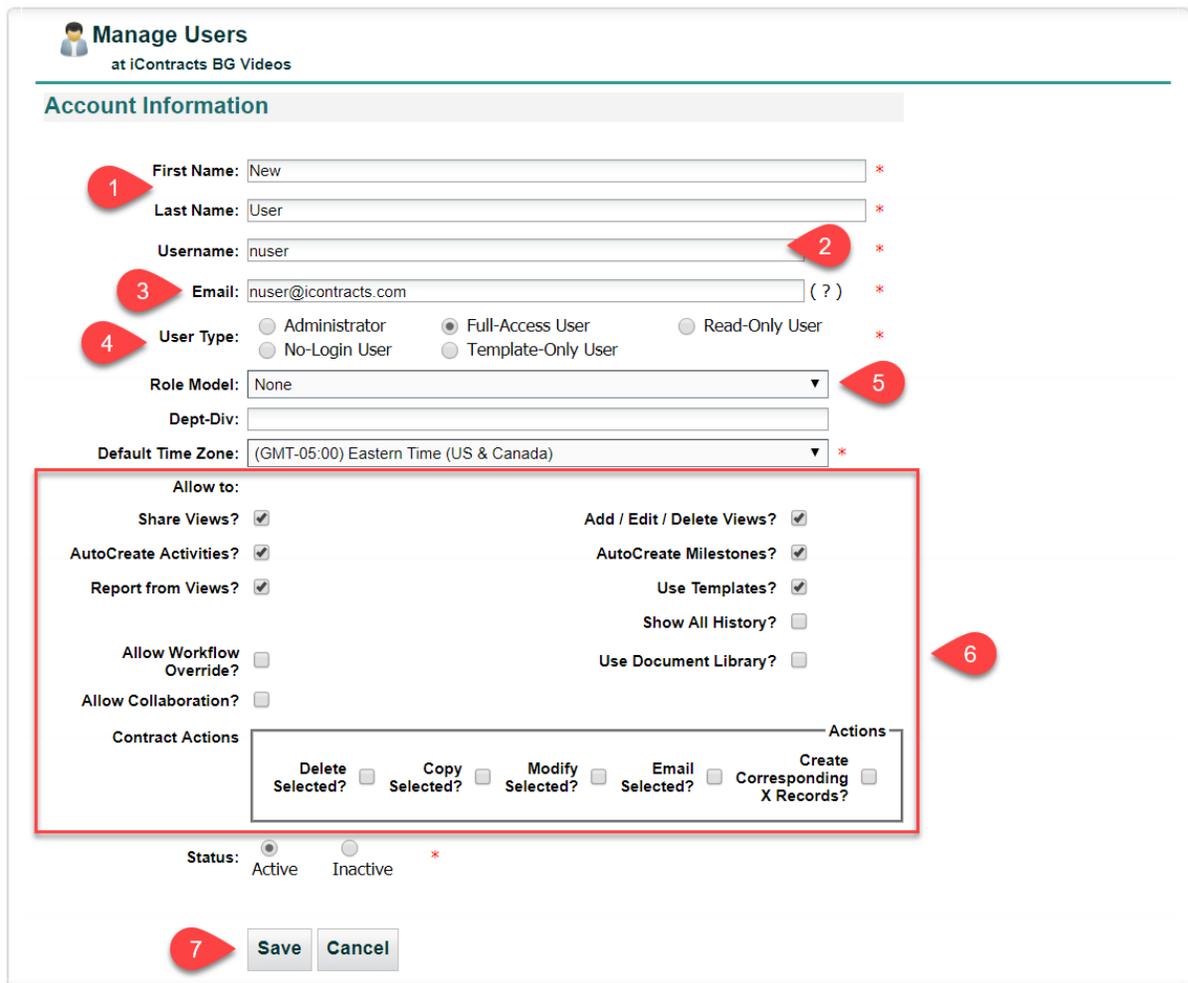


# Users: Reassigning Contracts

Reassigning Contract Owners or Responsible Parties is a task that many could be faced with, whether it be for an old employee leaving the company and hiring a replacement, or even just department shifts and promotions. There are numerous reasons you may need to reassign contracts in bulk from one user to another, and below, we'll walk you through how to quickly and easily do so.

## Creating the New User (*Optional*):

- Navigate to **Company Admin** → **Manage Users**
- Select **New User** from the top right
- Fill out the **Name (1)**, **Username (2)**, and **Email (3)**
- Select the **User Type (4)**
- If the New User will be set under the permissions of a **Role Model (5)**
- If the New User will be set up manually, set the **Allow To** and **Contract Actions** checkboxes appropriately **(6)** (*Folder Permissions will be handled in the next step*)
- **Save (7)**



**Manage Users**  
at iContracts BG Videos

**Account Information**

1 First Name:  \*

Last Name:  \*

Username:  2 \*

3 Email:  ( ? ) \*

4 User Type:  Administrator  Full-Access User  Read-Only User  
 No-Login User  Template-Only User \*

Role Model:  5

Dept-Div:

Default Time Zone:  \*

Allow to:

|  |  |
|--|--|
| Share Views? <input checked="" type="checkbox"/>           | Add / Edit / Delete Views? <input checked="" type="checkbox"/> |
| AutoCreate Activities? <input checked="" type="checkbox"/> | AutoCreate Milestones? <input checked="" type="checkbox"/>     |
| Report from Views? <input checked="" type="checkbox"/>     | Use Templates? <input checked="" type="checkbox"/>             |
| Allow Workflow Override? <input type="checkbox"/>          | Show All History? <input type="checkbox"/>                     |
| Allow Collaboration? <input type="checkbox"/>              | Use Document Library? <input type="checkbox"/>                 |

6

Contract Actions Actions

|   |   |   |  |  |
|---|---|---|--|--|
| Delete Selected? <input type="checkbox"/> | Copy Selected? <input type="checkbox"/> | Modify Selected? <input type="checkbox"/> | Email Selected? <input type="checkbox"/> | Create Corresponding X Records? <input type="checkbox"/> |
|---|---|---|--|--|

Status:  Active  Inactive \*

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## Copying User Folder Permissions:

- Go back to the **Manage User** page
- Select **Copy Permissions** from the top right
- To copy the Permissions of an **Existing User**, select the User you wish to **Duplicate Permissions from**, in the **Drop Down (1)**
- Find the **User** on the right side you wish to Copy Permissions **to**, and select the **Checkbox (2)**
- Select **Copy Permissions** from the left side **(3)**
- The Copy process can take a few seconds, just give the system a moment and wait for the **Green Confirmation Banner** at the top **(4)**

Permissions Copied Successfully

**Copy Permissions**

From:  Users  Role Models  Assign Role Model

Users: Mason Granville (1)

Please choose the user name from above whose permission is to be copied to other users.

Copy permissions  Cancel (3)

| Select All                          |           |                  | Include Inactive |          |
|-------------------------------------|-----------|------------------|------------------|----------|
| <input type="checkbox"/>            | lallen    | Liam Allen       | Full-Access User | Inactive |
| <input type="checkbox"/>            | lgills    | Liz Gills        | Full-Access User | Active   |
| <input type="checkbox"/>            | lwright   | Logan Wright     | Read-Only User   | Inactive |
| <input type="checkbox"/>            | lbaker    | Lucas Baker      | Full-Access User | Inactive |
| <input type="checkbox"/>            | mgarcia   | Madison Garcia   | Read-Only User   | Inactive |
| <input type="checkbox"/>            | mhill     | Mason Hill       | Read-Only User   | Inactive |
| <input type="checkbox"/>            | mroberts  | Matthew Roberts  | Read-Only User   | Inactive |
| <input type="checkbox"/>            | mmiller   | Mia Miller       | Full-Access User | Active   |
| <input type="checkbox"/>            | mgonzalez | Michael Gonzalez | Full-Access User | Active   |
| <input checked="" type="checkbox"/> | nuser     | New User         | Full-Access User | Active   |
| <input type="checkbox"/>            | nyoung    | Noah Young       | Full-Access User | Inactive |
| <input type="checkbox"/>            | ogreen    | Oliver Green     | Read-Only User   | Inactive |
| <input type="checkbox"/>            | orogers   | Olivia Rogers    | Full-Access User | Inactive |
| <input type="checkbox"/>            | pwalker   | Penelope Walker  | Read-Only User   | Inactive |
| <input type="checkbox"/>            | psmith    | Phil Smith       | Full-Access User | Active   |

- You can **verify** that the Folder Permissions have been set correctly by going into your **New User's** profile and checking the **Folder Permissions** tab

## Confirm that the Administrator has the ability to Reassign Contracts:

- Head back to the **Manage User** page
- Select your **Administrator Account** (or the *Full-Access User* you are trusting to perform this task)
- Make sure that under **Contract Actions**, the **Modify Selected** is checked, as this is the action that will allow us to transfer between Users.

Contract Actions

Actions

Delete Selected?  Copy Selected?  **Modify Selected?**  Email Selected?  Create Corresponding X Records?

## Reassigning Contracts from Existing User to New User:

- Go to the **Contracts Tab** in the Enterprise Ribbon
- Select **Add New View** from the Contract View panel to the left
- Create a **View** to bring up **ALL** the contracts your existing User is attached to as the **Owner** or **Responsible Party**
- Under *Criteria*:
  - o Select **Owner** from the first dropdown (1)
  - o Select “=” in the second dropdown (2)
  - o Type the existing Users **FULL name** into the third box (3)
    - *Spelling is key, so a Copy/Paste of the users name may be helpful*
  - o To ensure that ALL contracts are changed over, check **Include Archive** (4) (optional)
- Under *Default Fields and Sequence*
  - o Using the blue down arrow (5) set your fields to give you the data you need
    - *We suggest keeping the number data fields small, since normally, we just want to get a snapshot of the contracts we are reassigning*
- In the bottom right, select the **Save this View** (6) checkbox, and give it a **View Name** (7)
  - *This is to make it quick and easy to come back in and edit the view for Responsible Parties*
- Select **Save and Run** (8)

**Create/Modify Contracts View**

Get Contracts that match the following criteria: [Advanced Search](#)

1 Owner = 2 = Mason Granville 3

4  Include Archived

**Default Fields And Sequence**

| Contract ID | ContractName | ContractTypeName | Owner |
|-------------|--------------|------------------|-------|
|             |              |                  | ▼ 5   |

**Default Sort Order**

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

| Fields | Sort Order | Delete |
|--------|------------|--------|
|        |            |        |

**Additional Statistics**

--Select--    Display Count

Note: 18 characters of your View Name will show in BG Contracts Views, but the whole View Name will show on hover-over

6  Save this View  Default View  
\*View Name: Mason's Contracts 7

Share With Other Users

Schedule This View

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## Reassigning Contracts from Existing User to New User (cont.):

- The system will automatically default to your **New View** after you **Save and Run**
- We recommend that before you begin Reassigning, run a **Report (1)** so you have a backup CSV file that you can use to verify all the contracts have been Reassigned properly.
- Check the **Select All (2)**
  - o *If you only wanted to Reassign certain contracts, you could use the **Records Per Page** drop down option to show up to 100 of the users Owned contracts, and individually select the check boxes*
- Select **Modify Contract (3)** from the dropdown
- Click **Execute (4)**
  - o *To Edit the View to show only Contracts where the User is a **Responsible Party**, simply select **Edit View (5)**, and change the View Criteria to **Primary, Secondary, or Tertiary Party** respectively.*

The screenshot shows the 'Mason's Contracts' interface. At the top right, there are buttons for 'Edit View' (5) and 'Report' (1). Below these, there is a 'Select All' checkbox (2) and a 'Records Per Page' dropdown set to '10 records'. The 'Action:' dropdown (3) is set to 'Modify Contract', and there is an 'Execute' button (4) with a green checkmark. The main table lists contracts with columns for Contract ID, ContractName, ContractTypeName, and Owner. All contracts are selected with checkmarks. The table data is as follows:

| Contract ID | ContractName            | ContractTypeName     | Owner           |
|-------------|-------------------------|----------------------|-----------------|
| 610761      | Aramark - Food Supplies | Purchasing Agreement | Mason Granville |
| 610766      | Aramark - Facilities    | BAA                  | Mason Granville |
| 610769      | Shredorator, LLC        | Purchasing Agreement | Mason Granville |
| 610772      | Foreman, Eric MD        | Purchasing Agreement | Mason Granville |
| 610777      | BCWF-905                | Purchasing Agreement | Mason Granville |
| 610780      | Sunshine Healthcare Inc | BAA                  | Mason Granville |
| 610783      | Sunshine Healthcare Inc | Purchasing Agreement | Mason Granville |
| 610788      | Eggo Inc                | Facility Lease       | Mason Granville |
| 610790      | Kellogs                 | Purchasing Agreement | Mason Granville |
| 610792      | General Electrics       | Purchasing Agreement | Mason Granville |

At the bottom, there is a pagination bar showing 'Page 1 of 4' and a status bar indicating 'Displaying records 1 - 10 of 37'.

## Reassigning Contracts from Existing User to New User (cont.):

- From the pop-up menu, select **Owner (1)**
- Select your **New User** from the drop down **(2)**
  - o Check **Notify on Stage Update** if you want your new user to be **(3)**
- Click **Save** in the **Owner** row **(4)**
  - o *You may receive a pop-up telling you it may take the system a minute to complete the action. It is all dependent on the number of contracts being Modified. Just wait for the **Green Confirmation Banner**.*
- The same steps apply to the changing of **Responsible Parties (5)** with your **Edited Views**
- **Close Window (6)**

The screenshot shows a web form for reassigning contracts. The form includes the following fields and controls:

- Contract Name:** (text input)
- Related Contract:** (text input)
- Description:** (text input)
- Owner:** A dropdown menu currently showing "New User", with "Save" and "Cancel" buttons next to it. A red callout '1' points to the dropdown, and a red callout '3' points to the "Notify on Stage Update" checkbox.
- Notify on Stage Update:** A checkbox.
- Review Status:** A dropdown menu with a red callout '2' pointing to it.
- Contract Type:** A dropdown menu with a red callout '4' pointing to it.
- Responsible Parties:** A row of three dropdown menus labeled "Select Primary", "Select Secondary", and "Select Tertiary", with "Save" and "Cancel" buttons to the right. A red box highlights this entire row, and a red callout '5' points to the "Cancel" button.
- Folder Name:** (text input)
- Workflow/Stage:** (text input)
- Lock/Unlock:** (text input)
- Select Field:** A dropdown menu with "----Select----" as the current selection.
- Close Window:** A button at the bottom of the form with a red callout '6' pointing to it.

## Verify the Reassign (Optional):

- To verify the reassign, simply edit the view you created earlier to show **ONLY** your **New User's** contracts
- You can always sort and filter by **UpdatedOn** to see only the contracts they own AND were updated in the last few hours (*the time in which you just went through the reassign*)
- Using the **Report** button, you can also run a second report on the **New User's** assigned contracts and compare it to your **Original User's** Report within Excel

## Deactivate/Change Permissions the Old User (Optional):

If the Reassigning of Owners to a Contract were because someone is leaving the company, or they are switching departments, you can now go into their **User Setting** through **Manage Users** and either make them **Inactive (1)**, if they are no longer a part of your company, or change their **Folder Permissions (2)** to reflect their new position.

- Any changes you make to the **Original User** will **NOT** affect the **New User**.

**Mason Granville**  
at iContracts BG Videos New User

**User Account** | **Contact Information** | **UAP** | **2** | **Folder Permissions** | **Contract Permissions**

### Account Information

First Name: Mason \*  
Last Name: Granville \*  
Username: mgranville (?) \*

**Security/Visibility**  
[Contract Types](#)  
[Templates](#)  
[Library Items](#)

**New Contract Entry**  
[Contract Type](#) | [All](#) | [Add](#)

Allow Collaboration?

**Contract Actions** **Actions**

|   |   |   |  |  |
|---|---|---|--|--|
| Delete Selected? <input type="checkbox"/> | Copy Selected? <input type="checkbox"/> | Modify Selected? <input type="checkbox"/> | Email Selected? <input type="checkbox"/> | Create Corresponding X Records? <input type="checkbox"/> |
|---|---|---|--|--|

Status:  Active  Inactive \* **1** Confirmation Status : Confirmed

Last Login: 11/29/2018 8:08:15 AM Credentials Last Sent By: iContracts Administrator - 10/15/2018 01:31 PM