



## Creating the Table:

- Navigate to **Company Admin** → **Contract Administration**
- Select Contract Table Configuration which is towards the top
- Within Table Administration, select the green "+ New Table" from the top right corner
- Give your Table a Name (1)
  - This is the name that will appear on the Tables Tab on the Contract Summary page
- Optionally, give your Table a **Description (2)** 
  - This will ONLY display in the Table Admin section, not in the Table or Contract itself
- Select if you want your Table to be Active (3)
- Save (4)
- Navigate back to Table Administration to begin adding fields (5)

	5 << Table Administrat
Table:	
Table Name: Evaluations	1
Table Description: Grading scale of 1-4. For Monthly, Semi- Annual, and Annual Vendor Evaluations.	
3 Active: 🗹	
4 Save Cancel	

## Adding Fields to the Table:

- From the Table Administration page, select your new Table
- The page will look similar to the previous, but there is now the Add Field button

Table:		
Table Name:	Evaluations	*
Table Description:	Grading scale of 1-4. For Monthly, Semi- Annual, and Annual Vendor Evaluations.	
Active:	✓	
		Add Field
	Save Cancel	

## Adding Fields to the Table (cont.):

- Select the Add Field button
- Give your new Field a Name (1)
- Select the Field Type (2)
- Select if it is a **Required Attribute (3)**
- Select if the Field is Active (4)
- Save (5)

A Table Field :	1
Field Name: Evaluation Year     *       Field Type: SingleLine     *	
3 Required Attribute: Required-Mandatory ▼ Active: ♂ 4	
5 Save Cancel	

Once you **Save**, your new **Field** will be added to your **Table** like this:

	Table Field Saved successfully	8
		<< Table Administration
Table:		
	Evaluations	]*
Table Description:	Grading scale of 1-4. For Monthly, Semi- Annual, and Annual Vendor Evaluations.	
Active:	V	
1 1. Evaluation Year	(SingleLine)	4 X 5 Add Field
	6 Save Cancel	

- **Re-Arrange** Fields in Table (1)
- Field Name (Edit Field) (2)
- Field Type (3)
- Delete Field (4)
- Add more Fields (5)
- Continue to create Fields until all have been added to the table
- Once all Fields have been created, Save your new table (6)

## Adding the Table to a Contract:

- From the Contract Container's **Summary Tab**, select the green "+" next to **Contract Data (1)**
- Using the menu that pops up, select your **Table** from the drop-down menu (2)
- Select Add (3)

(615130) Vendor	r ABC	<u>_</u>	L_) 👩 🖏	Current Stage	e/Change Stage
Owner: Contract Type:	Bryan Gilliss Purchasing Agreement	Add Table			for 0 days
Alert Configuration: Summary Attacl	Alert (0) Remaining	Select Table: 2 Evaluations •	History		
Contract Data Show Contract Attribu	ites	3 Add Cancel			
		Sorting Field N			Add Fields
Contract Name:	Vendor ABC	Review Stat		o Reviewers Set for is Contract Container	

- The new **Table** will appear as a tab next to **Contract Data (1)**
- From within the new Table Tab, select Add (2)
- Fill in the fields with the correct information (Just like entering Data in traditional Fields)
- Save the data to your Table (3)

(615130) Vendor ABC 1,125 Day(s) Until Expiration Date, on 01/0		Add/Edit Table	Current Stage/Change Stage	
		Evaluation Year:	2018	Budget Review 🔻
		Evaluation Term:	Annual v	for 0 days
		Quality of Materials/Service upon Delivery:	3	
Summary Attachment(s)	Notes Rela	Timeliness of Deliveries and Services:	4	
Contract Data Evaluat	tions 1	Overall Quality of Materials/Service:	3 •	
Table Views	Evaluation	Expertise of Company Representative:	3 🔹	2 Add Report
View All Table		Technical Support:	3 🔹	
OAdd New View	Records Per	Have Employees Completed Orientation (Net Learning, Competency when applicable):	3	
	Evaluation Year	Representatives are safe with lifting technique and ergonomics:	4	Technical Support
	A Page	Representatives show professionalism to include dress code:	4	No records to display
		Representatives adhere to organizations chemical and biohazard safety policies:	4	
		Was pricing review and determined to be competitive?:	Yes •	
		3 Save Cancel		

- Your **Data** now appears in the **Table**, and it is able to be moved, edited, and arranged just like the other Grids within UCM
- You can also **Report** off the Table Data to a CSV Excel file
- To Add another set of data, simply select the Add button and fill out your Fields again

Eval	Evaluations - Tables Add Report								
Rec	Records Per Page 10 records V								
Edit	Evaluation Year	Evaluation Term	Quality of Materials/Service upon Delivery	Timeliness of Deliveries and Services	Overall Quality of Materials/Service	Expertise of Company Representative	Technical Support	Have Employe Orientation (N Competency v applicable)	
0	2018	Annual	3	4	3	3	3	3	
•	•								
14	Image   1   of 1   Image   Displaying records 1 - 1 of 1								