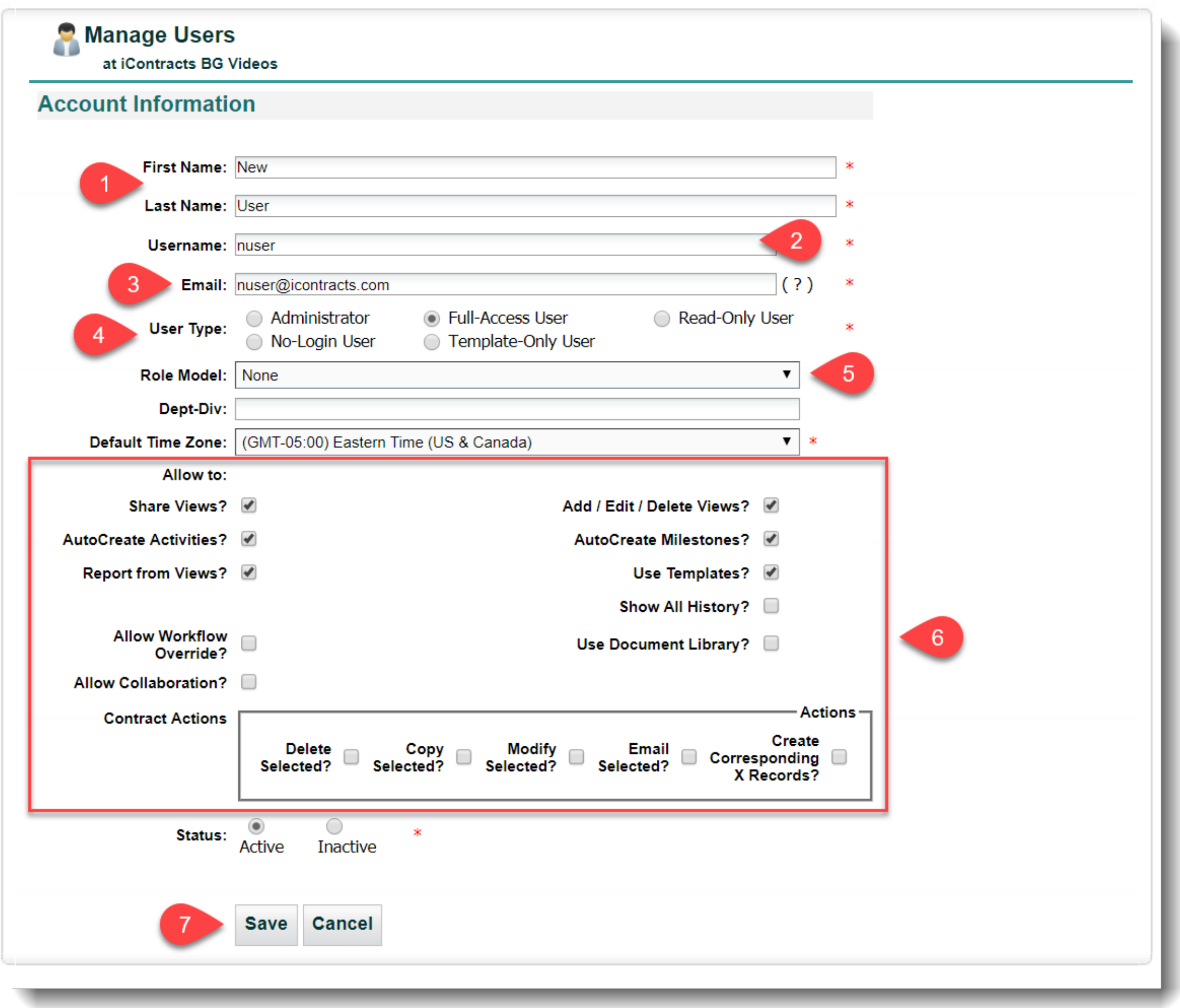
Users: Reassigning Contracts

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.

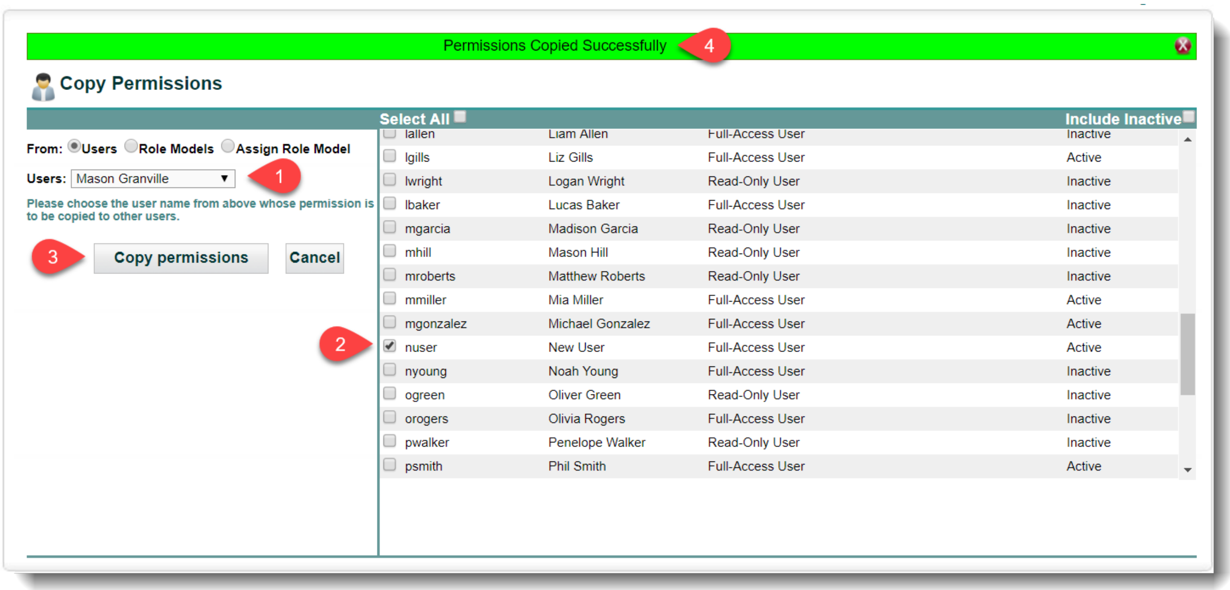
Creating the New User *(Optional)*:

- 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)**



Copying User Folder Permissions:

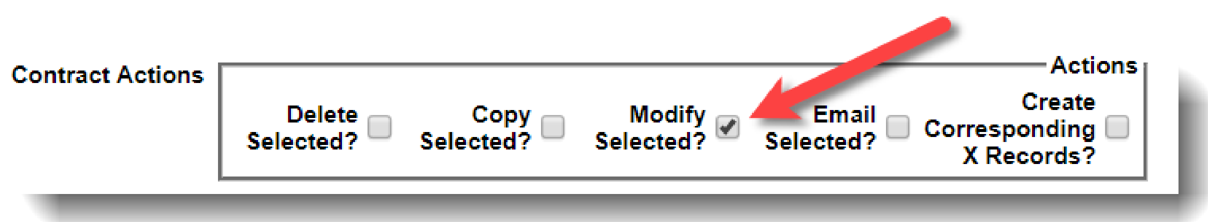
- Go back to the **Manage User** page
- Select **Copy Permissions** from the top right
- To copy the Permissions of an **Existing User**, select the User you wish to **Duplicate Permissions *from***, in the **Drop Down (1)**
- Find the **User** on the right side you wish to Copy Permissions ***to***, 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)**



- 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

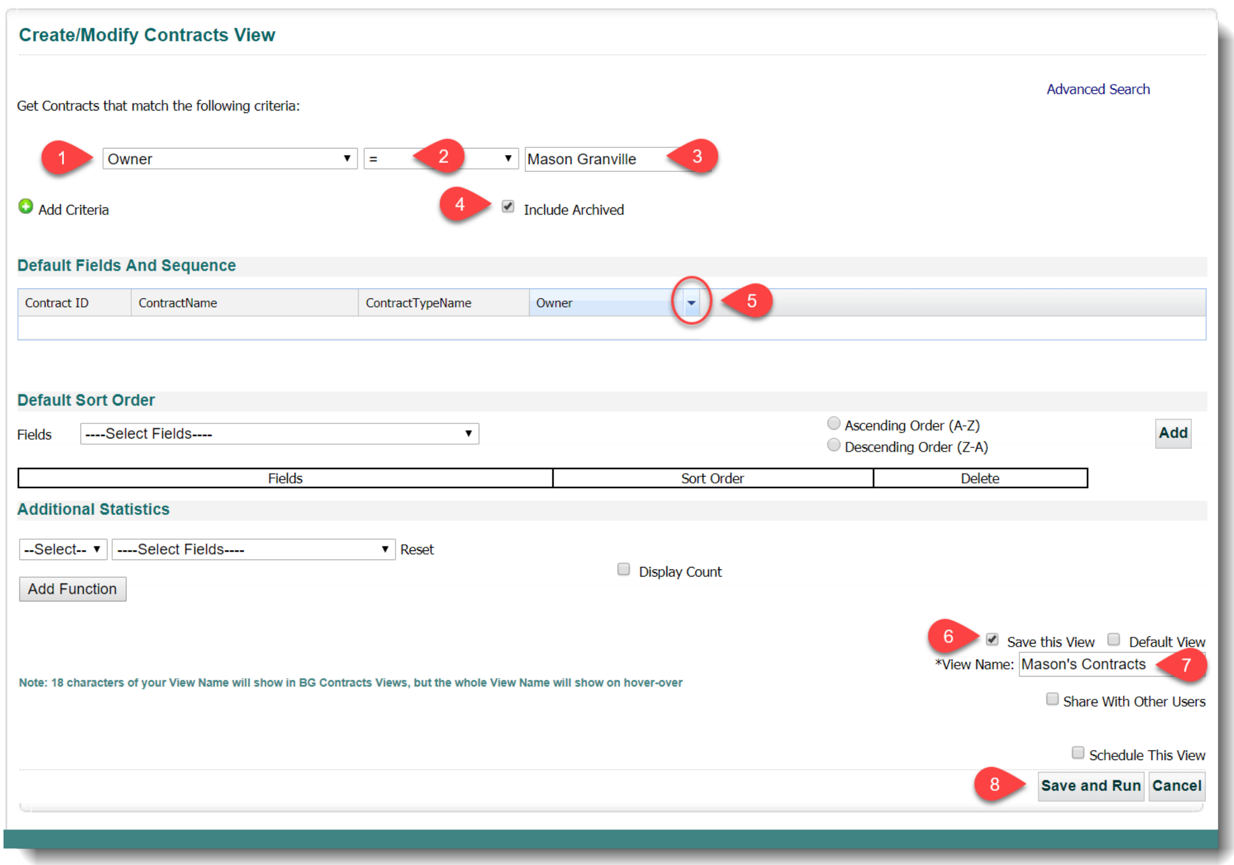
Confirm that the Administrator has the ability to Reassign Contracts:

- 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.



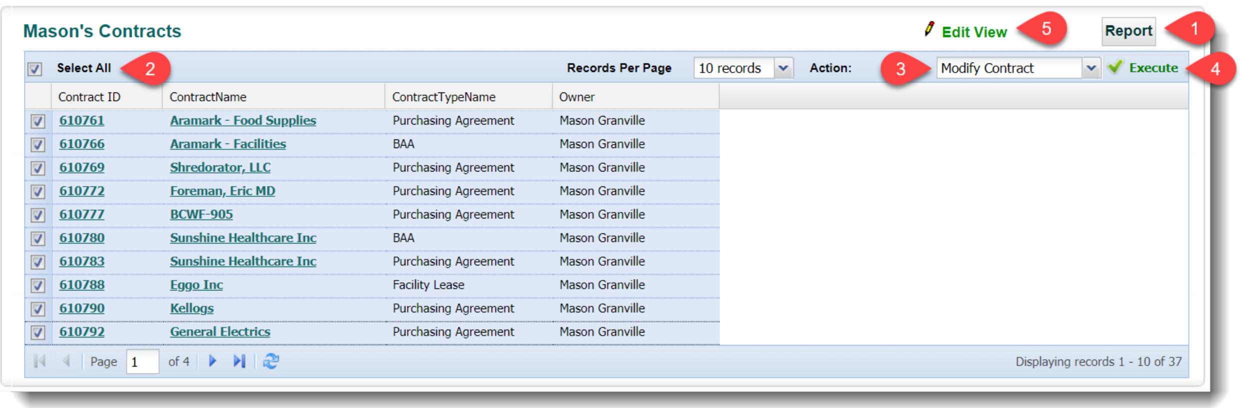
Reassigning Contracts from Existing User to New User:

- 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*:
    - Select **Owner** from the first dropdown **(1)**
    - Select **" = "** in the second dropdown **(2)**
    - 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*
    - To ensure that ALL contracts are changed over, check **Include Archive** **(4)** (*optional*)
- Under *Default Fields and Sequence*
    - 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)**



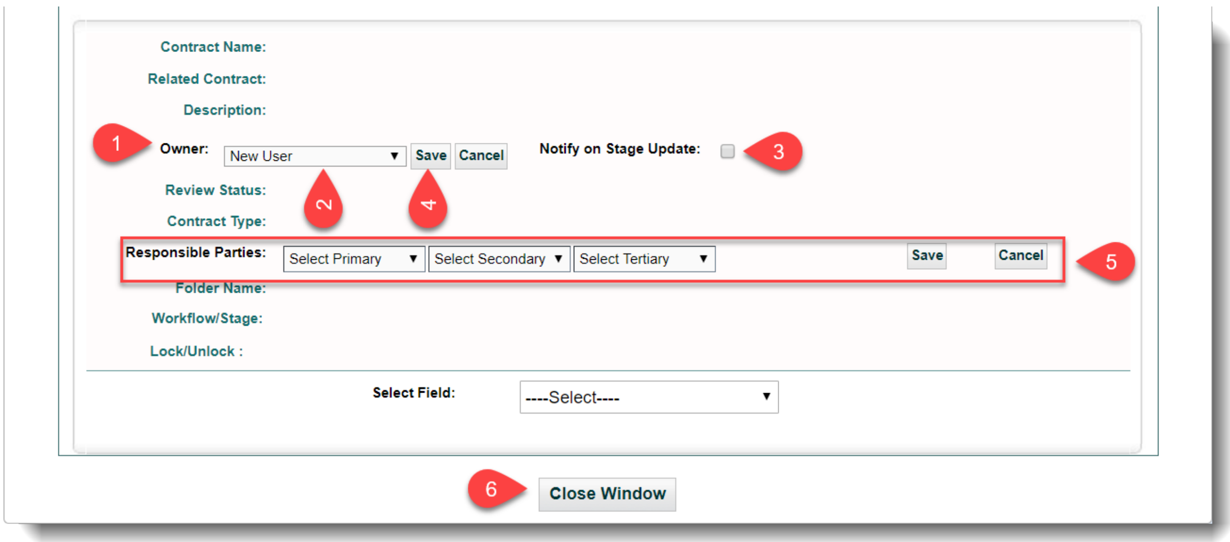
Reassigning Contracts from Existing User to New User *(cont.)*:

- 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** option **(2)**
  - *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)**
  - *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.*



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)**
    - Check **Notify on Stage Update** if you want your new user to be **(3)**
- Click **Save** in the **Owner** row **(4)**
    - *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)**



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**.