



**Universal Contract Manager (UCM)/  
UNF Full-Access User Manual**

# Table of Contents

- Logging in to iContracts ..... 2
- Home Screen Interface (Your Dashboard) ..... 3
- Updating Your User Profile Page..... 4
- Searching for a Contract or Contracts: Global Search ..... 5
- Notifications on the Home Screen ..... 6
- Entering Contracts ..... 7
- Direct Entry ..... 7
- Field Groups ..... 9
- Reviewers..... 12
- Enterprise Ribbon ..... 15
- Contracts Tab ..... 15
- Working with the Grid..... 16
- Views or Reports ..... 19
- Modifying a View ..... 23
- The Contract Container ..... 24
- Contract Container: Summary Tab ..... 26
- Contract Container: Attachments ..... 29
- Contract Container: Activities ..... 36
- Contract Container: Milestones ..... 39
- Contract Container: Notes ..... 42
- Contract Container: History ..... 45
- Contract Container: Emails ..... 46
- Contract Container: Related Contracts ..... 47
- Appendix A: List of Standard Default Contract Fields ..... 48
- Appendix B: UNF Naming Convention ..... 50

# Logging in to iContracts

Company Name: University of North Florida

Username:

Password:

[Forgot password?](#)

[Don't have an Account? Sign Up!](#)  
[Change the Company Name?](#)

Use the following links to access iContracts:

My Wings Banner Self Service: Staff page>My Applications>iContracts

OR

<https://ucm.iContracts.com>

Users are set up by the system administrator with the following parameters:

Company Name: University of North Florida  
Username: N#  
Password: MyWings password

# Home Screen Interface (Your Dashboard)



- |  |   |
|--|---|
| 1. Login information area                                  | 12. Activities tab                            |
| 2. Help text   | 13. Milestones tab                            |
| 3. Change your user profile                                | 14. Notes tab                                 |
| 4. Log out from the system                                 | 15. Contracts to Review Notification tab*     |
| 5. Text input area for Global Search                       | 16. Add Contract icon                         |
| 6. Global Search button to execute search                  | 17. View Activities icon                      |
| 7. Click to search archived (closed) contracts             | 18. Help icon                                 |
| 8. Enterprise Ribbon (Bar)                                 | 19. Create new Contract via Direct Entry icon |
| 9. Home tab (in this case you are viewing the Home screen) | 20. Create new contract via Template icon     |
| 10. Contracts tab  | 21. My Favorite Views icon                    |
| 11. Performance tab  | 22. Add View to My Favorite Views icon        |
|  | 23. Delete View from My Favorite Views icon   |

\*only visible when you have a contract to review

# Updating Your User Profile Page

Updating your profile is easily done by clicking the My Profile button at the top right of the screen. Simply enter the new information and click the Save button; i.e. title, UNF phone, UNF address. Only a system administrator can change your user type and email address. You will also find the iContracts company manual and help videos on this screen.

On the User Profile pane do not check or activate Shared Views, AutoCreate Activity settings, AutoCreate Milestone settings, nor change your password.

Welcome: UNFInstructor (F-R)  
Company: University of North Florida

Help My Profile Logout

Global Search

Search By: Contract Name Include Archived

Home Contracts Activities Milestones

### My Profile

#### Account Information

Username: UNFInstructor

User Type: Full-Access User

Default Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Download Full-Access Manual [04/2013]

Training Video Links

Save Cancel

#### Personal Information

First Name: iContracts

Last Name: Instructor

Title:

Email: ales@unf.edu

Phone:

Mobile: (international code+mobilenumber)

Fax:

Address

Street Address:

City:

State/Province:

Postal Code/Zip:

Country:

Save Cancel

#### Shared Views

Ignore Shared Views  Hold Ctrl key to select multiple items

Save Cancel

#### AutoCreate Activity settings

AutoCreate Activities:

Save Cancel

#### AutoCreate Milestone settings

AutoCreate Milestone:

Save Cancel

#### Change Password

Password:

Confirm Password:

Save Cancel

# Searching for a Contract or Contracts: Global Search

Located in the top right corner of the screen is the Global Search field for use in finding a contract or a set of contracts. There are four criteria to choose from to speed up your search:

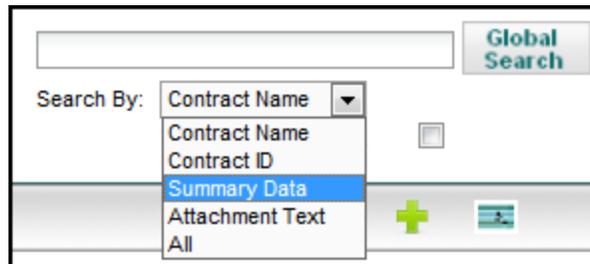
## Search by Contract Name (probably the most common way to search for a contract)\*



## Search by Contract ID (the unique identifier assigned by UCM)



## Search Summary Data (all data included in the Summary and General Info Field Groups)



## Search in Attachment Text (ignores Fields, Contract Names, and Contract IDs)



\* Include Archived should only be checked for contracts that have expired and have been moved to the Archived contract stage.

Note: Searching using the "ALL" feature is NOT RECOMMENDED. This selection slows the system.

## Notifications on the Home Screen

Any contract reviews assigned to a user that have not been completed will appear in the Enterprise Ribbon. Clicking on that alert will enable a pop-up window with a listing of the Contract Container names that will link to the Summary tab of those contracts. In addition, an e-mail is always sent when a user is assigned to a review. Contract reviews are covered in detail later in this documentation.



Activity notifications appear on the screen when the user logs in. To make it appear “on-demand” click on the blue box in the Enterprise Ribbon. Below is the Activity Reminder box that appears when an activity:

- has been assigned to you
- is due or overdue
- has not been marked as completed

**Activity Reminder** ✕

**Total Activity(s): 3**

 **lease payments**

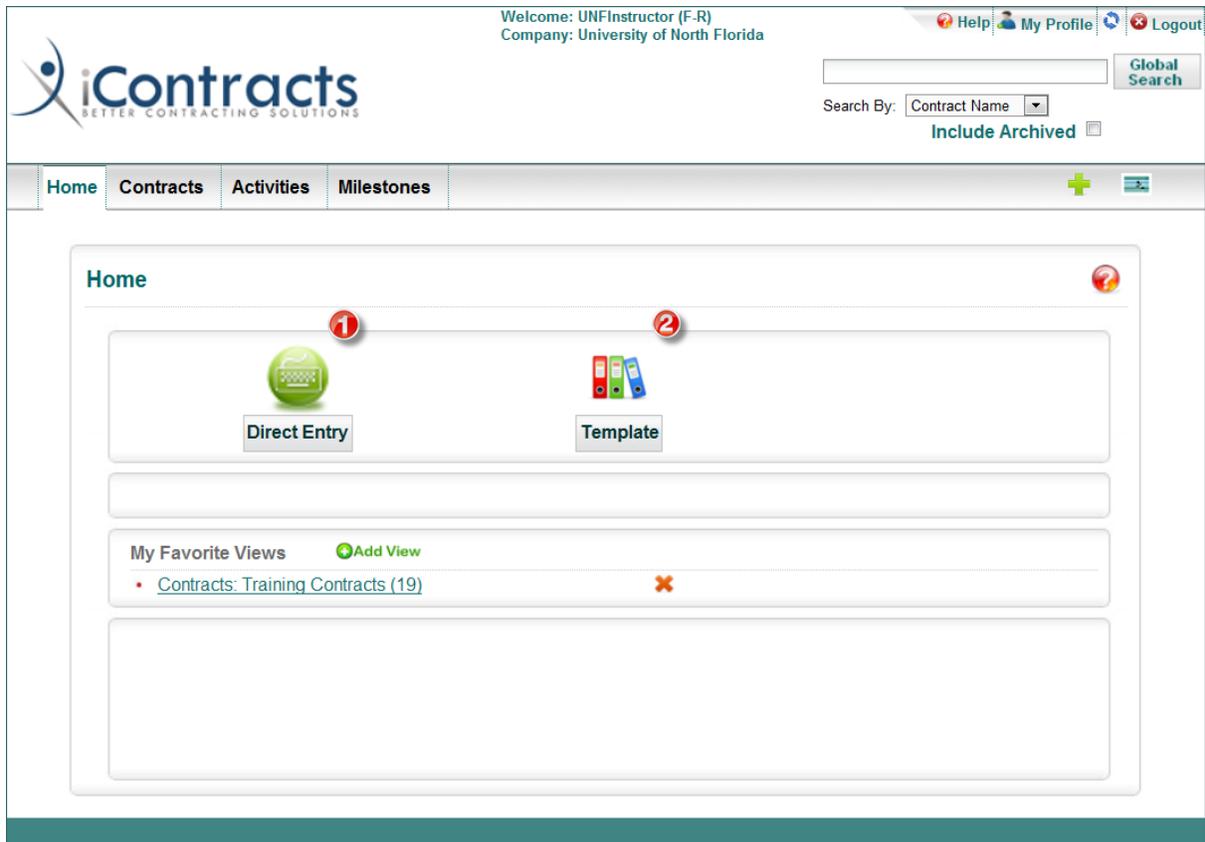
Start time: 10/1/2012 8:00:00 AM

Subject	Due in	
 lease payments	10/1/2012 8:00:00 AM	
 Financial Review	12/2/2011 8:00:00 AM	
 Complete Financial Review	7/11/2012 8:00:00 AM	

**Dismiss All** **Open Item** **Dismiss**

Checking the Dismiss box will permanently remove the highlighted activity from the list, yet not mark the activity as completed. Email reminders will continue if marked to do so. Checking the Dismiss All box will permanently remove all of the activities.

# Entering Contracts



There are two ways to create or enter a new contract:

1. Direct Entry
2. Defined Template (UNF does not currently use this option)

## Direct Entry



To create a contract, simply click on the Direct Entry button and enter a Title, Contract Type, Stage, Description and Folder. Click Continue to create a new Contract Container. After the Contract Container has been created, additional documents (attachments) can be added to your Contract Container as well as adding Contract Fields and Field Groups.

Welcome: UNFInstructor (F-R)  
Company: University of North Florida

Help My Profile Logout

Global Search

Search By: Contract Name Include Archived

Home Contracts Activities Milestones

### Home

#### Upload New Contract

Contract Name:  \*

Contract Type:  \*

Assign Workflow Template:

Initial Workflow Stage:

Contract Description:

Owner:

Folder Name:  \*

---

Document Title:

Document Category:

Document State:

File:  Browse...

Primary Document?:

Document Description:

---

Related Contract:

Continue . . . Cancel

Note: Fields notated by a red asterisk are required to be completed by the system.

Contract Name: When creating or entering the name of a new contract, refer to the Appendix B of this manual and follow the procedures under “UNF Naming Convention”.

The naming conventions of Contract Types and Workflows start with divisional specific prefixes.

For example: Administration and Finance is “AF”. Individual users only see Contract Types and Workflows that are associated to their division.

## Field Groups

Field Groups are a way to group data fields for organized entry, quick setup and maintains a cleaner, more visible look (illustration on following page).

The University of North Florida's Purchasing Department requests that specific Field Groups be filled out as vital information pertaining to any contract entered into the system. These fields are necessary to complete the Summary tab of the Contract Container.

The requested fields are as follows with those noted with an \* being required fields to complete:

1. Contract Category\*
2. Fiscal Year\*
3. Justification\*
4. Total 1st Year Cost\*
5. Effective Start Date
6. Effective End Date
7. Index\*
8. Fund\*
9. ORG\*
10. Vendor Name\*
11. Vendor N#
12. Vendor Application Received
13. Vendor W9 Received

When uploading a new contract, after entering the Summary Data fields, iContracts now continues on to the General Info Field Group & Insurance Requirements Field Group for data entry.

Once these field groups are completed and saved, a contract ID number is generated and an automatic e-mail notification is sent to the contract owner.

## Example for Training Manual (189173)

Current Stage/Change Stage

Owner Review for 0 days

Summary Attachment(s) Activities Milestones Notes History Email Related Contracts

Show Contract Attributes Expand All

Collapse All Add Fields

Contract Name: Example for Training Manual  
 Contract Origin: User  
 Contract ID: 189173  
 Related Contract: --  
 Description: An example for UCM-UNF iContracts manual.  
 Owner: iContracts Instructor Notify on Stage Update:   
 Review Status: No Reviewers Set for this Contract Container  
 Contract Type: TRAINING - UNF Demo Contract  
 Folder Name: University of North Florida\UNF Training Folder  
 Created On: 12/10/2013 4:26:32 PM Updated On: 12/10/2013 4:26:32 PM  
 Created By: iContracts Instructor Updated By: iContracts Instructor

General Info (Field Group)

Contract Category: [Select From List]

Fiscal Year: [Select From List]

Alternate Contact:

Justification:

Quote Expiration Date:

Total 1st Year Costs:

Recurring Annual Costs:

Change Order or Amendment Amount:

Total Contract Value:

Auto Renewal:

Renewal Options:

Effective Start Date:

Effective End Date:

Index:

Fund:

ORG:

PO Number:

Vendor Name:

Vendor N#:

Vendor Application Received:

Vendor W9 Received:

Save Cancel

Insurance Requirements (Field Group)

UNF Insurance Required:

UNF Insurance Expiration:

Vendor Insurance Required:

Vendor Insurance Expiration:

Save Cancel

## Adding a Field

Added fields will appear as their own ribbon at the top of the list of added fields, with the most recently added on top. Use the Add Fields drop-down box to select the new field. Field ribbons can be expanded or condensed to show or hide the information they contain. Click on the Edit icon (✎) to edit any field or the Delete icon (✖) to delete any field.

Date fields added separately will provide the option to create Activities and Milestones.

Welcome: UNFInstructor (F-R)  
Company: University of North Florida

Help My Profile Logout

Global Search

Search By: Contract Name

Include Archived

Home Contracts Activities Milestones

### Example for Training Manual (189173)

Current Stage/Change Stage  
Owner Review for 6 days

Summary Attachment(s) Activities Milestones Notes History Email Related Contracts

Show Contract Attributes  Expand All

Collapse All Select Category ---All Fields--- Add Fields -----Choose field to add-----

Contract Name: Example for Training Manual  
Contract Origin: User  
Contract ID: 189173  
Related Contract: ---  
Description: An example for UCM-UNF iContracts manual.  
Owner: iContracts Instructor Notify on Stage Update:   
Review Status: No Reviewers Set for this Contract Container  
Contract Type: TRAINING - UNF Demo Contract  
Folder Name: University of North Florida\UNF Training Folder  
Created On: 12/10/2013 4:26:32 PM Updated On: 12/16/2013 12:39:57 PM  
Created By: iContracts Instructor Updated By: iContracts Instructor

Effective Start Date (Date)

08/05/2013  Activity  Auto Update Activity  Milestone  Auto Update Milestone

Save Cancel

Effective End Date (Date)

01/01/2017  Activity  Auto Update Activity  Milestone  Auto Update Milestone

Save Cancel

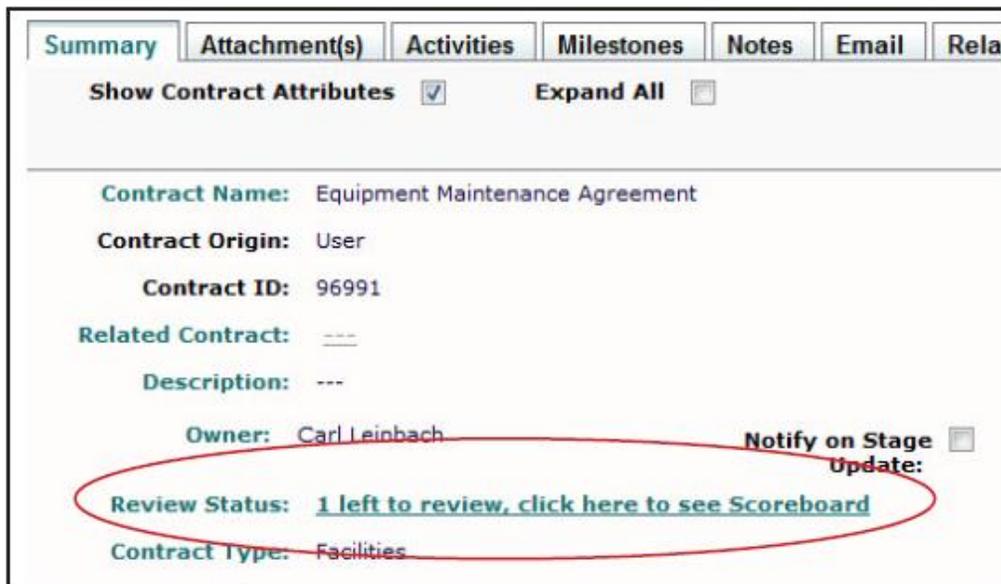
General Info (Field Group)

Contract Category: New  
Fiscal Year: FY 14  
Alternate Contact:  
Justification: Training Example of all appropriate info entered for a contract.  
Quote Expiration Date:

Edit Delete

# Reviewers

The Contracts to Review tab allows collaboration among multiple users not assigned in the workflow. iContracts will alert users if they have a contract or document to review by the notification on the Enterprise Ribbon to the far right when in the Home Screen. The user can see the name of the Contract Container(s) when they click on the notification and then proceed to the review process from there, as seen on the following page. Reviewers are defined when a Contract Container is created and can also be defined in the contracts Summary tab by clicking on the Review Status link.



## Reviewers Setup

Reviewers can be set up in the Contract Container within the Summary tab by clicking on the Review Status link. Select a user by clicking on the name, or multiple users by holding down the CTRL key and clicking on multiple names. Email notifications can also be designated here.

Owner: iContracts Instructor      Notify on Stage Update:

**Review Status:** No Reviewers Set for this Contract Container

Contract type: TRAINING - UNF Demo Contract

**SET CONTRACT REVIEW**

Select Reviewers: Hold Ctrl key to select multiple items

-- Select Users --  
 Alison Cruess  
 Ana Guzman  
 Angela Lee  
 Ann Hamlin

Notify On Status Change: -- Select User --

Notify On Review Completion: -- Select User --

Reviewers can “score” the document when either clicking on the contract name in the pop-up window generated by the Contract Review notification alert on the Enterprise ribbon or clicking on the Review Status link as described on the previous page.

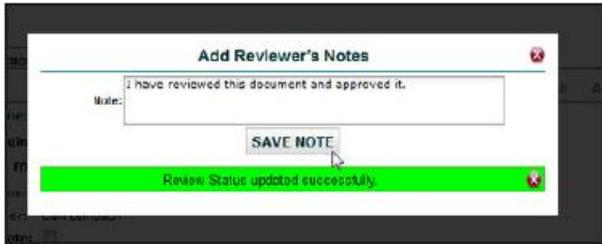
Choose the button and click Save to enter your choice and then enter any notes on the subsequent screen.

The system records the selection and sends an email, if defined, and will do so from each reviewer.

**Waste Collection 2012**

**Reviewers** (Total of 5 reviewers)

Reviewer names	5	0	0
Admin User	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Christian Berna	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Carl Leinbach	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Finance User	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Legal User	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
Carl Leinbach	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected



**Review Status:** [4 left to review, click here to see Scoreboard](#)  
**Contract Type:** Facilities

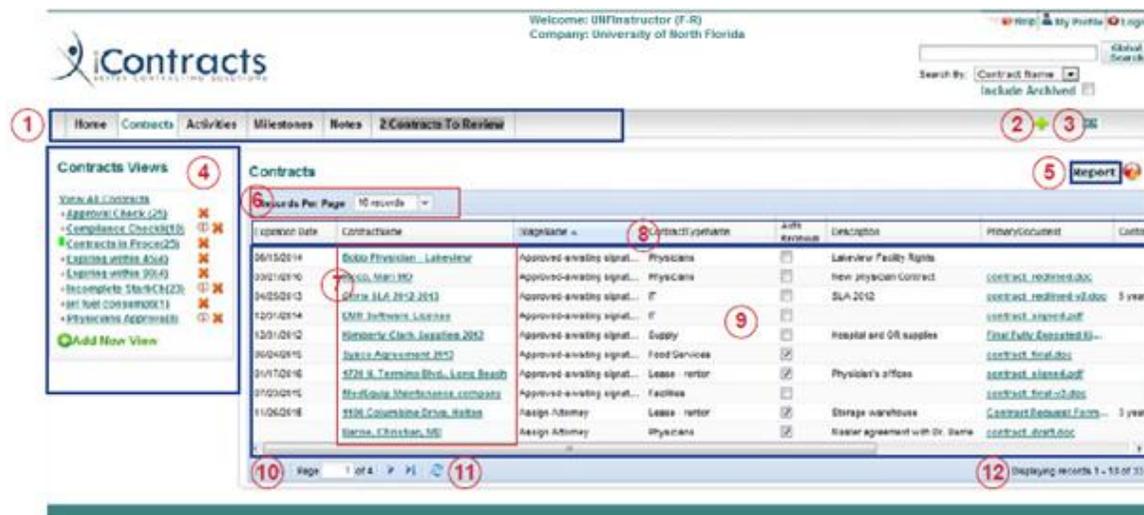
# Enterprise Ribbon



Navigating and using iContracts is straightforward. Across the top of each page is the Enterprise ribbon. By clicking on any tab on the Enterprise ribbon, a user activates that specific set of capabilities.

For example, by clicking on the Contracts tab, the user navigates to a listing of all active contracts. Each area in iContracts will list all of the items associated with that tab across ALL contracts based upon that user's permissions.

## Contracts Tab



\*The column headings can be arranged and sorted as the individual sees fit - some of the columns shown may not show on your screen.

1. Enterprise Ribbon
2. Add Contract button
3. Activities notifications
4. Contracts Views area
5. Report button
6. Records Per Page selector
7. Active Contracts listing
8. Field Header row
9. Contract grid
10. Page navigator
11. Refresh icon
12. Display counter

The Contracts tab provides users with a simple way to access all or any filtered set of contracts, referred to as Views. In the Contracts Views panel to the left, you can add or modify an unlimited number of saved searches that contain criteria such as multilevel sorting, page layouts and the ability to filter on any combination of contract data. Users can rearrange and sort the data to their liking. By clicking on the Report button in the upper right-hand corner of the page, a user may also download the complete file in CSV (comma-delimited) readable format of the contracts listed in their Contract Views pane. Remember that all grids in the system behave similarly, so the explanation of how to arrange the grid that follows applies to all areas inside of iContracts where a grid appears.

By clicking on any contract title, the user will move from the Contract Views to a Summary tab inside the selected Contract Container (to be covered later in this manual).

## Working with the Grid

Expiration Date	ContractName	StageName	ContractTypeName	Auto Renewal	Description	PrimaryDocument	Contract
06/15/2014	<a href="#">Boon Physician - Lakeside</a>	Approved-awating signat	Physicians	<input type="checkbox"/>	Lakeside Facility Rights		
03/21/2015	<a href="#">Rocco, Matt MD</a>	Approved-awating signat...	Physicians	<input type="checkbox"/>	New physician Contract	<a href="#">contract_redlined.doc</a>	
04/25/2013	<a href="#">Citic SLA 2012-2013</a>	Approved-awating signat	IT	<input type="checkbox"/>	SLA 2012	<a href="#">contract_redlined-v2.doc</a>	5 year
12/31/2014	<a href="#">EMR Software License</a>	Approved-awating signat...	IT	<input type="checkbox"/>		<a href="#">contract_signed.pdf</a>	
12/31/2012	<a href="#">Kimberly-Clark Supplies 2012</a>	Approved-awating signat...	Supply	<input type="checkbox"/>	Hospita and OR supplies	<a href="#">final Fully-Executed R...</a>	
00/24/2015	<a href="#">Sisco Agreement 2013</a>	Approved-awating signat...	Food Services	<input checked="" type="checkbox"/>		<a href="#">contract_final.doc</a>	
01/17/2010	<a href="#">1720 N. Terminal Blvd., Long Beach</a>	Approved-awating signat...	Lease - renter	<input checked="" type="checkbox"/>	Physician's offices	<a href="#">contract_signed.pdf</a>	
07/23/2015	<a href="#">MedEquip Maintenance agreement</a>	Approved-awating signat...	Facilities	<input type="checkbox"/>		<a href="#">contract_final-v3.doc</a>	
11/20/2015	<a href="#">1180 Columbine Drive, Bolton</a>	Assign Attorney	Lease - renter	<input checked="" type="checkbox"/>	Storage warehouse	<a href="#">Contract Request Form...</a>	3 year
	<a href="#">Barrie, Charles, MD</a>	Assign Attorney	Physicians	<input checked="" type="checkbox"/>	Master agreement with Dr. Barrie	<a href="#">contract_draft.doc</a>	

### Arranging the grid

The drop-down selector for displaying the number of records per page.

Click and drag between column heading to resize the column width.

### Contracts

Records Per Page
10 records
20 records
50 records
100 records

ContractName	StageName
<a href="#">Kimberly-Clark Suppl...</a>	App
<a href="#">EMR Software License</a>	App

Click and drag in the middle of any heading to change the order of displayed columns.

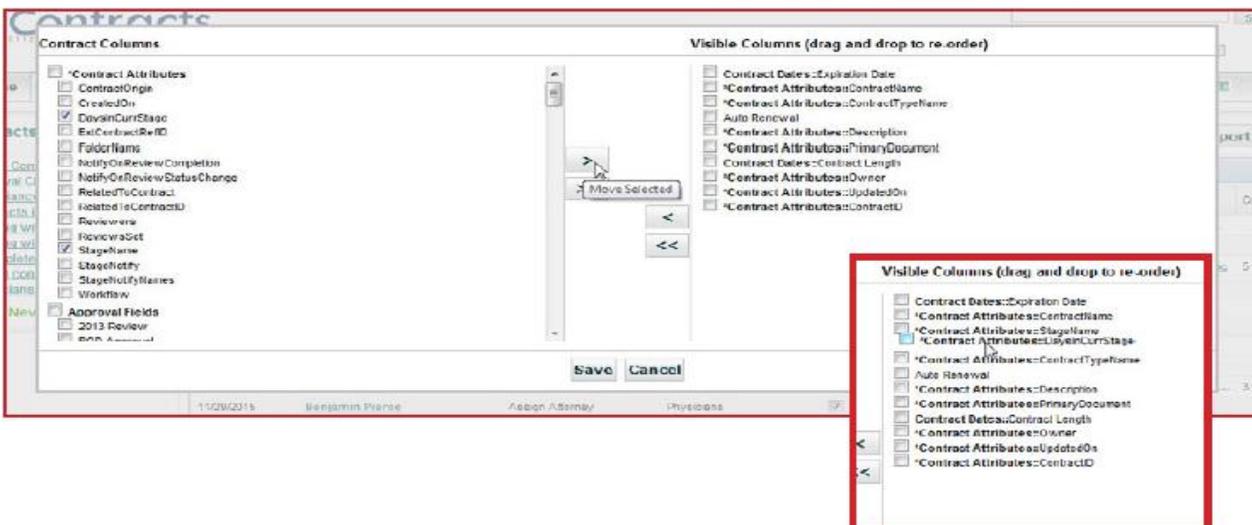
Expiration Date	ContractName	StageName	Auto Renewal	Date
12/31/2012	Kimberly-Clark Supplies 2012	Approved-awaiting signat...	<input type="checkbox"/>	27:
12/31/2014	EMR Software License	Approved-awaiting signat...	<input type="checkbox"/>	22:
04/25/2013	Citrix SLA 2012-2013	Approved-awaiting signat...	<input type="checkbox"/>	22:

Hover your mouse over any column heading and a drop-down arrow appears that allows sorting by ascending or descending order.



You can also choose which columns or fields you would like to display, in which a new pop-up window will appear for you to choose from all available fields. Listed on the left side are the default contract attributes to appear as the first category, and all of your custom-configured fields appear below sorted alphabetically by Field category. On the right side are the fields that appear as column headings on the grid, in which top-to-bottom appear as left-to-right in the grid. Clicking and dragging vertically will change the order of appearance in the grid.

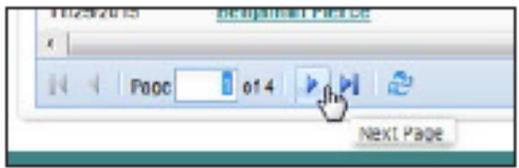
Clicking on any column heading will sort the grid based on that column in ascending order and ...



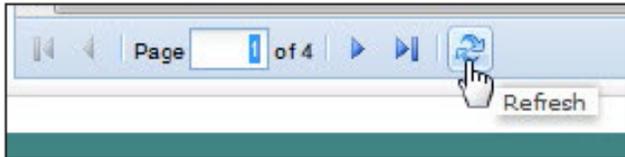
...clicking a second time will sort in descending order. The grid can be sorted by any visible column using this method. The column used for sorting is indicated by a darkened shade and a small triangular arrow pointing upward showing ascending sorting or downward for descending sorting.

At the bottom left of the grid is a page number indicator and navigation area. To change pages you can either use the left- or right arrows, or type in the page you would like to move to.

ContractID	ContractName	Contract
75002	HR auditor contract	10M
75040	Kimberly-Clark Supplies 2012	15M
75124	Waste Collection 2012	15M
75125	HAL business software license	15M
75127	Shindihouse Elevator Eve Contract	15M
75184	EMR Software License	15M
75604	Ken David MD	12M
75607	Rah Glen MD	12M
76608	MedSurq Supply Co	12M
75976	Bob Howich Physician 2012	6M



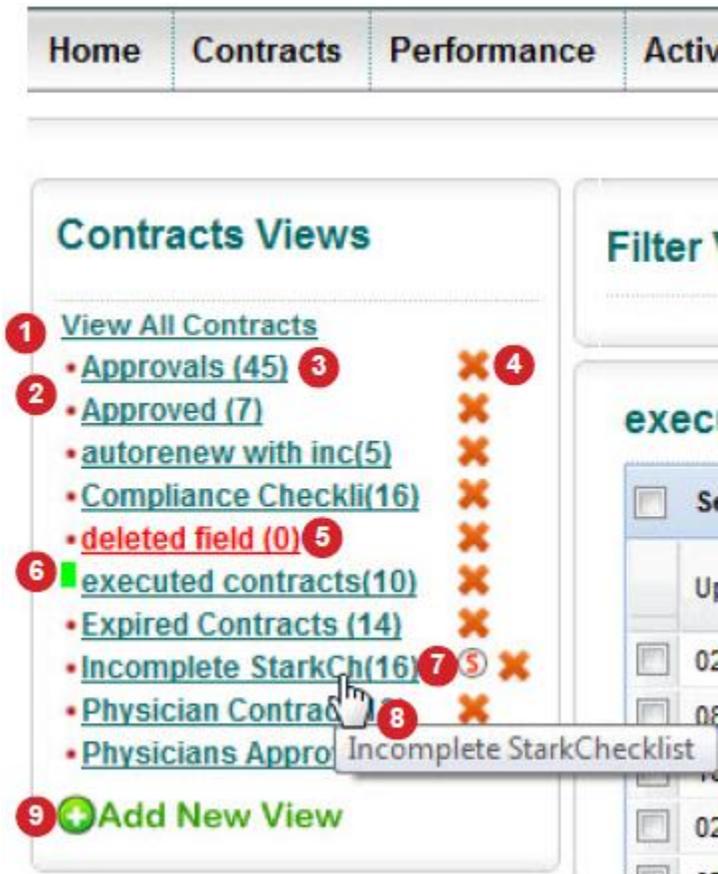
To refresh the listing of contracts in the grid (perhaps another user has updated data contained in any of the visible columns since it was last viewed) click on the circular arrows on the right.



Finally, on the far bottom right, there will be a listing of how many total contracts match the entered criteria.



# Views or Reports



1. Link to display all contracts for which you have permissions
2. Name of view
3. Number of contracts that currently meet the view criteria
4. Delete view
5. A view in red is a view in which a field used in the criteria has been deleted (hopefully you have none of these)
6. A green rectangle means that the view is defined as the default when entering the page
7. A circled red "S" indicates that the view is shared to you from another system user
8. Hover over a specific view to display the full name of the view
9. Link to Add New View

Views are customizable real-time queries that can be of one-time use or named and saved to be used repeatedly to narrow and simplify the list from any of the areas inside of iContracts. To create a report from any view, click on the Report button at the top right of the grid.

## To Create a New View

1. Choose the field to query and the associated criteria
2. Decide which columns to view in the layout and arrange them (see steps next page)
3. Choose the contract field that the created view will be sorted by
4. Choose the sort order
5. Click the Run button for one time use of the created view
6. For repeated use of a newly created view, click on 'Save this View'. You will be asked to name your view. Then click the Run button

### Create/Modify Contracts View

Get Contracts that match the following criteria:

Select Field 1

Include Archived

#### Default Fields And Sequence

ContractName	CreatedOn	Description	Owner

#### Default Sort Order

Contracts Field:  3

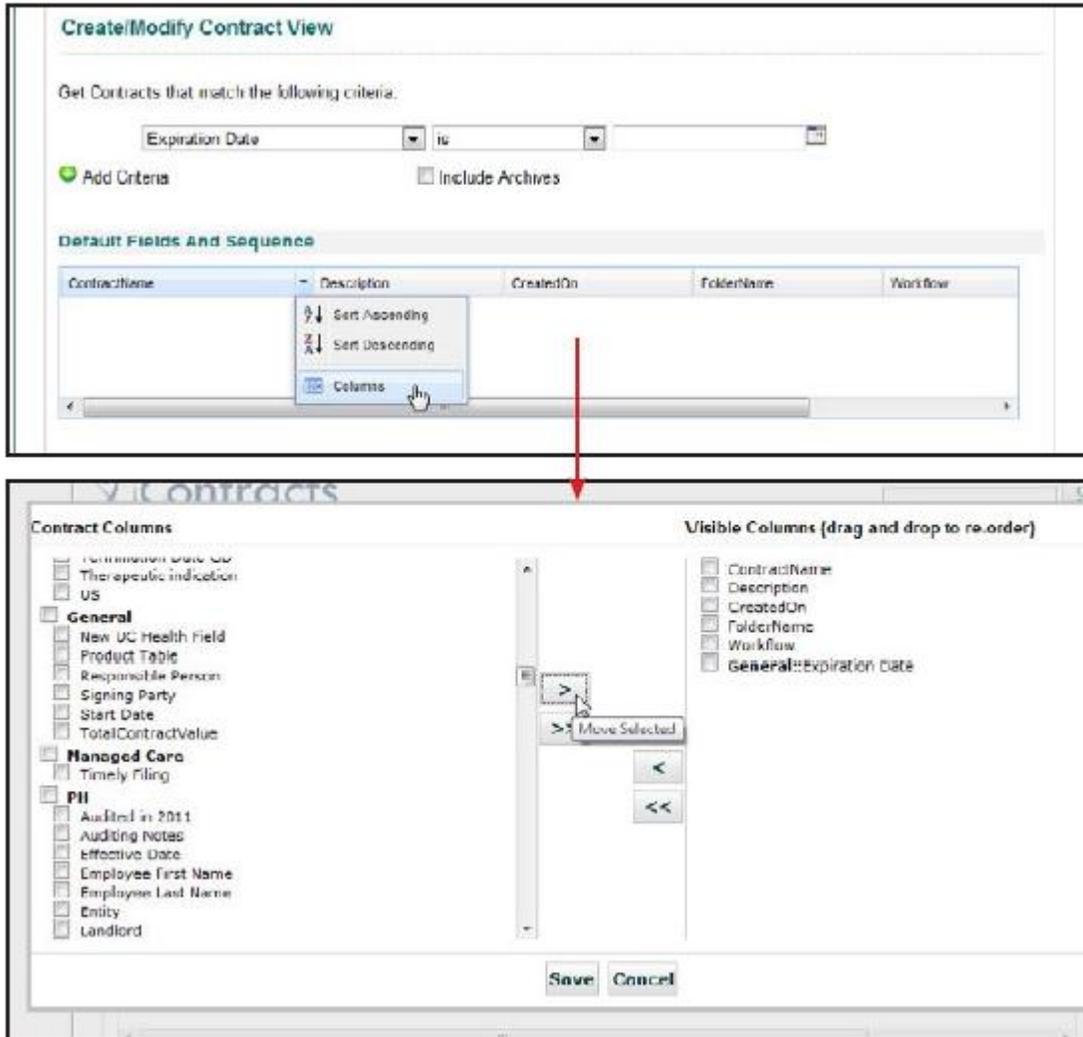
Ascending Order (A-Z)  Descending Order (Z-A)

Contracts Field	Sort Order	Delete

Save this View

## Determining Which Columns Appear in the Grid

You can define and change the default columns that will appear for each view. To do so, click on any column heading and choose Columns from the drop-down list underneath the sort order icons. A window will appear for you to check which fields to appear in the headings.



## Arranging the Grid Columns

Since every grid in the system behaves similarly, please refer to section 'Working with the Grid' on page 16.



The completed screen for creating a view is shown below with two sets of criteria to track, the desired columns and their order, sort order based on two fields, and the option for saving the view for repeated use.

### Create/Modify Contract View

Get Contracts that match the following criteria:

Expiration Date  on or before

and  ContractTypeName  contains  physician [remove](#)

[Add Criteria](#)  Include Archive

#### Default Fields And Sequence

ContractName	Expiration Date	Description	CreatedOn	FolderName

#### Sort Order

Contract Fields:  ContractName  Ascending Order (A-Z)  Descending Order (Z-A)

Contract Field	Sort Order	Delete
Expiration Date	Ascending	<input type="button" value="X"/>
ContractName	Ascending	<input type="button" value="X"/>

Save this View  
 \*View Name: 2011 Expiring Contracts  
 Share With Other Users

## Modifying a View

In order to edit any saved view, first run the view, and then click on the Edit View icon above the column headings area. If you are looking to simply filter the results, choose Filter located above the Report button.

The screenshot shows the iContracts web application interface. At the top left is the iContracts logo with the tagline 'HEALTH CONTRACTING SOLUTIONS'. To the right is a search bar with 'Global Search' and 'Search Archive' options. Below the logo is a navigation menu with tabs for Home, Contracts, Performance, Activities, Milestones, and Notes. The main content area is divided into two sections: 'Contract Views' on the left and 'Filter Views' on the right. The 'Contract Views' section lists several views: 'View All Contracts', 'Approval Checklist (3)', 'Approved (7)', 'Approved Physicians (7)', 'Physician Contracts (8)', and 'Physicians'. The 'Filter Views' section has a '+ Filter' button. Below the 'Filter Views' section is the 'Physician Contracts' view, which has an 'Edit View' button and a 'Report' button. The view displays a table with columns: 'ContractName', 'StageName', 'Expiration Date', 'ContractType', and 'Description'. The table shows one record: 'Bobo Physician - Battlecreek' in the 'Draft' stage, expiring on '4/26/2013', of type 'Physicians' in 'Battlecreek'. The 'Records Per Page' is set to '10 RECORDS'.

The resulting screen will be the query as it is currently saved. Modify any of the criteria. Prior to leaving the Edit View screen:

- Save and Run with the **same** name will **update** the view
- Save and Run with a **different** name will **create an additional** new view
- Run will simply **run** the view without saving it

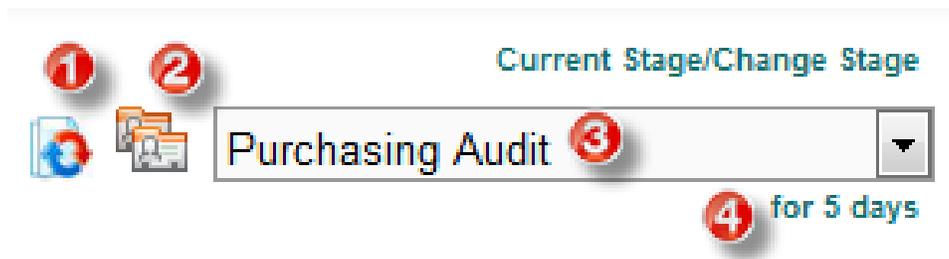
The screenshot shows the 'Sort Order' configuration screen. At the top, there is a 'Contract Fields' dropdown menu set to '-- Select Fields --'. To the right are radio buttons for 'Ascending Order (A-Z)' and 'Descending Order (Z-A)', with 'Ascending Order (A-Z)' selected. An 'Add' button is located to the right of the radio buttons. Below this is a table with three columns: 'Contract Field', 'Sort Order', and 'Delete'. The table contains two rows: one for 'ContractName' with 'Ascending' sort order and a delete icon, and one for 'Expiration Date' with 'Ascending' sort order and a delete icon. At the bottom right, there is a checkbox for 'Save this View' which is checked, a text input field for 'View Name' containing 'Physician Contracts', and a checkbox for 'Share With Other Users' which is unchecked. A 'Save and Run' button is located at the bottom right.

# The Contract Container



From the listing of contracts in the grid from the Contracts tab on the Enterprise Ribbon, a user can click to select any contract, view its contents, view key elements, and activate access to capabilities specific to the selected contract through a “secondary” navigation ribbon called the Contracts tab.

The difference between the Enterprise navigation ribbon and the Contract ribbon is that of perspective. The Enterprise navigation ribbon and its associated capabilities allow the user to look across all contracts in the enterprise or, depending on their security and permission settings, only contracts to which they have access. This paradigm gives users, managers and administrators a broad view of contracts, contract performance, and exceptions that require attention across the enterprise and, of course, rapid access to relevant information. The Contract ribbon gives users in search of specific contracts the ability to quickly access information, evaluate potential actions, and effectively manage its near and long-term lifecycle and performance. After a contract has been created either manually or through an automated upload, key information regarding the Contract Container will be available by clicking on the Summary tab. Summary information (or contract attributes) includes the contract title or name, description, owner, contract type, primary document name (if any), folder, created on date and time, and updated date and time. Most of this information can be modified by clicking on the field label and saving or discarding changes as necessary (provided they have access to do so by rights defined in the user’s security settings).



### **(1) Workflow Template Selector Icon**

The Workflow Template Selector icon resides in every section of the Contract ribbon and appears with red and blue arrows when a workflow has been assigned, otherwise it is seen as gray. By hovering over the icon, a pop-up box appears with the name of the defined Workflow Template. In order to reassign a workflow, an Administrator must be contacted.

### **(2) Assignees Indicator**

Clicking on this icon will bring up the Assignees notification listing for the chosen Workflow Template.

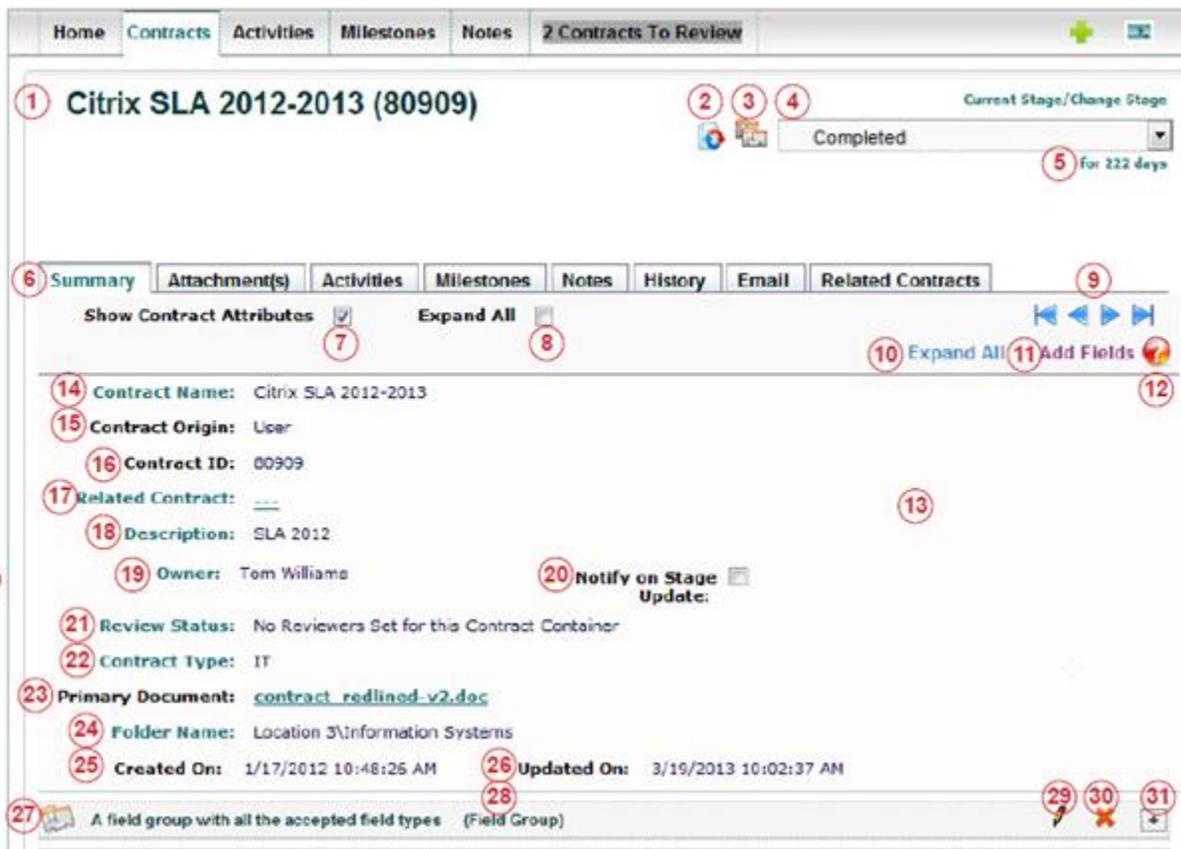
### **(3) Current Stage/Change Stage**

In the upper right-hand corner of the contract Summary tab page is a drop-down box containing stages that can be assigned to a contract. Within a Workflow Template, the stages can only be advanced forward one step, but backward as many as necessary. If a selected stage requires the completion of specific activities in order to be assigned, then a selected message will notify the user of this requirement and will not change the contract stage.

### **(4) Days in Current Stage Indicator**

The number of days a stage has been assigned is displayed beneath the Workflow Stage drop-down and is a reportable field as it shows up in the criteria listing.

# Contract Container: Summary Tab



- |  |   |                                 |
|--|---|---------------------------------|
| 1. Contract Container Name/ID                | 11. Add Custom Field/Field Group        | 22. Contract Type selector      |
| 2. Workflow Template Selector icon           | 12. Help icon                           | 23. Primary Document link       |
| 3. Assignees icon                            | 13. Contract Attributes Section         | 24. Folder Name indicator       |
| 4. Workflow Stage indicator                  | 14. Contract Name                       | 25. Contract Creation Date/Time |
| 5. Days in Current Stage                     | 15. Contract Origin (how it was loaded) | 26. Contract Updated Date/Time  |
| 6. Contract tabs                             | 16. Contract ID                         | 27. Field/Field Group ribbon    |
| 7. Show/Hide Contract Attributes             | 17. Related Contract                    | 28. Field Type indicator        |
| 8. Expand All Custom Fields                  | 18. Contract Description                | 29. Edit Field icon             |
| 9. Move to Next Contract in Previous Listing | 19. Contract Owner                      | 30. Delete Field icon           |
| 10. Expand/Collapse all Custom Fields        | 20. Notify On Stage Update checkbox     | 31. Expand/Collapse Field icon  |
|  | 21. Contract Review Status              |                                 |

## (5) Days in Current Stage

The number of days a stage has been assigned

## (6) Contract tabs

The tabs on the Contract ribbon

### (7) Show/Hide Contract Attributes

Shows/hides the top section of the Summary page that includes basic contract information. Checking this on or off is a global setting for all contracts and is available for each user individually.



### (8) Expand All Custom Fields

Opens all of the custom field ribbons to display the current data associated with the contract enabling the user to view, modify, or delete any field by clicking on the associated icons. The user can also see all history associated with any non-grouped field by clicking on its History tab.

### (9) Contract Navigation

This set of arrows allows you to navigate through the contracts listed in the previous grid of contracts from the Enterprise ribbon, as opposed to going back to the listing and choosing the next contract from the list.

### (10) Expand/Collapse All Custom Fields

Closes all custom field ribbons to hide or compress the data in the field.

### (11) Add Fields

Opens a drop-down box (shown below) displaying all possible fields that can be added to the current contract. Note that only fields for which the user has permissions for a specific contract will be available for selection by that user.



In addition to the fields described on the previous pages, specific information related to the contract (Fields) will be listed underneath the summary information and can be viewed in either collapsed (1) or expanded (2) form.

The specific fields can be modified or deleted directly on the contract Summary page and new fields can be easily added. Fields can be added singularly, or as Field Groups. The illustration here shows one of each, the single field is in collapsed form, and the field group is in expanded form.

To edit a field on the Summary page, click on the Edit icon (✎), change or add the necessary information, and click Save.

**General Info (Field Group)**

Contract Category:	New	
Fiscal Year:	FY 14	
Alternate Contact:		
Justification:	Training Example of all appropriate info entered for a contract.	
Quote Expiration Date:		
Total 1st Year Costs:	11000	
Recurring Annual Costs:		
Change Order or Amendment Amount:		
Total Contract Value:		
Auto Renewal:	<input type="checkbox"/>	
Renewal Options:		
Effective Start Date:	08/05/2013	
Effective End Date:	01/01/2015	
Index:	200400	
Fund:	110000	
ORG:	200400	
PO Number:		
Vendor Name:	Training Coordinator	
Vendor N#:	N00007620	
Vendor Application Received:	<input checked="" type="checkbox"/>	
Vendor W9 Received:	<input checked="" type="checkbox"/>	

**Insurance Requirements (Field Group)**

UNF Insurance Required:	<input checked="" type="checkbox"/>	
UNF Insurance Expiration:	02/14/2014	
Vendor Insurance Required:	<input checked="" type="checkbox"/>	
Vendor Insurance Expiration:	03/14/2014	

# Contract Container: Attachments

If you have any attachments to your contract, you will now see the Primary Document listed prominently (provided you have defined a Primary Document) with all of its pertinent data and a grid containing all of the attachments grouped by version as the default. You will have the ability to display your attachments grouped by any of the criteria most notably, but not limited to, Attachment Category, Version Number, Attachment State, and when items were added or updated.

The screenshot shows the 'Attachment(s)' tab in a contract container. The interface includes a navigation menu on the left with 'Attachment(s)' selected (1), a 'Document(s) Views' section with 'View All Documents' (3) and 'Add New View' (4) links, and an 'Add Document' button (5) in the top right. The main area displays a 'Primary Document' (2) with details: Version: 1.00, Document Category: Contracts, Document State: Draft, Related To: [redacted], Current File: [SUnion\\_1\\_sm.jpg](#) (6), Document Description: Contract (after redlined), Added On: 12/16/2013 4:49:38 PM, Added By: iContracts Instructor, Updated On: 12/16/2013 4:49:38 PM, Updated By: iContracts Instructor. Below this is a table (7) of attachments with columns: Edit, Delete, AttachmentType, DocumentName (8), AttachmentState, CurrentFile, Description, FileType, AddedOn, AddedBy, AttachmentNumber, and RelatedTo. The table shows two attachment groups: 'AttachmentGroup: Version: Contract (129596), [Total: 1]' with one row for 'Contract' (Primary, Draft, jpg, 2389) and 'AttachmentGroup: Version: Initial Quote (129596), [Total: 1]' with one row for 'Initial Quote' (Supporting, Draft, doc, 2388). A footer shows 'Page 1 of 1' and 'Displaying records 1 - 2 of 2'.

1. Attachment(s) Views tab
2. Document(s) Views
3. View All Documents link
4. Add New View link
5. Add Document button
6. Primary Document information
7. Document grid
8. Document Field grid
9. Attachment Group heading

Any number of attachments including Word documents, Excel spreadsheets, PDFs and others can be linked to a specific contract and are accessible through the Contract Attachment tab. Any of these attachments may be designated as the Primary Document while all others including drafts, exhibits, referenced documents and other working documents can be stored as Supporting Documents.

## To Add a New Attachment

1. Click on the Add Document button
2. The Upload Attachment window appears
3. Enter the title of the attachment to be added in the Title field
4. Select the category for the document from the Category drop down list
5. Select the state of the document from the State drop down list
6. Attach any file for the above attachment from File field
7. Enter more information about this attachment in the Description field
8. If the attachment is the primary document check the Make this the Primary Document box in order to make the attached file a primary document
9. Click the Save button, a confirmation appears that the attachment was successfully created

## Editing an Attachment's Information

Summary Attachment(s) Performance Activities Milestones Notes History Emails Related Contracts

**Contract Views**

- View All Contracts
- All Patents (20)
- Approved Checklist (166)
- Approved (5)
- autorenew with issues (4)
- Awaiting Budget/Financial Approval (6)
- Fanciful (2)
- Expired Contracts (8)
- Needs Primary Document (58)

**Upload Attachment**

Document Title: Final Contract

Attachment Category: Contract Processing

State: Final

File: C:\Users\sales4\Documents\demo\_files\contract\_finalv3

Description: Final Version of Contract

Make this the Primary Document

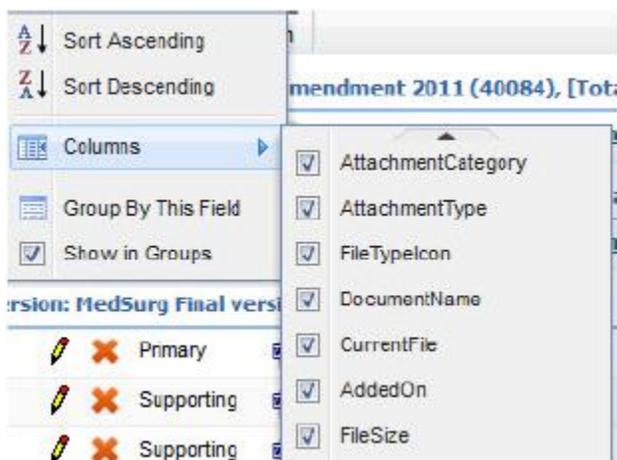
Save Cancel

You can change an attachment's title, category, version, state or description or make a supporting document a primary document. To edit an attachment's information, click on the Edit icon (✎).

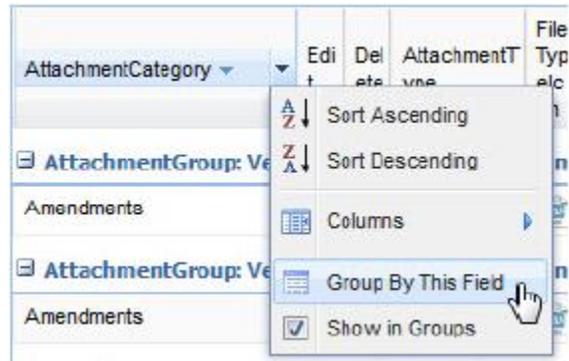
AttachmentGroup	Version	Title	Category	Version	Action
AttachmentGroup: Version: Final Contract (16624), [Total: 2]					
Final Contract	1.00		Contract Processing	1.00	✎ ✖
Data Destruction Final Contract 2010-2011	1.00		Contract Processing	1.00	✎ ✖
AttachmentGroup: Version: Financial Rvw complete (35626), [Total: 1]					
Financial Rvw complete	1.00		Contract Processing	1.00	✎ ✖

## Arranging the Attachments Grid

As with every grid in iContracts, you have the ability to choose which columns to display, but differently than the Enterprise grids, the listing of options appears in a fly-out menu that you can click in a checkbox to choose its visibility.



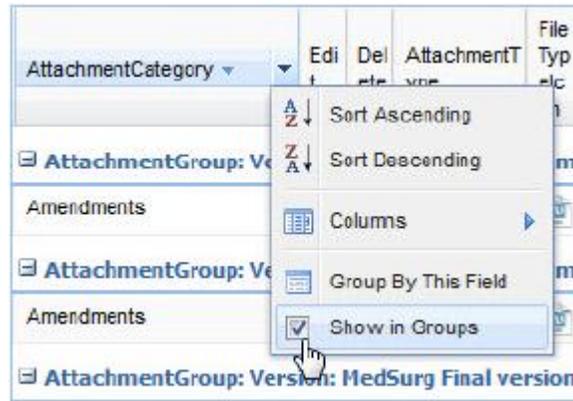
You can group any column by selecting Group By This Field from its drop-down menu.



(Resulting Example)

AttachmentCategory	Edit	Delete	AttachmentType	FileType	DocumentName	CurrentFile
<b>AttachmentGroup: Version: MedSurg Contract Amendment 2011 (40084), [Total: 1]</b>						
Amendments			Supporting		<a href="#">MedSurg Contract Amendment 2011</a>	<a href="#">amendme</a>
<b>AttachmentGroup: Version: MedSurg Contract Amendment 2012 (40085), [Total: 1]</b>						
Amendments			Supporting		<a href="#">MedSurg Contract Amendment 2012</a>	<a href="#">amendme</a>
<b>AttachmentGroup: Version: MedSurg Final version (40093), [Total: 5]</b>						
Contract Processing			Primary		<a href="#">MedSurg Final version</a>	<a href="#">contract f</a>
Contract Processing			Supporting		<a href="#">MedSurg First Draft</a>	<a href="#">contract-d</a>
Contract Processing			Supporting		<a href="#">MedSurg Redline</a>	<a href="#">contract r</a>

In order to show an uncategorized listing of all documents, uncheck the Show in Groups box from the drop-down menu.



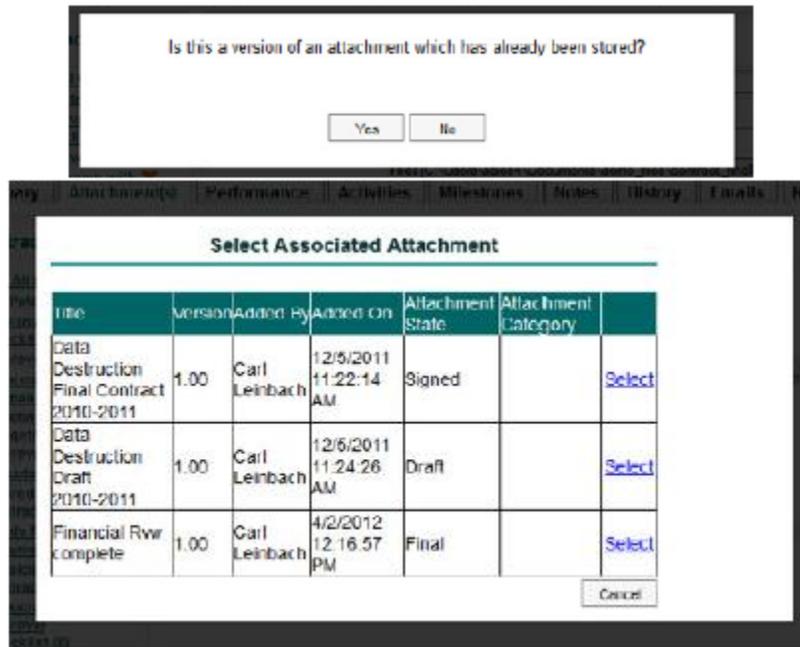
(Resulting Example)

A screenshot of a document management interface. The top navigation bar includes tabs for 'Summary', 'Attachment(s)', 'Performance', 'Activities', 'Milestones', 'Notes', 'History', 'Emails', and 'Related Contracts'. The 'Attachment(s)' tab is active. On the left, there is a sidebar with 'Attachment Views' and options like 'View All Attachments (14)' and 'Add New View'. The main content area shows a 'Primary Document' titled 'MedSurg Final version' with details: 'Version: 3.00 / Attachment Category: Contract Processing / Status: Final', 'Related To: MedSurg First Draft', 'Current File: contract\_final-v3.doc', 'Description: Final Contract-unsigned', 'Added On: 5/23/2012 10:18:25 AM / Added By: Carl Leibach', and 'Updated On: 5/23/2012 10:18:25 AM / Updated By: Carl Leibach'. Below this is a table of attachments.

DocumentName	AttachmentCategory	Edit	Delete	AttachmentType	FileType
<a href="#">MedSurg Contract Amendment 2011</a>	Amendments			Supporting	
<a href="#">MedSurg Contract Amendment 2012</a>	Amendments			Supporting	
<a href="#">MedSurg Support and Maintenance Amend...</a>	Amendments			Supporting	
<a href="#">MedSurg Final version</a>	Contract Processing			Primary	
<a href="#">MedSurg First Draft</a>	Contract Processing			Supporting	
<a href="#">MedSurg Redlines</a>	Contract Processing			Supporting	
<a href="#">MedSurg Redlines</a>	Contract Processing			Supporting	
<a href="#">MedSurg Redlines</a>	Contract Processing			Supporting	
<a href="#">MedSurg financial Review 2010</a>	Financial Reviews			Supporting	
<a href="#">MedSurg financial Review 2011</a>	Financial Reviews			Supporting	
<a href="#">MedSurg financial Review 2012</a>	Financial Reviews			Supporting	
<a href="#">MedSurg Sales Presentation</a>	Misc			Supporting	
<a href="#">MedSurg RFP</a>	Misc			Supporting	
<a href="#">MedSurg Pricing Proposal</a>	Misc			Supporting	

## Version Control

Any document can be a version of another. The system will ask if a newly added document is a version of another and the user will be able to select from a list of existing attachments.



On the following screen, the system will suggest a version number, which can be overridden.



Users can edit existing attachments so that they are a version of another document and can specify the version number, if desired.

AttachmentGroup: Version: Final Contract (16624), [Total: 2]

Final Contract	Contract Processing	1.10		
Data Destruction Final Contract 2010-2011		1.00		

AttachmentGroup: Version: Financial Rvw complete (35626), [Total: 1]

Financial Rvw complete

Summary | Attachment(s) | Performance | Activities | Milestones | Notes | History | Emails | Related Contracts

Title: Final Contract

Version: 1.10

Related To: Data Destruction Final Contract 2010-2011

Attachment Category: Contract Processing

State: Final

Description: Final Version of Contract

Edit Version

Save Cancel

Select Associated Attachment

Title	Version	Added By	Added On	Attachment State	Attachment Category	
Data Destruction Draft 2010-2011	1.00	Carl Leinbach	12/5/2011 11:24:26 AM	Draft		Select
Financial Rvw complete	1.00	Carl Leinbach	4/2/2012 12:16:57 PM	Final		Select

Cancel

Assign Version For Attachment

Attachment Version (0.00-999.99) :

OK Cancel

If the system recognizes the same file name as another already loaded, it will automatically select that document and then suggest a version number.

Is the File "contract\_redlined.doc" is the version of Document "MedSurg-Redlines"

Yes No

## Attachment Views

Like all the other areas in iContracts, the ability to create a view exists within the attachments area for each Contract Container. This makes it easy to display only the items for which you are searching. Because the grid will extend to show all of your attachments on one screen, which could possibly get quite lengthy, the total number of attachments will be shown in parenthesis underneath the View All Attachments link inside the Attachment Views area.

When you create or modify an Attachment view, the criteria by which you can search is listed here. All the other options are identical to all other views in iContracts.

Summary Attachment(s) Performance

**Attachment Views**

[View All Attachments \(14\)](#)

• [Contract Versions](#) ✕

[Add New View](#)

**Primary Doc**

**Med Surg Fin**

**Version:** 3.00  
**Related To:** M  
**Current File:** :  
**Description:** F  
**Added On:** 5/2  
**Updated On:** :

AttachmentCategory ▾

AttachmentGroup: 1  
Amendments

AttachmentGroup: 1

**Create/Modify Attachment View**

Get Attachments that match the following criteria:

• Add Crit

**Default F**

Attachment

Any Field  
Any Field  
AddedBy  
AddedOn  
AttachmentCategory  
AttachmentNumber  
AttachmentState  
AttachmentType  
ContractName  
CurrentFile  
Description  
DocumentName  
FileSize  
FileType  
RelatedTo  
UpdatedBy  
UpdatedOn  
VersionNumber

cont  
include

**Default Sort Order**

Attachment Fields ---Select Fields---

# Contract Container: Activities

The screenshot shows the 'Activities' tab in a software interface. At the top, there are navigation tabs: Summary, Attachment(s), Activities (selected), Milestones, Notes, History, Email, and Related Contracts. Below the tabs, there are buttons for 'Add Activity' and 'Report'. On the left, there is a sidebar for 'Activities Views' with options 'View All Activities' and 'Add New View'. The main area displays a table of activities.

Complete	Activity Name	End Date/Time	Assigned Other Name	Activity ID	Assigned Name	Complete On	Contract
	<a href="#">Yearly Contract Review</a>	12/31/2012 05:00:00 PM		85490	Contract Manager		<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	02/11/2013 08:30:00 AM		192735	Carl Lohbach	02/25/2013 01:58:53 PM	<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	02/16/2013 08:30:00 AM		192740	Carl Lohbach	02/27/2013 12:56:27 PM	<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	02/19/2013 08:30:00 AM		192736	Carl Lohbach	02/25/2013 01:58:58 PM	<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	02/22/2013 08:30:00 AM		192741	Carl Lohbach	03/19/2013 03:57:22 PM	<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	02/26/2013 08:30:00 AM		192737	Carl Lohbach	02/25/2013 01:56:18 PM	<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	02/28/2013 08:30:00 AM		192742	Carl Lohbach		<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	03/04/2013 08:30:00 AM		192738	Carl Lohbach	02/25/2013 01:51:02 PM	<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	03/08/2013 08:30:00 AM		192743	Carl Lohbach		<a href="#">Rahil Glen MD</a>
<input type="checkbox"/>	<a href="#">check amendments</a>	03/11/2013 08:30:00 AM		192735	Carl Lohbach	02/25/2013 01:51:27 PM	<a href="#">Rahil Glen MD</a>

Page 1 of 3 | Displaying records 1 - 10 of 29

The contract Activities tab provides users with a view of past, present or future activities associated with the Contract Container. As with the Contract tab, you can add or modify an unlimited number of saved searches (Activities Views) that contain criteria such as alterable sorting, page layouts, and the ability to filter on any combination of activity data. In addition to the ability to create complex searches, with one click users may select all activities, all assigned activities, or all activities created by you. Any filtered view of contract activities may also be exported by simply clicking on the Report button. New activities may also be added directly from this page.

## Adding an Activity

You can add an activity for yourself or another team member. You can either add an activity from the Activities window or from a contract Activities window. If you add an activity from the Enterprise Ribbon Activities window, it is not associated with an agreement; however you can associate from the drop down list provided. **When assigning an activity, it is recommended to add from the Contract Container, choosing the selected contract, and then from the Activities tab.**

To view the activities related to a particular agreement click the Activities tab. Activities are listed under the agreement activities area near the bottom of the window.

The activity as it appears when it is assigned to you and as assigned to another user.  
Note that if it is NOT assigned to you, you cannot mark it as completed.

### To Add an Activity from the Contract Activities Window

1. Click the Activities tab near the top of the page
2. Click the Add Activities button on the right side of the page
3. Define the new activity

### To Define the New Activity

Whether you've created a new activity from the Activities window or from an Agreement Activities window, the New Activities window appears.

4. Enter the activity to be performed in the Activities Name field
5. Enter a completion date for this activity in the Due Date field
6. Select the person to whom this activity should be assigned from the Assigned To field. If you assign this activity to another person, they will receive an e-mail notification about the activity from iContracts
7. Select the other person to whom this activity should be assigned from the Assigned Other field. If you assign this activity to another person, they will receive an e-mail notification about the activity from iContracts
8. Enter more information about this activity in the Description field
9. Click the save button. A confirmation appears that the activity was successfully created. The activity created in the agreement summary will include a link to the agreement in the Related To field

### To Complete an Activity Task

1. Click Activities in the menu bar
2. Click the Completed check box for each activity you want to mark as completed in the Activities table
3. If the activity is assigned to another user, the Mark as Completed option will not appear and you will not be able to complete it. Only the person to whom an activity is assigned can complete it

Once you complete an activity, the activity appears with its row crossed out in the grid.

### **To Reactivate an Activity**

1. If you have marked an activity as completed, and then decide that it is not complete, you can reactivate the activity in iContracts
2. Click Activities in the menu bar
3. Click the activity you want to reactivate in the Activities table
4. Click the Reactivate Activity button at the top right. The activity now appears in the Activities list as an active task

### **To Delete an Activity**

1. Click Activities in the menu bar
2. Click the activity you want to delete in the Activities table
3. Click the Delete link at the top of the Activities detail window
4. A confirmation dialog appears; click Yes to delete the activity

### **To Edit an Activity**

You can change an activity's subject, due date, or description; or you can assign an activity to a different person. If you want to complete an activity, see Completing Tasks.

1. Click Activities in the menu bar
2. Click the activity you want to edit in the Activities table
3. Click the Edit icon (✎) at the top of the Activities detail window; the Edit Activity window appears
4. You can change the subject, assignment, due date or description for the activity; then click the Save button

### **To Export the List of Activities**

You can export your list of activities from iContracts. Activity information is exported in a comma-delimited (.csv) format file.

1. Click Activities in the menu bar
2. Click the export button
3. In the dialog box that appears, decide whether or not to open or save the .csv spreadsheet file

### **To View the Activities in the Activities Window**

You can view tasks that you created, or that were assigned to you, from the Activities window. The Activities window shows all activities that you have created or are assigned to you.

1. Click Activities in the menu bar
2. The Activities window appears
3. You can see the activities assigned to the logged in user and have a check box (to mark complete) in the left most column

Any activity that the user created has a dot in that column. Only the user to whom the activity is assigned can mark it completed. To view the activities related to a particular Contract Container, simply click the Activities tab in the Contract ribbon. Activities are listed under the Agreement Activities area near the bottom of the window.

# Contract Container: Milestones

The Milestones tab provides users with a view of past, present, and future milestones associated with all contracts housed in the system. As with the Contract tab, you can add or modify an unlimited number of saved searches (Milestone Views) that contain criteria such as alterable sorting, page layouts, and the ability to filter on any combination of activities data. Any filtered view of contract milestones may also be exported by simply clicking on the Report button. New milestones may be added directly from this page by clicking on Add Milestone. **When assigning a milestone, it is recommended to add from the Contract Container, choosing the selected contract, and then from its Milestone tab.**

The milestones associated with a Contract Container are notifications associated with a particular contract based on a date and can be set to notify multiple users on a specified number of days before an event, such as a contract's expiration. Milestones can be created from a few different places within the Contract Container - from the Milestones tab itself or a date field located in the Summary tab.

The screenshot shows the 'New Milestone' form with the following details:

- Milestone Name:** Walk Thru
- Completion Date:** 6/3/2014
- Description:** Walk Thru of process.
- Responsible Person:** Angela Lee
- Notification Method:**  Email,  Text Message,  Calendar,  RSS Feed
- Notify Before:** 4 Days
- Also Notify:** A dropdown menu is open showing a list of users: Gina Moses, Hans Pripke, IContracts Administrator, IContracts Instructor (highlighted), IContracts Student, James George, Jeannine Prew, and Jeff Durfee.
- Notify Before:** 3 Days
- Notification Method:**  Email,  Text Message,  Calendar,  RSS Feed
- Repeat Email Notifications:**
- Notify On Completion:**
- Completed:**

Buttons: Save, Cancel

**Milestones Table:**

Complete	ContractId	MilestoneId	ContractName	Description	MilestoneName	MilestoneCompletionDate	CreatedOn	UpDatedOn	CreatedBy
No records to display									

## Creating a Milestone from the Milestones Tab in a Contract

You can add a milestone for yourself, or another team member, using iContracts. You can either add a milestone from the Enterprise Ribbon Milestone window or from an Agreement Milestone window. **It is recommended to add from the Contract Container, choosing the selected contract, and then from its Milestone tab.**

1. Click the Milestone tab near the top of the page
2. Click the Add Milestone button on the right side of the page
3. Define the new milestone

### To Define the New Milestone

1. Enter a title and description for the milestone in the Milestone Name and Description fields
2. Enter completion date in the Completion Date field
3. Select the contract from Contract drop down list
4. Select the responsible person from Responsible Person drop down list
5. Enter the notify days in the Notify Before fields
6. Check the notification method you want to notify with
7. Select the other notify person from Also Notify drop down list
8. Enter the notify days in the Notify Before fields
9. Check the notification method you want to notify with
10. Completed check box is to be checked when the milestone has been achieved
11. Click the Save button

Note: Checking the Repeat Email Notification box will send a daily reminder to the responsible person.

### To View Milestone Details

1. Click Milestones tab in the menu bar
2. Milestones are listed in the table
3. Click the milestone you want to view in the Milestone table
4. Milestone detail window will open

### To Edit a Milestone

You can edit a milestone to change its name, completion date, description, responsible person, notification days, etc.

1. Click Milestones tab in the menu bar
2. Milestones are listed in the table
3. Click the milestone you want to edit in the Milestone table
4. Milestone detail window will open
5. Click the Edit button at the top of the milestone detail window; the Edit milestone window appears
6. You can change name, completion date, description, responsible person, notification days, notification method etc.; then click the Update button

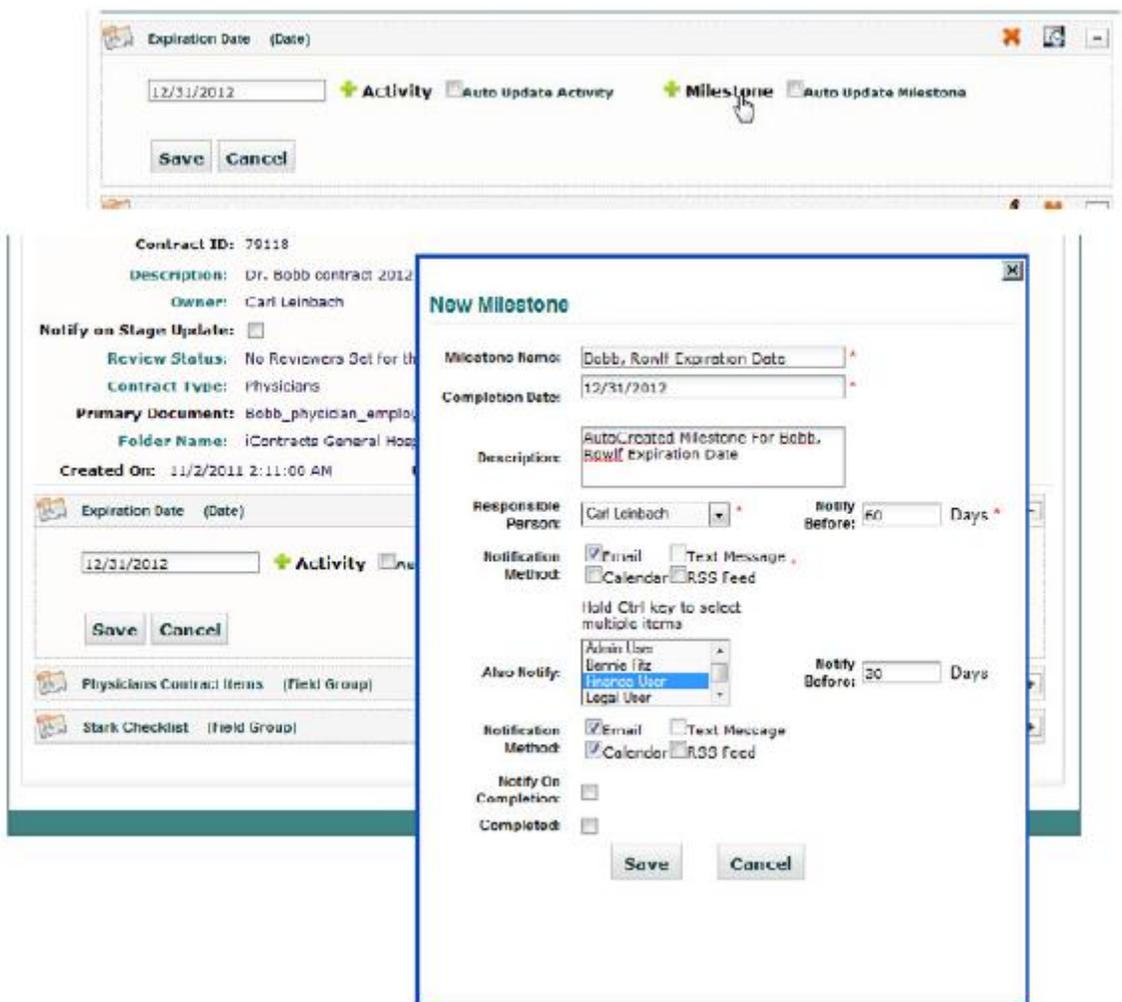
## To Delete a User Created Milestone

You may delete any user created milestone that has been defined for an agreement.

1. Click Milestones tab in the menu bar
2. Milestones are listed in the table
3. Click the milestone you want to delete in the Milestones table
4. Milestones detail window will open
5. Click the red Delete icon at the top right of the Milestone detail window
6. A confirmation dialogue appears; click Yes to delete the milestone

## Creating a Milestone from a Singular Date Field

Milestones can also be created from the Summary tab from a date field not appearing in a Field Group. A pop-up dialog box will appear to fill out directly from that screen without having to first go to the Milestones tab. The milestone will then appear in the list with all the other milestones from this Contract Container, as well as in the Milestones tab located on the Enterprise ribbon.



## Contract Container: Notes

The Notes tab within the Contract Container includes all notes associated with only that contract. Examples of views in the Notes section are “Notes to Me” or “Notes from Me”. You can add a note for yourself or another team member. To create a note, click on the Add Note button, fill out the form and attach a document, if necessary. If a document is attached to a note, it will then also appear within the Attachments tab with a description.

This is a great area to keep track of collaboration about the contract in an organized and chronological manner.

The screenshot displays the iContracts web application interface. At the top, it shows a welcome message for 'UNFInstructor (F-R)' at the 'University of North Florida'. The main navigation bar includes 'Home', 'Contracts', 'Activities', 'Milestones', and 'Notes'. The current contract is 'MedSurg Supply Co', and its current stage is 'Final Approval Purch-Legal'. Below the navigation, there are tabs for 'Summary', 'Attachment(s)', 'Activities', 'Milestones', 'Notes', 'Emails', and 'Related Contracts'. The 'Notes' tab is active, showing a table of notes with columns for 'Title', 'Attachment', 'CreatedOn', 'UpdatedOn', and 'Note'. There are also buttons for 'Add Note' and 'Report'.

Title	Attachment	CreatedOn	UpdatedOn	Note
<a href="#">Documents countersign</a>		12/14/2011	12/14/2011	
<a href="#">Financial Review compl</a>	Contract Financial Review.docx	04/11/2012	04/11/2012	
<a href="#">Financial Review Compl...</a>		03/20/2012	03/20/2012	
<a href="#">Financial Review compl...</a>		03/07/2012	03/07/2012	
<a href="#">financial review compl...</a>		02/19/2012	02/19/2012	completed on 85889 by km
<a href="#">Financial Review Compl...</a>		02/09/2012	02/09/2012	greenham
<a href="#">Financial Review Compl...</a>		12/08/2011	12/08/2011	qwerty

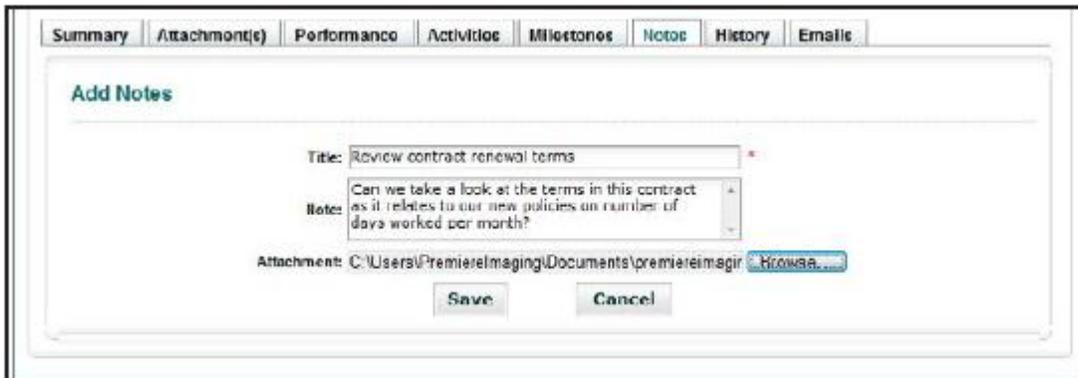
## To Add a Note from the Notes Tab

You can add a note for yourself, or another team member, using iContracts. You can either add a note from the Note window or from an agreement note window. If you add a note from the Note window, it is not associated with an agreement; however you can associate from the drop down list provided.

1. Click the Notes tab on the Contract ribbon
2. Click the Add Note link



3. Fill out the information fields - required fields are marked with an asterisk
4. Attach any file in support of the above note from Attachment field
5. Click the Save button and a confirmation appears that the note was successfully created.; the note will include a link to the contract of which it relates when saved





### To Delete a Note

1. Click the Notes tab on the Contract Ribbon
2. Click the note title you want to delete in the Note table
3. Click the Delete icon (✖) at the top of the Note detail window
4. A confirmation dialogue appears. Click Yes to delete the note

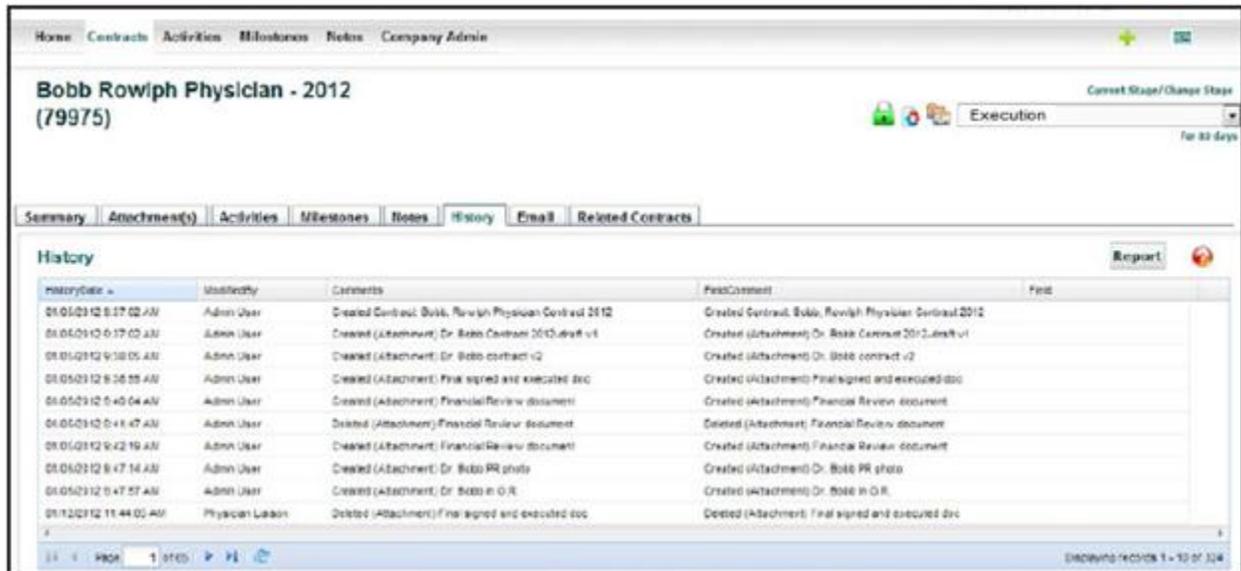
### To Edit a Note

You can change a note's title, content, or you can associate a note to a different contract.

1. Click the Notes tab on the Contract ribbon
2. Click the note title you want to edit in the note table
3. You can change the title, content or you can associate a note to a different contract; then click the Save button

# Contract Container: History

The contract History tab provides users with a filtered view of changes associated with a Contract Container from the time the contract enters the system. Users can configure which columns will display, in what order they will display (from left-to-right) as well as which column the display is sorted on. History serves as an audit trail so that a user with access can see when contract fields and attachments were added, edited, and/or deleted by them. The history of a Contract Container cannot be modified . . . even by a UNF iContracts System Administrator.



## Contract Container: Emails

The contract Emails tab allows users to easily send emails and attached documents associated with a contract to anyone directly from iContracts. Email supports To:, Cc:, Bcc:, and a Subject line and also allows the user to format a message to the recipients. All, none, or select attachment documents can be sent along with the email message. All outgoing email messages are logged against the History tab.

**Bobb, Rowlf** Current Stage/Change Stage

🔒 🔄 Draft

Summary Attachment(s) Performance Activities Milestones Notes History **Emails**

To :  
CC :  
BCC :  
Subject :  
Message :

Attachment : All None

<input checked="" type="checkbox"/>		<b>Final Contract</b> Bobb_physician_employment_agreement-FINAL.pdf	390.00 Bytes
<input checked="" type="checkbox"/>		<b>Dr. Bobb contract 2012</b> Bobb_physician_employment_agreementV1.doc	64.00 Bytes
<input checked="" type="checkbox"/>		<b>Dr. Bobb contract 2012</b> Bobb_physician_employment_agreementV2.doc	60.00 Bytes
<input checked="" type="checkbox"/>		<b>web photo_bobb</b> drnrbh.jpg	21.00 Bytes
<input checked="" type="checkbox"/>		<b>Review contract renewal terms</b> policy_64964a_final.pdf	1288.00 Bytes

Total Selected bytes: 1803.00 Bytes

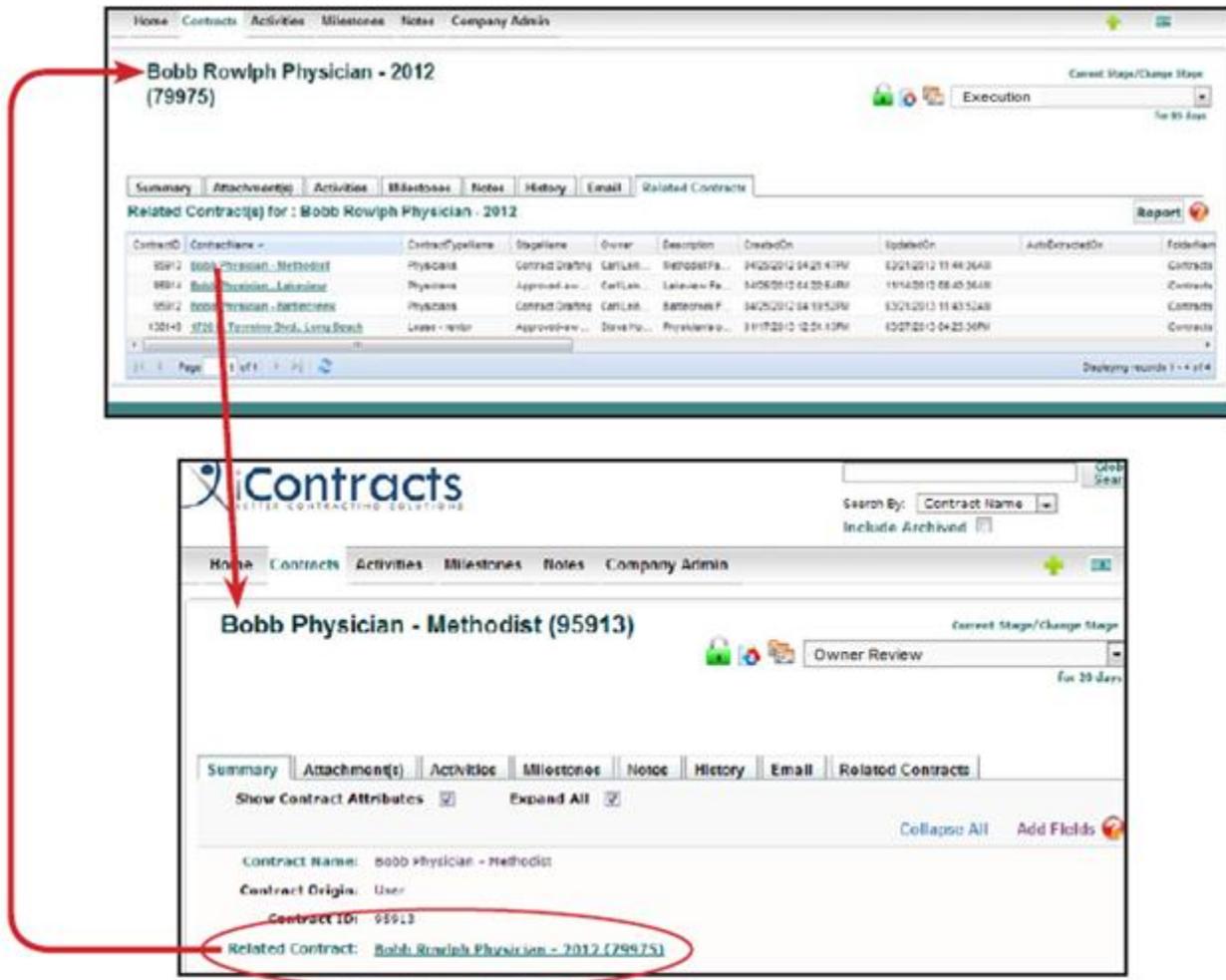
**Send** **Cancel**

# Contract Container: Related Contracts

A user can also look at what is pointing to a particular contract in the system. While viewing a Contract Container, the user can go to the Related Contracts tab to view a list of all of the contracts which are pointing to the currently displayed contract. In the example below, we can see both are pointing to it as their Related Contract. There is no limit to how many Physician contracts can point to another contract.

If we were to click on the contract listed below, we would see (on its Summary tab) any and all contracts listed as its Related Contract.

When looking at a contract's Summary tab, users can specify a contract that the current contract is related to (Related Contract, circled, below). Each contract in the system can specify another contract that it is related to.



# Appendix A: List of Standard Default Contract Fields

The list of fields shown on the right is the system provided contract attributes. These are available for query purposes and always appear at the top of the list of available fields for reporting.

### Archive

Indicates if a contract is hidden from the default view, but not deleted from the system

### Contract ID

The unique number assigned by iContracts that is associated with a Contract Container; this unique number is listed in parenthesis next to the Contract Name when inside the Contract Container, as well as in the contract attributes on the Summary tab

### ContractName

The name given for a Contract Container

### ContractOrigin

How the contract was entered into the system; the choices are Bulk Loader, User and Template

### ContractTypeName

The type of contract as provided by the user

### CreatedOn

The date the contract was entered into the system

### DaysInCurrStage

The number of days since the contract entered its current Workflow Stage; this number is displayed inside the Contract Container under the current Workflow Stage in the Workflow Stage indicator drop-down

### Description

Additional information detailing the nature of a Contract Container in the system

### EXTContractRefID

A reference to a record located in another external system used for linking the two systems together (this functionality is not standard)

### FolderName

The name of the folder in which the contract resides for security and permissions

### NotifyOnReviewCompletion

The user specified for notification when a review has been completed by all users specified for the review

## Contract Columns

- \*Contract Attributes
  - Archive
  - ContractID
  - ContractName
  - ContractOrigin
  - ContractTypeName
  - CreatedOn
  - DaysInCurrStage
  - Description
  - ExtContractRefID
  - FolderName
  - NotifyOnReviewCompletion
  - NotifyOnReviewStatusChange
  - Owner
  - PrimaryDocument
  - RelatedToContract
  - RelatedToContractID
  - Reviewers
  - ReviewsSet
  - StageName
  - StageNotify
  - StageNotifyNames
  - UpdatedOn
  - Workflow

**NotifyOnReviewStatusChange**

The user specified for notification after all the reviews have been completed for a contract

**Owner**

The user responsible for the contract in the system

**PrimaryDocument**

The attachment designated to be the main document, or perhaps the latest version of a document

**RelatedToContract**

Lists the contract specified that the current contract relates to

**RelatedToContractID**

Lists the contract ID specified that the current contract relates to

**Reviewers**

Lists the users specified in the Review module to review a contract

**ReviewsSet**

Denotes if a contract has been assigned for a review

**StageName**

Lists the name of the current Workflow Stage for the contract

**StageNotify**

Denotes if a user has been specified to receive notifications for a change in the workflow status of a contract

**StageNotifyNames**

The users specified to be notified when the workflow status of a contract has changed

**UpdatedOn**

The time and date stamp for a change in the contract data

**Workflow**

The name of the assigned workflow template for a contract

