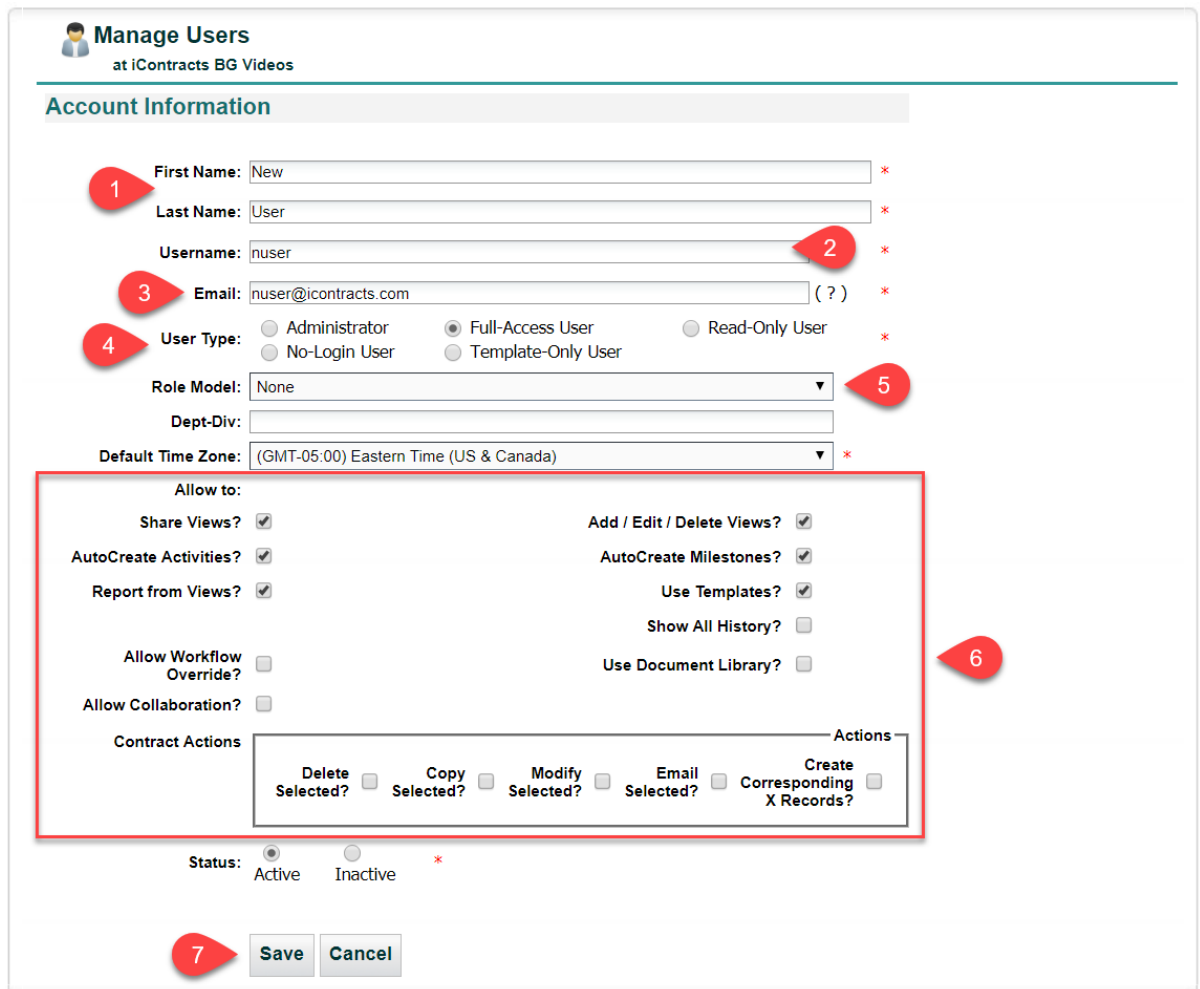


Users: Reassigning Contracts

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"/>
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Status: Active Inactive *

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)**

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

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

Actions

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

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 (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 a web application interface for 'Mason's Contracts'. At the top right, there are buttons for 'Edit View' (5) and 'Report' (1). Below these, a table lists contracts with columns for 'Contract ID', 'ContractName', 'ContractTypeName', and 'Owner'. A 'Select All' checkbox (2) is checked. The 'Action' dropdown menu (3) is set to 'Modify Contract', and an 'Execute' button (4) is visible. The table contains 10 records, all owned by 'Mason Granville'. The bottom of the interface shows pagination: 'Page 1 of 4' and 'Displaying records 1 - 10 of 37'.

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

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. It includes fields for Contract Name, Related Contract, and Description. The 'Owner' field is a dropdown menu currently showing 'New User', with a 'Save' button and a 'Cancel' button next to it. A checkbox for 'Notify on Stage Update' is present. Below these are 'Review Status' and 'Contract Type' fields. The 'Responsible Parties' section has three dropdown menus labeled 'Select Primary', 'Select Secondary', and 'Select Tertiary', with 'Save' and 'Cancel' buttons. At the bottom, there is a 'Folder Name' field, a 'Workflow/Stage' field, and a 'Lock/Unlock' field. A 'Select Field' dropdown is also visible. A 'Close Window' button is located at the bottom center. Red callout numbers 1 through 6 are placed over the form to indicate the steps: 1 points to the Owner dropdown, 2 to the dropdown arrow, 3 to the Notify on Stage Update checkbox, 4 to the Save button, 5 to the Responsible Parties section, and 6 to the Close Window button.

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 Allowed](#)

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"/>
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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