

# Tips & Tricks:

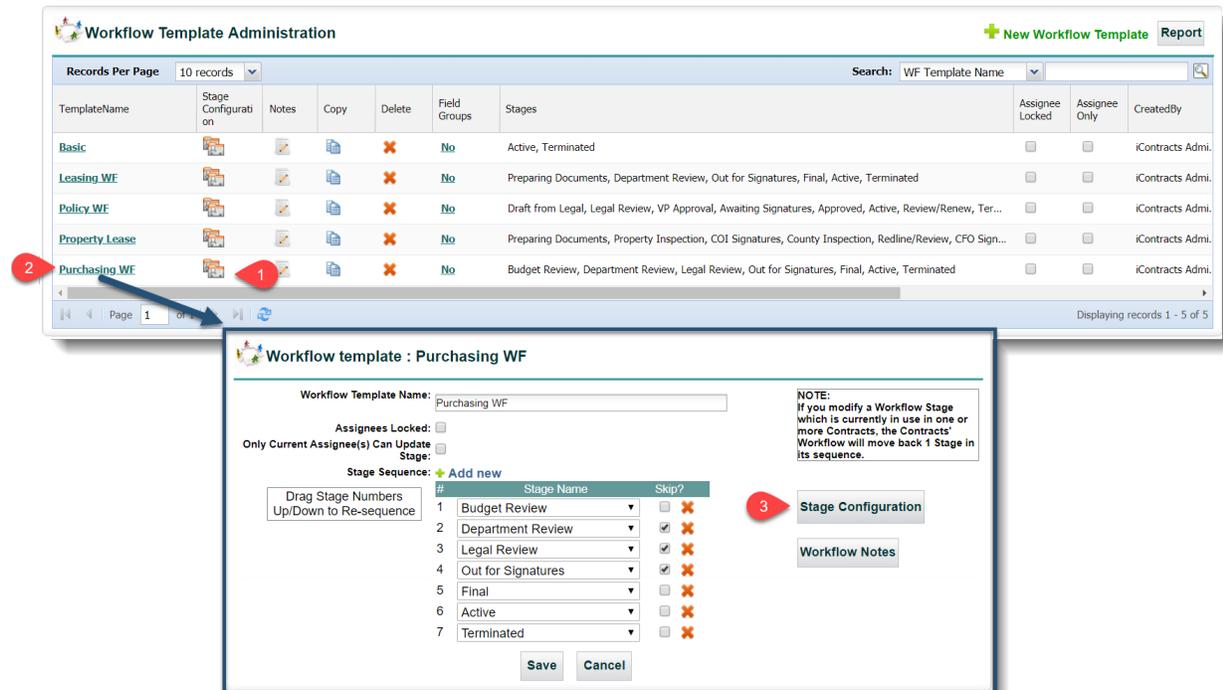
## Workflow Reminders/Esclations

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



The screenshot shows the 'Workflow Template Administration' interface. At the top, there's a search bar and a 'New Workflow Template' button. Below is a table with columns: TemplateName, Stage Configuration, Notes, Copy, Delete, Field Groups, Stages, Assignee Locked, Assignee Only, and CreatedBy. The 'Purchasing WF' row is highlighted, with a red circle (2) around the template name and a red circle (1) around the stage configuration icon. A blue arrow points from the icon to a detailed configuration window.

The detailed window for 'Purchasing WF' shows the 'Stage Sequence' section with a table:

#	Stage Name	Skip?
1	Budget Review	<input type="checkbox"/> <input checked="" type="checkbox"/>
2	Department Review	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
3	Legal Review	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
4	Out for Signatures	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
5	Final	<input type="checkbox"/> <input checked="" type="checkbox"/>
6	Active	<input type="checkbox"/> <input checked="" type="checkbox"/>
7	Terminated	<input type="checkbox"/> <input checked="" type="checkbox"/>

Red circle (3) is around the 'Stage Configuration' button. There are also 'Save' and 'Cancel' buttons at the bottom. A note 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.'

## 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:
  - o **(A) Stage:** The name of each Stage of the Workflow. Acts as a clickable link to enter the **Stage Assignee Configuration** pop-out.
  - o **(B) Individual User:** The Individual Users assigned to that Stage
  - o **(C) Role Models:** Same as *Individual Users*, but with the particular Role Model assigned
  - o **(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.
  - o **(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
  - o **(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**
  - o **(G) Escalation Days:** The number of days after the Stage has *initially* been moved that the Assigned Escalated User will begin receiving **Escalation Notifications**
  - o **(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
  - o **(I) Set Approvals:** Whether this Stage requires the assigned users to select either Approved or Rejected before the Stage moves forward
  - o **(J) Skip Stage:** Whether the Stage is one that can be skipped in the normal workflow

### Stage Configuration Click on stage to change parameters

<b>A</b> Stage	<b>B</b> Individual Users	<b>C</b> Role Models	<b>D</b> Field Groups	<b>E</b> Notes	<b>F</b> Reminder Days	<b>G</b> Escalation Days	<b>H</b> In Enterprise Ribbon	<b>I</b> Set Approvals	<b>J</b> Skip Stage
Budget Review	Chloe Lewis			No	5	10	Yes	Yes	No
Department Review	Owner			No	2	0	Yes	No	Yes
Legal Review	Phil Smith		Business Agreement	Yes	5	0	Yes	No	Yes
Out for Signatures	Owner			No	5	7	Yes	Yes	Yes
Final	Owner			No	0	0	Yes	No	No
Active				No	0	0	No	No	No
Terminated	Owner, Primary			No	0	0	No	No	No

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

#### Manage Workflow Notes

Workflow Template Name: Purchasing WF

Stage: Legal Review

Note: Please review, and fill out newly added fields in Summary Tab

Stage	Notes
Budget Review	
Department Review	
Legal Review	Please review, and fill out newly added fields in Summary Tab.
Out for Signatures	
Final	
Active	
Terminated	

#### Approver(s)

**Approver(s) Scorecard:**

Approver names: 1 Pending 0 Approved 0 Rejected

Bryan Gilliss

Bryan Gilliss  Pending  Approved  Rejected

Notes:

## 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
  - o *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.
  - o *If any number is set to **0**, then no reminders will go out*
  - o 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.
  - o *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.)

### Stage Assignee Configuration

**Workflow Template Name:** Purchasing WF 1  
**Stage:** Out for Signatures

*Hold Ctrl Key To Select Multiple Items*

**Individual User(s):** Liz Gills  
Mason Granville  
Mia Miller  
Michael Gonzalez  
New User  
Phil Smith 2

*Hold Ctrl Key To Select Multiple Items*

**Role Model(s):** Copy TEST RM  
Everything Enabled 3

*Hold Ctrl Key To Select Multiple Items*

**Field Group(s):** Adjunct Professor  
Business Agreement  
Physician Agreement  
Property Lease  
Purchasing Items  
Vendor Important Dates 4

**Remind after days:** 3 \* 5

6 **Escalate after days:** 7 \*

**Repeat escalation in days:** 2 \* 7

*Hold Ctrl Key To Select Multiple Items*

**Escalate to User(s):** Owner  
Primary  
Secondary  
Tertiary  
Alexander Carter  
Aria Clark 8

**Include in Enterprise Ribbon:**  9

10 **Set Approvals:**

**Skip Stage:**  11

12 **Save** **Cancel** **Exit**

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.

Current Stage/Change Stage

     Out for Signatures ▼

for 22 days

# Email Notifications

## Initial Stage Notification:

Reply Reply All Forward  
Wed 12/5/2018 10:10 AM

IA iContracts Admin <donotreply@icontracts.com>  
[UCM] ContractID: 615516, Escalation Test Contract, Workflow Template Name: 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.

This is an automatic notification from iContracts' Universal Contract Manager (UCM) for a Contract which has moved into a Stage in its Workflow that is assigned to you.

**Contract Name:** Escalation Test Contract (615516)  
**Contract Type:** Adjunct Professor  
**Current Stage:** Department Review

**Description/Instructions:**  
**Assignee(s):** Bryan Gilliss  
**Contract Owner:** iContracts Administrator ([bgilliss@icontracts.com](mailto:bgilliss@icontracts.com))  
**Updated On:** 12/05/2018 10:09 AM  
**Updated By:** iContracts Administrator  
**Previous Stage:** Budget Review  
**Days in Previous Stage:** 0

This Contract requires follow-up/attention. To access the contract container, please [Click Here](#)

## Reminder:

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

IA iContracts Admin <donotreply@icontracts.com>  
[UCM] Reminder 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 Reminder: This is a reminder that a Contract has been in a Stage that is assigned to you since 12/05/2018 (1 Days) and requires your follow-up. Here are the details:

**Contract Name:** Escalation Test Contract (615516)  
**Contract Type:** Adjunct Professor  
**Current Stage:** Department Review

**Description/Instructions:**  
**Assignee(s):** BryanGilliss  
**Contract Owner:** iContracts Administrator ([bgilliss@icontracts.com](mailto: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](#)

## Email Notifications (cont.)

### *Escalation:*

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

 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 ([boilliss@icontracts.com](mailto:boilliss@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](#)