

## Profile/Help Support Center – System Admin Directory

You can reach out to UCM Administrators directly by clicking on this hyperlink (IF your Admins turned this function on for your company). Each User Type has a different Support Center area but the link is the same for all users.

Administrator Users will see:

**Support Center**

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Template-Only Users will see:

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## Limiting Fields in a Field Group

Field Groups are now limited to a maximum of 50 fields per group. Once the limit is reached, the system displays a red warning at the top of the Field Names column. In addition, the “Add to Group” button is disabled, and you will not be able to add any more fields until you delete fields and again have fewer than fifty fields in the Field Group. You can still drag fields up and down to rearrange the order, you just cannot add additional fields.

**Contract Field Group : Litigation Defense Contracts**

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Field Group Name:

Description:

Field Category:

Field Name:

Field Type:

Maximum Fields per Field Group reached!

#	FieldName	Field Type	
1.	Vendor Link ID	SingleLine	✖
2.	Vendor Name	SingleLine	✖
3.	Vendor Address Link	MultiLine	✖
4.	Vendor Phone Number	SingleLine	✖
5.	Vendor Contact Person	SingleLine	✖
6.	Test_2871_Date10	Date	✖
7.	Test_2871_Date12	Date	✖
8.	Test_2871_Date8	Date	✖
9.	Test_2871_Date9	Date	✖
10.	Testing calc date field	Date	✖
11.	Other Info 1	MultiLine	✖
12.	Other Info 2	MultiLine	✖
13.	Other Party	SingleLine	✖
14.	Other Party Name	SingleLine	✖

	38.	BAA Required	DropDown	✖
	39.	BAA Effective Date	Date	✖
	40.	Calc Date Test	Date	✖
	41.	Calc Numeric Test	Numeric_Calculated	✖
	42.	Checkbox Test	CheckBox	✖
	43.	Compensation	MultiLine	✖
	44.	Contract Reference	SingleLine	✖
	45.	Contract Terms	MultiLine	✖
	46.	Contractual duty	SingleLine	✖
	47.	Date Test	Date	✖
	48.	Date of Expiration	Date	✖
	49.	Effective Date	Date	✖
	50.	Historical Notes	MultiLine	✖

Field Groups allow you to create "groupings" of Contract Fields so that they can be put in a specific order, top to bottom, and to make it easy to automatically or manually add sets of up to 50 Fields at a time.

## Skipping Workflow Stages

This is a new enhancement that allows UCM Administrators to setup a Workflow Stage (or several Stages) to be skipped during the lifecycle of a Contract Container. This process can be setup independently of whether the Assignees Locked or if a Stage has specific assignees.

Please refer to your **UCM Login Page** for [Instructions to clear your browser cache](#) before starting with any new Feature.

## Workflow Template Administration

When you view the *Workflow Template Administration* screen, there is now a column to “**Skip?**” a stage. By default, no Stage has this option checked until you select it.

The screenshot shows the 'Workflow template : New Template Name Goes Here' interface. It includes a text input for the template name, two checked checkboxes for 'Assignees Locked' and 'Only Current Assignee(s) Can Update Stage', and a 'Stage Sequence' section with an 'Add new' button. A table lists seven stages: Draft, Pending, IT Review, Internal Signatures, Other Party Signatures Req, Active, and Terminated. Each stage has a 'Skip?' checkbox (unchecked) and a red 'X' icon. A 'Drag Stage Numbers Up/Down to Re-sequence' box is on the left, and 'Save' and 'Cancel' buttons are at the bottom. A 'NOTE' box on the right states: 'NOTE: If you modify a Workflow Stage which is currently in use in one or more Contracts, the Contracts' Workflow will move back 1 Stage in its sequence.' There are also 'Stage Configuration' and 'Workflow Notes' buttons on the right.

#	Stage Name	Skip?
1	Draft	<input type="checkbox"/> X
2	Pending	<input type="checkbox"/> X
3	IT Review	<input type="checkbox"/> X
4	Internal Signatures	<input type="checkbox"/> X
5	Other Party Signatures Req	<input type="checkbox"/> X
6	Active	<input type="checkbox"/> X
7	Terminated	<input type="checkbox"/> X

(Continued)

## Skipping Stages

As a general rule, you can choose any Stage to mark for skipping. You can choose multiple stages or multiple stages in succession. This allows more flexibility within a Workflow. You may even need fewer Workflows as a result of controlling which stages are mandatory and which ones can be skipped.

**Workflow template : New Standard Skipping Stages WF**

Workflow Template Name:

Assignees Locked:

Only Current Assignee(s) Can Update Stage:

Stage Sequence: [+ Add new](#)

Drag Stage Numbers Up/Down to Re-sequence

#	Stage Name	Skip?
1	Draft	<input type="checkbox"/> ✗
2	Budget Review	<input checked="" type="checkbox"/> ✗
3	Department Review	<input type="checkbox"/> ✗
4	Internal Legal Review	<input checked="" type="checkbox"/> ✗
5	Other Party Signatures Req	<input type="checkbox"/> ✗
6	Internal Signatures	<input type="checkbox"/> ✗
7	Executed	<input checked="" type="checkbox"/> ✗
8	Active	<input type="checkbox"/> ✗
9	Terminated	<input type="checkbox"/> ✗

**NOTE:**  
If you modify a Workflow Stage which is currently in use in one or more Contracts, the Contracts' Workflow will move back 1 Stage in its sequence.

Once the Skipped Stages are selected and the Workflow saved, users can skip any stages marked as being able to skip in the Contract Container's *Current Stage/Change Stage*.

In this example, this Contract is in **Department Review** Stage. The user is skipping "Internal Legal Review" and going right to "Other Party Signatures" because the Stage "Internal Legal Review" has been indicated in the above configuration as being able to be Skipped.

**Current Stage/Change Stage**

Department Review

- Draft
- Budget Review
- Department Review
- Internal Legal Review
- Other Party Signatures**
- Internal Signatures
- Executed
- Active
- Terminated

# Results of Skipping Stages

The **History Tab** shows in the *Field Comment* column whenever a Stage is skipped.

History				Timeline View	Report
Records Per Page				20 records	
Comments	Field	FieldComment	HistoryDate		
Stage updated to Other Party Signatures	Stage	Stage changed from Pending to Other Party Signatures after 0 days while skipping one or more stages as allowed	09/18/2017 9:17:33 AM		

## Workflow Stage Enhancement – Include in Enterprise Ribbon

In addition to individual Stages being Included in the Enterprise Ribbon's *Assigned Contracts Count* button, you can now set ALL stages to either Yes or No. This saves you time when there are numerous stages in your Workflow.

Please refer to your **UCM Login Page** for [Instructions to clear your browser cache](#) before starting with any new Feature.

### Editing Stage Configuration

Select your Workflow Template from **Contract Administration: Workflow Template Administration**. Click on the **Assignees** icon to display the *Stage Assignees* screen.

Workflow Template Name: Standard WF

Stage: --Select Stage--

Include in Enterprise Ribbon:

Individual User(s): *Hold Ctrl Key To Select Multiple Items*

- Owner
- Primary
- Secondary
- Tertiary
- Alison dolomanuk
- Anthony Schwartz

Role Model(s): *Hold Ctrl Key To Select Multiple Items*

- Accounting
- Education
- Executive
- Human Resources
- IT
- Legal

Field Group(s): *Hold Ctrl Key To Select Multiple Items*

- Contractors
- Employee Contract Fields
- EXECUTIVE REVIEW
- General Contract Fields
- Insurance
- LEGAL REVIEW

Stage	Individual Users	Role Models	Field Groups	Notes?	Include in Enterprise Ribbon
Draft	Owner, Primary, Secondary, Tertiary			Yes	Yes
Budget Review	Joy Danielson, Pat Myers, Steven Snyder			No	Yes
Department Review	Jason Bourne, Mary Roberts, Peter Jones			No	Yes
Internal Legal Review	Mary Roberts			No	Yes
Other Party Signatures	Tertiary	Legal		No	Yes
Internal Signatures	Owner, Primary, Secondary	Executive		No	Yes
Executed	Primary	Executive		No	No
Active	Owner, Primary, Secondary, Tertiary			Yes	Yes
Terminated				No	No

For Include in Enterprise Ribbon setting, change ALL Stages to:

Click **NO** or **YES** to set all Stages to exclude or include from the *Assigned Contract Count* on the Enterprise Ribbon.

Do you want to toggle Include In Enterprise Ribbon for all Stages? Changes will be Auto-Saved.

Click **OK** to confirm. Your selection is **color coded** for easier identification.

For Include in Enterprise Ribbon setting,change ALL Stages to:  NO  YES

For Include in Enterprise Ribbon setting,change ALL Stages to:  NO  YES

