Introduction

Welcome to the intelligentcontract.com Administration Quick Guide !

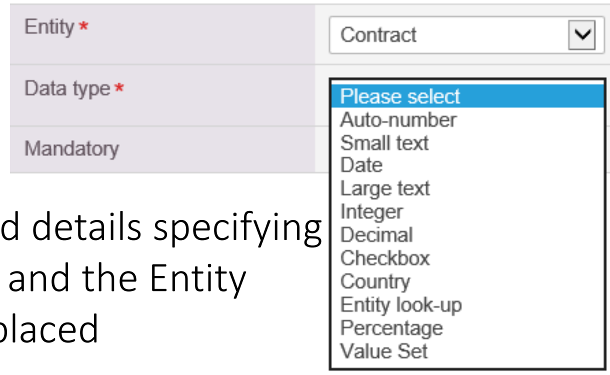
The aim of this Admin Quick Guide is to aide Admin Users to configure their intelligentcontract.com account to their organisational needs.

The areas covered in this guide are:

1. Creating a Custom Field
2. Defining Form Layouts
3. Value Sets
4. Security Groups
5. Feature Visibility
6. Define Organisational Structure
7. Manage Entity Names
8. Account Configuration
9. Users
10. Import and Export
11. Getting Support

Creating a Custom Field

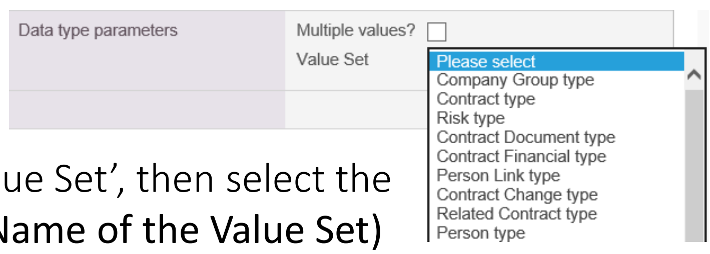
- Enter the Configuration screen and open Manage Custom Fields
- Click the + to add a new field



- Complete the Customised field details specifying the Name, Label (field name) and the Entity where the new field is to be placed

Note: 'Entity' refers to where the field will appear i.e. Contract, People, Reminder

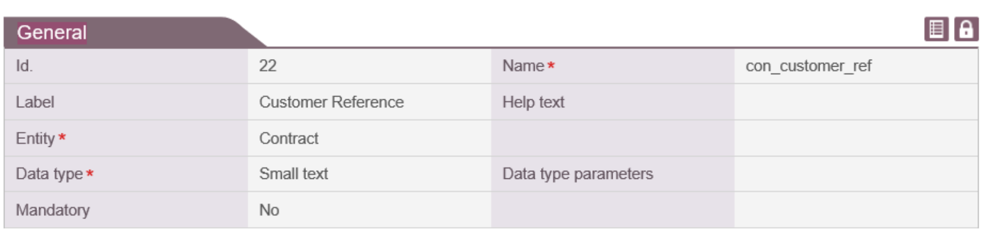
- Identify the type of field to be created by selecting the Data Type



- If you have selected 'Value Set', then select the Data Type Parameters **(Name of the Value Set)**

- **Double check the values entered before saving as the Entity and Data Type values cannot be altered afterwards, you will need to delete and create a new one.**

- Save

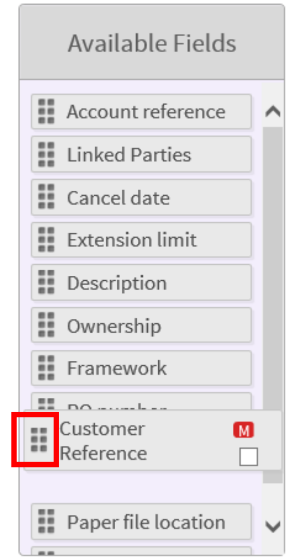


Note: It is recommended that if any specific new fields are required they should be created as new Custom Fields, and not a reuse of existing system fields.

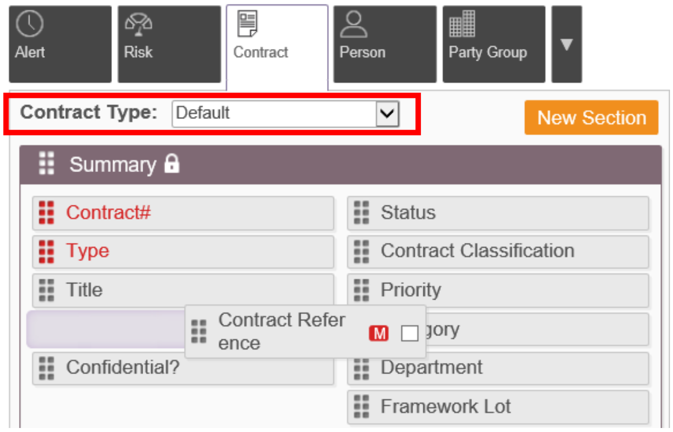
- See 'Form Layouts' to now place your new field onto a specific part of a form

Defining Form Layouts

The Form Layout of any Entity or Entity 'Type' can be adjusted to your requirements. Any Customised Fields that are created will be located here to be placed on the form



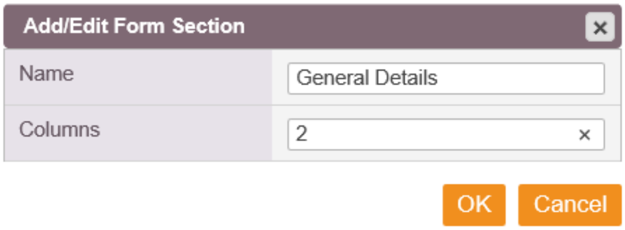
- All system fields are displayed either on the existing form or in the Available Fields section
- Any new Customised fields will be located in the Available Fields section for you to drag and drop onto the layout
- The fields can be dragged and dropped to their preferred location by clicking on the group of box's attached to the field
- If you are creating a specific layout for a 'Type' select this value first then make the adjustments



Note: 'Type' is only required for:

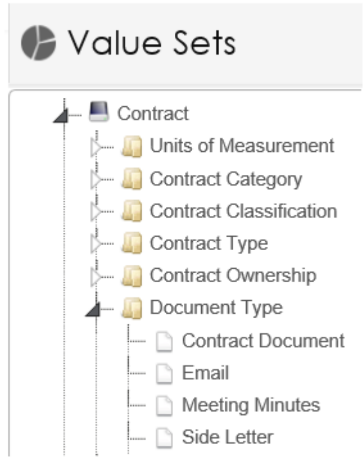
- Contracts
- People
- Parties
- Documents

- If you require a New Section to be created, press the [New Section] button then specify the Section name and how many columns across it should be
- Sections can be dragged and dropped to a preferred location on the layout

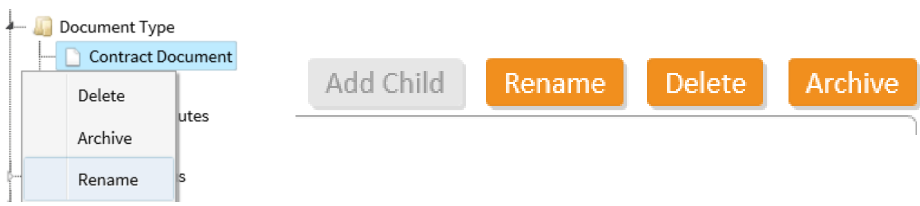


- Always Save before selecting another Entity or 'Type' to amend as all changes will be lost if not Saved first

Value Sets

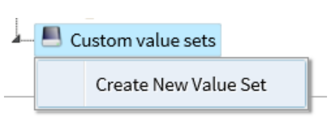


- Values Sets are the values held within the Drop Down lists within the system
- Each Value Set can be adjusted to display options that are important to your organisation
- To Rename or Delete an existing value, either right click over the value and select the appropriate option or highlight the value and use the [Rename] or [Delete] buttons

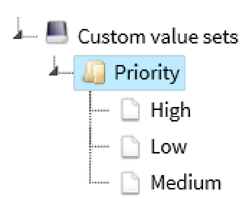


- To add a New value, either right click over the Value Set folder and select ‘Create New Value’ or highlight the folder and press the [Add Child] button

- To create a completely new Value Set, go to the Folder ‘Custom Value Sets’ either right click and select ‘Create New Value Set’ or press the [Add Child] button



- Give the New Value Set a name and Add Child records to it and enter your preferred values
- Save



Note: Use Custom Value Sets in conjunction with Custom Fields to create a custom drop down list

Security Groups

- Security Groups are created to restrict Users access to specific areas of the system
- The system default Security Groups are 'Everyone' and 'No-One'.

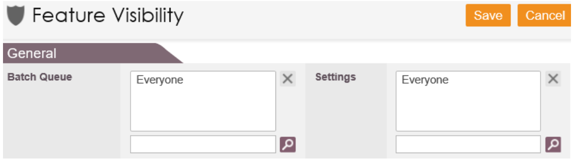
Note: All Users are automatically added to 'Everyone'

- To create a new Security Group, press + and add the Name and Description
- To add a User to a Security Group add them in the Users sub entity area

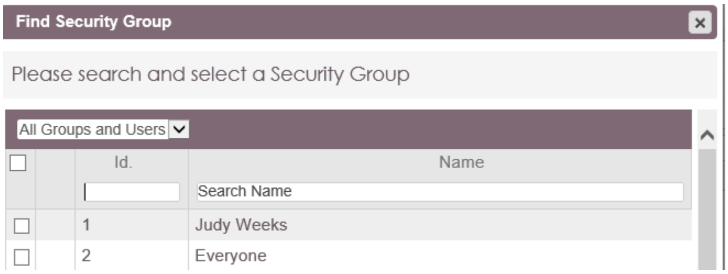
Note: If Contracts are added to security groups, only users within those security groups can see that Contract

Feature Visibility

- Feature Visibility is used to define which features (e.g. Contracts, Recycle Bin etc.) each Security Group has access to



- To remove a Security Group from a section, highlight the Security Group assigned and press the x
- To add a Security Group to a section press the magnifying glass and select the correct value



- Save

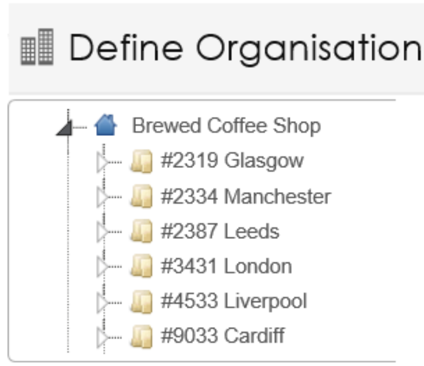
Note: To make a feature 'Invisible' to all Users, assign it to the 'No-One' Group

Define Organisational Structure

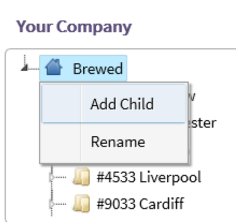
- Define Organisational Structure is where you can stipulate the details of any Internal Companies or Departments within your organisation

- Contracts can then be associated with these department instead of Parties

- Identifying in this way will allow you to report or search on specific data concerning a particular area of your organisation



- Your main company name will be defaulted, highlight the correct option and either right click and select [Add Child] or press [Add Child] button to create sub values



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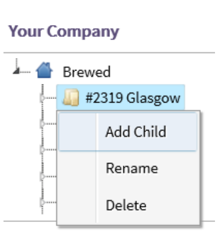
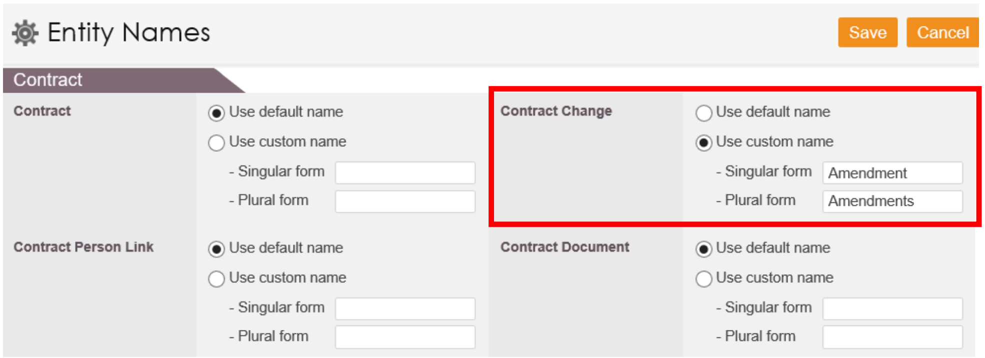


Managing Entity Names

- The names of each Entity can be adjusted to your requirements
- The default names of each Entity name are displayed on the left
- To adjust the Name select ‘Use Custom Name’ and enter the Singular and Plural values required



- Save

Account Configuration

- Account Configuration is used to identify which defaults should be applied to your account
- The Key things that can be altered are:
- **Set Complex Passwords**
- **Date Display Format**
- **Enable External File links**
- **Reminder Frequency**
- **Session Time Out**
- **Change Password after reset**
- **Time zone**
- **Enable Force Password Reset after specified time**
- Adjust the settings using the Radio buttons and text box’s to set your specific default details
- Save

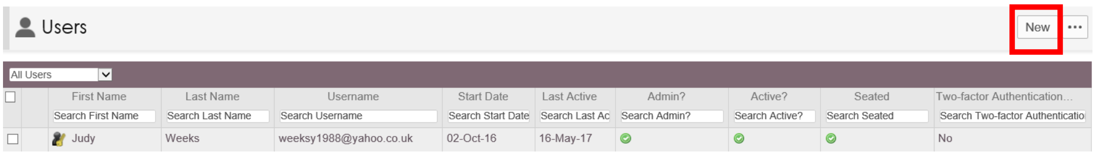
Users

There are 3 types of Users:

- **Admin** – this User will have full access to the system including the Admin section and will have the ability to do everything mentioned in the prior pages
- **Full** – this User will have full access to the system but will NOT have access to the Admin area
- **Read Only** – this User will be able to see all the data within the system but will not be able to Amend / Delete or Create data

To Create a new User:

- Admin Users, click [New]



- A new User will need a person record
- In the User area use the magnifying glass to find an existing person record, if one does not exist then create one using the +
- Enter the Person details and press Save
- Continue creating the profile of the User
- The Username will be their Email Address
- If they are to be an Admin or Read Only User then tick the appropriate checkbox – if neither are ticked then they are classed as a Full User
- Tick the Seated checkbox to set them as an Active User

Note: Users cannot be deleted – simply just unseat them

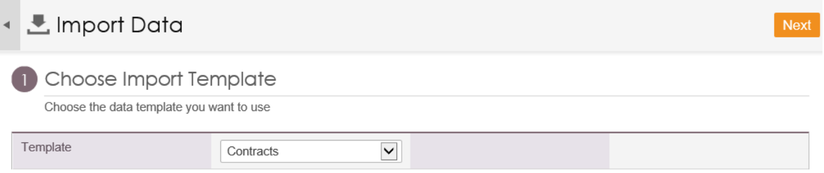
- Set their Password details
- The User will then receive welcome email to intelligentcontract.com

Note: You can set a Start or End date for Users that have not yet started or who are leaving.

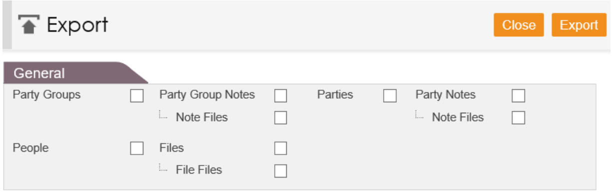
Import and Export Data

- From the Admin menu you are able to Import and Export data
- **Import** – data can be imported for:

- Contracts
- People
- Reminders
- Documents
- Parties



- **Export** – Export all your data into a series of Excel spreadsheets and a zip file of documents for backup.



Getting Support

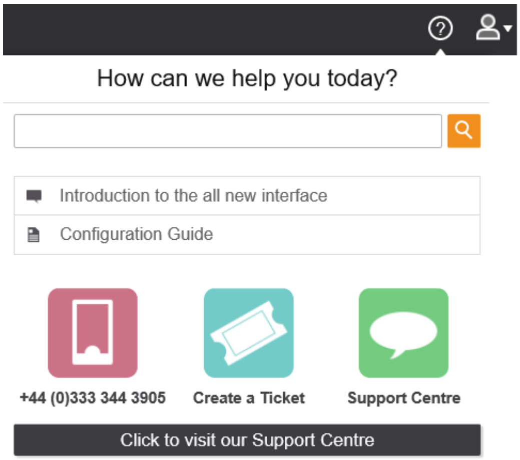
If you need help you can contact intelligentcontract support. Click 'Support' at the top-right of any screen to open the support menu.

Support Centre
Visit our Support Centre to have access to articles covering all aspects of intelligentcontract

Submit a ticket
Send us a support email.
We'll get back to you and track your issue

Live chat
Use in browser text chat to get immediate help from a support agent

0333 3443905
Call to speak to a support agent



Note: Helpdesk is open UK hours of 9:00 – 17:30 Mon-Fri excluding Bank Holidays