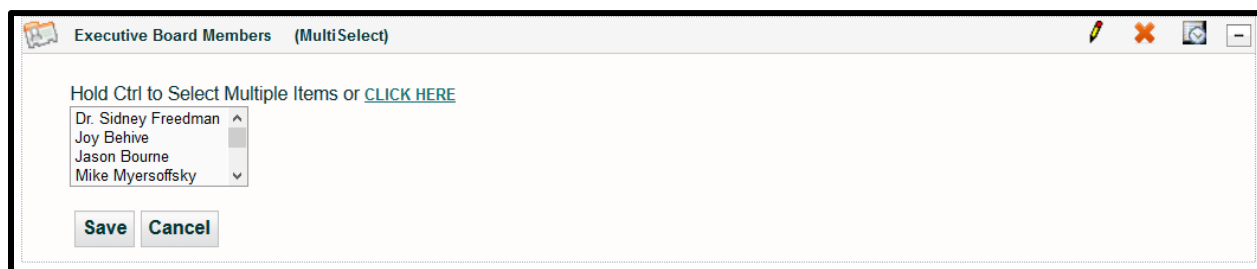
Creating reports with *Add New View* is very helpful when you're trying to filter your list of contracts, attachments, milestones, etc. and you need to run a special report on such criteria.

Since creating search criteria is based on the fields already setup in your UCM System, using DropDown and MultiSelect field types to have multiple options for a specific field can streamline your search criteria. For example, if you have a number of DropDown values that all start the same way, such as "IT this" and "IT that", you can search on the DropDown field that "Begins with" IT, and you'll get results that list both.

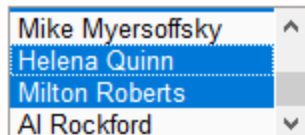
This will help anyone who previously had to do multiple DropDown fields where field = "IT this" **OR** DropDown field = "IT that", which was problematic because sometimes you want/need to do multiple criteria on this, OR that, OR that, OR that, OR this, and finally have an AND, but combining "and + or" searches do not always give you the expected results.

Selecting multiple items in a MultiSelect field on the Summary Tab

Before you can setup custom views, you must first include the field in the Contract Container. Choose your items from the list; at least one, but you can select multiple items with either the [Ctrl] key or by displaying the side-by-side columns.



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



- or -

Click on the link "CLICK HERE" to list side-by-side columns.

Make Selections

- ☐ Dr. Sidney Freedman
- ☐ Joy Behive
- ☐ Mike Myersoffsky
- ☐ Al Rockford

Selected

- ☐ Jason Bourne
- ☐ Helena Quinn
- ☐ Milton Roberts

> >> < <<

Save Cancel Exit

Make sure to click **Save** to keep the Selected Items.

Creating Criteria Views

When you create custom views, you have more search options with your MultiSelect or DropDown fields. The following example shows a *Contract View* but you can use any type of view.

Create/Modify Contracts View

Get Contracts that match the following criteria:

Executive Board Members is Joy Behive Jason Bourne Mike Myersoffsky Helena Quinn

+ Add Criteria ☐ Include Archived

Use the [Ctrl] key to select multiple items.

- For example, you would click on “*Jason Bourne*” and then hold the [Ctrl] key while you click on “*Helena Quinn*”.

When you are defining the columns to be displayed in your search results, make sure the field used as criteria is added to the grid.

Get Contracts that match the following criteria:

Executive Board is Mike Myers
Joy Behive
Jason Bourne
Milton Hershey

[Add Criteria](#) ☐ Include Archived

Default Fields And Sequence

Contract ID	ContractName	ContractTypeName	Executive Board	FolderName	Owner
<div></div>					

The results of your search will display in a unique grid column where multiple items are separated by a | symbol:

Contract ID	ContractName	Executive Board Members	TEST Multi-select Values	Insurance Company
254613	Dr. Jonah Smith			Medicare
254614	Computer Equipment Leases		More than 10	
256508	Starlord Building Lease	Dr. Sidney Free...	2 More than 10	
256509	General IT Contractor Agreement		More than 10	
256510	Urgent Care Housekeeping		2	
256511	Sally Sweeping Services Contract		2	
256512	Lease Agreement		More than 10	
256514	Physicians Agreement		2	
257738	Geek Doctors, LLC		1	
257742	Computer Technology Corporatio...		More than 10	

Using DropDown Criteria

Creating criteria with a DropDown field allows you to select one item or you can search for an item that “*starts with*”, “*ends with*”, and so on. For example:

Create/Modify Contracts View

Get Contracts that match the following criteria:

Vendor Type

starts with

med

Displays the following results.

<input type="checkbox"/>	Select All		Records Per Page	10 records		Action:	<input type="text" value="Select Action"/>
	Contract ID	ContractName	Vendor Type	ContractTypeName			
<input type="checkbox"/>	334118	Dental Suppliers	Medical/Dental Services	Purchasing			
<input type="checkbox"/>	334119	Red Cross Supplies	Medical/Surgical Supplies	Purchasing			
<div><</div>							
<div><div> </div>Page <input type="text" value="1"/> of 1<div> </div></div>							

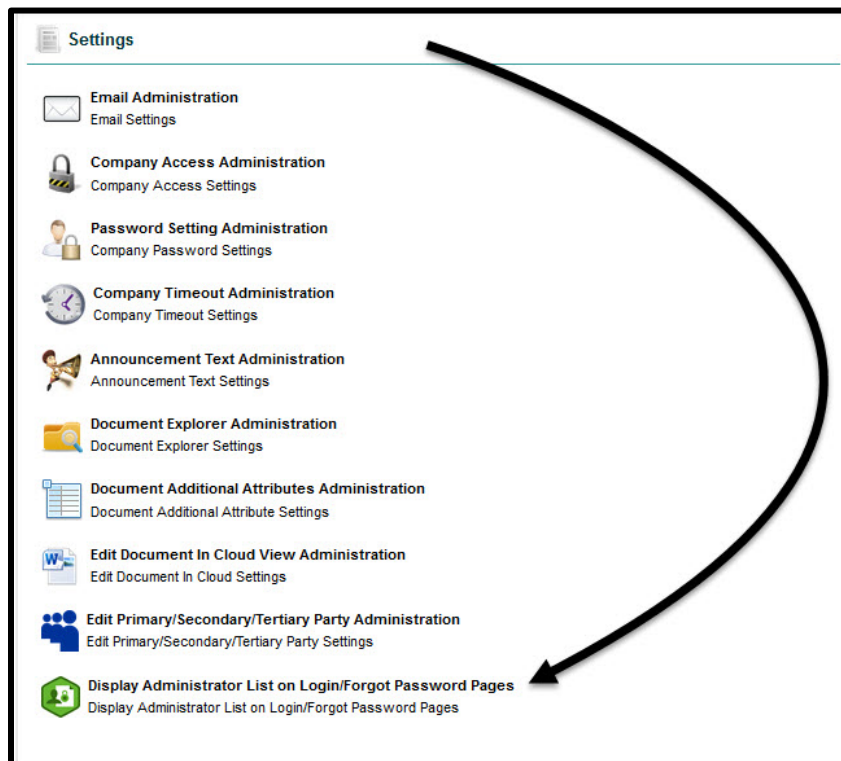
Displaying UCM Administrators On The Login Page

Introduction

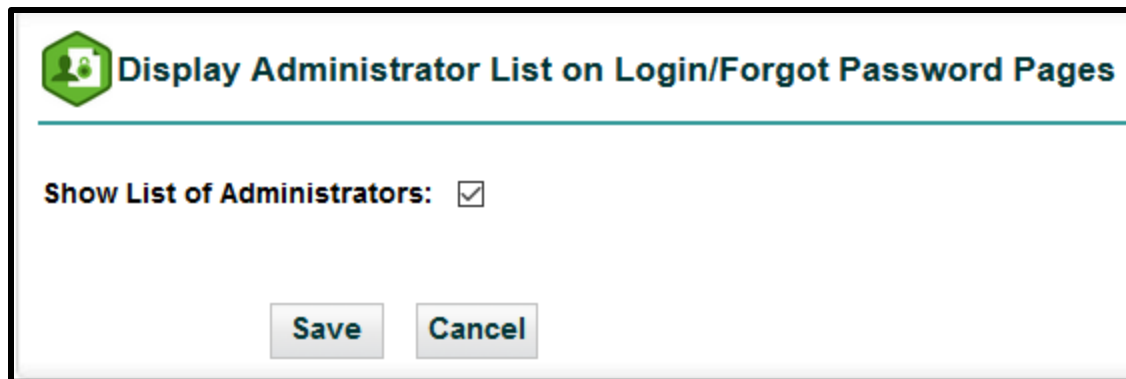
A challenge facing UCM Administrators is when their Users forget their login credentials and have to reach out to the Admin for assistance. Well, now we have a new way to assist users who may not even know who the UCM Administrators are within their company.


Setting up the Login Page to display iContracts UCM Administrators

Before a user can click a link to find out who is an iContracts UCM Administrator, the Admin must first activate this feature in the **Company Admin:Settings** screen.



After you click on the selection, activate the List by clicking on the checkbox, then click **Save**. Of course, you can reverse this setting and turn this list off as well.

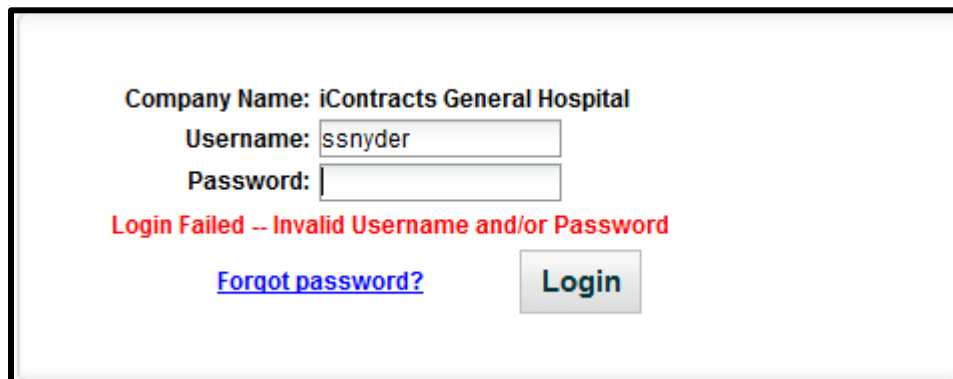


 **Display Administrator List on Login/Forgot Password Pages**

Show List of Administrators: ☒

How to Display Your UCM Administrators

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



Company Name: iContracts General Hospital

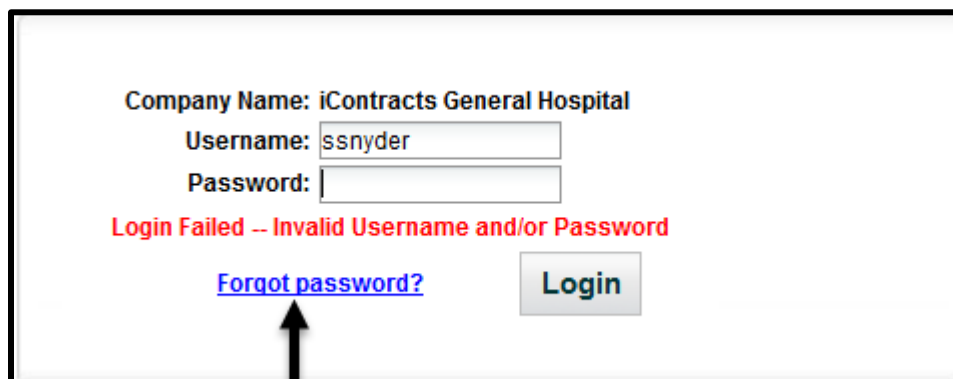
Username:

Password:

Login Failed -- Invalid Username and/or Password

[Forgot password?](#)

Rather than just keep trying to remember your password and risk getting locked and then scrambling to find out who to contact for help and wasting down time, click on "Forgot Password".



Company Name: iContracts General Hospital

Username:

Password:

Login Failed -- Invalid Username and/or Password

[Forgot password?](#)

You will normally be able to have your credentials emailed to you directly. You would click **Submit** for an email from the UCM System.

Forgot Your Password?

Enter Your Username to receive your password

Company Name:

Username:

[Show iContracts General Hospital Administrators](#)

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
Admin	User	cleinbach@icontracts.com
Carl	Leinbach	cleinbach@icontracts.com
Contract	Manager	cleinbach@icontracts.com
Danielle	Obchinetz	dobchinetz@icontracts.com
David	Stobb	cleinbach@icontracts.com
George Michael	Bluth	cleinbach@icontracts.com
Michael	Nocito	mnocito@icontracts.com
Savita	Password	stiwari@icontracts.com

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.