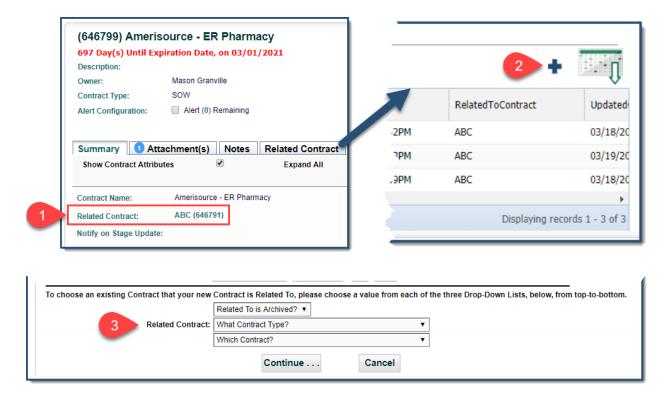# Related Contracts

Within UCM, you can Relate Contracts together in a linear fashion. You can have either a *Parent/Child* Relationship, or a *Married* Relationship. This document will go into detail on the different Relationships your Contracts can have, how to create those Relationships, and the different methods to Relating Contracts together.
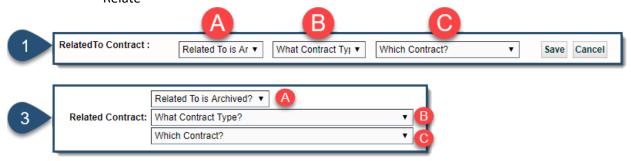
Methods to Relate a Contract:

- There are three (3) different Methods to Relate a Contract to another in UCM:
    - From the **Related Contract** attribute on the *Summary Tab* of a Container **(1)**.
        - *This action can also be performed in mass using the Modify Contract Action from a View.*
    - Using the **Blue "+" (Plus)** in the *Related Contracts Tab* of a Container to Create a new Container to automatically be Related **(2)**.
    - When creating a new **Contract Container**, the final section before you create your Container allows you to Relate your new Contract to an existing Contract **(3)**.
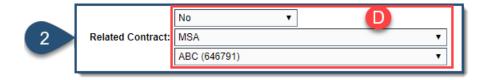
How to Relate a Contract:

- When you Relate a Contract to another using Method **1** or **3** above, you have three (3) dropdown menus that you need to fill out to select your Related Contract.
  - **(A)** – *Related To is Archived?*
    - This is either a Yes or No answer, and usually the answer will be No. It may seem a little counter-intuitive to answer No to the first question, but if you answer Yes, you will only be able to select Archived Contracts from the next two options.
  - **(B)** – *What Contract Type?*
    - Here, you can help to narrow down the next selection, a list of Contracts, by selecting the Contract Type of the Contract you are looking to Relate to. You can also select ALL as the first option if you are unsure.
  - **(C)** – *Which Contract?*
    - Based on the selections you made from the previous two dropdowns, you will now have a list of all the Contracts in your system that meet that criteria listed in alphabetical order.
  - IF you do not see the Contract you are looking for, we recommend you set dropdowns **A** and **B** to **No** and **ALL**, respectively, and then you will see all your available Contracts to Relate

- When you use Method **2**, those three questions are automatically filled out for you with the information from the Container you clicked the Blue "+" from **(D)**.

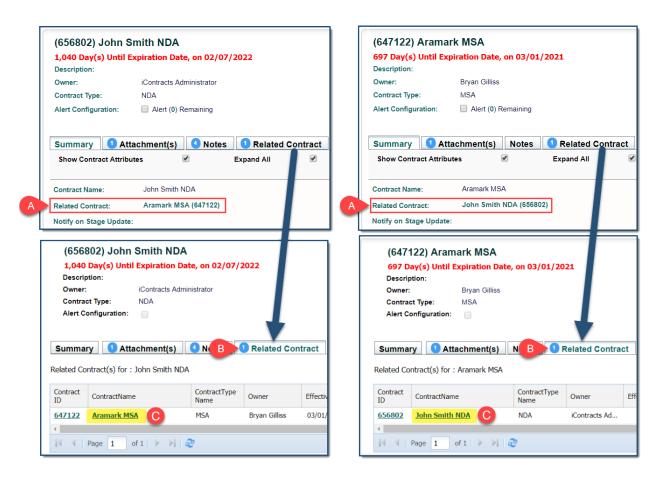# Different Types of Relationships: *Parent/Child*

- A Parent/Child Relationship in UCM allows you to have a Parent Contract (*Ex: An MSA or NDA*) and then have a list of its Children (*Ex: SOW's that fall under an MSA*) under the Related Contracts Tab in a Container.
- A Parent/Child Relationship will also allow to create Views for the Children contracts, that provides links to the Parent Contracts from within the system.
- There is no "Relationship Status" field when relating Contracts, but there is a way to know which Contract is the Parent and which are the Children:
  - **Parent: (A)** Here is where the Parent Contract will appear for your Children Contracts. Notice how in the *Parent Contract* image below, there is no Related Contract in that space. That is because it is the Parent. In the *Child Contract* however, you have a direct link right back to the Parent from the Summary Tab.
  - **Children: (B)** Inside of a Parent Contract, the Children are stored in a Grid under the *Related Contracts Tab*. Notice the Blue Dot with a number inside on the *Tab* that lets your know how many Children the Parent Contract has *(in our image it's 3)*. Also notice in the *Child Contract* image below, that there is no Blue Dot next to the Related Contract Tab. That is because it doesn't have Children, just a Parent.

Different Types of Relationships: *Married*

- A Married Relationship in UCM is when two (2) Contracts are linked to each other, and appear under the Summary Tab & Related Tab within a Contract Container.
    - *An example of this could be for an MSA and NDA that relate to one another. Neither would be a Parent or a Child, they are both of equal, although different, importance.*
- In the image below, you can see what a Married Relationship would appear like:
    - **(A)** – Both Contracts have a Contract in the *Summary Attributes* section
    - **(B)** – Each Contract also has a single Contract in their *Related Contracts Tab*
    - **(C)** – The Contract listed under the *Related Contracts Tab* is the same Contract that is in the *Summary Attributes* section.
- This type of Relationship allows for quick movements back and forth between the two contracts, as well as allowing it to be included in any Related Contract Views.
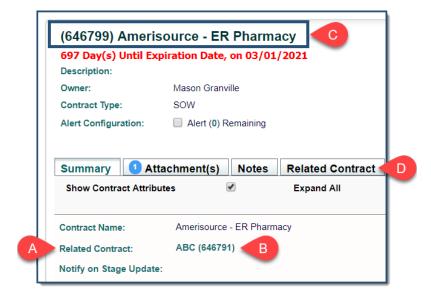
How to Create a Relationship: *Parent/Child*

Now that we know the different *METHODS* to Relate Contracts and the two different *TYPES* of Relationships that UCM has to offer, lets see *HOW* we go about creating these Relationships using the Methods from the first page, starting with Parent/Child.
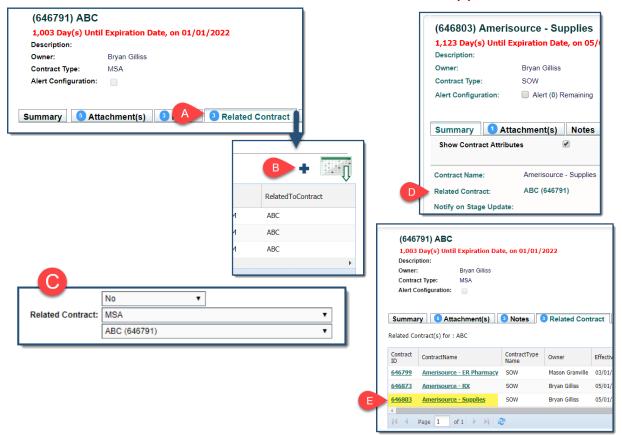
Assigning a Parent:

- *Method 1:* **Related Contract** attribute from *Summary Tab*
    - o This Method is used by selecting the *Related Contract Attribute* **(A)**, from inside the Contract Container you want to **BECOME** the Child.
    - o The Contract that you select here **(B)**, will become the current Contracts **(C)** Parent.
    - o There are no Contracts under the *Related Contracts Tab* **(D)**, because this is the Child.

Creating a Child:

- *Method 2:* **Blue "+" (*Plus*)** from the *Related Contracts Tab*
    - o This Method is used by selecting the *Related Contract Tab* **(A)**, from inside the Contract Container you want to be the ***Parent*** of the Child Contract you are **CREATING**.
    - o From that Tab, select the Blue "+" **(B)** over to the right side abve the Grid.
    - o You are taken what appears to just be a regular *Direct Entry* page, but at the bottom, the Related Contract information **(C)** is already filled out with what will become the Parent Contract.
    - o Now you just have to fill in the required Contract Information (*Name, Type, Folder Location, etc.*) for the CHILD Contract your are creating
    - o Your New CHILD Container will have the Parent Contract already in the *Related Contract Attribute* **(D)**, and if you click that link to go to the Parent, your Newly Created CHILD Container is under the Related Contracts Tab of the Parent **(E)**.
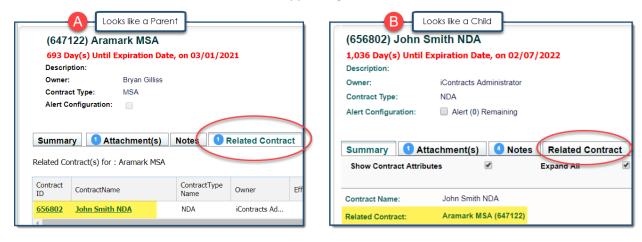

- *Method 3:* **Creating a Contract Container** from either Direct Entry, Templates, or Library Templates
    - o This Method follows the same steps as *Method 2* above, however you skip over parts **A** and **B**, and instead of **C** being filled in for you, you have to select the Contract that you want to become the *Parent* of the new CHILD Contract you are creating.

How to Create a Relationship: *Married*

A Married Relationship in UCM is in essence creating two (2) Parent Contracts that are Related to eachother. Because of this, we can follow the same procedure as the *Parent/Child* relationship for each of the three (3) Methods above, just with an additional step.

- After you followed the Steps above for the particular Method that you are using, *Related Contract Attribute*, *Blue "+"*, or *New Contract*, you'll have two Containers that look like:
    - A Parent **(A)** (*Related Contract appearing in the Related Contracts **Tab***)
    - A Child **(B)** (*Related Contract appearing in the Related Contracts **Attribute***)

- To now Marry them, go into the *Parent* Container **(1)**, and use Method 1, *Related Contract Attibute*, to select the Contract you want to marry **(2)**.
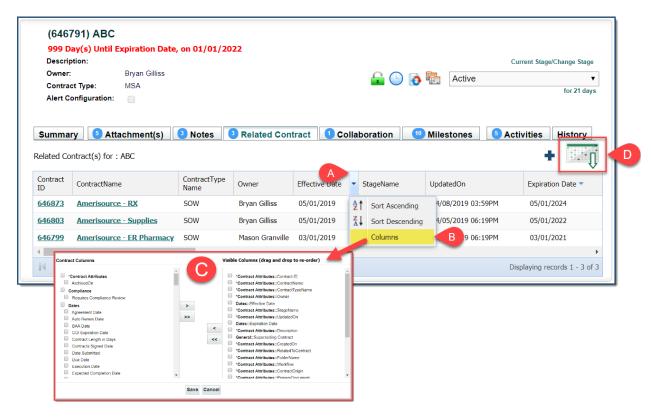

- Now your contracts should look like the example on Page 4, with both Containers having the other under both the *Related Contract Attribute* and *Tab*.

Reporting:

You can run Reports on Related Contracts in two (2) places, from the *Related Contracts Tab* in a *Parent Container*, and from a Global Level with *Views*.
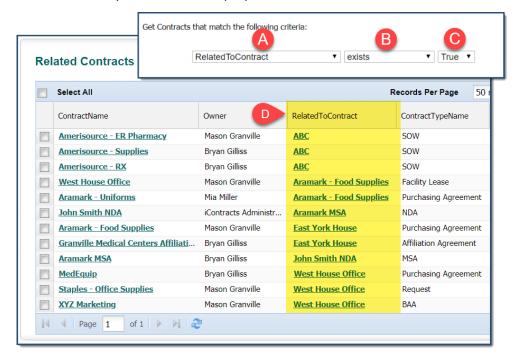
- **Related Contracts Tab:**
    - From inside a Parent Contract Container, select the *Related Contracts Tab*, and you'll see a grid with all the Children Contracts inside.
    - To format your Grid and change the information that will be on your Report, hover over any of the column headings and click the blue triangle that appears to the right of the name **(A)**.
    - Select Columns **(B)**.
    - This will bring up a Left-Right pop-out for you to select and arrange the fields you want to appear in your Grid and Report **(C)**.
    - Once you have your Grid set, Click the **Report** icon and you're spreadsheet will automatically download all the information appearing in your Grid **(D)**.

Reporting (cont.):

- **Views:**
  - o Every company is different, and no two Views are the same, but to create the most basic of a *Related Contracts* view is very simple.
  - o In the *Criteria*, have it set to:
    - **(A)** – *RelatedToContract*
    - **(B)** – *exists*
    - **(C)** – *True*
  - o This criteria will pull in all CHILD contracts (*and any other Summary Data you would like to have about the CHILDREN*), into a View. Your PARENT Contracts will be listed under the Column Heading **RelatedToContract (D)**, which we highly recommend be one of the columns in your View for this purpose.

Un-Relating Contracts:

- To Un-Relate Contracts, head to the *Child* contract that you want to Un-Relate
- Under the *Related Contract Attribute*, begin the steps of Method 1 to bring up the three questions **(A)**
- Select ANY option in either of the first two dropdowns **(B)(C)**
- Then WITHOUT selecting a Contract in the final dropdown **(D)**,
- Save **(E)**

- Now there should be no Contract in the *Related Contract Attribute* or *Tab*, and any Parent Contract that it was Related to, will no longer have this Contract listed under it's Related Contracts Tab.