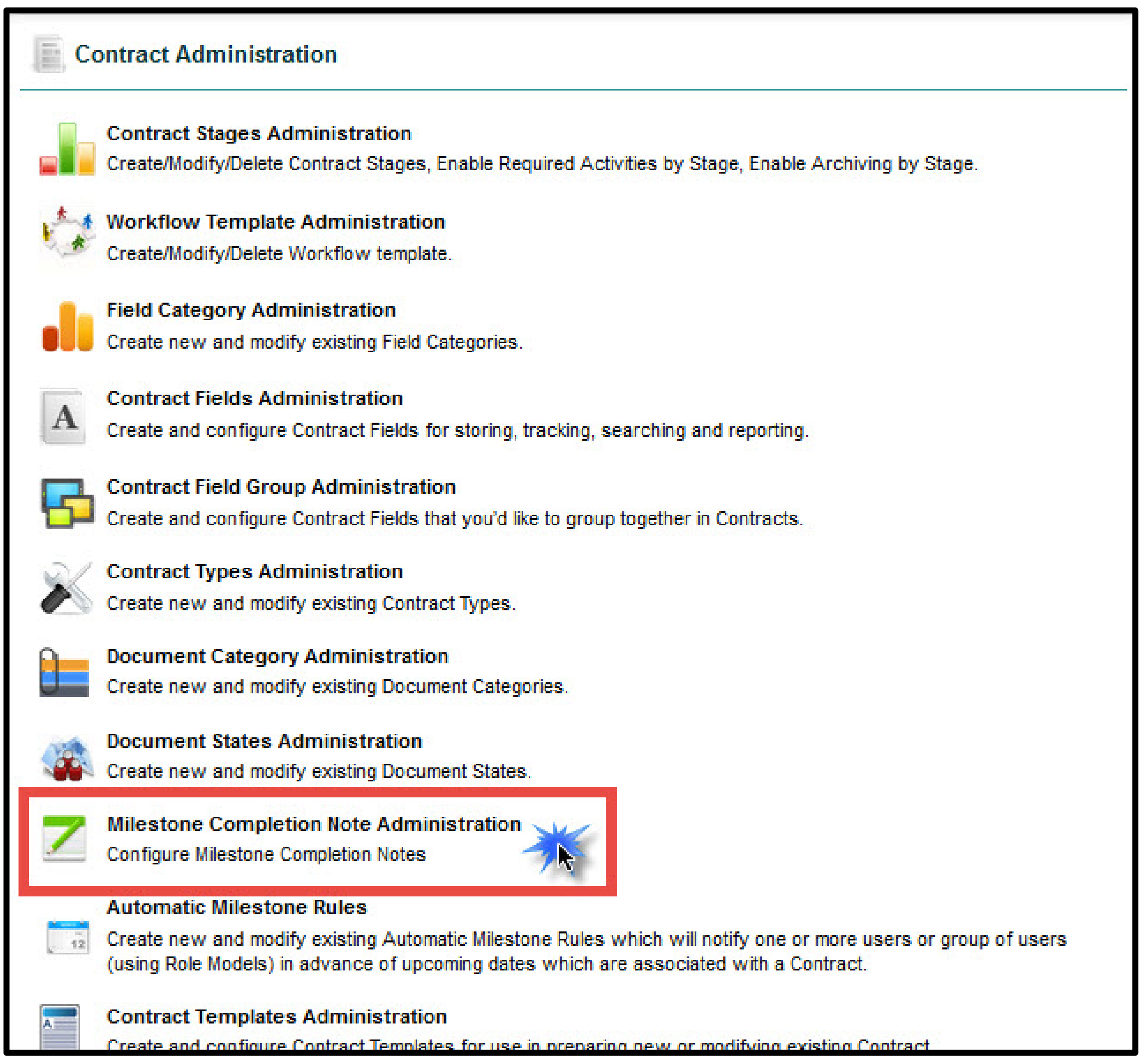
# Adding Notes to a Completed Milestone (for Administrators)

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.

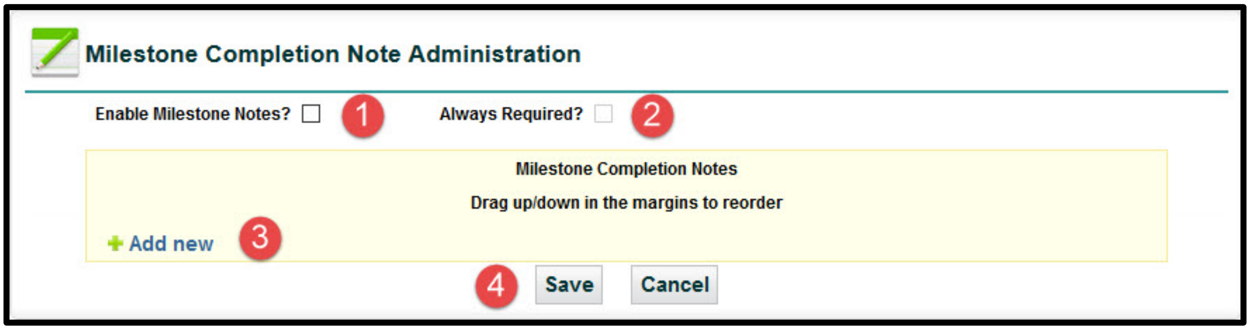
In addition to adding Notes, you may have the ability to select a pre-configured response from a drop-down list.  Any completed milestone Notes you enter, or select from the drop-down, are added to the contract's History.

## UCM Administrators

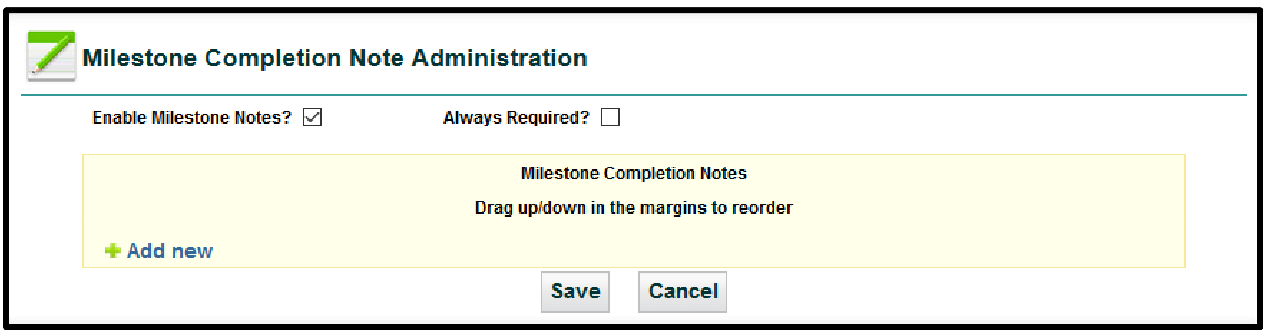
To setup Milestone Notes, admins use **Company Admin: Contract Administration: Milestone Completion Note Administration** to activate and configure their list of prepared responses.



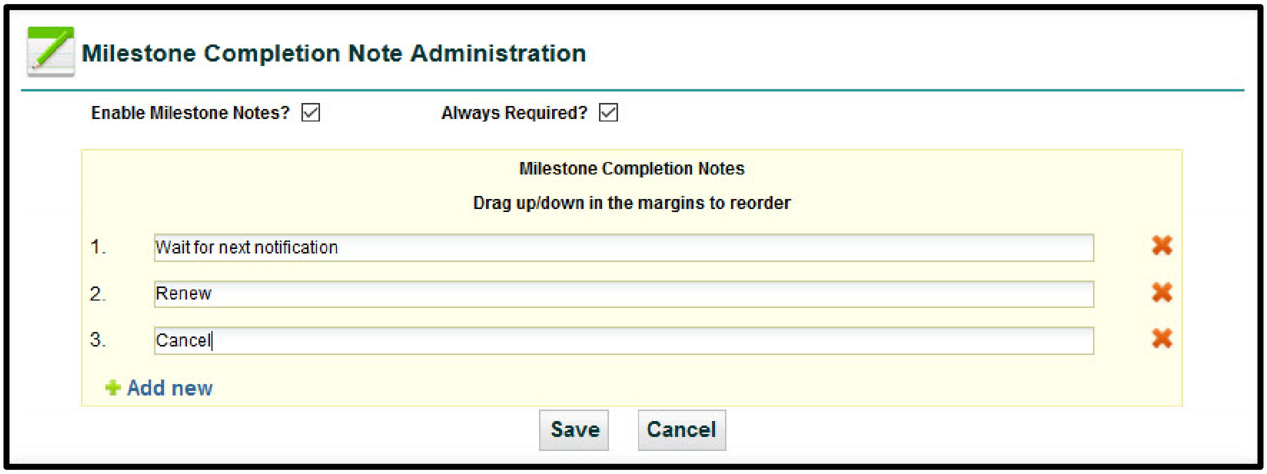
Once you Enable Milestone Notes, you have several options to use these completed milestone notes.



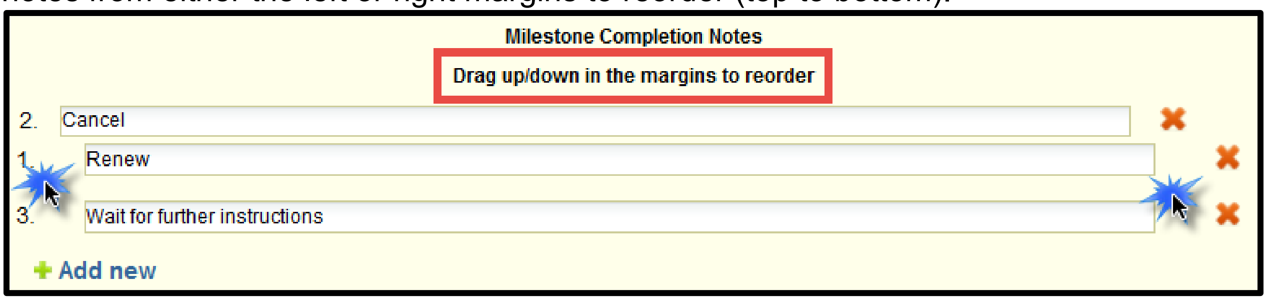

1. **Enable Milestone Notes?** Click checkbox to activate. This checkbox can also be unchecked to turn off this feature.
2. **Always Required?** If checked, you must have at least one type of note: free-form text, or pre-configured responses setup with "**Add new**".
3. **Add new** Click to enter your responses. For example, "Wait for next notification", "Renew", or "Cancel". See images below.
4. **Save** Saves your Milestone Completion Notes.



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

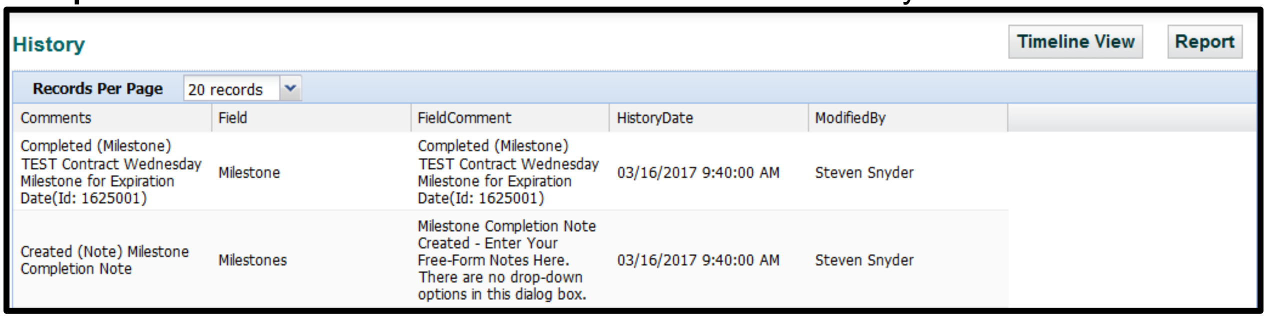



Once you **Save** your Milestone Completion Notes, you can then click and drag the notes from either the left or right margins to reorder (top to bottom).

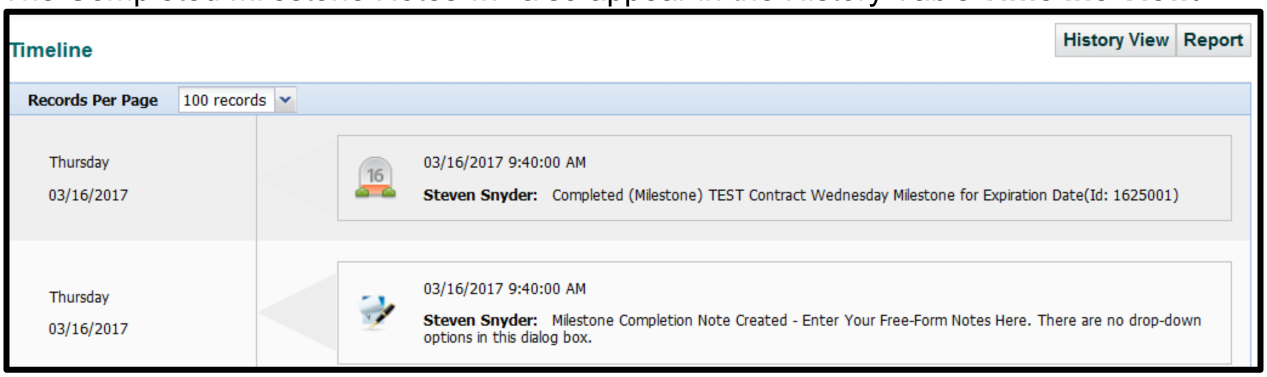


## History Tab

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




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



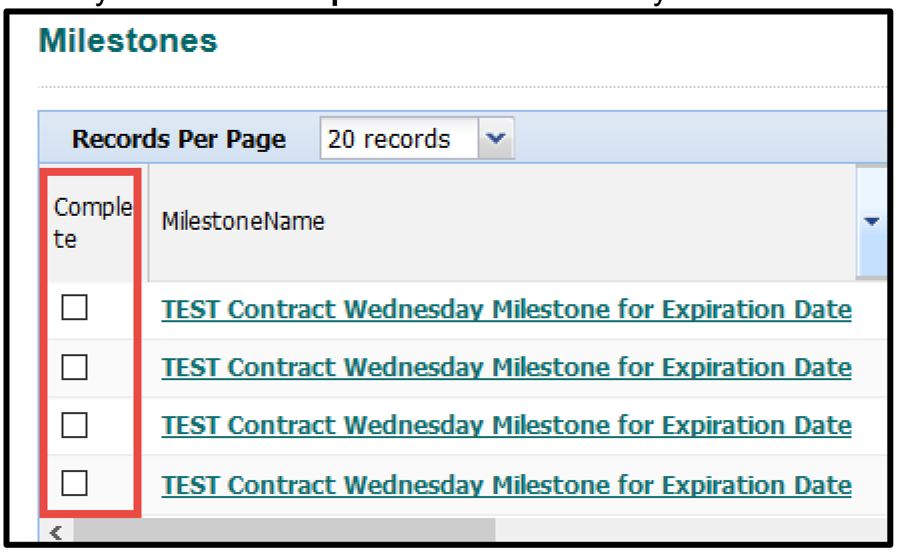
# Adding Notes to a Completed Milestone (for Users)

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.

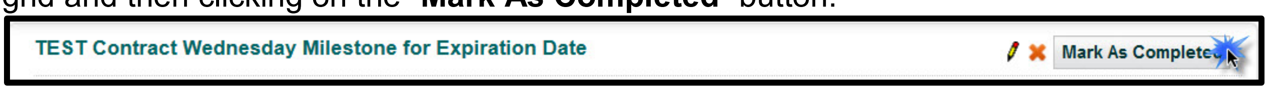
## UCM Users

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

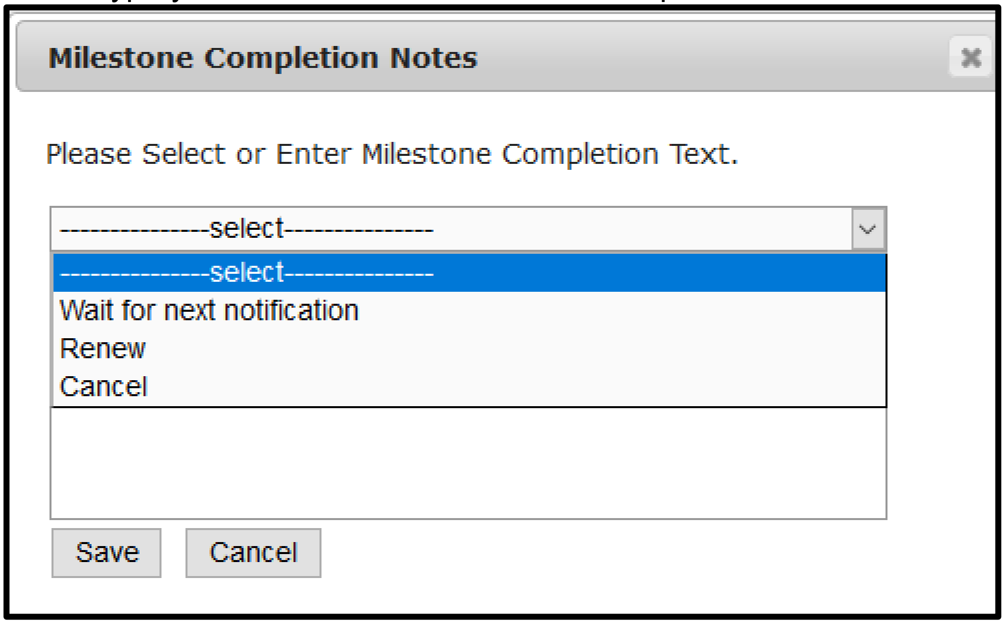



***- OR -***

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:

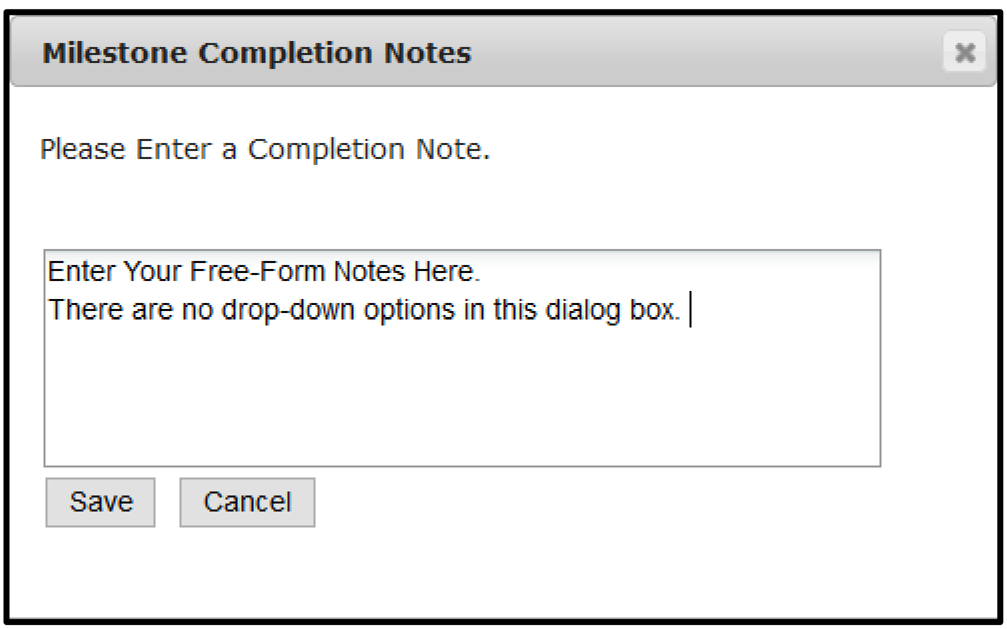


The **Milestone Completion Notes** dialog box will display any pre-configured notes that the UCM Administrators have created.  Select one of these items from the drop-down and/or type your free-form notes below the drop-down items.




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

Type your notes in this section.

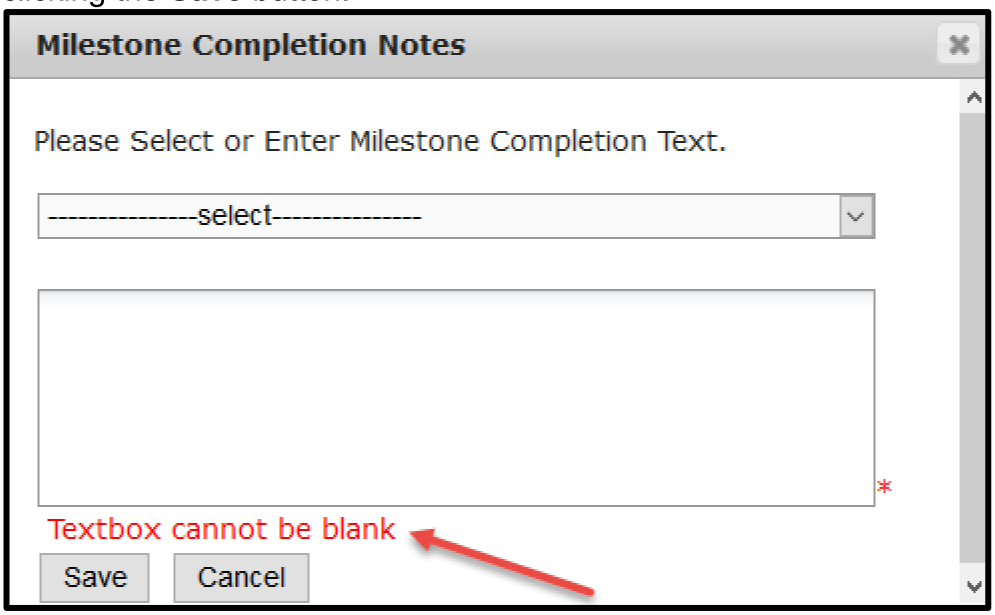



Click the **Save** button to record your Milestone Completion Notes into UCM.

***Tip:*** *Clicking **Save** will also finalize the Milestone as <u>completed</u>. 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.

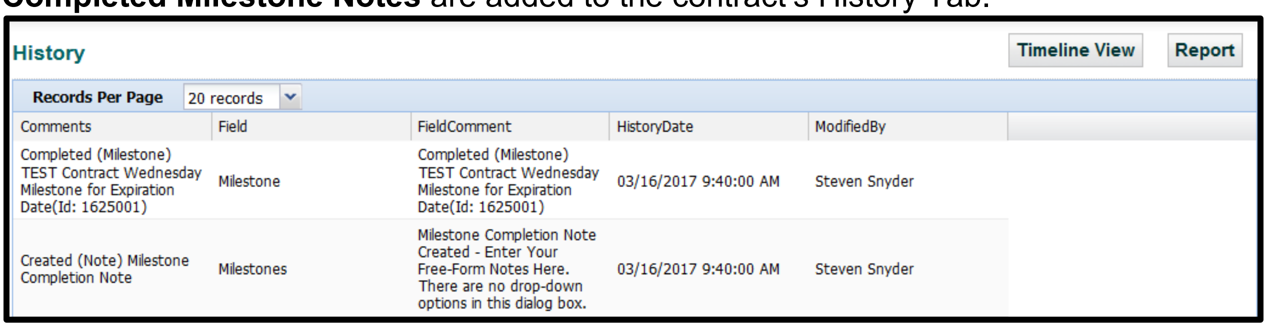
✍ If “*Always Required?*” was checked by the Admin (on the back end) and you do not enter any notes or select from the drop-down list, you will see an error message after clicking the **Save** button.




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.

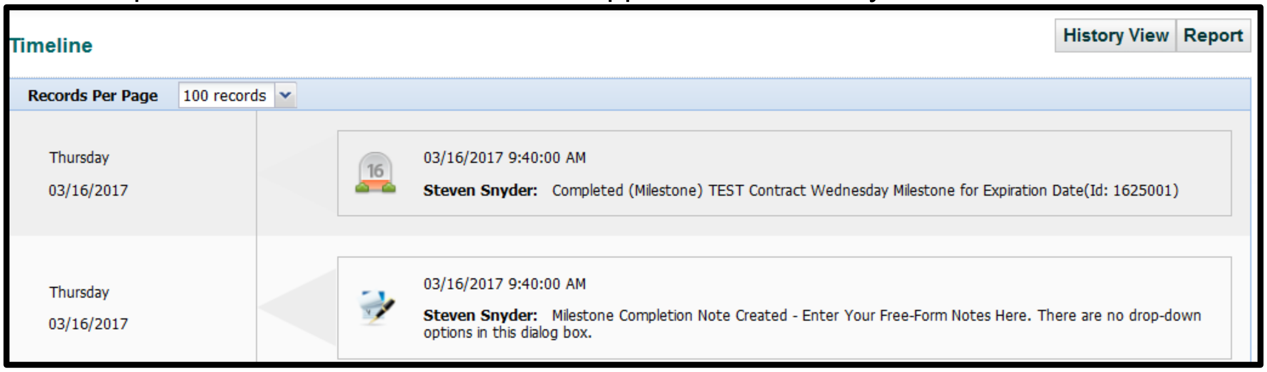


History | Timeline View | Report

Records Per Page: 20 records

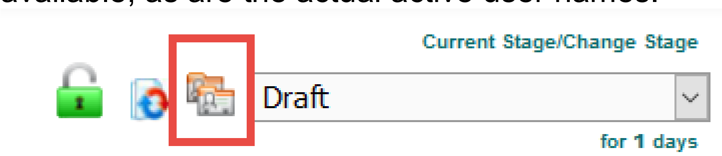
| Comments | Field | FieldComment | HistoryDate | ModifiedBy |
|---|---|---|---|---|
| Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001) | Milestone | Completed (Milestone) TEST Contract Wednesday Milestone for Expiration Date(Id: 1625001) | 03/16/2017 9:40:00 AM | 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**.



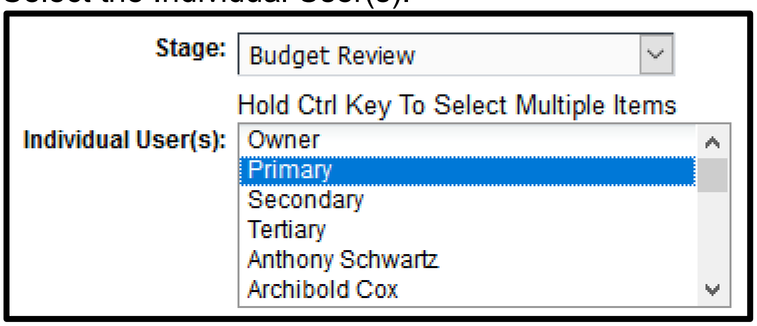
# Adding Primary/Secondary/Tertiary Users to Workflow Stage Assignees (User-side)

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.

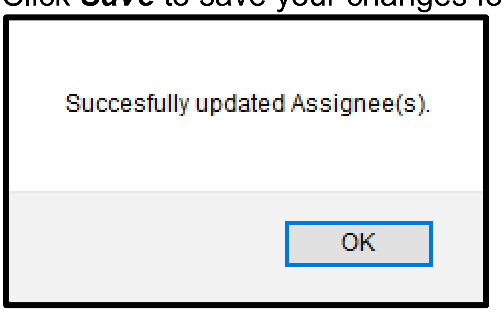



### Designating Workflow Assignees in the Contract Container

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




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 | | |

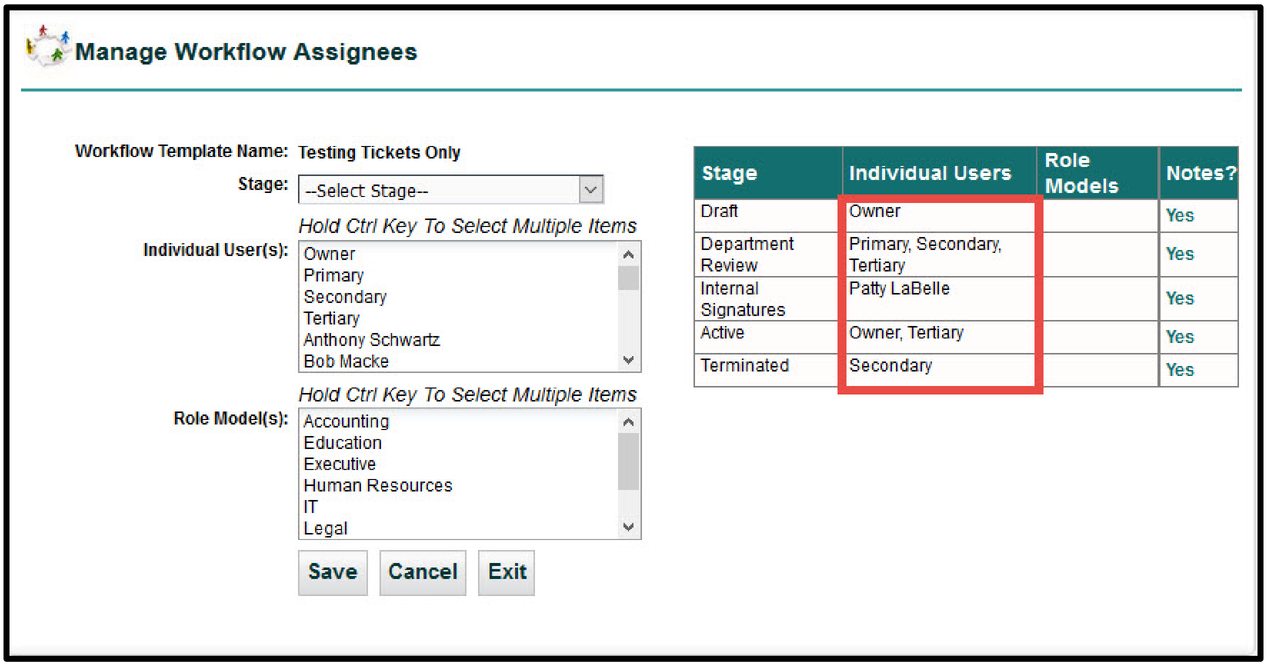
# Adding Primary/Secondary/Tertiary Users to Workflow Stage Assignees (Administrator-side)

**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 t 

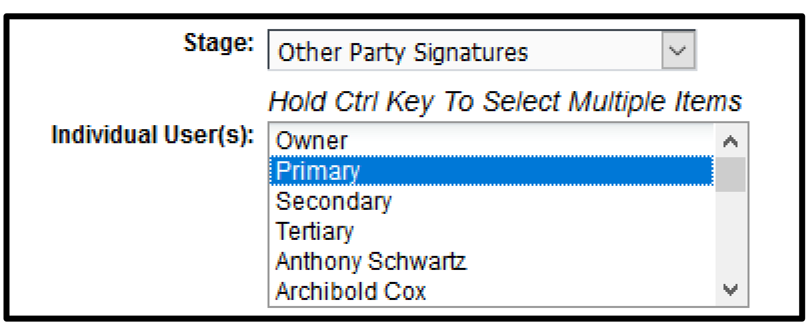

  *- or –*

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




Select the Stage from the drop-down list.

Select the Individual User(s).



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

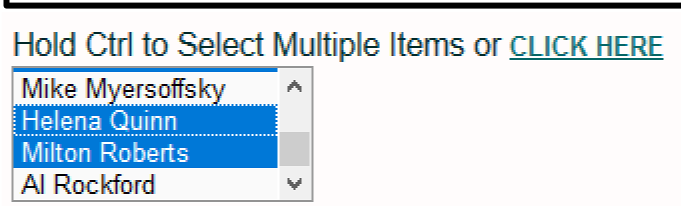
Creating reports with *Add New View* is very helpful when you're trying to filter your list of contracts, attachments, milestones, etc. and you need to run a special report on such criteria.

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.

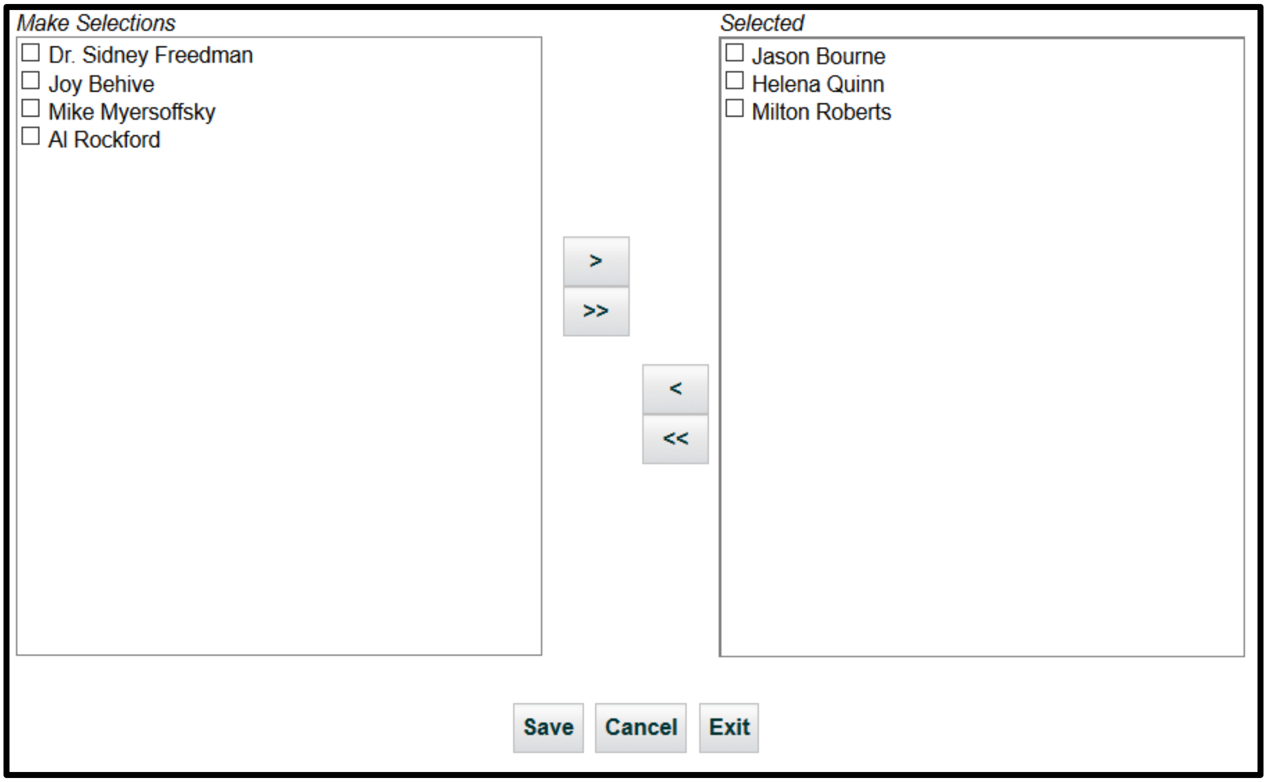
## Selecting multiple items in a MultiSelect field on the Summary Tab

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.


- *or* -

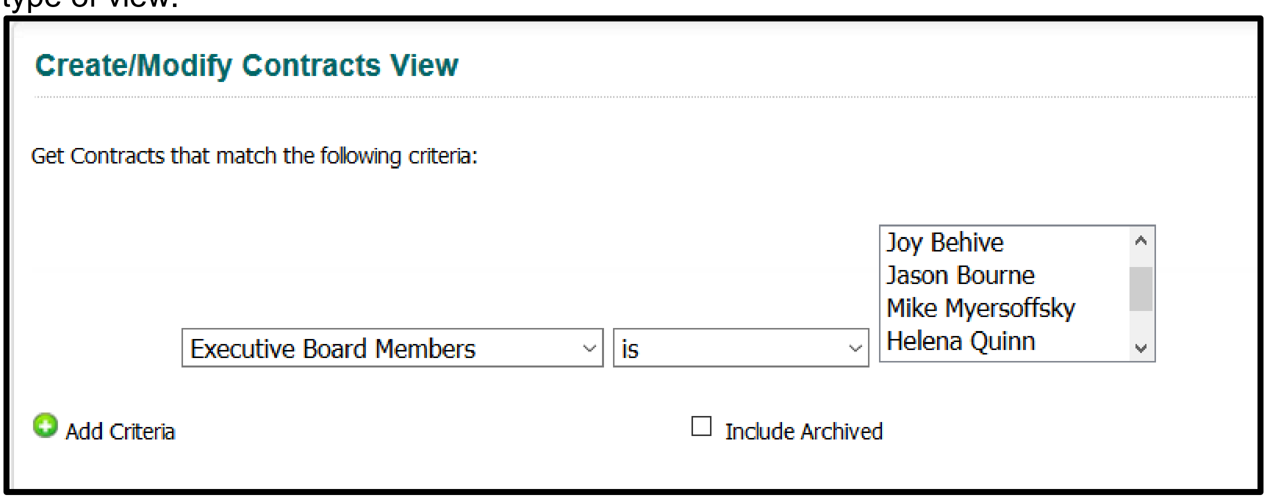
Click on the link "CLICK HERE" to list side-by-side columns.




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

## Creating Criteria Views

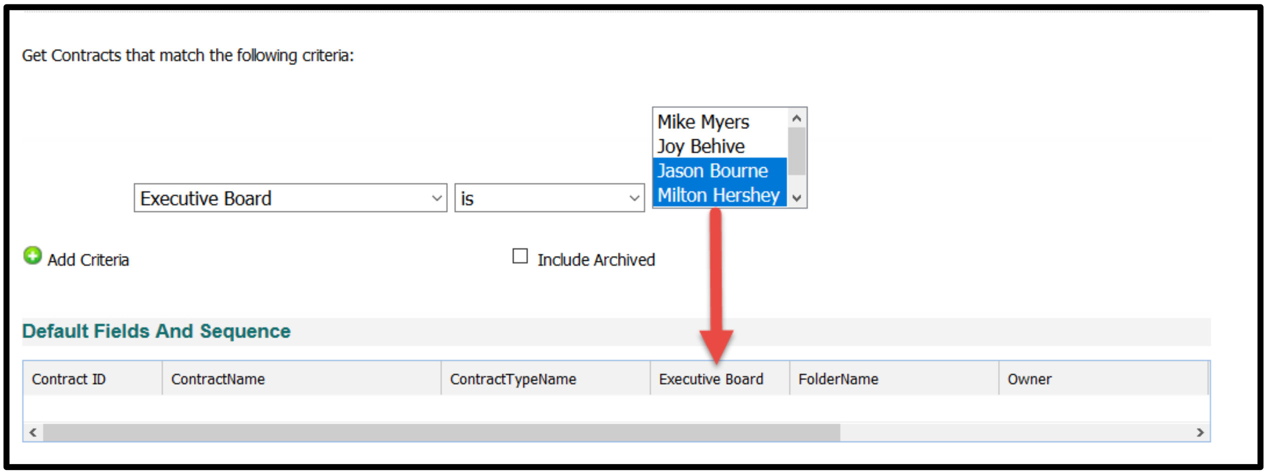
When you create custom views, you have more search options with your MultiSelect or DropDown fields. The following example shows a *Contract View* but you can use any type of view.




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.

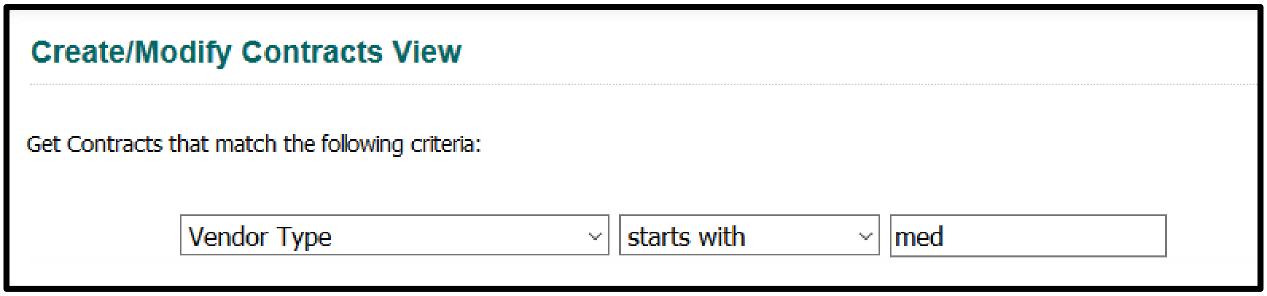



The results of your search will display in a unique grid column where multiple items are separated by a | symbol:

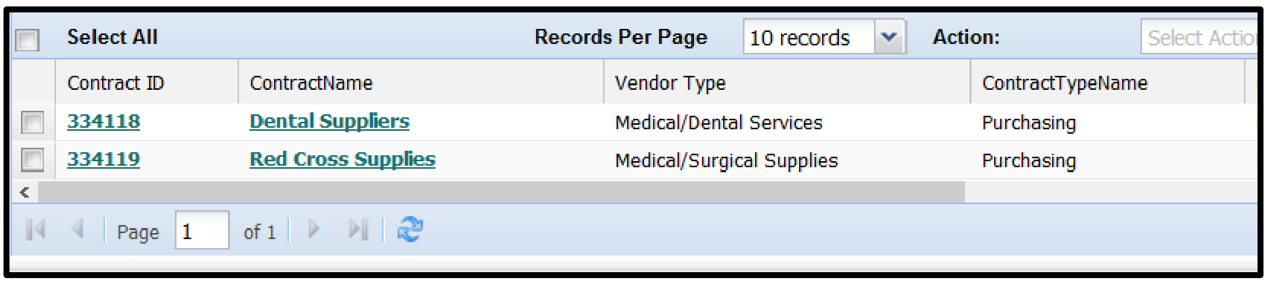
| Contract ID | ContractName | Executive Board Members | TEST Multi-select Values | Insurance Company |
|---|---|---|---|---|
| 254613 | Dr. Jonah Smith | | | Medicare |
| 254614 | Computer Equipment Leases | | More than 10 | |
| 256508 | Starlord Building Lease | Dr. Sidney Free... | 2 \| More than 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:




Displays the following results.



# Displaying UCM Administrators On The Login Page

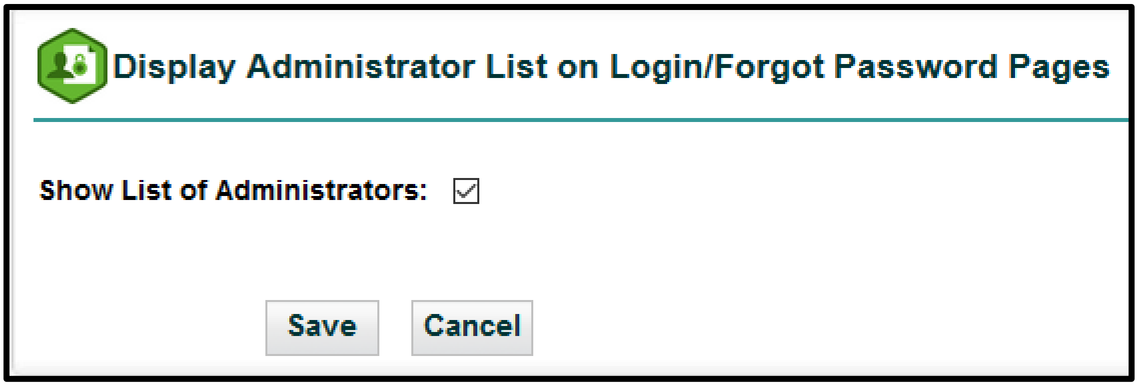
## Introduction

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

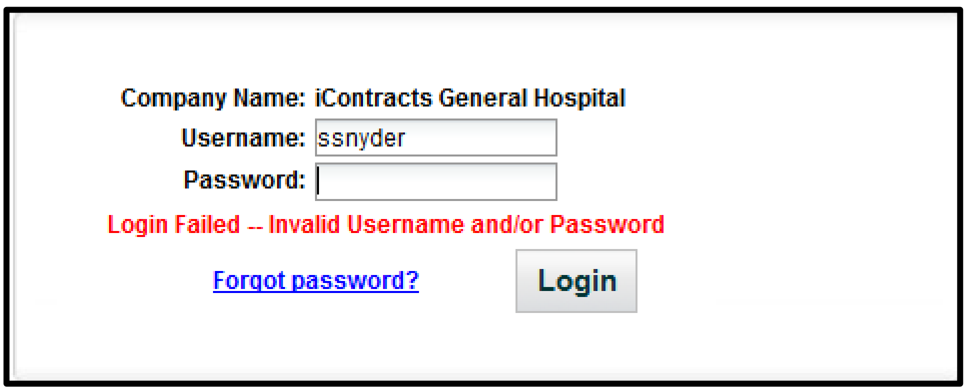
Before a user can click a link to find out who is an iContracts UCM Administrator, the Admin must first activate this feature in the **Company Admin:Settings** screen.


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.

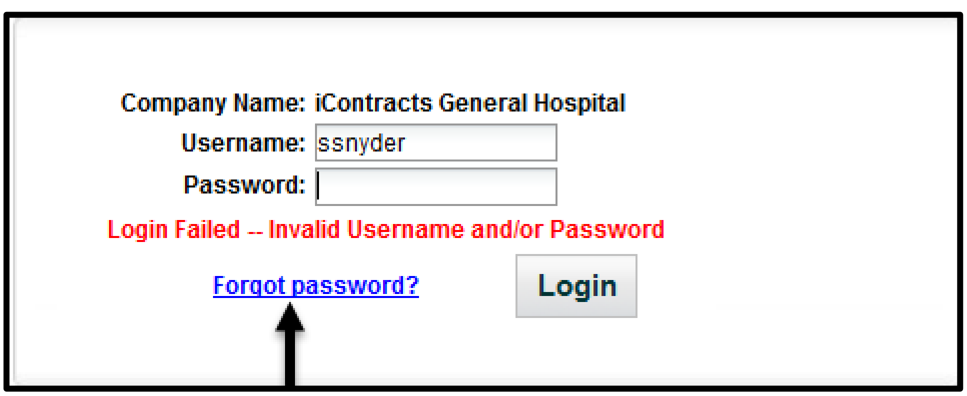



## How to Display Your UCM Administrators

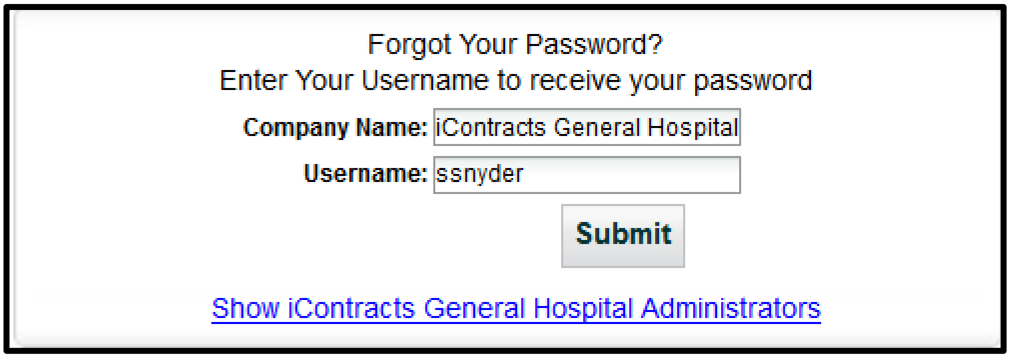
When logging into UCM, you get **5 attempts** to login correctly before UCM locks you out of the system for security purposes.




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".

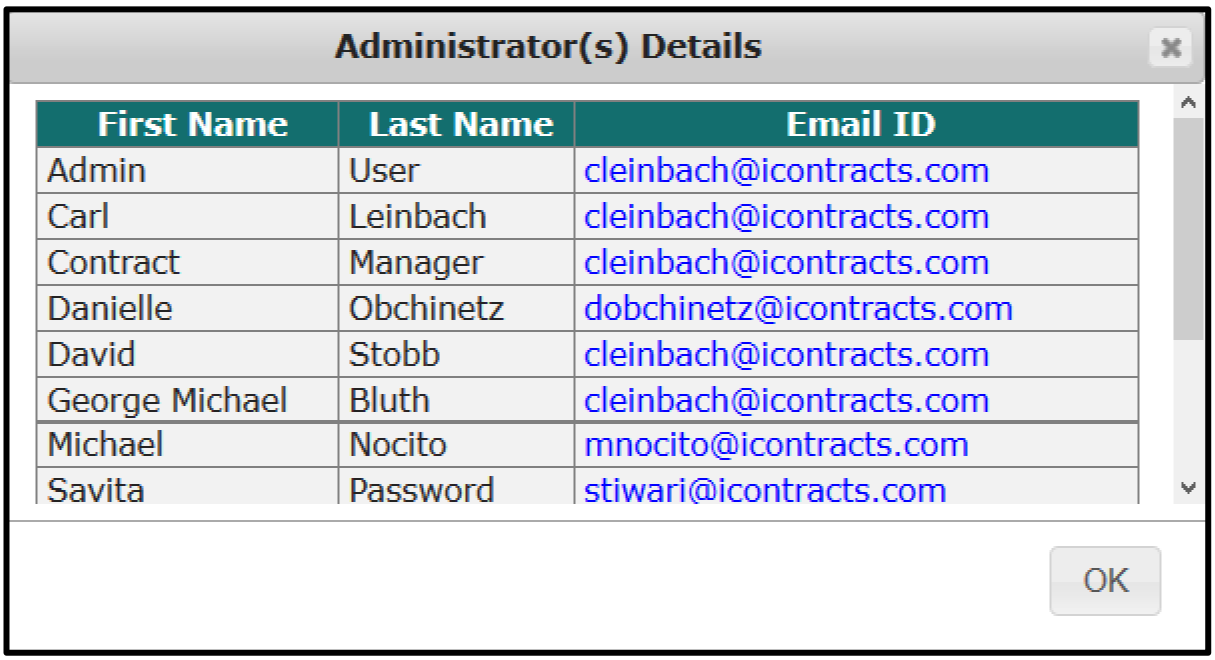



You will normally be able to have your credentials emailed to you directly.
You would click **Submit** for an email from the UCM System.




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 |

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.