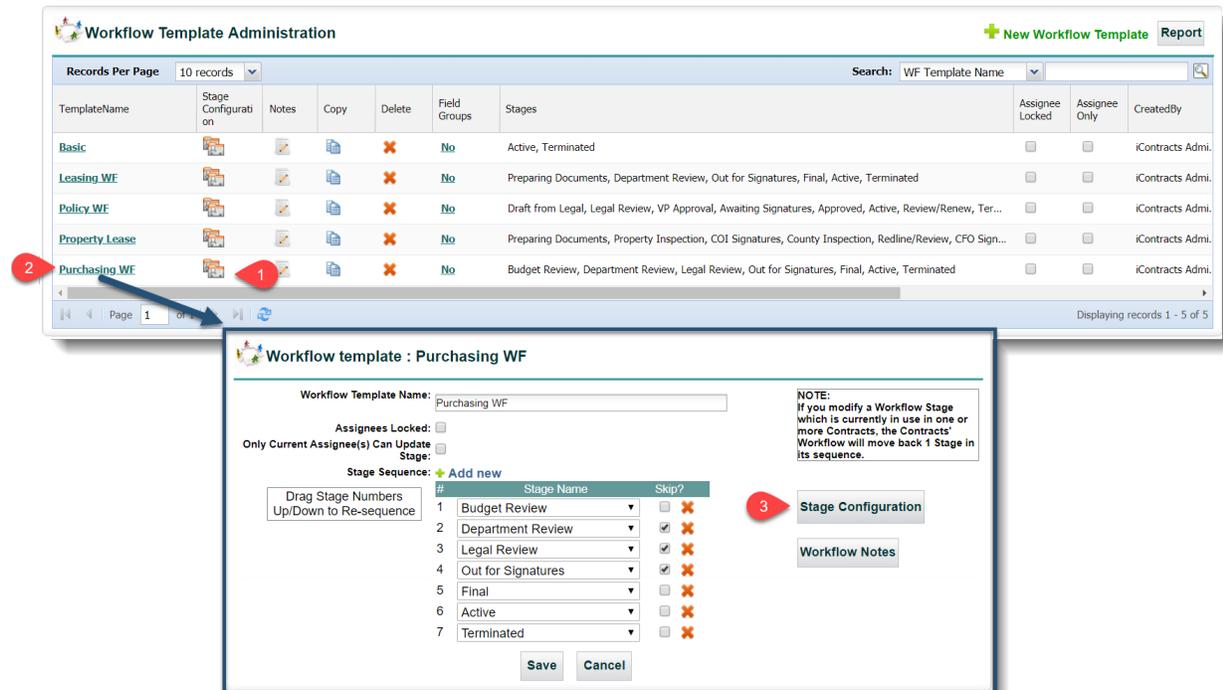# Tips & Tricks:
Workflow Reminders/Escelations

You may be using Workflows already within Universal Contract Manager (UCM), but not every user is using the Reminders and Escalations features, which can be very helpful for preventing contracts from sitting in one stage for longer than it needs to.

* The following instructions assume that Workflows have already been created and are in use

Access Stage Configuration Table

- Navigate to **Company Admin → Contract Administration**
- Select **Workflow Template Administration**
- To access the Stage Configuration Panel either click the **icon (1)** for Stage Configuration, or click the **Workflow Template Name (2)** and then select **Stage Configuration (3)** from the following screen

Reading and Navigating the Stage Configuration Table

- When you open **Stage Configuration**, you're met with a table of your currently selected workflow
- Each column contains specific details relating to the workflow stages:
  - **(A)** *Stage*: The name of each Stage of the Workflow. Acts as a clickable link to enter the **Stage Assignee Configuration** pop-out.
  - **(B)** *Individual User*: The Individual Users assigned to that Stage
  - **(C)** *Role Models*: Same as *Individual Users*, but with the particular Role Model assigned
  - **(D)** *Field Group*: Each Stage can have a new Field Group appear when a contract reaches a certain Stage. Those particular Field Groups are listed here.
  - **(E)** *Notes*: Both informative and interactive. Lets you know at a glance if there is a Note left for the assigned users to receive on that particular Stage, and the **Yes/No** button is also the link to Add/Edit the Note
  - **(F)** *Reminder Days*: The number of days after the Stage has *initially* been moved that the Assigned Users or Role Models will begin receiving **Reminder Notifications**
  - **(G)** *Escalation Days*: The number of days after the Stage has *initially* been moved that the Assigned Escalated User will begin receiving **Escalation Notifications**
  - **(H)** *In Enterprise Ribbon*: Whether any contract that is in an assigned Stage will show up in the **Assigned Contract** tab in the Enterprise Ribbon   *Ex:* `4 Assigned Contract(s)`
    - **(HH)** *No/Yes Button*: Turn ALL Stages of the workflow either On or Off in the Enterprise Ribbon
  - **(I)** *Set Approvals*: Whether this Stage requires the assigned users to select either Approved or Rejected before the Stage moves forward
  - **(J)** *Skip Stage*: Whether the Stage is one that can be skipped in the normal workflow

Individual Stage Assignee Configuration Pop-Out

- Click on the **Stage Name** of the stage you wish to edit
- You'll have the **Stage Assignee Configuration** pop-out window appear
- Here you can add and edit the different columns from the previous step
    - *The exception being **Notes** which have their own menu from which to add/edit*
- You are given the **Workflow** and **Stage** as a reference up top so you can be sure you're working in the correct area **(1)**
- The **Individual Users (2)**, **Role Models (3)**, **Field Groups (4)**, and **Escalate to User (8)** menus all work the same. Simply click on the *single* User or Field Group for an individual assignee, or hold down **CTRL** (*Control*) and select multiple if needed
- The **Remind after days (5)** will send out a **reminder email** to the assigned **User(s)** or **Role Models** that many days after the Workflow was initially moved to the Stage.
    - *If any number is set to **0**, then no reminders will go out*
    - An example would be:
        - Stage gets moved from *Stage1* to *Stage2* on a **Monday** and the assigned User receives an email letting them know the contract is in a stage that they are assigned to
        - *IF* the user does not do what is needed to move the workflow to the next stage, and the **Remind after** days is set to **3**, the first **Reminder** email will be sent on **Thursday** to the assigned user, and repeated every day after until the stage is moved.
        - *IF* the assigned user still does not move the stage, *AND* you have **Escalate after days (6)** set, say to **7**, then the assigned **Escalate User** will receive an email letting them know that the **Assigned User** hasn't moved the stage yet on the following **Monday**.
        - The Escalated User won't receive daily reminders, but rather what ever number is set in **Repeat escalation in days (7)**, so in our example, that would be **Wednesday**, then **Friday**, and so on until the stage is moved.
- **Include in Enterprise Ribbon (9)** and **Skip Stage (11)** are simple checkboxes that toggle the Contract from appearing in the Assigned Users enterprise ribbon, and allowing the Stage to be skipped over.
- **Set Approvals (10)** adds an extra level of accountability to your stages. With this set, before a Stage can be moved, the Assigned User(s) must first manually press an Accept button, and leave a brief comment.
    - *Once all the users have Accepted the Approval, the stage automatically moves to the next Stage. If you have multiple users assigned to a Stage, once the final user Accepts, the Stage will still automatically move to the next, so no more worrying about who needs to do so!!*
- **Save (12)**

Individual Stage Assignee Configuration Pop-Out (*cont.*)

All of these options can be set for each individual Stage, but **ARE system wide**. Most of these options are also available on a *per contract basis*, when you click the **Manage Assignees** icon in the Contract Container Workflow area.

Email Notifications

Initial Stage Notification:

Reminder:

Email Notifications (cont.)

Escalation:

Reply Reply All Forward
Thu 12/6/2018 5:31 AM

IA **iContracts Admin <donotreply@icontracts.com>**

[UCM] Escalation Notification For Contract: Escalation Test Contract (Workflow: Escalation Test, Stage: Department Review)

To   Bryan Gilliss

ⓘ Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Workflow Escalation: This is a notification that a Contract has been in a Stage that is assigned to its current Assignees since 12/05/2018 (1 Days) and requires your attention as an Escalation Contact. Here are the details:

Contract Name:	**Escalation Test Contract (615516)**
Contract Type:	**Adjunct Professor**
Current Stage:	**Department Review**
Description/Instructions:	
Assignee(s):	MasonGranville
Contract Owner:	iContracts Administrator (bgilliss@icontracts.com)
Updated On:	12/05/2018 15:09:10
Updated By:	iContracts Administrator

This Contract requires follow-up/attention. To access the contract container, please Click Here