# ICONTRACTS UCM QUICK START GUIDE

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LOGGING IN

First things first, to login to the system you will need three things:

- Your Company Name: UCR SOM
- Your User Name
- Your Password

By now, you should have received an email from the system that contains the above. If you are unsure of any of these items or have not yet received your credentials, reach out to one of your system administrators.

Once you enter these items into the login screen, click Login.

*You also have the ability to send yourself a Password Reset by clicking on the ‘Forgot Password?’ link.

HOW TO CHANGE YOUR PASSWORD

On your initial login to the system, you may be automatically directed to the Profile/Help section to change your password.

If not, navigate to this area by clicking on the Profile/Help button at the top right of any screen and scroll to the very bottom. Should you need to change your password again in the future, this is where you will go to do so.

Your password must contain a letter, a number, and at least

This area also contains documentation and Training videos. See the Where to Find Help section of this guide for more information.
INTERFACE

On a typical login, you are first directed to the Home Screen, which is outlined below. You may not have both of the icons below depending on the permissions you were given by your Administrator. These areas may contain Templates or reference documents that could be useful for your position. Consult with you Administrator(s) to see what they would like you to use.

The grey bar across the top indicates you are currently on the Home Screen. This is called the Enterprise Ribbon. It allows you to navigate through the different areas of the system.

The next section on this screen allows you to save up to ten of your favorite Views (reports) onto your Home Screen for easy access.

The last section on this screen shows you the most recent contract containers (records) you accessed.
ADDING A CONTRACT REQUEST

Adding a contract request can be done directly from the Home screen. Simply select the “Template” icon, then Click to fill Fields” on the Contract Request Form and start filling in information about the type of contract you are requesting.

Under “Description”, select “Create new Contract Container”

Contract Name: The legal name of the other party. This name should appear on their W-9.
Contract Type: Always select “New Request”
Initial Workflow Stage: Always select “Requested”
Contract Description: Tell us about this request
Owner: Should be the requestor’s name. If you are an administrative assistant filling out the request on someone else’s behalf, select their name from the dropdown.
Folder Name: New Requests
Document Title: “Contract Request Form”

Leave the rest of this section blank.
More fields will appear. Fill in all fields as detailed as possible.

Check the top box on the right, which will mark all fields as checked. This is imperative, as this adds the information to the contract container.

Once all information is filled in, select the Word icon. This will generate the Contract request form in Word format. There is no need to save the file that pops up, it will automatically be saved in the new contract contained. Next, click on the icon with the plus sign.
It is imperative to check this box!

Examples of what could be entered here. If it is a services agreement, we need all physicians listed.
The next screen that pops up will allow you to upload any relevant attachments. This includes Stark Forms, W-9’s, relevant/related email conversations or a contract template that needs review.

Select “Save” then “Continue.”

This will prompt an email to be sent to the Contracting Department and they will review and begin working on your request.
NAVIGATION

Getting around in UCM is designed to be as straightforward as possible. For instance, if you would like to navigate to the Contracts in your system, click on Contracts in the Enterprise Ribbon.

Simply click on the Contract Id or Contract Name for the Container you would like to view in order to navigate into that Container.

You can click and drag each column header to arrange the information in a way that displays the information pertinent to you.
INSIDE THE CONTRACT CONTAINER

You can navigate to any of the Tabs contained in the Enterprise Ribbon. From any of these areas you may click on the hyperlinked data points to navigate into those individual items.

On the Contracts Tab, you can click on Contract Name or Contract ID to navigate into the individual Contract Container. From there you can see all of the data for that contract, take a look at that record’s documents, or even email the documents out of the system.

Contract name and ID numbers show at the top of the screen once in the contract container.

Workflow may be tracked within this system.

Contains all the documents housed here.
CUSTOMIZING YOUR SCREEN

Data in UCM is often shown in a “Grid” format (shown above). These Grids are configurable on a per user basis. This means you can rearrange your grid to show the data most important to you.

By hovering over any column heading and selecting the downward arrow to the right of the column title, additional configuration options appear.

You can select the option to sort in ascending or descending order or, by choosing the “columns” option, open the following interface to rearrange your columns.
SEARCHING

The **Global Search**, located at the top right of any screen within UCM, allows you to search by the following methods in order to find a particular Contract in the system.

- Contract Name
- Contract ID
- Summary Data
- Attachment Text

Keep in mind that searches performed using Summary Data or Attachment Text often generate multiple results for the same Container. This occurs because the search term may appear more than once for a single record.

If your contract is in the Archive, check the Include Archive checkbox. Archived contracts do not appear in searches unless this box is checked. Contracts may be archived if they are no longer active.

**Contract Views** are a great way to find sets of Contracts. You can create your own Views by clicking on the Add New View button at the bottom of your list of Views. Views may also be shared with you by other users within your organization. Your Administrator or another user may have shared some of these for you to start with. If not, or if you would like to create your own custom Views, consult the Read-Only Manual’s chapter on ‘Creating and Editing Views’ located in the Profile/Help section of UCM.

Click on one of the Views on the left of your screen to see only the contracts that meet the criteria of that View.
DOCUMENTS

Once you navigate into the Contract for which you need to find a document, click on the Attachment(s) tab at the container level.

In the Attachment(s) tab you will be able to see all the documents that relate to that contract. In some cases, there may be a ‘Primary Document’ showing above the grid containing the contract’s documents. This is the main document for the container.

To download a document, click on the hyperlink in the column labeled ‘CurrentFile’. This will download the document to be opened locally, or open the document in a ‘True View’ capacity. This column is outlined in green in the image below.

**Note:** The blue dots indicate that a tab has content within and the number indicates how many attachments there are.
EMAILS FROM THE SYSTEM REGARDING REVIEWS AND EXPIRING CONTRACTS AND HOW TO RESPOND TO THEM

There are many emails that come from the system, but we will discuss Milestone Notifications here, as they are the most common of the notifications. Shown below is a sample email of Milestone notifications that contains multiple Contracts that are expiring soon:

![Sample Milestone Notification Email]

The data Fields and instruction lines will vary, depending on how your System Administrator created the Rules for these notifications, but they will always contain a link that will open the System and direct you to the Milestone area. Of course, if you are not already logged in, you will have to do so along the way. The Milestone screen will appear as shown:

![Sample Milestone Screen]

To indicate that you have acted on this notification, the User can “Mark as Completed.” The term ‘Completed’ may vary from one organization to the next, and you will receive instructions on how to proceed with these notifications from your system administrator.
HOW UCR HANDLES MILESTONE NOTIFICATIONS

Milestones are currently set up for expiring contracts. If you receive a notification, click on the link and review the contract information. If you believe the contract should be renewed, go to the “Email” tab, email the Director of Contracting and Contracts Analyst of your desire to renew the agreement, then go back to the “Milestone” and click “Mark as Completed” and type your notes indicating that the agreement should be renewed. This will suppress repeat notifications from getting emailed to you. If you believe a contract should NOT be renewed, follow the same instructions, and notify the Director of Contracting and Contracts Analyst that the contract will not need to be renewed.

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WHERE TO GO FOR HELP

Your Administrator at Company Name: Sallie Barnett
Email Address: Sallie.Barnett@medsch.ucr.edu
Phone Number: 951-827-4523

Your Administrator at Company Name: Sherry Berona
Email Address: Sherry.Berona@medsch.ucr.edu
Phone Number: 951-827-4584

The Profile/Help section contains documentation and training videos that you can use to educate yourself on all of the features at your disposal. To find this area, click on the Profile/Help Link at the top right of any screen. This appears next to the Refresh Security Profile button and the Logout button.

In the image to the right you can see the Read-only User Manual link, which details all of the functions of that user type, and the Link to view the Training Videos.

Feel free to explore these items as well as the other information in the Profile/Help section, all of which are outlined in detail in the Read-Only User Manual.