Universal ContractManager
CONTRACTS AND COMPLIANCE - SIMPLIFIED
Powered by iContracts

UCM Glossary

TERM	DEFINITION
AceOffix	Plug-In that allows you to *Edit your Documents in the Cloud* using Microsoft Word.
Activities	*Notifications* set on a per-Contract basis for a specific date that is set at the creation of the Activity. CAN be reoccurring and marked as completed.
Admin Directory	List of your *System Admins* for your end users to be able to contact for assistance. Each Admin is able to remove themselves from this list.
Alert	*Notifications* set on a per-Contract basis for a specific date that is set at the creation of the *Alert*. Can be reoccurring, but NOT marked as completed.
AMR	Automatic Milestone Rules. See *Milestones*
Announcement Text	A scrolling announcement that will appear on your *Home* page.
Approver	A *User* assigned to a *Stage* of a *Workflow* that must be either Approved or Rejected.
Archive	Is activated through *Workflow* (even the most basic). "Hides" your contract from normal system use, but can still be found by checking the "Include Archive" checkbox for all *Global Searches* and *Views*.
Assignee	Any *User* assigned to a task/stage/notification in the system.
Attachment	Any files, documents, or images uploaded to a *Container*. This can be the physical Contract itself and/or any supporting documents.
Attachment Text	*UCM* scans any text in your *Attachments* that it can clearly read, and makes it searchable in our *Global Search* within 24 hours of uploading
Bulk Load/Archive	Adding or Archiving Contracts in mass.
Bulk Loader	A separate program that allows for *Bulk Loading* into *UCM*.
Collaboration	The premium *Email* tool in *UCM*. Located inside of your *Contract Container*. Records all email communication and documents in an email chain for historical records right inside the *Container*. ** All Subscriptions come with a basic Email tool, Collaboration has an additional cost.*

Company Admin	*Enterprise Ribbon* tab to access the many different setting and configuration options.
Company Name	On your login page, the specific name of your company that you gave to *UCM*. If you are ever unsure of your *Company Name* and cannot login, please contact a *System Admin* or *UCM Support*.
Contract	Within *UCM*, the term Contract is most frequently used to refer to a *Contract Container*. If we are talking about the physical Contract itself, that would be an *Attachment*.
Contract Actions	Can preform mass changes to groups of contracts including, *Delete*, *Modify*, and add *Attachments*.
Contract Administration	One of the options in *Company Admin*. Where most of the system configuration takes place for items *like Workflow, Fields, Contract Types, Templates, Milestones, etc.*
Contract Container	The core component of the system that houses everything pertaining to that Contract. Contains your custom *Summary Data* for tracking, all the *Attachments* and *Notes* for that contract, any *Email* correspondence sent from the system, all *Notifications*, and a full *History*.
Contract Container Tabs	The specific tabs inside a *Container* that only contain those items related to that Contract. *Ex: Attachments Tab in a Container will only have the files relating to that Contract, while the Attachments Tab from the Enterprise Level will show you all the files in your System.*
Contract Folders	See *Folders*
Contract ID	A unique, system generated ID number. Used most often in support to help verify that any issues we are investigating are for the correct Contracts.
Contract Name	A custom name entered each time you create a new *Container*.
Contract Type	Created by Admins, it allows you to select any number of *Field Groups* to be on display, and ready to be filled in, immediately upon creation of the *Container*. Can also have a specific *Workflow* attached by default. Contract Type is also used in setting up *Milestones* and creating *Views. *Required for system use.*
CSV	A type of Excel Spreadsheet file that has all formatting stripped. All reports exported from the system come in this format. For all spreadsheet import areas in the system, we recommend you use *.CSV (MS-DOS)* file types.

Delete	Any place that you see *Delete*, you have the ability to disable that for your users. **When something is Deleted in UCM, it is not retrievable.**
Direct Entry	Most straightforward and common way to create a new *Contract Container*. Allows your users to give the Container a *Name*, select the *Contract Type*, assign an *Owner*, place it in a *Folder*, add a single *Document*, and *Relate* to another Contract, among other options as well. Located on the *Home* page, and as a green plus (+) in the *Enterprise Ribbon*.
Document	See *Attachment*
Document Category	Customizable *Attachement* property. Usually this will be for the types of documents being uploaded, *MSA, SOW, BAA, NDA, etc.*
Document Explorer	A different way to view and organize *Attachments* inside of a *Container*. The folder structure set here is NOT at all related to the *Folders* set up for security.
Document State	Similar to *Document Category*, just for the different states a document could be in. Still customizable by you, but by default, *Draft, Final,* and *Signed* come pre-loaded.
Edit in Cloud	Feature that uses the *AceOffix* plug in, and allows you to use your version of Microsoft Word inside a browser pop-out. Requires an install of *AceOffix* and Microsoft Word to be installed on the device currently being used.
Email	The basic email tool in *UCM*. Comes included with every subscription. Can only send a single email from a *Contract Container*, and does not record replies. For a more advanced Email tool, see *Collaboration.*
Enterprise Ribbon	The gray bar across the top portion *UCM* that persists throughout the whole System.
Enterprise Tabs	The tabs on the *Enterprise Ribbon* that contain ALL items in the System at a Global Level. *Ex: The Attachments Tab from the Enterprise Level will show you all the files in your System, while the Attachments Tab in a Container will only have the files relating to that Contract.*
Escalate Email	Part of *Workflow*. Can assign a *User* to receive Escalation Email reminders if a task is not performed within a set number of days.
Field	Custom data points to track and report from within the system. Can select from seven (7) types, *Single-Line, Multi-Line, Drop Down, Multi-Select, Checkbox, Numeric,* & *Date*. Details for each type are on the last page.

Field Category	A classification you can give any of your custom *Fields* to make sorting them and organizing them from an Admin perspective easier. NOT used for standard reporting purposes.
Field Group	A collection of *Fields*, set in the order you want them to appear. *Field Groups* are usually the main component of a *Contract Container*, and are assigned to different *Contract Types* so they appear automatically when a new *Container* is created.
Folders	The security model inside UCM. Each *Contract Container* must be placed in a *Folder* when it is created. *Users* are granted different levels of permissions to the custom folders you create depending on how you wish to control user visibility. NOT to be used for general reporting purposes. Strictly meant to be Security based. Custom fields and other system attributes will handle any reporting that you may have previously used folders for before you purchased UCM.
Global Search	Located in the top right of the system, can use either *Contract Name, Contract ID, Summary Data,* or *Attachement Text* to search across all contracts in the system.
Grid	The most common display inside UCM. Acts similar to a spreadsheet, with columns, rows, and moveable/sortable header, and when you generate a Report, the information in the Grid is what is exported to the spreadsheet file.
Help Widget	Located in the bottom left corner of your screen. Allows you to quickly search through our *Knowledgebase* or contact *UCM Support* without having to leave the system.
Home	First tab in the *Enterprise* Ribbon, and where your users are taken to when they login. Will have *Direct Entry*, and depending on your system settings, *Template* and *Library* icons, an area for any *Announcement Text* that you want to appear, your favorite *Views*, and your most recently accessed *Containers*.
Knowledgebase	Where all Training and Support Guides, Video, and Articles are stored. The *Help Widget* can search through the Knowledgebase, but there is also a link directly to the separate site itself located in the *Profile/Help* section about the *Global Search*.
Left-Right Screen	A basic "select to display" screen that appears for most of the *Grids* in the system when adding/removing/rearranging and columns, when using a *Multi-Select Field,* and other areas where multiple selections and organizing may need to be done.

Library	A place to store *Documents* such as boilerplate documents, for easy document creation. Does NOT have to be configured for any *Library Templates*, can simply be a small repository for most commonly used documents. Template Features are available, see *Library Templates* below.
Library Template	Different from normal *Templates*, Library Templates can have formatting persist from a Word document. Can also pull data from your *Fields* into the document itself to quickly help fill out your most commonly used documents. Needs to be a Word file. Not PDF compatible.
Milestones (*AMR*)	Global *Notifications* that are set up once by an Administrator, to be based off a specific *Date Field*, and then Milestones are automatically created whenever there is a value placed in the specific *Date Field*.
Named User	Used to define the difference between a *User* who is receiving notifications sent specifically to them and a *User* who receives notifications from being under a *Title*.
Notes	Can be used to leave shot notes in a *Container* instead of having to upload an entire document, but Notes also will store any note left as a part of *Workflow*, *Collaboration, Activities, etc.*
Notifications	There is no UCM attribute named *Notifications*. They are handled by *Activities, Milestones, Alerts,* and *Reviews.*
Object (*UAP*)	UCM has the option to have multiple versions of different systems within the same one. This allows two or more different systems to operate independently of each other in their basic set-up, but still communicate with the other when needed. *Ex: An Object for Managing Contracts and an Object for Managing all Vendors*. ** All Subscriptions come with one (1) object, any additional incur an additional cost.*
Object Administration	Accessed only by a *Primary Admin*. Contains certain global settings for that particular *Object*.
Owner	See *Titles*
Primary Admin	Each system can multiple *Primary Admins*. Being a *Primary Admin* grants you access to the object settings only available in *Object Administration*.
Primary/Secondary/Tertiary	See *Titles*
Profile/Help	Located in the top right of the screen, above *Global Search*. Allows your users to set some information about themselves. Has links to the *Knowledgebase* and *Admin Directory*.

Reminders	Continuous notifications that are sent out when a *Stage* has not been moved after a set number of days. *Escalate Emails* are sent usually after Reminders have already been sent multiple times.
Reports	See *Views*
Required – Mandatory	Will NOT allow a *User* to leave the *Field* blank. Appears in **BOLDED** Red Text to you *Users*.
Required – Warning	Will alert your *User* that the *Field* is empty, but WILL allow them the ability to acknowledge that it is being left blank, and still save. Appears in Non-Bold Red Text to you *Users*.
Responsible Party	See *Titles*
Review	An ad-hoc feature similar to *Workflow Approvals*. Can only be sent out once and has no Reoccurrence option.
Reviewer	A *User* who is assigned to review a *Contract Container*. As opposed to an *Approver*, who is a part of a previously set-up *Workflow*, a Reviewer can be added quickly, ad-hoc, to a *Container*. However, unlike and *Approver*, once they approve or reject their review, they would have to be manually sent another *Review*, as opposed to an *Approver*, who would automatically receive any *notification* if their assigned *Stage* was reached again.
Role Models	A way to create a *Security Permissions* group. Then, when creating a new *User*, you can simply apply the Role Model, and any changes made to the Role Model in future will get automatically pushed out to all the *Users* under that Role Model.
Security Permissions	The configuration of Folder Access and System Functions that you grant or deny to a specific *User* or *Role Model*.
Settings	One of the options in *Company Admin*. Has less to do with *Configuration* and more with general settings like Password Length, and Sessions Time-Out parameters.
Stage	An individual piece of a *Workflow*. Each Stage can be custom named, and they all have the optional features of individually assigning *Users* to be notified/approve, enabling *Field Groups* to appear in the *Summary Data* when a Stage is reached, have custom reminder and escalation emails sent out to the *Assignees*, and many other options.
Summary Data	All of the data and values that are in your *Fields* and *Field Groups* inside of a *Contract Container*. Able to be searched by using *Global Search*, and also used a criteria to filter any *Views* with.

System	A broader term for *UCM* as a whole. For most clients, this does not apply, but if you have multiple *Objects*, know that when talking about the System, that means that those features and settings affect ALL the different *Objects* inside your System.
System Admin	Any Administrator *User Type* in your system.
System Attributes	Trackable and reportable *Fields* that are NOT customizable, and are present in ALL versions of UCM. *Ex: Contract Name, Owner, Workflow, StageName, etc.*
Tabs	The different areas of your *System* or *Contract Container*. The biggest difference is between the Tabs in the *Enterprise Ribbon* and in a *Contract Container*. These sets of Tabs mirror each other almost perfectly, but the *Enterprise Ribbon* Tabs show you everything on a *SYSTEM* wide level, and inside a *Container*, it is only those items that pertain to that contract.
Task	There is no UCM attribute named *Task*. When we mention "completing a task" in any training or support material, we are talking in general terms. For us, a *Task* could be anything from manually approving a *Workflow Stage* to just viewing some data in a *Container* for a *Review*.
Templates	Creates a basic document with values being filled in on the document alongside fields that are a part of the Container. An HTML editor is used for formatting. Can pull pre-existing information from your *Summary Data* into the document. Can be a Word Doc or a PDF.
Titles	Can refer to anyone of the following: *Owner*, *Primary, Secondary, Tertiary Responsible Parties*. A Title can be assigned to receive *Notifications*, *Reports*, *Views*, etc. and then each individual *Contract Container* can have *Named Users* assigned to those Titles for more flexibility.
UAP	Universal Application Platform. See *Object*
UCM	Universal Contract Manager. The *system* you are using, where all of your *Contracts* are being held.
UCM Support	Your resource for any assistance that the Knowledgebase cannot solve. You can contact us through the *Help Widget*, the *Knowledgebase* itself, or email us at ucmsupport@icontracts.com
User Types	Administrator, Full-Access, Read-Only, No-Login, and Template-Only. For details on each, see table on last page.

Users	Anyone who is set up by an Administrator and appears in the Manage User's section of *Company Admin*. Even when referring to *No-Login* users types, they are still considered a *User* of the *System*.
Views	Our way of filtering down content to create *Reports* using both *System Attributes* and custom *Fields*. Any View can be exported to a spreadsheet for further manipulations. Views are also able to be shared with other *Users*, and even be set on a specific schedule to have the spreadsheet report emailed to *Named Users*.
Workflow	The feature of UCM that helps get your contracts to an active state. Workflows are made up of *Stages*, that can each have individual settings. Workflows can also be applied to a *Contract Type*, so the correct *Users* and departments are always getting notified along the Contracts life-cycle.
Workflow Approvals	Additional accountability in your *Workflow* that forces any *Users* who are an *Assignee* on a *Stage* to select either Approve or Reject before allowing the *Workflow* to move forward or back.

FIELD TYPES	DESCRIPTION
Single-Line	Character limit of 80. No line breaks. Can have any type of special characters, and even have hyperlinks to other websites if needed.
Multi-Line	No Character Limit. Can have line breaks. Can have any type of special characters, and even have hyperlinks to other websites if needed.
Drop Down	A drop down menu with your own custom list of values to select from. Can only select one (1) value from a Drop Down. Virtually no limit on the amount of values you can add to be selected from.
Multi-Select	A small box, or optionally larger *Left-Right Screen*, where you can select one (1) OR more of your own custom values. Virtually no limit on the amount of values you can add to be selected from.
Checkbox	A basic checkbox button. *We recommend that for any field you may consider using a Checkbox for, that you consider, for reporting purposes, a Checkbox is either Yes or No. If you need to be able to identify if a "no" really means "no", or if it means "not applicable" we suggest using a Drop Down with the values "YES|NO|N/A"*
Numeric	Abled to be calculated with other *Numeric* and *Date* fields. To be used when a "true" numeric value will be used to calculate or track/report based on its value. Not for "informational" numbers like phone numbers or ID Codes. They would go in *Single Line* fields.
Date	A specific date that can be tracked, have notifications set off of, reported, and calculated from. *Milestone* notifications are based entirely off Date fields.

USER TYPES	DESCRIPTION
Administrator	Complete system access. Security setting DO NOT apply. **Can have different levels of Admin usage that are detailed in our Manage Users training course.*
Full-Access	Has Read-Write abilities, and access to all features of the system, but can do NO global system configuration. Your most common "power-user" type.
Read-Only	Can see and access the entire system, as well as Create and Edit *Views,* but cannot edit or create any *Contract Containers*.
No-Login	Allows you to create a *Named User* for *Notification* and assigning to *Titles*, but they cannot access the system at all. *Ex: A CFO who needs to know when certain contracts over a particular value are expiring, so they need to be able to have a View scheduled to be sent to them*.
Template-Only	Has no visibility to the Contracts already in the system, and cannot even use *Direct Entry*, but they can use *Templates* to create a new *Contract Container* alongside a document. *Ex: Using an Intake Request form to kick-off a Contract, but that user would no longer be involved with that Contract at all apart from being the one to submit the request.*