



Gimmel
Information Management for Everyone®

Release Notes

Gimmel Contract Management

Software Version 6.9.1

August 2016

Title: *Gimmal Contract Management Release Notes*

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Document Revision History

Publication Date	Document Version #	Description
April 2016	1.0	Initial Version
May 2016	1.1	Updated Enhancements, fixed bugs and known issues sections
August 2016	1.2	Advanced Property Mapping and AutoLink Documents

If you have questions or comments about this publication, you can email TechnicalPublications@Gimmal.com. Be sure to identify the guide, version number, section, and page number to which you are referring. Your comments are welcomed and appreciated.

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Release Announcement

Gimmel is pleased to announce the release of Gimmel Contract Management version 6.9.1.

The information in these Release Notes supplements information in various separate Gimmel Contract Management version 6.9.1 product documents.

These Release Notes for Gimmel Contract Management include:

- **Enhancements** – Improved the usability of existing features
- **Feature Requests** – New functionality
- **Issues addressed** – Bug fixes

Content on the following pages describes the Gimmel Contract Management 6.9.1 changes.

System Requirements

This section describes the software and hardware necessary to install and run Gimmel Contract Management.

Required Documentum Software Versions

Gimmel Contract Management Version 6.9.1 is certified to operate with the following Documentum versions:

- Documentum Administrator – Version 7.2
- Content Server – Version 7.2
- Documentum Administrator – Version 6.7 SP2
- Content Server – Version 6.7 SP2

NOTE: As of April 2015, version 6.7 SP2 of Documentum Administrator and Content Server are only supported with the EMC Extended Support Plan.

Optional Supported Documentum Products

- Documentum Rendition Services
- Documentum Reporting Services
- Documentum Index Server (Documentum xPlore)

Deployment Requirements

Gimmel Contract Management Version 6.9.1 requires DAR Deployer 6.7 SP2 Patch 21 or later for the installation of the required Documentum Archive (dar) files.

Hardware

Gimmel software products are deployed on an existing or new Documentum environment leveraging existing or planned infrastructure investments. No additional hardware is required.

Enhancements

My Tasks

It was very difficult to distinguish between the original task and the reminder task that is sent based on the **Notification Resend Interval** system parameter. A new link named **Show/Hide Resend Notifications** has been added to the Actions bar. Clicking the **Hide Resend Notifications** link will filter the Tasks list to only show the original tasks, thus hiding any tasks that are just reminders. After clicking the **Hide Resend Notifications** link, the text should change to **Show Resend Notifications**. Clicking the **Show Resend Notifications** link will display all Tasks and Resend Notifications.

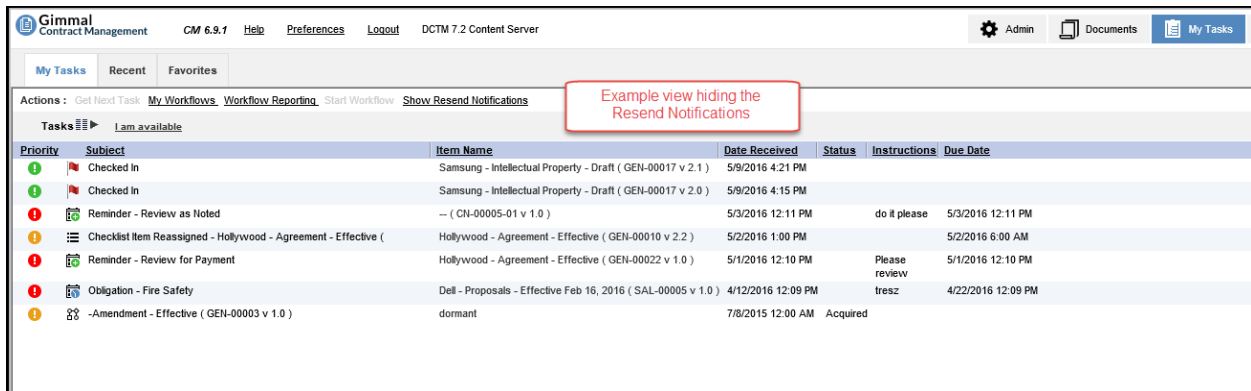


Figure 1 – Resend Notifications Hidden



Added Job Parameter for Notification Email Address

Added support for the following parameter to the **IM_ProcessMonitor** job. Please refer to the *Gimmel Contract Management v6.9.1 Installation and Maintenance Manual* for information on using this parameter.

notificationEmail

If specified, any errors encountered during the execution of the job will be sent to the designated email address. If sending to multiple email addresses, they should be separated by a semicolon.

Examples:

Single email address:	<code>-notificationEmail joe.smith@acme.com</code>
Multiple email addresses:	<code>-notificationEmail joe.smith@acme.com;jane.doe@acmecorp.com</code>

Added support for the following parameters to the **IM_RenderPDF** job:

notificationEmail

If specified, any errors encountered during the execution of the job will be sent to the designated email address. If sending to multiple email addresses, they should be separated by a semicolon.

Examples:

Single email address:	<code>-notificationEmail joe.smith@acme.com</code>
Multiple email addresses:	<code>-notificationEmail joe.smith@acme.com;jane.doe@acmecorp.com</code>

batchSize

Allows an administrator to specify the number of nontext PDF files to be sent to the OCR processing engine. If not specified, the system defaults to 10.

Examples:

Batch size of 20	<code>-batchSize 20</code>
Batch size of 75	<code>-batchSize 75</code>

Enhanced the Document Import Utility

Added support for the following parameters to the **IM_DocumentImportUtility** document import job. Please refer to the *Gimmel Contract Management v6.9.1 Installation and Maintenance Manual* for information on using this parameter.

notificationEmail

If specified, a summary email of the import job is sent to the designated email address. If sending to multiple email addresses, the parameters should be separated by a semicolon.

Examples:

Single email address:	<code>-notificationEmail joe.smith@acme.com</code>
Multiple email addresses:	<code>-notificationEmail joe.smith@acme.com;jane.doe@acmecorp.com</code>

senderEmail

If specified, the summary email is sent from this email address. If the argument is not specified, the email defaults to the email address of the Installation Owner.

Examples:

Email address:	<code>-senderEmail dctmadmin@acme.com</code>
----------------	--

fieldDelimiter

This parameter specifies the delimiter that is used to separate the data fields in the input file. If the argument is not specified, the delimiter defaults to **tab**. Valid values are:

- **tab** – Indicates the data items in the input file separated by a tab character
- **comma** - Indicates the data items in the input file are separated by a comma (,)
- **pipe** - Indicates the data items in the input file are separated by the pipe (|) character

Examples:

Comma	<code>-fieldDelimiter comma</code> <code>-fieldDelimiter Comma</code>
Tab	<code>-fieldDelimiter tab</code> <code>-fieldDelimiter TAB</code>
Pipe	<code>-fieldDelimiter pipe</code> <code>-fieldDelimiter Pipe</code>

repeatDelimiter

This parameter specifies the delimiter that is used to separate repeating data fields in the input file. If the argument is not specified, the delimiter defaults to **pipe**. The **fieldDelimiter** and **repeatDelimiter** values must be set to different values. Valid values are:

- **pipe** - Indicates the data items in repeating fields in the input file are separated by the pipe (|) character
- **comma** - Indicates the data items in repeating in the input file are separated by a comma (,)
- **tab** - Indicates the data items in repeating fields in the input file separated by a tab character

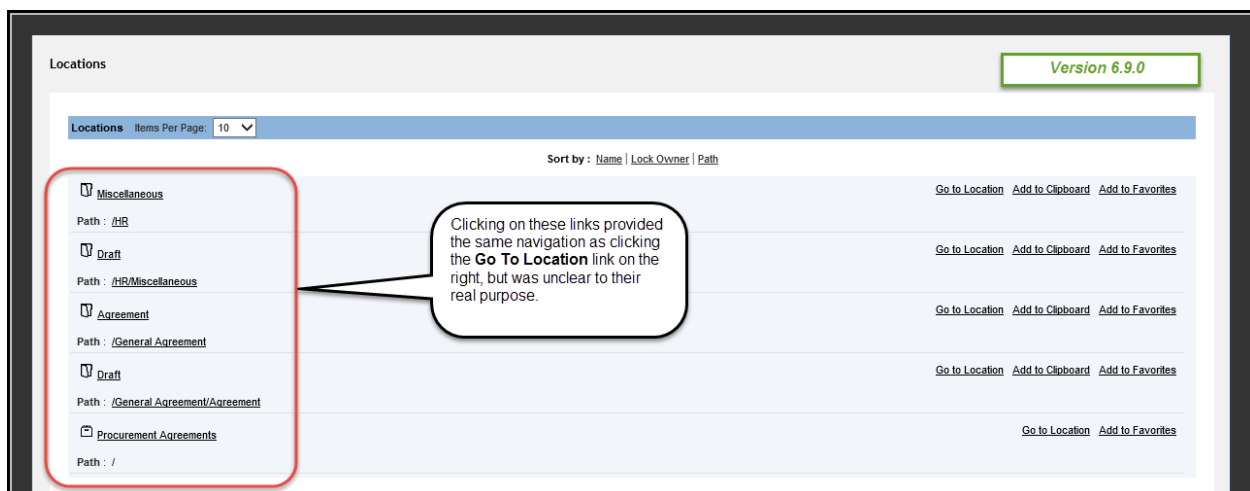
Examples:

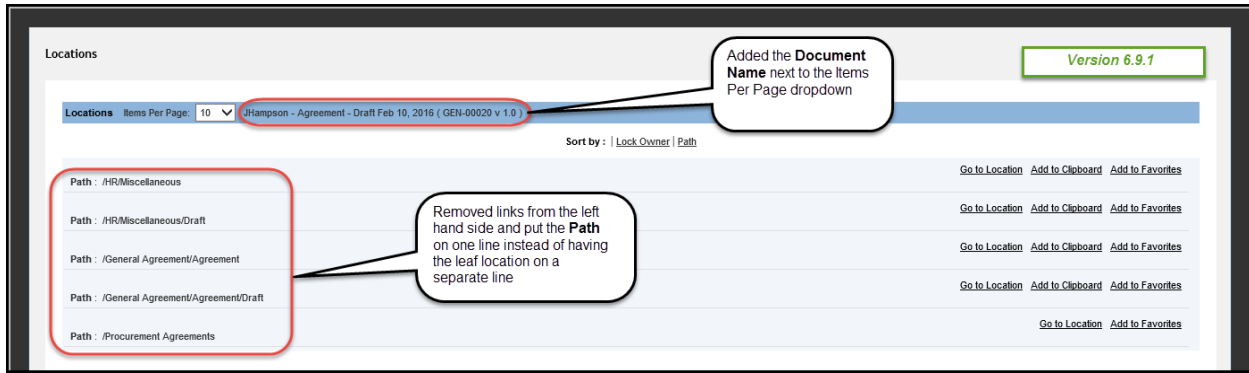
Comma	<code>-repeatDelimiter comma</code> <code>-repeatDelimiter Comma</code>
Tab	<code>-repeatDelimiter tab</code> <code>-repeatDelimiter TAB</code>
Pipe	<code>-repeatDelimiter pipe</code> <code>-repeatDelimiter Pipe</code>

View Locations Page Updated

The links on the left hand side of the **View Locations** page provided the same navigation as clicking the **Go To Location** link on the right, but they were not as reliable. The screen captures below show the comparison between Gimmel Contract Management 6.9.0 and Gimmel Contract Management 6.9.1.

1. Added the **Document Name** next to the Items Per Page dropdown
2. Removed links from the left side of the page and changed the Path to be on a single line





Reports from Document Dashboard

Restricting a Report to a Particular Document Type

The **Properties Page Report** setting in the **Edit Settings | Report** tab now allows a report to be restricted to a single document type. The format is `documentType | ReportName`. For example, to restrict the **Assigned Tasks Complete** Crystal report to be visible only on the Document Dashboard for General Agreements, you would enter the following in the Properties Page Report:

general_agreement|Assigned Tasks Complete

NOTE: There is no space between the document type, the pipe symbol, and the report name.

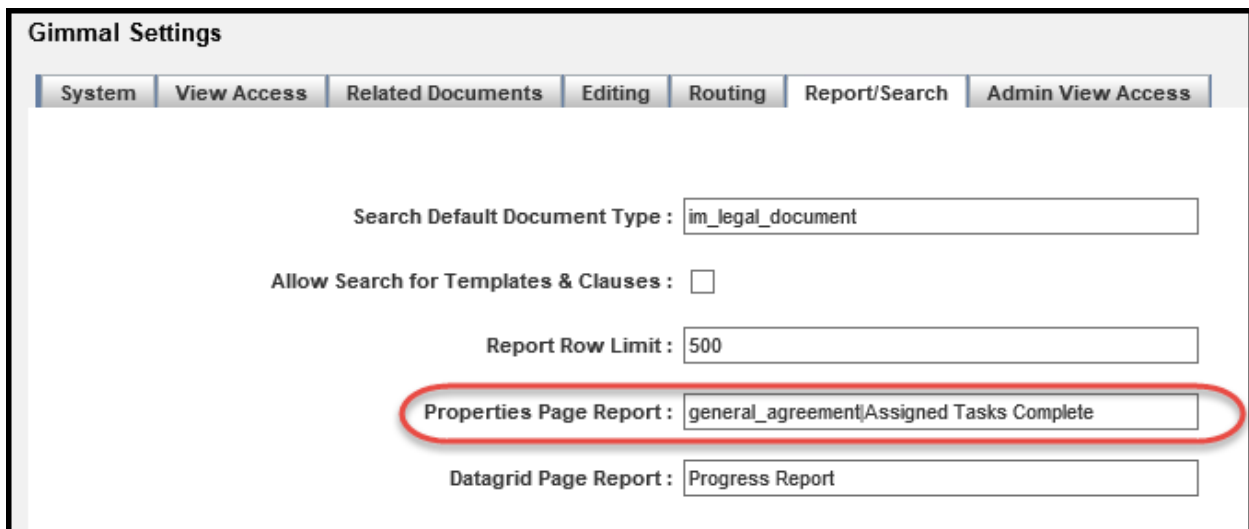


Figure 2 - Edit Settings | Properties Page Report

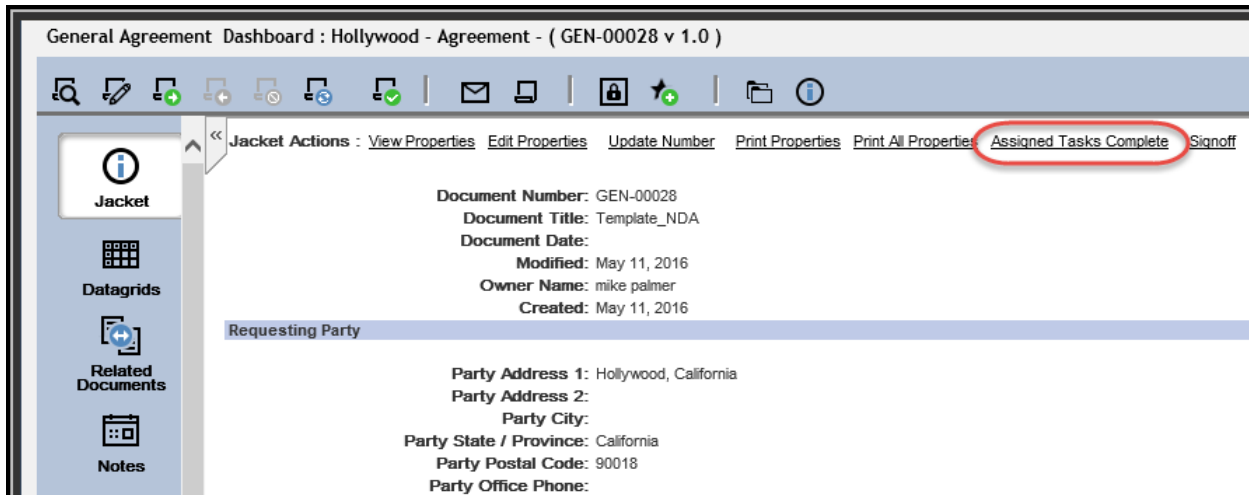


Figure 3 - Properties Page Report on Jacket Document Dashboard

Displaying a Different Crystal Report on Datagrids

A new property named **Datagrid Page Report** allows for a different Crystal report to be displayed on the Datagrid.

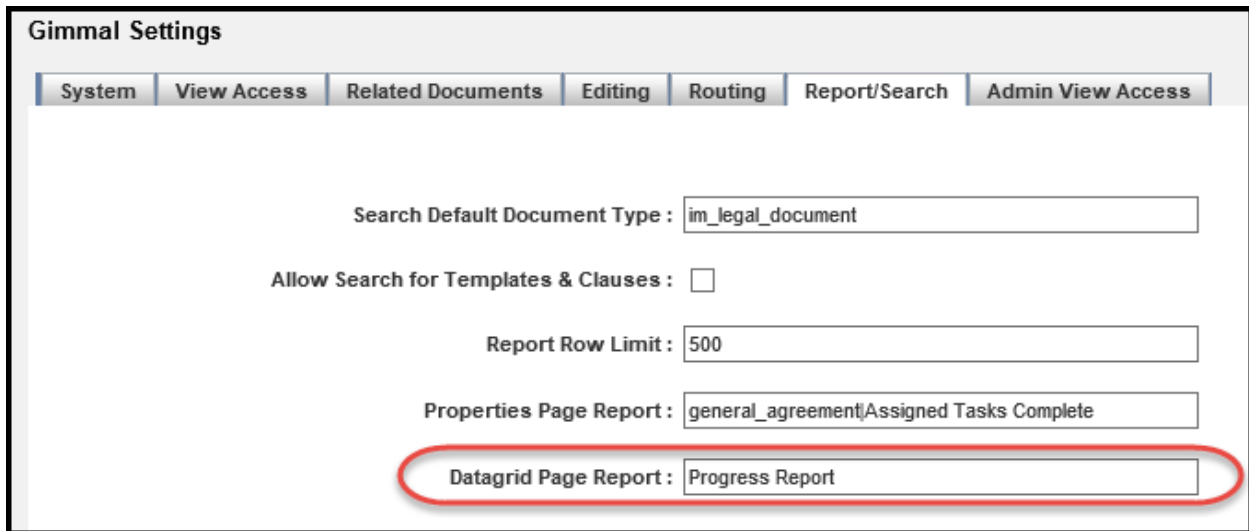


Figure 4 -Edit Settings | Datagrid Page Report

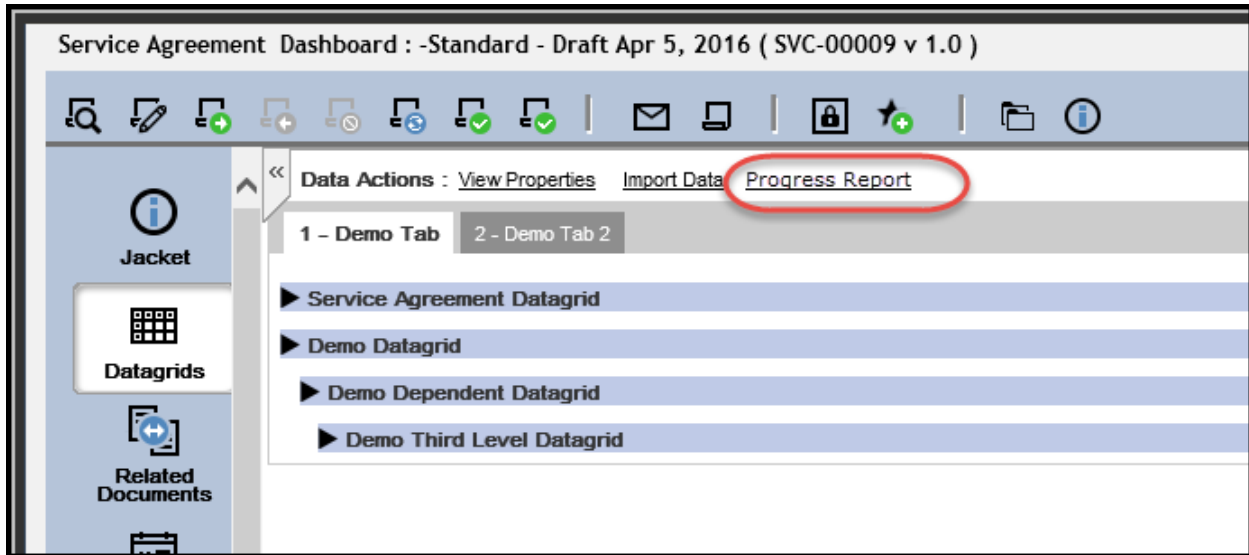


Figure 5 - Datagrid Report from Document Dashboard

Allow a Horizontal line to Be Configured on a Jacket

With the previous Jacket configuration you could only add a blue separator with text. Now you can add lines on a Jacket, which allows improved grouping of related fields.

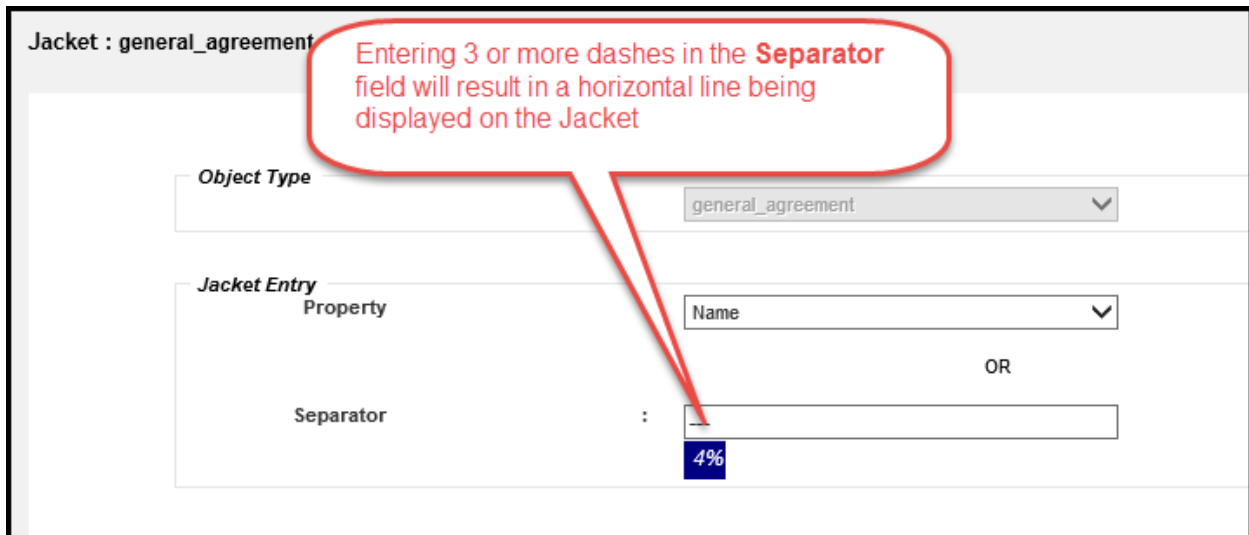


Figure 6 - Configuring a Jacket to Display a Horizontal Line

General Agreement Dashboard : Samsung - Intellectual Property - Draft Aug 26, 2015 (GEN-00017 v 2.2)

Jacket Actions : [View Properties](#) [Edit Properties](#) [Update Number](#) [Print Properties](#) [Print All Properties](#) [Assigned Tasks Complete](#) [Signoff](#)

Document Number: GEN-00017
 Document Title: Edge
 Document Date:
 Modified: May 11, 2016
 Owner Name: Darius Linder
 Created: May 9, 2016

Requesting Party

Party Address 1: 607 Washington Street
 Party Address 2:
 Party City: New York
 Party State / Province: New York
 Party Postal Code: 10014
 Party Office Phone: 844-577-6969

Party Contact:
 Party Contact Email: sam@samsung.com
 Party Tax ID: 125487

Contract Dates

Execution Date: Aug 26, 2015
 Effective Date: Aug 26, 2015
 Expiration Date: Aug 26, 2016
 Termination Date:

Figure 7 - Example Jacket Configuration with a Horizontal Line

Jacket Entries

Jacket Actions : [Add Entry](#)

Items Per Page: 50 ▾

Sequence		Jacket Entry
1	↓	document_number
2	↑ ↓	document_title
3	↑ ↓	document_date
4	↑ ↓	r_modify_date
5	↑ ↓	owner_name
6	↑ ↓	r_creation_date
7	↑ ↓	Requesting Party
8	↑ ↓	im_party_address_1
9	↑ ↓	im_party_address_2
10	↑ ↓	im_party_city
11	↑ ↓	im_party_state_province
12	↑ ↓	im_party_postal_code
13	↑ ↓	im_party_office_phone
14	↑ ↓	---
15	↑ ↓	im_party_contact
16	↑ ↓	im_party_contact_email
17	↑ ↓	im_party_tax_id
18	↑ ↓	Contract Dates
19	↑ ↓	im_execution_date
20	↑ ↓	im_effective_date
21	↑ ↓	im_expiration_date
22	↑ ↓	im_termination_date
23	↑ ↓	Custom
24	↑ ↓	custom_800021bc
25	↑ ↓	custom_800021be
26	↑ ↓	custom_800021bd
27	↑	i_cabinet_id

Figure 6 - Jacket Configuration to Display a Horizontal Line

Datagrid Enhancements

See the items below for the enhancements and bug fixes related to Datagrids:

- When entering data into a text, number, or currency field and pressing the Enter key, your changes are no longer lost.
- The display order of dependent Datagrids can now be specified by setting the **Datagrid Sequence** value when configuring the Datagrid.
- The default height of a Datagrid can now be specified by setting the **Datagrid Height** value when configuring the Datagrid.
 - If a value is not specified for the Datagrid Height, approximately 8 rows will be displayed on the Datagrid without scrollbars.

- For example, if you only want 3 visible rows on a Datagrid, set the **Datagrid Height** to **11em** (each row is equal to approximately 3em and the header row is 2em).
- The **Datagrid Height** value also accepts **px** as a unit specifier if you need to fine-tune the Datagrid.
- Automated Reminders can be created for Datagrids that contain at least one date field.
- The date value in a Date field can now be deleted.
- You can now enter a date in many formats with the keyboard in a Date field instead of having to use the Date Picker.

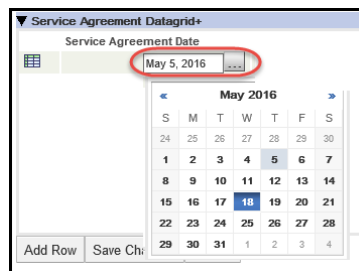


Figure 9 - Enter Date in Date Field

Datatable Enhancements

The following enhancements were added to Datatables:

- Datatables can now be configured to populate fields with a default value when a new row is added.
- Lookup fields on Datatables now allow TextArea and Dropdown field dependencies and filters.

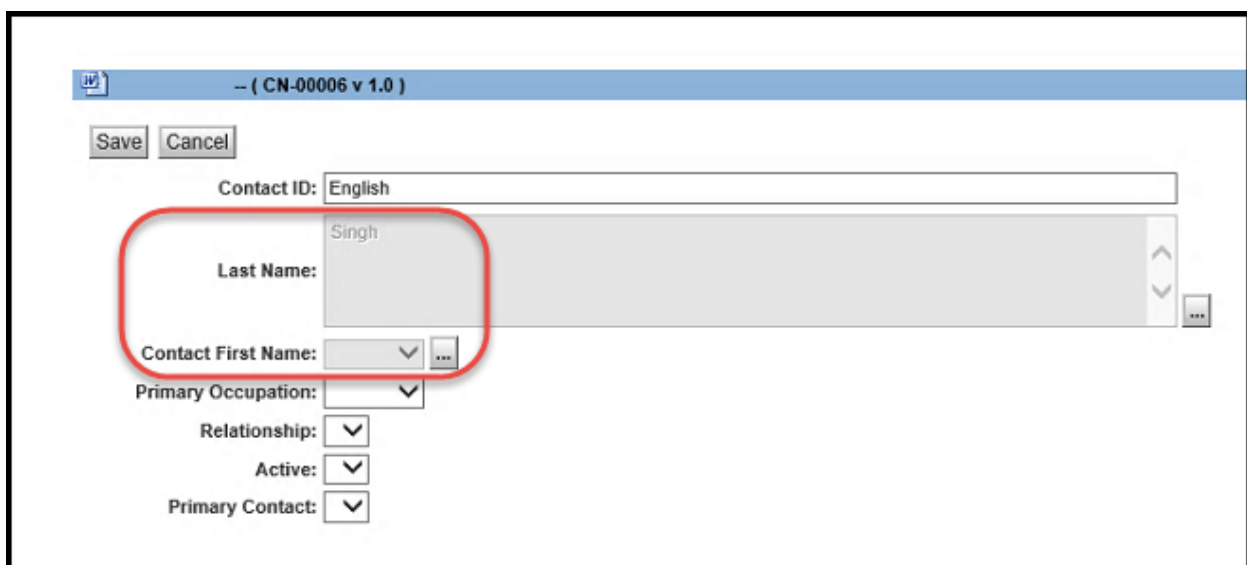


Figure 10 – Improved Lookup Fields

Feature Requests

Advanced Property Mapping

Additional system parameters have been added that allow for Property fields to be copied to other fields while transforming the values.

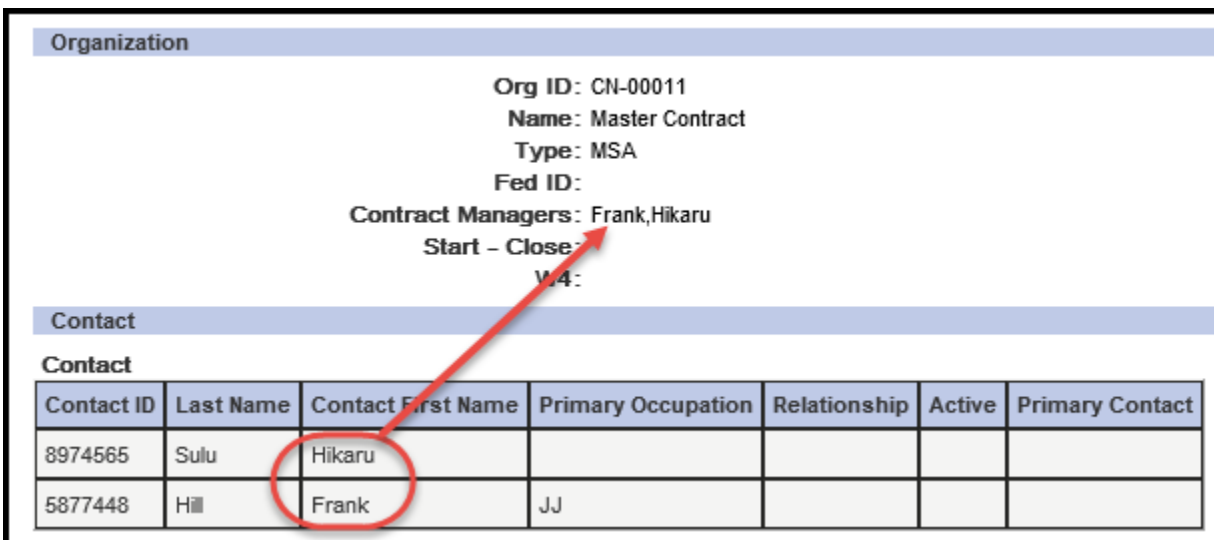
PropertyMap - Repeating Properties Formatted with a Separator to a Single Property

The PropertyMap system parameter allows you to take the values from repeating property fields and copy to a single property on a document. The name of the parameter must begin with PropertyMap followed by a unique descriptor (for example, PropertyMapContact, PropertyMap1, etc.).

Parameter Value: <object_type>|<order (asc desc)>|<separator>|<source (repeating attribute)>|<target attribute on document>

Example: Copy all of the Contact First Name (im_firstname) repeating fields to the Contract Managers (im_contractmanagers) field separated by a comma and sort the values in ascending order.

Parameter Name:	PropertyMapContractManager
Parameter Value:	service_agreement asc , im_firstname im_contractmanagers



The screenshot displays a software interface with two main sections. The top section, titled "Organization", shows details for "Org ID: CN-00011", "Name: Master Contract", "Type: MSA", and "Fed ID:". Below this, the "Contract Managers" field is populated with "Frank,Hikaru". A red arrow points from the "Hikaru" entry in the "Contact First Name" column of a datagrid below to the "Contract Managers" field. The bottom section, titled "Contact", contains a datagrid with the following data:

Contact ID	Last Name	Contact First Name	Primary Occupation	Relationship	Active	Primary Contact
8974565	Sulu	Hikaru				
5877448	Hill	Frank	JJ			

Parameter Value: <datagrid label>|<order (asc desc)>|<separator>|<source (datagrid column)>|<target attribute on document>

Example: Copy the values from the Category (c_category) field on the Service Agreement Datagrid to the Project Description (im_projectdescription) field separated by a dash and sort the values descending.

Parameter Name:	PropertyMap_DG_Category
Parameter Value:	Service Agreement Datagrid desc - c_category sa_project_description

Service Agreement Dashboard : McAfee - Standard - Approved Mar 1, 2016 (SVC-00006 v

Search, Edit, Add, Refresh, Undo, Redo, Save, Print, Lock, Star, Home, Info

Data Actions : [View Properties](#) [Import Data](#) [Assigned Tasks Complete](#)

1 - Demo Tab 2 - Demo Tab 2

Service Agreement Datagrid+

Service Agreement Date	Category
May 19, 2016	Exhibits
May 19, 2016	Amendment
May 20, 2016	License

Add Row Save Changes Cancel

Service Agreement Dashboard : McAfee - Standard - Approved Mar 1, 2016 (SVC-00006 v 2.0)

Search, Edit, Add, Refresh, Undo, Redo, Save, Print, Lock, Star, Home, Info

Jacket Actions : [View Properties](#) [Edit Properties](#) [Update Number](#) [Print Properties](#) [Print All](#)

Name: McAfee - Standard - Approved Mar 1, 2016 (SVC-00006 v 2.0)

Expiration Date:

Modified By: prgadmin

Party Address 1: 123 Virus Street
Party City: Phoenix
Party State / Province:
Party Country:

Property Mapping

Requesting Department: HR
Requesting Contact: Freddy Alvo

Project Description: License-Exhibits-Amendment

ConcatenateMap - Multiple Single Value Properties Formatted to a Single Property

The ConcatenateMap system parameter allows you to concatenate multiple properties to a single property on a document. The name of the parameter must begin with

ConcatenateMap, followed by a unique descriptor (for example, ConcatenateMapContact, ConcatenateMap1, etc)

Parameter Value: <object_type>|<formatter (%1 %2)|<source (comma-separated single attributes)>|<target attribute on document>

Example: Concatenate the FirstName (im_firstname) and LastName (im_lastname) fields to the FullName (im_fullname) field for the Service Agreement (service_agreement) document type in **LastName, FirstName** format.

Parameter Name:	ConcatenateMapContact
Parameter Value:	service_agreement %1, %1 im_lastname,im_firstname im_fullname

AutoLink documents to multiple locations

DynamicLinkingMap and DynamicLinkingRule – Allows for a single copy of a document to be filed to multiple folders

The DynamicLinkingMap System Parameter is similar to the **Auto File Rules**, but it creates link(s) to the original document, thus the document can be located in multiple folders. The name of the parameter must begin with DynamicLinkingMap followed by a unique descriptor (i.e. DynamicLinkingMapStatus, DynamicLinkingMap1, etc)

Parameter Value: <object_type>|<root path>|<format(%s<> static, %t<> document, %d<>datagrid|<static values (comma separated)|<document property (comma separated)>|<datagrid columns (<grid_name>.<grid_column> comma separated must be in hierarchy order)

The DynamicLinkingRule System Parameter is required for the DynamicLinkingMap to be executed. The name of the parameter must begin with DynamicLinkingRule followed by a unique descriptor (i.e. DynamicLinkingRuleStatus, DynamicLinkingRule1, etc)

Parameter Value: <object_type>|<dynamiclinkingmap name>|<optional: query predicate>

Example 1: Link Service Agreement (service_agreement) documents to **Service Agreement/Status/Party City**

Parameter Name:	DynamicLinkingMap_SA
Parameter Value:	service_agreement Service Agreement / %t1/%t2 document_status,im_party_city
Parameter Name:	DynamicLinkingRule_SA

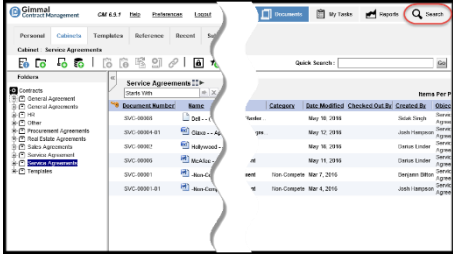

Parameter Value:	service_agreement DynamicLinkingMap_SA
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Example 2: Link Service Agreement (service_agreement) documents to **Service Agreement/Status/Party City** when the Document Category is NDA

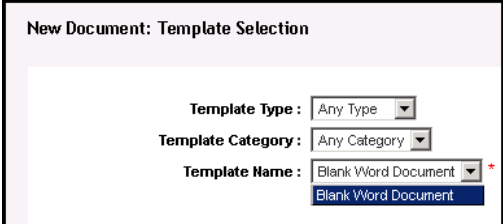
Parameter Name:	DynamicLinkingMap_SA
Parameter Value:	service_agreement Service Agreement /%t1/%t2 document_status,im_party_city
Parameter Name:	DynamicLinkingRule_SA
Parameter Value:	service_agreement DynamicLinkingMap_SA document_category='NDA'

Issues Addressed

ID	Title	Description	Resolution
TFS 11435	Clipboard icon not working	The Add to Clipboard icon is grayed out always and not working. Items can be added to the clipboard by using the Right Click menu.	The tooltip was changed to Add Folder to Clipboard to clearly indicate the Clipboard icon is for adding Folders to the clipboard. Individual items are added to the clipboard via the right-click menu option.
TFS 7943	Reminder Highlighting should be consistent	After editing a Reminder, all Reminders were being selected instead the Reminder that was just edited.	After editing a Reminder, select the Reminder that was just edited.
TFS 10851	Improve IM_RenderPDF logging	When multiple repositories reside on the same content server and an exception is thrown from IM_RenderPDF, the information in the ServerApps.log doesn't contain enough information to troubleshoot the problem	The docbase/repository name and the actual name of the directories are now included in the ServerApps.log file.
TFS 11194 TFS 10730 TFS 10778 TFS 10784 TFS 11105 TFS 12197 TFS 13292	Improve explanatory message when eSign users are do not have a DocuSign account	As a User I want documents that are sent for signature via DocuSign to come from the person that initiated the signature instead of from the DocuSign Integration account that is configured in the CM Admin screen	If a user initiates a document to be signed via DocuSign and the initiator does not have a DocuSign account, they will receive the following information message: A DocuSign account was not found for <i>FirstName LastName (email address)</i> . Emails sent to the counterparty will come from <i>DocuSign Integration Account</i> instead of from you. Please contact your DocuSign administrator to create your DocuSign account

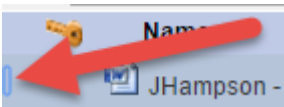
ID	Title	Description	Resolution
TFS 11377	Advanced Search is only available from the Documents View	As part of the UI updates in CM version 6.9.0, the Advanced Search icon was moved next to the Quick Search and changed to text. A side effect of this change is that unless you are on the Documents Cabinets View you have to make 2 additional clicks to get to the Advanced Search page	<p>Moved the Advanced Search next to the Reports View in the upper right of the screen.</p> 
TFS 11101 TFS 11103	Do not display Copy Values from Master button when in read-only mode	When Viewing the Properties of a document, do not display the Copy Values from Master button	The Copy Values from Master button is now only visible while editing document properties instead of while viewing and editing.
TFS 11542	Remove Webtop, DFC and Java information from About Gimmel page	The Webtop, DFC and Java information from the About Gimmel page should only be displayed to a super user	<p>When a non-superuser clicks on the icon in the lower right of the page to display the About Gimmel page, the Gimmel Release and Gimmel Build information is displayed.</p>  <p>If a superuser holds down the ctrl key while clicking the icon in the lower</p>

ID	Title	Description	Resolution
			<p>right of the page, additional information is displayed.</p> 
TFS 11596	Selected Cabinet/Folder not being remembered	If you have a cabinet or folder selected in the Documents View , navigating to another view such as Admin, My Tasks or Reports, then click on Documents again, you are taken to your Personal Cabinet instead of the location where you were before you went to a different view	When navigating between Views (Admin, My Tasks, Reports, Search) in the upper right or tabs (Templates, Recent Subscriptions, Favorites) within the Documents View, your location within the Cabinet tree is remembered.
ZD 14366 TFS 12355	When entering incorrect login credentials, the screen refreshes and the Repository changes	For customers using the Cloud based version of Gimmel Contract Management, entering an incorrect login, the Repository value changes when the screen is refreshed and the user must go back to their	For customers using the Cloud based version of Gimmel Contract Management, the Repository value is not remembered if incorrect login credentials are entered.

<i>ID</i>	<i>Title</i>	<i>Description</i>	<i>Resolution</i>
		bookmarked link in order to try to login again.	
TFS 11097	Update "Blank Word 97 / 2000 Document" Template Name	When creating a new document, use the Microsoft Word 2010+ document template	<p>For new installations Blank Word 97 / 2000 Document has been replaced with Blank Word Document and utilizes Word 2013 styles</p>  <p>The screenshot shows a dialog box titled "New Document: Template Selection". It contains three dropdown menus: "Template Type" set to "Any Type", "Template Category" set to "Any Category", and "Template Name" set to "Blank Word Document". A red asterisk is visible next to the "Template Name" dropdown. Below the dropdowns is a blue button labeled "Blank Word Document".</p>

Known Issues

The following table provides an overview of known issues contained in version 6.9.1 of Gimmal Contract Management:

ID	Title	Workaround
TFS 3816 TFS 3817	Right-click drag and drop functionality working inconsistently with IE 11	This behavior only affects right-click drag and drop and only in IE 11. If you experience this behavior, use the Gimmal Contract Management Clipboard feature to move, copy, or link items to a different cabinet or folder.
TFS 6762	Import Document Window takes a long time to load with IE 11	This behavior affects importing documents with UCF enabled and only in IE11. When importing a document via the Import icon, the import page takes longer than expected to load. If you experience this issue, you can wait for the page to load, utilize the drag and drop functionality to import documents, disable UCF or use Firefox. Upgrading to JRE 1.8.0.74 also resolves this issue.
TFS 10358	Chrome has a paperclip on selected item, other browsers do not.	Selecting a document in Chrome has a paperclip on the selected item, while it does not in other browsers. This has no impact on functionality 
TFS 13317	Tabbing through Datagrids	When using the Tab key to navigate through fields on a Datagrid, although the column becomes active, the actual data entry for the column does not. You may use the mouse to make the data entry for the column active
TFS 13314	Close after editing a Datagrid	When editing values in a Datagrid, you must click the Save Changes button in the corresponding Datagrid before clicking the Close button in the lower right of the Document Dashboard. If you click the Close button before clicking the Save Changes button, your changes will be lost.