



Gimmel
Information Management for Everyone®

Contract Management User Guide

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About this User Guide

This user guide presents detailed user information about Gimmel Contract Managements 6.9.1 and is intended for contract management specialists, records management specialists, and legal personnel

Designed to be both a learning guide and a procedure reference, this user guide includes extensive [blue](#) cross-references with page numbers throughout to quickly direct the user to the information needed. Cross-references are also listed in the Index and in the Glossary, which defines words and phrases with a unique Gimmel Contract Management meaning. In the electronic document, click a blue cross-reference to jump to that reference.

To quickly find content, choose from the following:

- ? **Table of Contents on page iii: Subjects** in chapters in page number order. Additionally, each chapter also begins with its own Table of Contents.
- ? **List of Procedures on page ix: Procedures** in alphabetical order by the procedure's verb, such as add, edit, view.
- ? **Index on page 277: Subjects** such as Cabinets, Favorites, Reports, in alphabetical order.
- ? **Glossary on page 265: Words and phrases** with a unique Gimmel Contract Management meaning in alphabetical order.

This user guide is available in online and print formats. Online user guides are formatted in Portable Document Format (.PDF) files. To view, print, or copy PDF files, download the free Adobe Reader from Adobe Systems, <http://www.adobe.com>.

Terminology

Some of the terms used in this user guide may be new to you and are included in the "[Glossary](#)" on [page 265](#). Before reviewing this user guide, remember that the term *document* is used to indicate any type of file. When reading the term *document*, it carries the same meaning as more specific terms such as *contract* or *attachment*, which are types of documents. Attachments can be in any format, such as .doc, .pdf, or .xls.

Examples and Conventions

The representative examples of the various Gimmel Contract Managements Management interfaces and windows in this user guide are generic and are not intended to match any organization's specific configuration of document Cabinets, types, properties or content in Gimmel Contract Managements Management.

A red asterisk * indicates that field's information is required and must be entered.

Key interface words, such as tabs, field names and actions, are indicated with these fonts:

Click the **Reference** tab.

Use the plug-in.

Links requiring a mouse click are indicated with an underline:

Click View.

Bold is used to give a word increased emphasis.

Italics is used to highlight a word as having a specific Gimmel Contract Management meaning.

Blue is used to indicate a cross-reference to additional supportive or related information, such as:

See "[Moving, Copying and Linking Items Inside Gimmel Contract Management](#)" on page 85.

See [Figure 1](#).

OR is used to indicate another method to accomplish the same action.

More detail: Presents an additional level of detail about the current task, usually more details about requirements and exceptions. Read these details for a fuller understanding of the task or to discover a shortcut idea.

ALERT! Indicates that taking this action **cannot** be undone or restored and helps the user avoid taking an incorrect action.

Introduction

This chapter presents the following topics:

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Gimmel Contract Management Overview

Say goodbye to the risks and missed savings or revenue opportunities that go along with paper contracts, and say hello to visibility, efficiency, and compliance.

Gimmel Contract Management centralizes all of your company's critical documentation into a single and easy-to-use web-based contract management solution to ensure every promise is kept, every term is met, and every revenue opportunity is captured.

At a high level, contract management incorporates the following activities in four major stages. See [Figure 1-1](#).

Figure 1-1 Gimmel Contract Management Management Solution



How Gimmel Contract Management Positively Impacts Your Business

Improve Relationships with Suppliers, Vendors, and Internal Clients

Eliminate the risk of missed obligations and failure to meet financial terms. Gimmel Contract Management delivers insight into your total vendor pool and all pending obligations, helping you to eliminate risks and allowing you to more effectively communicate with and manage your suppliers, vendors, and internal clients. See ["Managing Document Obligations"](#) on page 160.

Never Miss a Renegotiation Opportunity

Don't let another renewal period go by unnoticed! This is your opportunity to research competitive offers, renegotiate terms so they better work for you, or negotiate new terms. Gimmel Contract Management ensures you never miss this critical point in a contract's lifecycle, alerting you to each and every renewal or expiration date. See ["Managing Document Reminders"](#) on page 148.

Visibility into ALL Documents across Your Entire Enterprise

The best decision is an informed decision. From NDAs and CDAs, employee agreements and HR documents, intellectual property documentation, service agreements, or any other contract you may have, Gimmel Contract Management delivers visibility into the intelligence buried within these documents so you can make the best business decisions. See ["Managing Document Properties"](#) on page 72 and [Chapter 11, "Searching Documents"](#).

Never Lose Track of a Document Again

Remove sloppy paper and misfiled documents from your environment. Gimmel's contract asset repository electronically stores documents in a central database according to your business rules, so the document you need is right where it's supposed to be every time you look for it. See ["Navigating Gimmel Contract Management Views"](#) on page 12.

Work Smarter and More Resourcefully

Find documents faster and work more efficiently! Powerful full document content and data property searches help you find documents in seconds instead of minutes, while robust standard and custom reporting allow you to track everything within or related to a contract/project. Easily update items across multiple Contract in one quick step so you can move on to other tasks and keep up productivity. See [Chapter 11, "Searching Documents"](#) and [Chapter 12, "Generating Document Reports"](#).

Secured Access Anytime from Anywhere

Ensure the integrity of your Contract and documents is never compromised. Gimmel Contract Management's web-based interface allows you to access your work-in-progress and archived documents at anytime, from anywhere, from many types of devices, while providing powerful security features trusted by some of the world's leading commercial and government organizations.

Seamlessly Integrate with your Existing Systems

Gimmel Contract Management seamlessly integrates with your existing ERP, CRM, procurement, or business intelligence systems *without* custom development. PeopleSoft, Oracle, SAP, JDEdwards, and more...Gimmel Contract Management can centralize even the most complex custom contracting environments with a single user-friendly interface.

Sarbanes-Oxley (SOX) Compliance

The Sarbanes-Oxley (SOX) Act of 2002 requires establishing, evaluating, and monitoring the effectiveness of internal controls over financial and operational processes. Gimmel Contract Management offers the following features that aid companies in their compliance efforts:

- Complete audit trail of all activities involving contracts and other legal documents. See ["Managing the Document Audit Trail" on page 99](#).
- All versions of a document are automatically maintained. See ["Managing Document Versions" on page 97](#).
- Logging of all document reviews and notes. See ["About Managing Workflows for a Document" on page 108](#) and ["Managing Document Notes" on page 94](#).

More than Just Software

At Gimmel, we are more than just software providers; we are cross-industry contract management specialist. We have helped thousands of users across multiple industries successfully improve and streamline their contract management processes. We understand the similarities as well as the unique differences each company faces in their contracting processes. Gimmel Contract Management has been designed with the flexibility, functionality, and scalability to meet the contracting needs specific to universities, movie studios/entertainment groups, government organizations, energy/hi-tech, consumer products, pharmaceuticals, food and beverage distributors, and more.

Navigating and Preferences

This chapter presents the following topics:

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Log In/Log Out of Gimmel Contract Management

Gimmel Contract Management is a Web-based application offering easy deployment in your organization. All that is necessary to access Gimmel Contract Management is a standard Web browser, your network ID, and a password.

Log In

Before beginning

After receiving your network ID (user name) and password, ask your system administrator for:

- The web link for Gimmel Contract Management
- The repository name

1 Enter the web link into a browser to display the **Login** window. See [Figure 2-1](#).

Figure 2-1 Gimmel Contract Management Login



2 Enter your **User Name** and **Password**.

More detail: Your User Name and Password are usually the same as your operating system login and password. See your system administrator.

More detail: Your organization's logo may display in the upper left.

3 In **Repository**, select the appropriate repository from the menu.

More detail: Available repository selections may be restricted by your Gimmel Contract Management configuration. See your system administrator for details.

More detail: If displayed: it is **not** recommended to select the **Remember my credentials** checkbox. For more information, see "[Edit User Preferences – General Tab](#)", [step 5 on page 36](#).

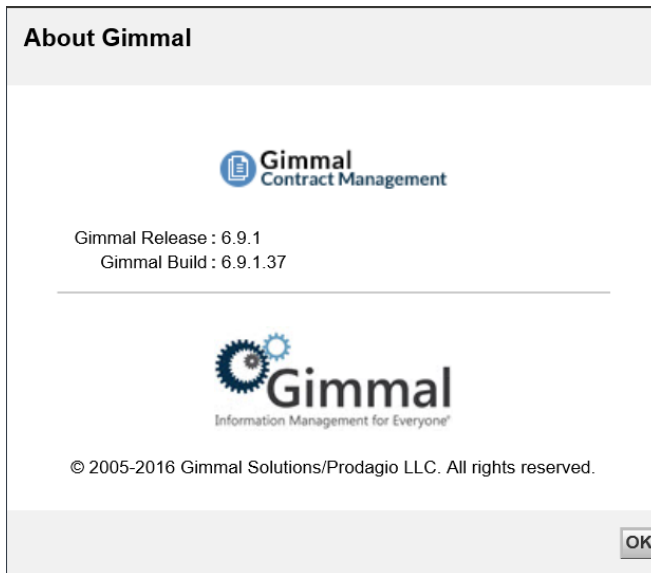
More detail: If displayed: click **[+] More Options** to select Domain, Language, and Additional Accessibility Options.

4 Click **Login**. The logged-in user's default view and tab display.

Display the Gimmel Contract Management and Java Version

- 1 Click the Gimmel Contract Management Powered logo in the lower right corner of the Documents, My Tasks, and Reports views. The About Gimmel Contract Management window displays the Gimmel Contract Management version and Java version (Figure 2-2).

Figure 2-2 About Gimmel Screen

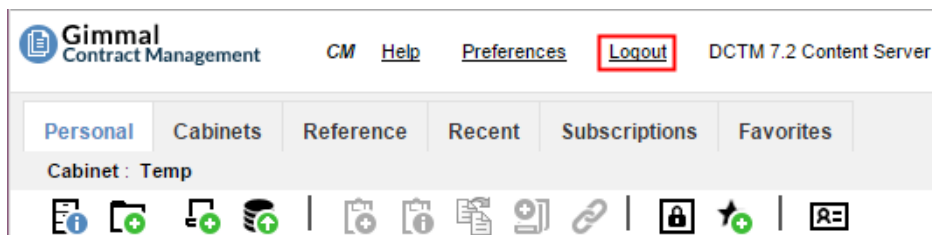


- 2 Click **OK**. The About Gimmel Contract Management window closes.

Log Out

- 1 At any time, from any view, click **Logout**. See Figure 2-3.

Figure 2-3 Logout Link Location




- 2 The Logoff window displays, indicating successful logout.
- 3 *If needed:* To log in again, click **Login Again**. See “Log In” on page 9.

More detail: Your organization’s logo might display in the upper left.

Administrators and Users

In addition to end users, Gimmel Contract Management has two types of administrators: *system administrator* and *business administrator*.



The *system administrator* is responsible for the installation and troubleshooting of the database and Gimmel Contract Management. The system administrator also creates user IDs and adds or deletes users from permission groups. The system administrator typically is a member of the Information Technology (IT) group.

The *business administrator* is a user who has added responsibility for the maintenance of the interface and the details of each user's access to Gimmel Contract Management. The business administrator also controls the selections displayed in menus, seen by all users. The business administrator typically works in the Legal Department or another group that has approval authority for the content of contracts and the model documents used to create contracts.

Navigating Gimmel Contract Management Views

The main Gimmel Contract Management Documents view is used to locate, navigate, and organize documents. This view displays buttons for other views, tabs, and links to access all available document actions and tasks.

Common terminology used for items in the views are:

- **System Links:** Top left of the view— **Help, Preferences, Logout.**
- **View Icons:** The buttons at the top right of the view provide access to different functions and actions. If you are a business administrator, you have Administrator permission and will see an additional Administrator icon. Compare [Figure 2-4](#) with [Figure 2-5](#).

Figure 2-4 View Icons — User View

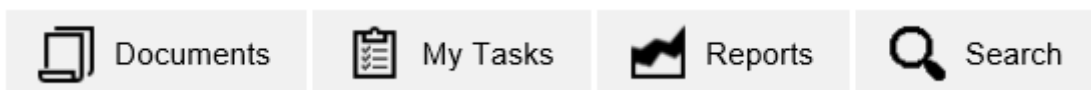


Figure 2-5 View Icons — Business Administrator View



For details on functionality available to business administrators, see the separate document titled *Gimmel Contract Management 6.9 Business Administrator Guide*.

- **Tab Row: Personal, Cabinets, Templates, Clauses, Reference, Recent, Subscriptions and Favorites.** Some configurations may not display some of these tabs.
- **Cabinet or Folder Action Icons:** includes all icons located directly underneath the tab Row.
- **Quick Search and Item Display:** basic search of objects, documents and Related documents and control of how many items display on a page.
- **Item Listing:** the detailed listing of contracts and documents in the highlighted Cabinet or folder.
- **Object Links:** at the right side of Item Listing, a set of links for each object. Some configurations may not display these Links.
- **Cabinet and Folder Structure:** left side of view.

Views and Their Tabs

Gimmel Contract Management displays various views: Documents, My Tasks, Reports and Search and most of these views includes some similar and some unique tabs.

Documents View

In the Documents view, several tabs display: **Personal, Cabinets, Templates, Clauses, Reference, Recent, Subscriptions, Favorites.**

More detail: Some tabs may **not** display in some client configurations.

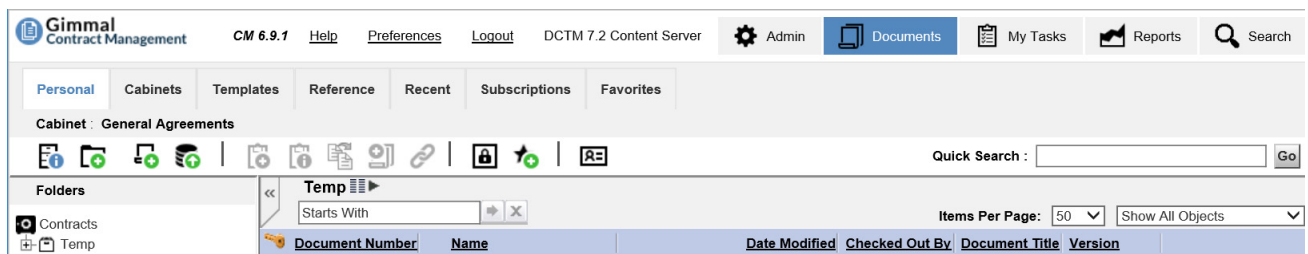
Personal Tab

After login, Gimmel Contract Management normally launches and displays the user's **Personal** tab and personal Cabinet identified by the user's name. See [Figure 3](#).

More detail: The default view and tab displayed after log in may be changed by each user. See ["Edit User Preferences – General Tab"](#) on page 35.

By default, new documents created from Templates and some imported documents are stored in the Personal Cabinet. When the user finishes creating or editing a document, normally it is moved out of the Personal Cabinet to its correct public **Cabinets** location. See ["Moving, Copying and Linking Items Using the Clipboard"](#) on page 89. The document may also be moved using Auto File to file it publicly. See ["Auto File a Document"](#) on page 65.

Figure 3 Personal Tab

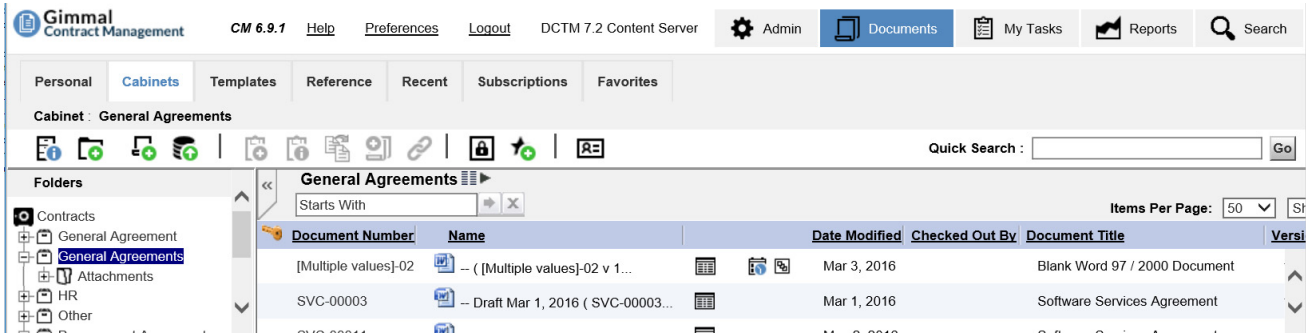


Cabinets Tab

The **Cabinets** tab displays the public Cabinets, which usually reflect the organization structure. Users can navigate through the public Cabinet hierarchy into the folders below to access a contract or related document. Not all Cabinets are public. Your view of available public Cabinets depends on your level of permission. See [Figure 4](#).

If your organization uses a large number of Cabinets, folders, and documents, find a document or a group of documents quickly using the Search view. See [Chapter 11, "Searching Documents."](#)

Figure 4 Cabinets Tab



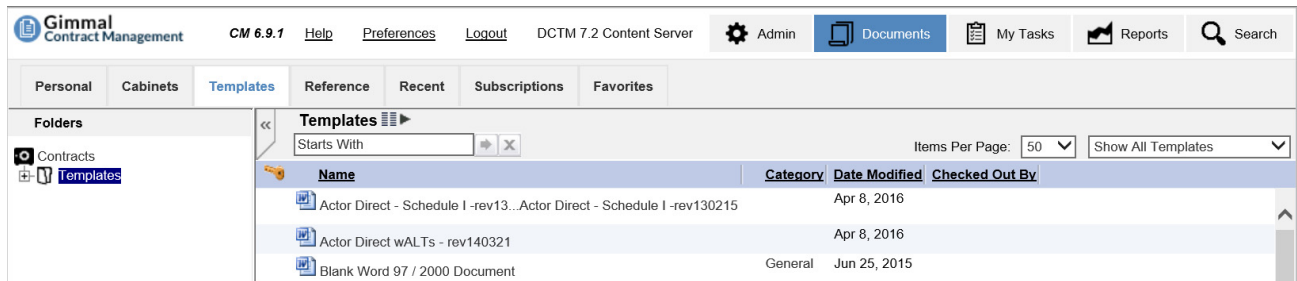
Templates Tab

The **Templates** tab displays the contents of the Templates Cabinet, which houses a library of Templates used to create contracts. See [Figure 5](#). Users responsible for creating contracts can apply a Template to more easily and quickly create an accurate new document in their personal Cabinet. See [“Importing Documents” on page 43](#).

Templates are created, stored and updated by business administrators. To request Template changes or additional Templates, contact your business administrator.

More detail: The Templates tab can be configured to **not** display. See the separate *Gimmel Contract Management 6.9 Business Administrator Guide*.

Figure 5 Templates Tab



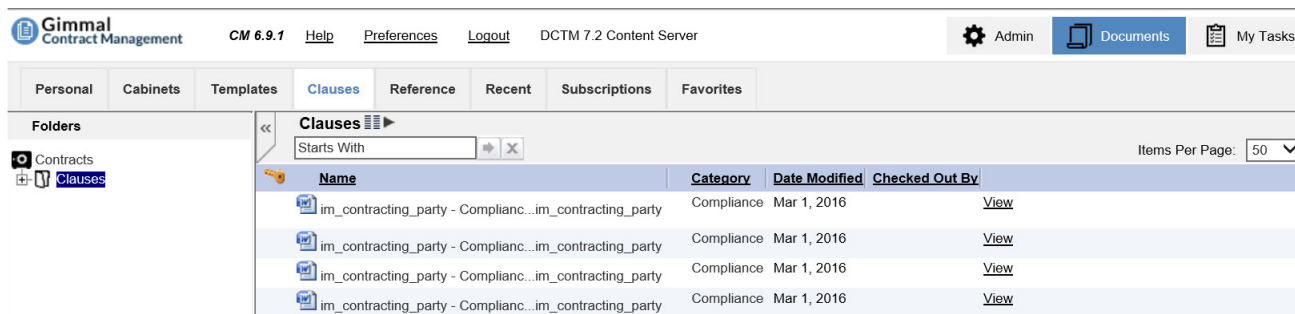
Clauses Tab

The **Clauses** tab displays a list of Clauses that can be included in many Templates when building documents from Templates. Normally, Clauses are a few standard paragraphs, but they can be of unlimited length and complexity. See [Figure 6](#).

Clause documents are stored and updated by business administrators. To request changes or additional Clauses, contact your business administrator.

More detail: The Clauses tab can be configured to **not** display. See the separate *Gimmel Contract Management 6.9 Business Administrator Guide*.

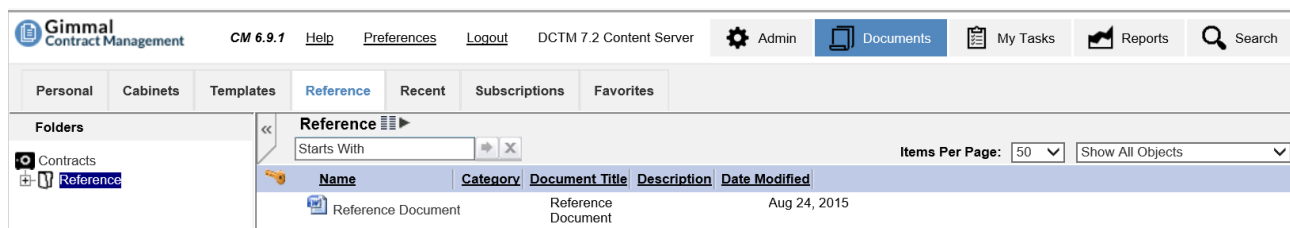
Figure 6 Clauses Tab



Reference Tab

The **Reference** tab displays the items in the Reference Cabinet, which houses a library of supporting content, in any format, that can be viewed and copied by users. Reference text and graphical content can also be included as content in contracts (Figure 7).

Figure 7 Reference Tab



Reference documents are stored and updated by business administrators. To request changes or additional reference documents, contact your business administrator

More detail: the Reference tab can be configured to **not** display. See the separate *Gimmel Contract Management 6.9 Business Administrator Guide*.

View Reference Documents on the Reference Tab

- 1 Click the **Reference** tab.
- 2 *Optional:* Click to open the needed Reference document folder.
- 3 In the document list, double-click the needed Reference document. A read-only version displays.

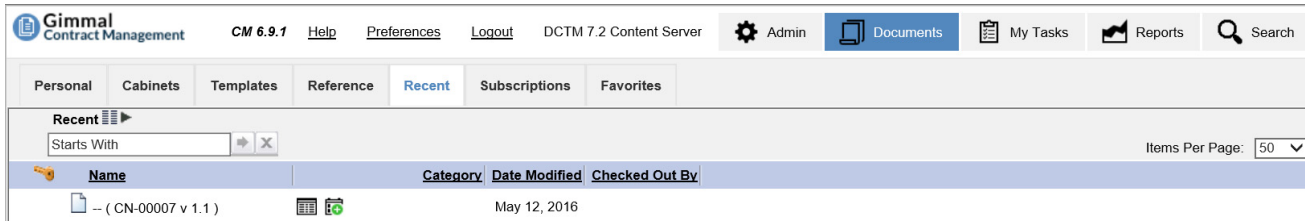
Recent Tab

The **Recent** tab displays items the user has recently created, edited or checked out, regardless of the location of the items. Gimmel Contract Management automatically maintains the items listed in the **Recent** tab (Figure 8).

The business administrator does **not** control what displays in each user's **Recent** tab.

More detail: The default time period for display of Recent documents is the last 14 days. This time period is configurable. See your system administrator for your organization’s default time period. The Recent tab can be configured to **not** display. See the separate *Gimmal Contract Management 6.9 Business Administrator Guide*.

Figure 8 Recent Tab

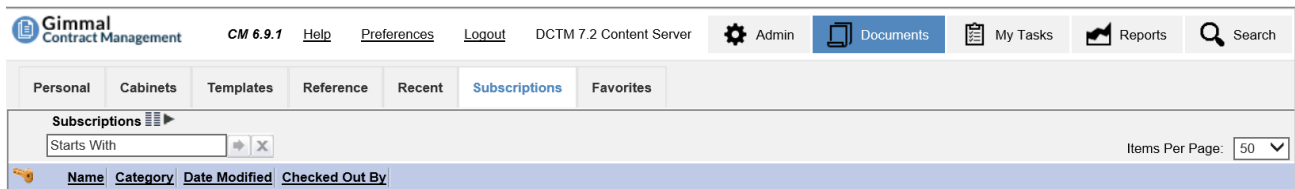


Subscriptions Tab

The **Subscriptions** tab lists only the documents you have identified (“subscribed to”) that have been changed by other users. See [“Subscribing to a Document” on page 67](#).

More detail: The Subscriptions tab can be configured to **not** display. See the separate *Gimmal Contract Management 6.9 Business Administrator Guide*.

Figure 2-1 Subscriptions Tab



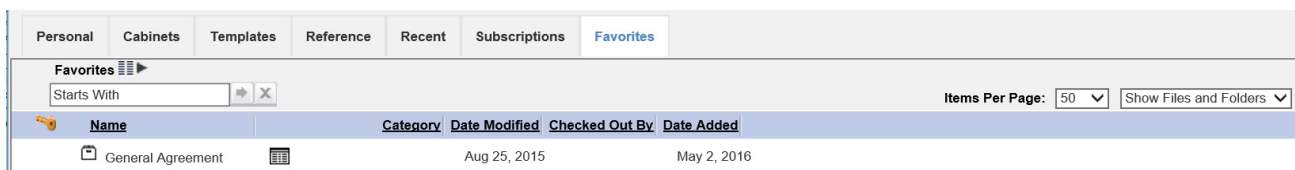
Favorites Tab

The **Favorites** tab lists the bookmarked items you created for quick access to the Cabinets, folders or documents you use the most. See [Figure 3](#). Gimmal Contract Management does **not** automatically list files in the **Favorites** tab; each user maintains his/her own Favorites listing. See [“Managing Favorites” on page 80](#).

The business administrator does **not** control what displays in each user’s **Favorites** tab.

More detail: The Favorites tab can be configured to **not** display. See the separate *Gimmal Contract Management 6.9 Business Administrator Guide*.

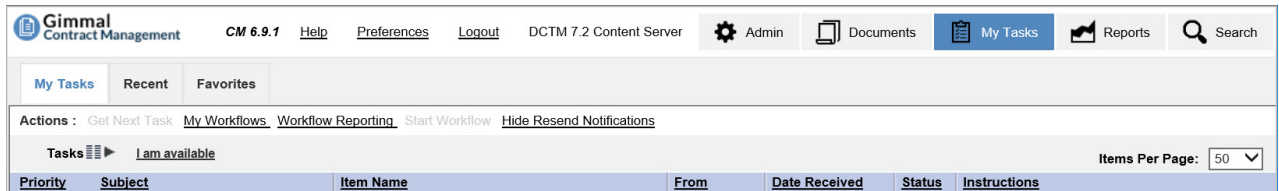
Figure 3 Favorites Tab



My Tasks View

The My Tasks view functions as your to-do list and includes three tabs: **My Tasks**, **Recent** and **Favorites**. It also provides a list of Reminder, Obligations, Workflows, Routing and Notification tasks assigned to you. See [Figure 4](#). The **Recent** and **Favorites** tabs also display on the Documents view. See [“Documents View” on page 13](#).

Figure 4 My Tasks View



When you **view** a task, it becomes acquired by you and the task status is identified as *Acquired*. You are then responsible for performing the action (including completing the task) and forwarding the task to the next person or group in a workflow.

Often, a task is assigned to a group of people. Each person in the group receives an item in their My Tasks view for that task. After one person acquires the task, the task is removed from the other users' My Tasks view. For more information about My Tasks, see [Chapter 10, “Managing My Tasks.”](#)

Reports View

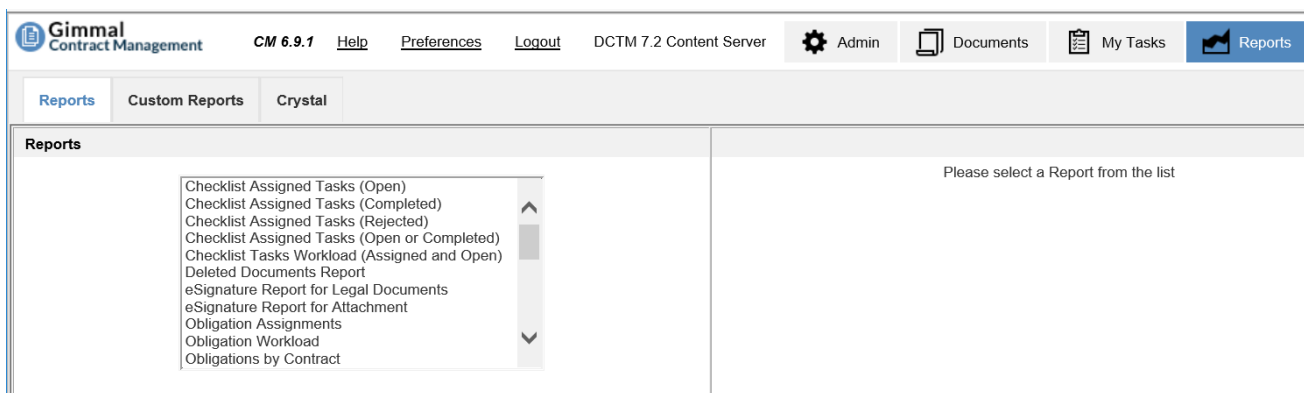
The Reports view provides and displays various standard **Reports** and **Custom Reports**. Most reports require certain report data to be entered before the report can be generated. See [Figure 5](#).

In addition to being viewed, reports can also be downloaded and printed. For more information about Reports, see [Chapter 12, “Generating Document Reports.”](#)

More detail: Certain client configurations also include a **Crystal** tab, for access to Crystal reports and five standard Crystal reports.

More detail: The Reports view can be configured to **not** display. See the separate *Gimmel Contract Management 6.9 Business Administrator Guide*.

Figure 5 Reports View



Search View

The **Quick Search** field is available on the top right of the Documents view only. The **Search** view, referred to as Advanced Search, is accessed by clicking **Search** on the top menu from any view allows searching by document properties and/or document content for any document in the repository. In standard Gimmel Contract Management configurations, searching also includes documents in the **Personal** tab of all other users. See [“Personal Tab” on page 13](#).

All searches require certain information to be entered before the search can display results. Entered information filters all information in the repository and displays only matching results. All individual user Searches can be named and saved, and are available to all users. See [Figure 2-1](#). For more information about Search, see [Chapter 11, “Searching Documents.”](#)

Figure 2-1 Search View – Advanced Search

Advanced Search: General

General | My Saved Searches | All Saved Searches

Contains:

Document Type: All Contracts

Properties: Category =

[Add another property](#)

Date: Modified Anytime From

To

Search Clear Cancel

Document Dashboard

In the Documents view, document (item) names in either the **Personal** or **Cabinets** tabs are listed. After each document name, different icons may or may not display to indicate what other documents or active features are available for the document. See [“Documents View” on page 13](#).

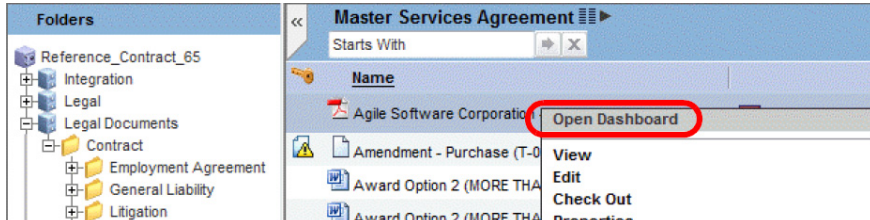
ALERT! Because of the Gimmel Contract Management ability to relate documents, be aware that a document dashboard will provide access to many other document dashboards (such as Related Documents) in a “drill down” relationship. Always read the current document dashboard name to ensure it is the correct document before taking an action!

Open a Document Dashboard

Opening the dashboard also displays high-level document details (the document Jacket):

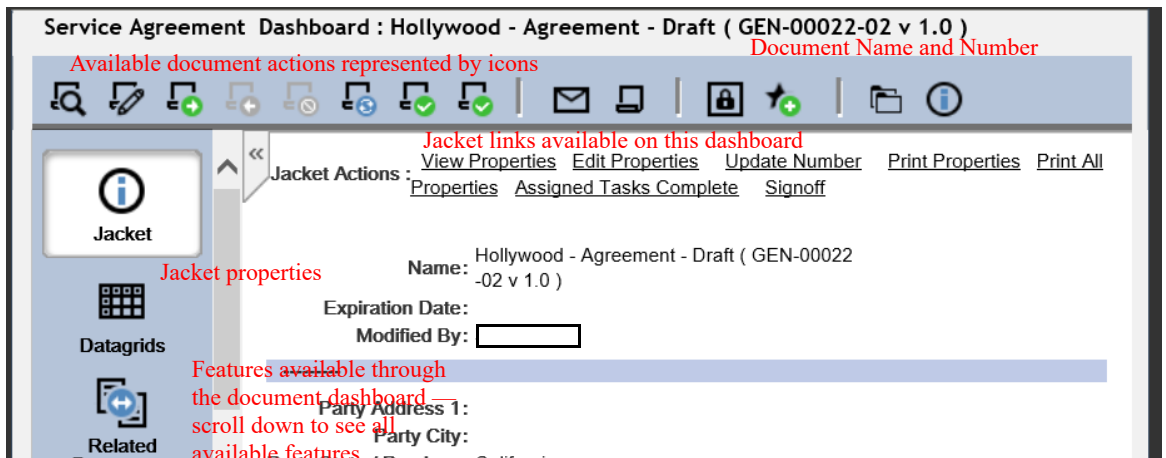
- 1 Double-click the document name (including in Search Results)
OR
Right-click the document name and select Open Dashboard. See [Figure 2-2](#).

Figure 2-2 Open a Document Dashboard



- 2 View the open document dashboard (see [Figure 2-3](#)) which is the highest-level display for each document and includes:
 - Available document actions (a horizontal row of small icons)
 - Available document features (a vertical row of large icons)
 - **Links** for available Jacket actions
 - High-level document Jacket properties
- 3 Click **Close**. The document dashboard closes and the previous view displays.

Figure 2-3 Document Dashboard



Help

Indexed and bookmarked help for users is available via the Help link ([Figure 2-3 on page 2-10](#)).

Access Help

- 1 On any Gimmel Contract Management view, click **Help**. User guide help information displays.

Managing Cabinets and Folders

Cabinets are the first level of storage in a Gimmel Contract Management repository. All users can view existing Cabinet properties. Use the left pane of Gimmel Contract Management to navigate Cabinets and folders. The Cabinets and folders structure is similar to Windows Explorer folders.

More detail: Cabinets can only be created and deleted by system administrators, so the **New Cabinet** button will **not** display for users without system administrator permissions.

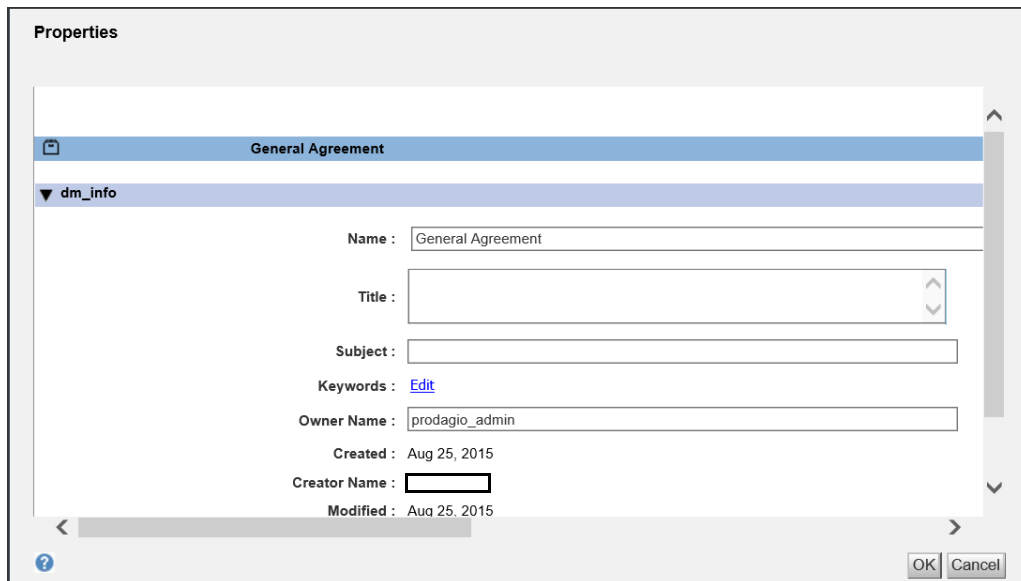
Navigate Cabinet and Folder Structure

- To display the contents of a Cabinet, click the **plus** sign beside the Cabinet name.
- To display the subfolders inside a folder, click the **plus** sign beside the folder or sub folder name.
- To hide folders or subfolders, click the minus sign beside the folder or sub folder.
- To view the documents inside a folder, click the folder name.

View Cabinet Properties

- 1 In the Documents view, click a Cabinet name.
- 2 Click the **Cabinet Properties** button. The Properties window displays. Different configurations display different properties (Figure 2-4).

Figure 2-4 Cabinet Properties



The screenshot shows a 'Properties' dialog box for a cabinet named 'General Agreement'. The dialog has a tree view on the left showing the cabinet structure. The main area contains the following fields:

- Name: General Agreement
- Title: (empty)
- Subject: (empty)
- Keywords: [Edit](#)
- Owner Name: prodagio_admin
- Created: Aug 25, 2015
- Creator Name: (empty)
- Modified: Aug 25, 2015

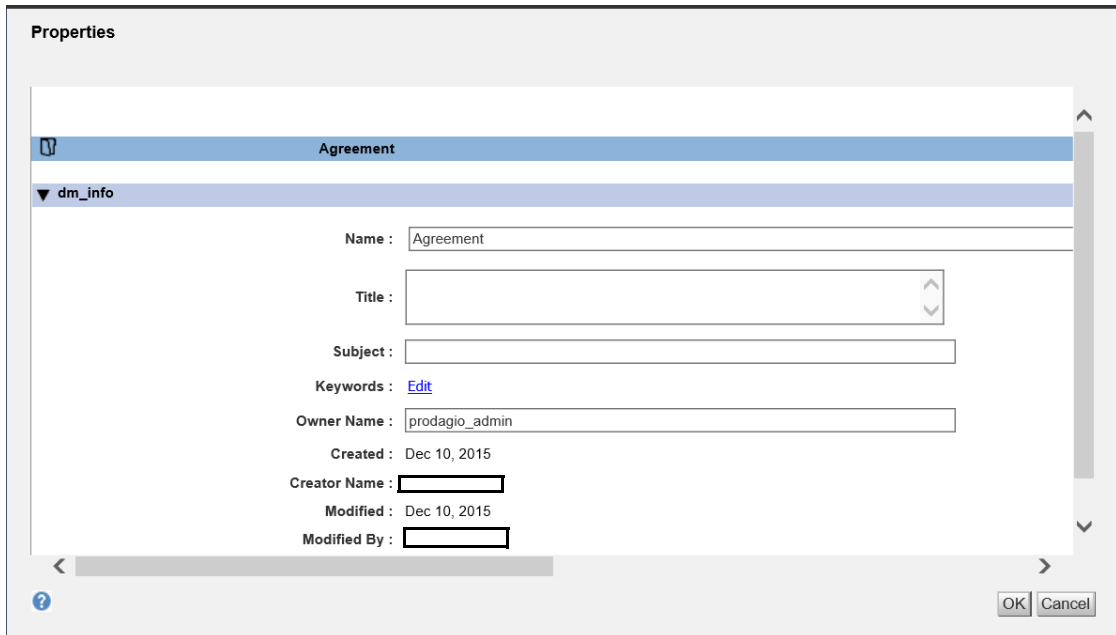
At the bottom right, there are 'OK' and 'Cancel' buttons.

- 3 Click **OK** to save changes and close the Properties window, or **Cancel** to close without saving.

View Folder Properties

- 1 In the Documents view, click a folder name.
- 2 Click the **Folder Properties** button. The Properties window displays. Different configurations display different properties (Figure 2-5).

Figure 2-5 Folder Properties



- 3 Click **OK** to save changes and close the Properties window or **Cancel** to close without saving.

Create a New Folder

Create **new folders** in any displayed Cabinet. New subfolders can also be added to existing folders. At any time, delete any unwanted folders or subfolders.

ALERT! The system parameter Enforce Auto File check box must be deselected to enable create new folder functionality. See the *Gimmel Contract Management 6.9 Business Administrator Guide*.

- 1 In the Documents view, click the Cabinet name or folder name to include the new folder.
- 2 Click the **New Folder** button. The **New Folder: Create** window displays the **Create** tab (Figure 2-6).

Figure 2-6 New Folder – Create Tab

New Folder: Create

1. Create 2. Properties 3. Permissions

Contracts

Name: *

Type: Folder(dm_folder) ▼

[\[+\] Show options](#)

- 3 Type a **Name** for the new folder. Any character except a slash (/) is permitted.
- 4 Select folder type from the **Type** menu.
- 5 To add the new folder to Favorites when finished with creating the new folder, click **[+] Show options** and select the **Add to Favorites** check box.
- 6 Click **Next**. The **New Folder Properties** tab displays (Figure 2-7).

Figure 2-7 New Folder – Properties Tab

New Folder: Properties

1. Create 2. Properties 3. Permissions

Contracts

Testing

▼ dm_info

Name: Testing

Title: ▲ ▼

Subject:

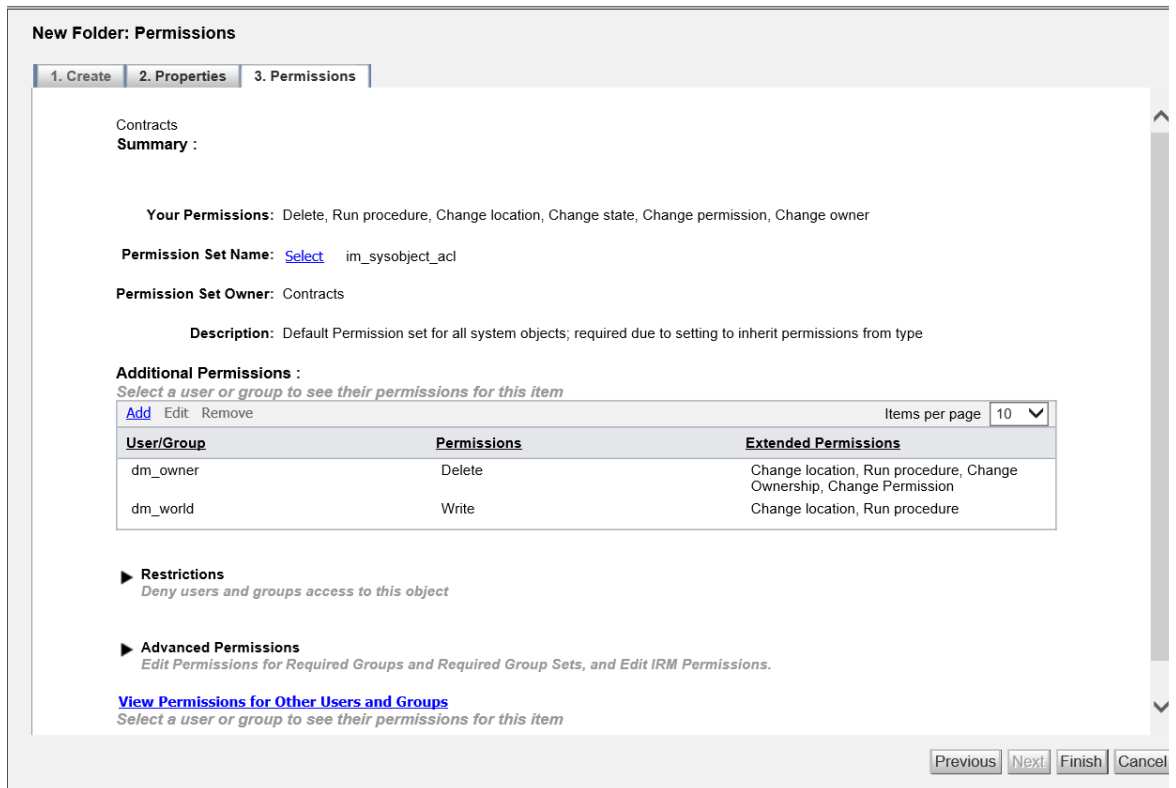
Keywords: [Edit](#)

Owner Name:

Created: May 9, 2016

- 7 Make edits and entries as necessary.
- 8 *If needed:* to enter the new folder **Keywords**, click Edit and to enter **Owner Name**, click Edit. Folder keywords are very useful when searching.
- 9 Click **Next**. The **Permissions** tab displays (Figure 2-8).

Figure 2-8 New Folder – Permissions Tab



ALERT! This **Permissions** tab lists all standard permissions for this new folder. It is recommended to **not** change any settings on this tab.

- 10 Click **Finish**. The Document window displays with the new folder listed under the selected folder and Cabinet.

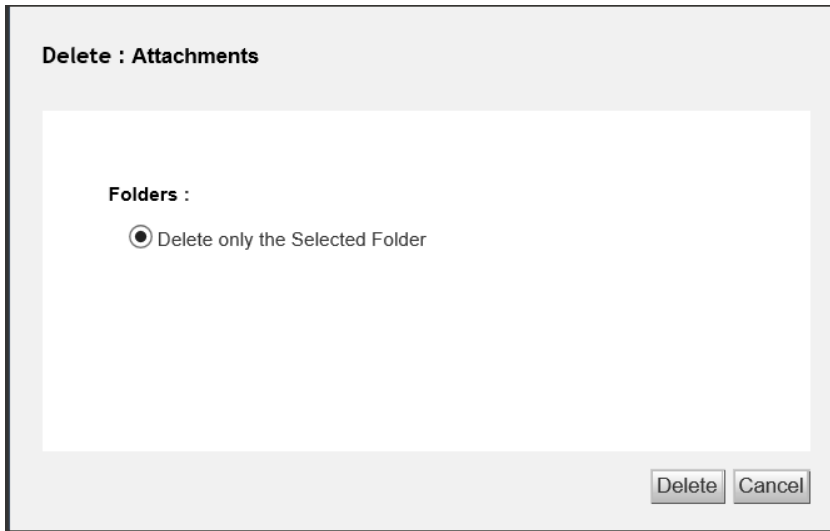
Delete a Folder

Certain users might be able to delete certain folders.

More detail: If the folder to be deleted contains subfolders and items, please delete all the items and subfolders before deleting the folder.

- 1 In the Documents view, click the folder that you want to delete.
- 2 Click the **Delete Folder** button (Figure 2-9).

Figure 2-9 Delete Folder Window



- 3 In **Folders**, the default selection is Delete only the Selected Folder.
- 4 In **Versions**, the default selection is Delete Current Versions (folder will not be deleted if object versions remain).
 - A *If needed*: select **Delete All Versions**.
- 5 Click **Delete**. The Documents window displays, with the selected folder deleted.

Buttons and Icons

Gimmel Contract Management incorporates a variety of buttons and icons to initiate actions, access available features or to indicate a condition. Refer to Tables 1 to 4 for complete descriptions of these Gimmel Contract Management icons.

See Figure 2-4 and Figure 2-5 to see the buttons to access the views.

More detail: Depending on your permission level, you might not see all of the buttons and icons listed in Tables 1 to 4.

Table 1 View and Dashboard Listing Buttons and Icons

Buttons listed with an item title launch actions for that item.	
	Nonclickable icon at the left side of the item name indicates the item's format ; here, the Microsoft Word icon.
	Opens the Document Dashboard for the item listed in views, tabs, windows and Report results. See "Document Dashboard" on page 18 and "Available Standard Reports" on page 222 .
	Indicates the item has one or more Reminders . See "Managing Reminders" on page 144 .
	Indicates the item has one or more Obligations . See "Managing Obligations" on page 153 .
	Indicates the item has one or more Related Documents . See Chapter 6, "Managing Related Documents" .
	Indicates the item has one or more Notes . See "Managing Document Notes" on page 94 .
Icons and buttons displayed on a window provide more information about that item.	
	Checked out by (user name) indicates who has checked out the item and allows other users to open, but not edit the item. See "Editing a Document" on page 50 .
	Checked out by you indicates the item has been checked out by the logged-in user. See "Editing a Document" on page 50 .
	Creation Process Was Not Completed indicates the creation of a new item was not completed. See "Completing Incomplete Documents" on page 46 .
	On the Reminder window, indicates the Reminder was created by an Automated Reminder . See "Managing Reminders" on page 144 .
	Properties button displays the properties of an item, such as a document or a Saved Search. See "Managing Document Properties" on page 72 and "Manage My Saved Searches" on page 215 .
	Calendar button displays a month and year calendar for date selection. See "Generate a Standard or Custom Report" on page 238 .
	Go Back button in the Property History window displays the next older list of Properties. See "Displaying Document Property History" on page 100 .
	Go Forward icon in the Property History window displays the next newer list of Properties. See "Displaying Document Property History" on page 100 .
	Item Completion indicates that a Checklist item is complete. See "Completing a Checklist Item" on page 179 .
	Item Not Completed indicates that a Checklist item is assigned, but not yet completed. "Completing a Checklist Item" on page 179
	On the Checklist window, Signoff Required indicates that a Checklist item requires an electronic signature to complete the item. See "Completing a Checklist Item" on page 179 .

Table 1 View and Dashboard Listing Buttons and Icons











	On the Checklist window, Signoff Completed indicates that a Checklist item has been electronically signed to complete the item. See "Completing a Checklist Item" on page 179.
	Item Rejected indicates that a Checklist item was rejected and returned to the sending user. "Rejecting a Checklist Item" on page 181.
	Nonfinancial Obligation. See "Add a Financial or Non-Financial Obligation" on page 154.
	Financial Obligation. See "Add a Financial or Non-Financial Obligation" on page 154.
	Details displays detailed information during mouse over. See "Managing Document Reminders" on page 148.
	The Gimmel Contract Management Users button on the Choose a user/group window lists all Gimmel Contract Management users. See "Routing Documents" on page 132.
	Datagrid Delete allows deleting an existing Datagrid row. See "Editing Document Properties" on page 73.
	Datagrid Edit allows editing an existing Datagrid row. See "Editing Document Properties" on page 73.
	Datagrid Insert allows inserting a new Datagrid row. See "Editing Document Properties" on page 73.
	Lookup displays a search window for quick insertion of Properties information. See "Editing Document Properties" on page 73.

Table 2 Document Dashboard Actions Buttons












Buttons in the Document Dashboard launch actions for that item.	
	View displays a read-only view of an item in its creating application. See "View a Read-Only Document from the Document Dashboard" on page 50.
	Edit automatically checks out the item; then displays the item for editing in its creating application. See "Editing a Document" on page 50.
	Check Out the item displayed; does not open the item for editing. During check out, the item is not available for others to edit, but the item can be viewed by others. See "Check Out a Document" on page 50.
	Check In the checked out item. After check in, the item is again available for others to edit. See "Check In a Document" on page 52.
	Cancel Check Out of the item displayed. Canceling check out discards any changes made after item check out. The item is now available for others to open and edit. See "Canceling Document Check Out" on page 55.
	Version Using Original Template creates a new version of an item created from its original Template. Only applies to items created with a Template. See "Versioning a Template-Created Document" on page 56.
	Manage eSignature initiates the process of requesting user(s) to apply their electronic signature to a document.
	Email the item opens a Send Email window with the item attached. See "Email Document(s) as Attachment(s) from the Document Name" on page 61.
	Start Ad Hoc Routing begins routing the item displayed to other users selected from a list. See "Routing Documents" on page 132.
	Permissions display the permission set details for the item displayed (Cabinet, folder or document). See <i>Gimmel Contract Management 6.9 Business Administrator Guide.</i>
	Auto File moves the item from the Personal tab to the location in the Cabinet tab defined by its document type Auto File rule. See "Auto File a Document" on page 65.

Table 3 Document Dashboard Features Buttons









	Displays the Jacket properties of the item. Allows changing all item properties if user has write (edit) privileges. See "Viewing Document Properties" on page 72 and "Editing Document Properties" on page 73.
	Displays Checklist items assigned or not yet assigned as a task to users. Allows attaching a Checklist to an item if no Checklist is currently attached. See Chapter 9, "Managing Checklists" .
	Displays item Reminders . Reminders are not required to be completed. See "Managing Reminders" on page 144.
	Displays the Related Documents for the item. May include five Related document types: Master, Subordinate, Reference, Amendment and Attachment. Allows various ways to associate the different Related Document types. See Chapter 6, "Managing Related Documents" .
	Displays the Contacts information for the item. Allows assigning new Contacts. See "Managing Document Contacts" on page 103.
	Displays Notes recorded for the item and allows creating new notes. See "Managing Document Notes" on page 94.
	Displays Obligations for the items and allows creating new Obligations. Obligations are required to be completed. See "Managing Obligations" on page 153.
	Displays a list of all Versions of the item. See "Managing Document Versions" on page 97.
	Displays an auditable view-only Property History of all changes made to the item properties. See "Displaying Document Property History" on page 100.
	Displays a view-only Audit Trail of actions taken on the item. The Audit Trail is automatically recorded by Gimmel Contract Management and is read-only. See "Managing the Document Audit Trail" on page 99.

Table 4 Title Bar Action Buttons















Buttons displayed beneath the Title bar apply actions to the Cabinet or Folder	
	Displays the properties of the selected cabinet or folder. See "View Cabinet Properties" on page 20.
	Create a New Folder in the selected Cabinet. See "Create a New Folder" on page 21.
	Delete a folder. See "Delete a Folder" on page 23.
	Create a New Document in the selected Cabinet or folder by applying an existing Template. See "Creating a New Document by Applying a Template" on page 40.
	Import files (documents) or folders containing files into the highlighted Cabinet or folder. See "Importing Documents" on page 43.
	Add to Clipboard the selected Cabinet, folder, or item. Enables Move Here , Copy Here and Link Here . See "Add an Item or Items to the Clipboard" on page 89.
	View Clipboard displays a list of items now in the Clipboard. See "View Items on the Clipboard" on page 90.

Table 4 Title Bar Action Buttons

	Move Here moves a selected item in the Clipboard to the current Cabinet and folder location displayed on the Title bar. See "Move an Item or Items" on page 85.
	Copy Here copies a selected item in the Clipboard to the current location displayed on the Title bar. See "Copy an Item or Items" on page 86.
	Link Here links a selected item in the Clipboard to the current location displayed on the title bar. See "Link an Item or Items" on page 87.
	Add to Favorites adds the selected item displayed on the Title bar (Cabinet, folder or document dashboard) to your list of Favorites. See "Adding Favorite Items" on page 80.
	Remove from Favorites removes the selected item displayed on the Title bar (Cabinet, folder or document dashboard) from your list of Favorites. See "Removing Favorite Items" on page 82.
	Global Contacts lists all contacts that can be added as a Contact to any item. See "Managing Document Contacts" on page 103.
	Column Preferences allows each user to change the columns which display in the current view or Search Results and in what sequence the columns display. See "Changing the Displayed Columns" on page 30.

For Search Results buttons, see [Table 15 on page 11-212.](#)

For additional My Tasks view buttons, see ["Managing Tasks with the My Tasks View" on page 186.](#)

Navigating Items (Documents)

Each user can alter the items (documents) displayed on their views and tabs. Each user can do the following:

- Change the displayed columns. See [“Changing the Displayed Columns”](#) on page 30.
- Change the number of items displayed. See [“Changing the Number of Items Displayed”](#) on page 31.
- Filter items to display only items matching the filter selection. See [“Filtering Items Displayed by Type and Name”](#) on page 32.
- Sort displayed items in alphabetical or reverse-alphabetical order. See [“Sorting Items”](#) on page 32.
- Adjust the width of one or more columns in the item listing. See [“Adjusting Column Widths”](#) on page 33.
- Select multiple items. [“Access the Shared Document Actions of One or More Items”](#) on page 30.
- Access document Actions. See [“Accessing Document Actions”](#) on page 29.
- Find items rapidly with Quick Search. See [“Quick Searching for Documents”](#) on page 206.
- View completion or incomplete action messages. See [“Action Status Message Display”](#) on page 34.
- Find items using **Search by Name**. See [“Search Item Names”](#) on page 32.

Accessing Document Actions

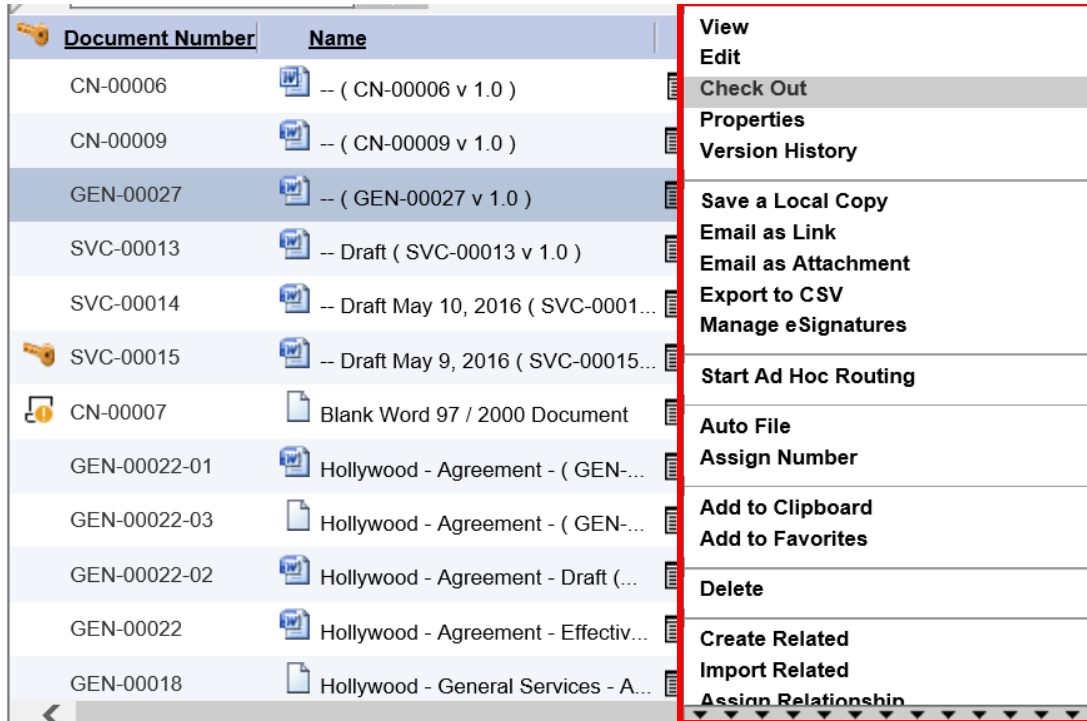
The selections available in the document actions for each document will vary. If multiple items (documents) are selected, only document actions available for all items will display.

More detail: Column changes made to the current view and tab are retained until columns are changed again.

Access the Document Actions of an Item

- 1 Select an item (or items using shift-click); then right-click to access all available document Actions for the selected item(s). See [Figure 2-10](#).

Figure 2-10 Accessing the Document Actions



Access the Shared Document Actions of One or More Items

- 1 To select a group of adjacent items: click the first item, hold the Shift key and click the last adjacent item. For non-adjacent items: hold the Ctrl key and click each non-adjacent item. Each selected item highlights in medium blue.
- 2 Right-click. All shared Action items display. If any action is taken, that action will be taken for all selected items.

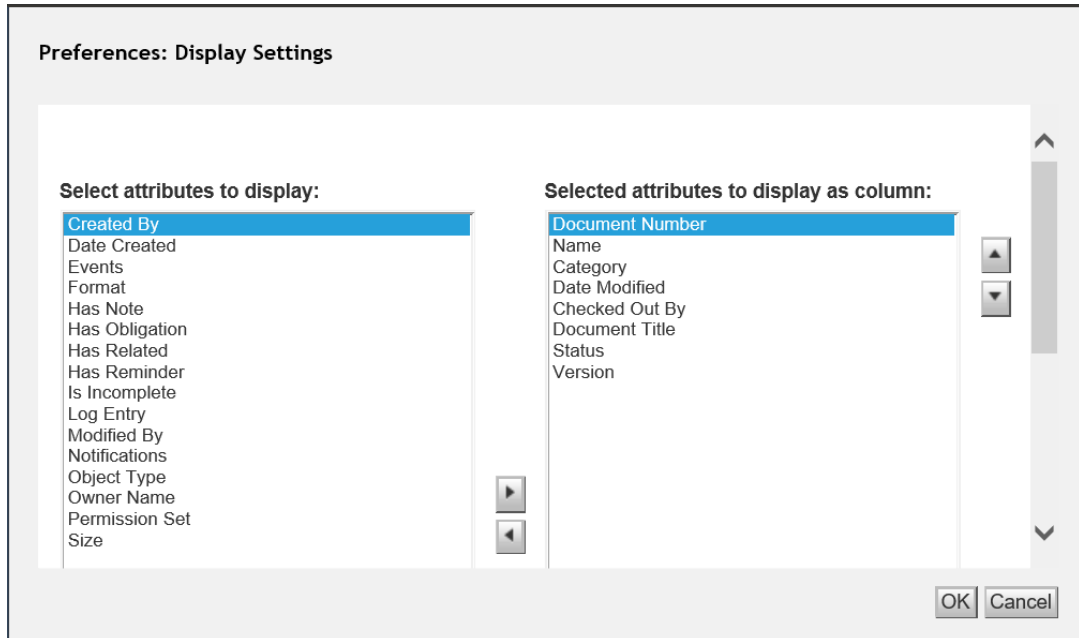
Changing the Displayed Columns

Available columns can be added to or removed from the displayed view and displayed column order can be changed.

Change and Save Columns

- 1 On many views and tabs, you can click the Column Preferences icon. The Preferences Display Settings window displays. See [Figure 2-11](#).

Figure 2-11 Preferences Display Settings



- 2 To add an attribute, in the **Select attributes to display** pane, click to select an attribute; then click the Add from List button to move the selected attribute to the **Selected attributes to display as column** pane.
- 3 To remove an attribute, in the **Selected attributes to display as column** pane, click to select an attribute; then click the Remove from List icon to move the selected attribute to the **Select attributes to display** pane.
- 4 Select an attribute; then click the **Move Up List** icon or **Move Down List** icon to sort the attribute in the desired column order.
- 5 To save changes, click **OK**.
- 6 *If needed:* To undo all changes, click **Reset to Defaults**.

More detail: The attributes beginning with *Has* **always** display their icons (Reminder, Obligation, Related Documents, Notes) immediately after the **Name** column, even if the *Has* attributes are in the **Select attributes to display** pane (default).

Changing the Number of Items Displayed

The number of items displayed in views and tabs can be changed by each user. The latest number is remembered at the next log in.

Change the Number of Items Displayed

- 1 Click the **Items Per Page** menu to change the number of items displayed on each view or tab. See [Figure 3](#).
- 2 Select 10, 50 or 100 items from the menu. The view or tab refreshes to display only the selected number of items.

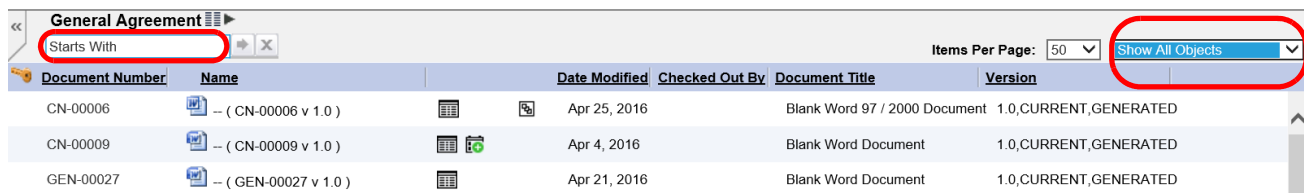
Filtering Items Displayed by Type and Name

Use the Type and First Characters filters to display only those items matching the selected type and/or the first few characters of the item name.

Filter Items Displayed by Type

- 1 In the **Show All Objects** menu, select a filter for the selected Cabinet or folder. See [Figure 3](#). The available filters are:
 - Show All Objects – displays all items
 - Show Primary Documents – displays all primary documents
 - Show Attachments – displays all Attachments

Figure 3 Changing Items Displayed



More detail: The selections available in the Show All Objects menu could change based on the currently displayed window.

Search Item Names

- 1 In the **Starts with** field, enter the first few characters of the item name. See [Figure 3](#).
- 2 Click the **Search By Name** button. All names matching the entered first characters display.
- 3 To clear the search characters and display all items, click the **Clear** button.

Quick Search

See "Quick Searching for Documents" on page 206.

Sorting Items

Sorting displayed items allows listing items by a column heading different than the default column heading. List displayed items by any heading in ascending (a-z) or descending (z-a) order.

More detail: Current sorting is retained after an action is taken until the view or tab is closed, refreshed or the user logs out of Gimmel Contract Management.

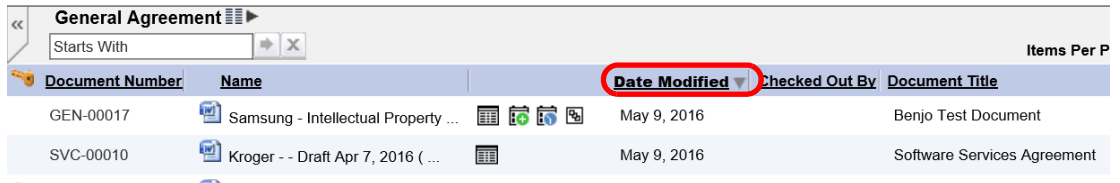
Sort Items

- 1 Display the list of items to be sorted.

More detail: By default, items are sorted by the **Name** heading, ascending (a to z).

- 2 Click the column heading that you want the items to be sorted by in ascending order. . See Figure 2-1.

Figure 2-1 Sort Items by Date Modified



Document Number	Name	Date Modified	Checked Out By	Document Title
GEN-00017	Samsung - Intellectual Property ...	May 9, 2016		Benjo Test Document
SVC-00010	Kroger - - Draft Apr 7, 2016 (...)	May 9, 2016		Software Services Agreement

- 3 Click the column heading again to toggle the sort order.

Autocomplete Text Fields

Autocomplete helps eliminate repetitive data entry into text fields by remembering and allowing single click inserting of previously entered data. To enable Autocomplete, see [“Edit User Preferences – General Tab” on page 35](#).

Auto Complete Text Fields

- 1 Enter the first character in a text field and Autocomplete suggests possible matches created by information entered in that field previously. The more characters entered, the greater the possibility of Auto Complete providing an exact match.

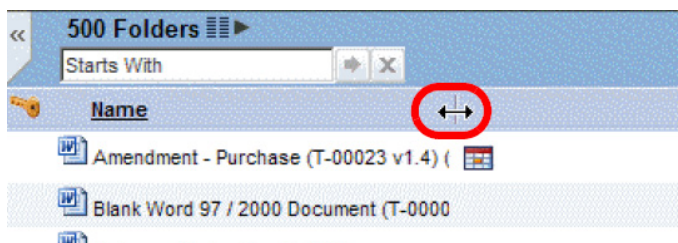
Adjusting Column Widths

If needed, change the width of each invoice column to display all column information or more of the information.

Adjust Item Column Widths

- 1 In the column headings of the various views and tabs, drag each column delimiter (in the column header row) horizontally to increase or decrease the selected column width. See Figure 2-2.

Figure 2-2 Adjusting Column Widths

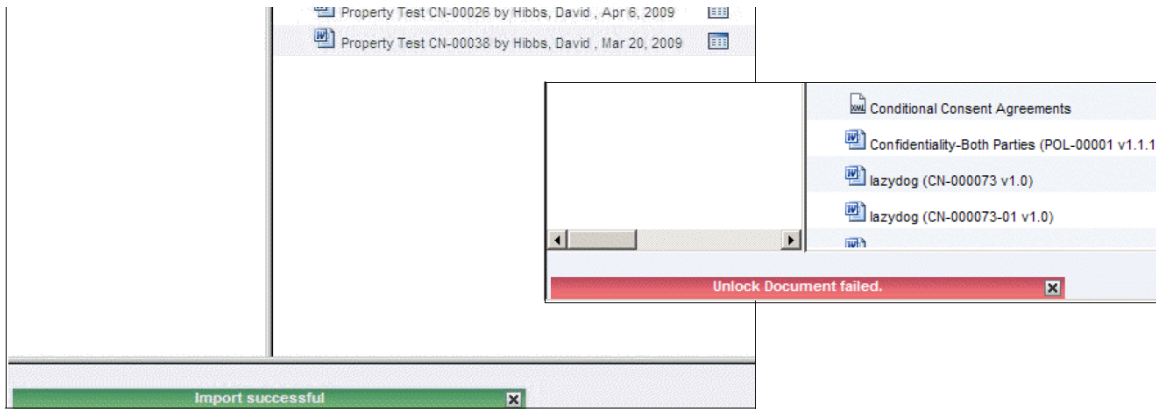


- 2 To save this new width, click any other tab; then click back to the tab with the changed width.

Action Status Message Display

A message displays in the lower left corner of various views to indicate action completion (in a green background) or action incomplete (in a red background). Click the Close icon to close the message. See [Figure 2-3](#).

Figure 2-3 Message Display



Editing User Preferences

After login, change the display of your default view to suit your personal preferences. Any changes you make are automatically saved and are applied each time you log in.

Edit User Preferences – General Tab

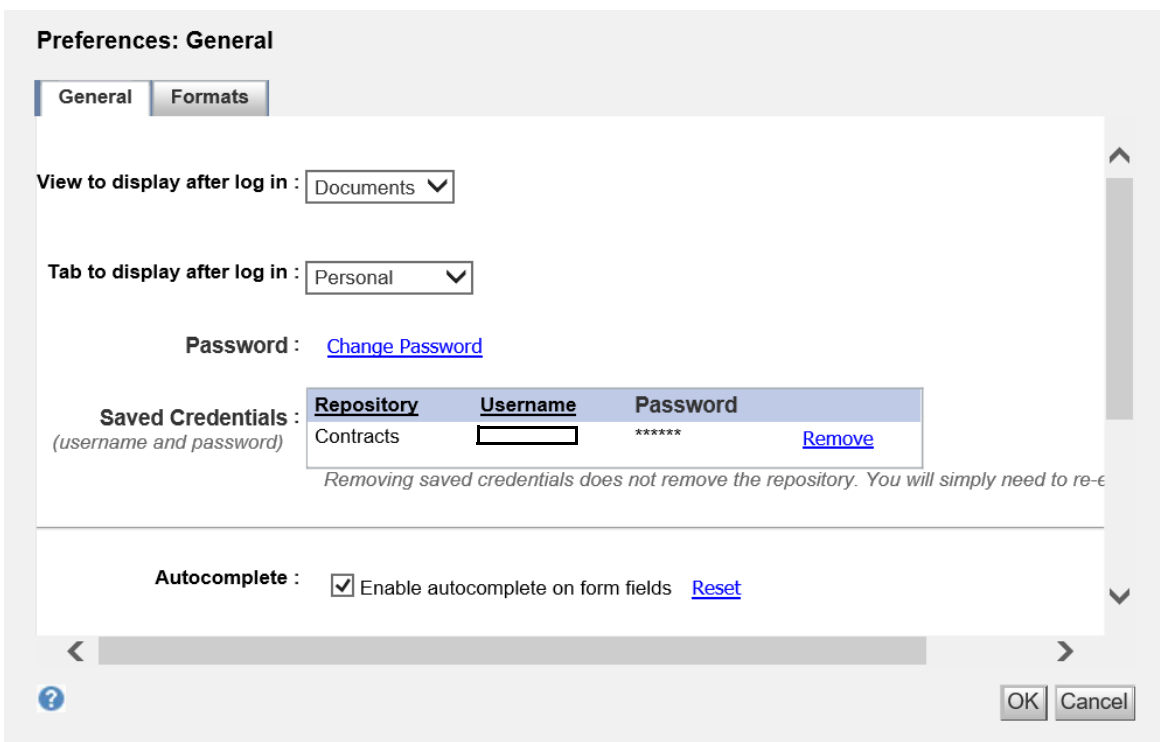
- 1 On any Gimmel Contract Management view, click **Preferences**. See [Figure 2-4](#).

Figure 2-4 Preferences Link Location



The Preferences window – General tab displays. See [Figure 2-5](#).

Figure 2-5 Preferences – General Tab



The screenshot shows the 'Preferences: General' dialog box. It has two tabs: 'General' (selected) and 'Formats'. Under 'View to display after log in', a dropdown menu is set to 'Documents'. Under 'Tab to display after log in', a dropdown menu is set to 'Personal'. There is a 'Password:' label with a blue link 'Change Password'. Below that is a 'Saved Credentials' section with a table:

Repository	Username	Password	
Contracts	<input type="text"/>	*****	Remove

Below the table is a note: 'Removing saved credentials does not remove the repository. You will simply need to re-'. At the bottom, there is an 'Autocomplete' section with a checked checkbox 'Enable autocomplete on form fields' and a blue link 'Reset'. At the bottom right are 'OK' and 'Cancel' buttons.

- 2 In **View to display after log in**, select the view to display immediately after log in from the menu. This selection then defines which tabs display in the following **Tab to display after log in** menu.
- 3 In **Tab to display after log in**, select from the menu which tab to display immediately after log in from the already selected view.
- 4 To change the logged in user password, click **Change Password**. The Change Password window displays. See [Figure 2-6](#).

Figure 2-6 Change Password

The screenshot shows a 'Change Password' dialog box. At the top, it says 'Change Password' in a grey header. Below that is the Gimmel Contract Management logo. The dialog contains the following fields and labels: 'Name:', 'Repository: Contracts', 'New Password:' followed by a text input field with a red asterisk, and 'Confirm New Password:' followed by another text input field with a red asterisk. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

- A Enter the **New Password** and enter new password again in the **Confirm New Password** field.
- B Click **OK**. The new password is immediately effective.

More detail: On some configurations, **Change Password** might not display.

- 5 It is recommended to **not** change **Saved Credentials**. Your login will be authenticated by Gimmel Contract Management with your user name and password.

More detail: Access **Saved Credentials** only if you have previously selected **Remember my credentials on the Login window**. See [Figure 2-1 on page 2-9](#).

Use **Saved Credentials** to clear your saved credentials, particularly if someone else will use your computer. See ["Log In/Log Out of Gimmel Contract Management" on page 9](#).

- A To remove saved credentials, click **Remove** and click **OK** on the **Remove Credentials** window.
- 6 To enable the drag and drop method of importing document **when using the Internet Explorer browser only**, select **Use the drag and drop plug-in**.
- 7 To enable **Autocomplete**, select **Enable autocomplete in form fields** to remember and automatically display previous entered data for quick selection. See ["Autocomplete Text Fields" on page 33](#).
 - A *If needed:* click **Reset** to clear all previously entered field data and forcing Gimmel Contract Management to begin re-earning all newly added field data.
- 8 To display **Hidden objects**, select **Show hidden objects**. The default setting is unchecked.

More detail: Show hidden objects only displays for users with the appropriate permissions (usually business administrators). Hidden objects are object properties that are not normally displayed.

9 *If needed:* to turn **Accessibility Options** on, select **Turn accessibility options on**. Accessibility options enhance use of Gimmel Contract Management for individuals with physical impairments.

10 In **File Transfer**, select UCF File Transfer or HTTP File Transfer from the menu.

More detail: If UCF File Transfer is selected, drag and drop is enabled when using the Internet Explorer browser only (if Use the drag and drop plug-in is checked). If HTTP File Transfer is selected, drag and drop is disabled. If changing the current file transfer method, please wait at least five minutes for the change to take effect.

11 To save changes on this tab, click **OK**.



Creating and Importing Documents

This chapter presents the following topics:

About Document Types	38
The Role of Document Types.....	38
About Document Numbers	39
Creating and Importing Documents	40
Creating a New Document by Applying a Template	40
Create a New Contract or Other Document	40
Importing Documents	43
Import a Document	43
Locating a Document after Import	45
Completing Incomplete Documents	46
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About Document Types

A document type is a grouping or categorization of documents that are similar in format, content and/or purpose. Document types are a key property field, configured to match each organization's document types. Document types greatly affect how a document is created or imported.

For example, a contract can be a document type, or a procurement contract can be a document type, or a federal procurement contract can be a document type. Attachments are another common document typed. The naming and grouping of document types reflects your business rules and work processes.

Your system administrator has configured the Gimmel Contract Management document types required by your organization.

Gimmel Contract Management also includes some commonly used document types which may or may not be used by your organization. The most commonly used document type is `im_legal_document`, which often becomes the default document type if no other type is selected.

The Role of Document Types

The document type assigned to a document plays a key role in how that document is processed by Gimmel Contract Management. Document types:

- Determine which property fields and which selection lists display.
- Provide key relationships to other document functionality, such as user groups and permissions, importing new documents and Templates.
- Provide key interrelationships to certain Gimmel Contract Management functions such as Jackets, Checklists, and Search.

The document type determines which property fields are displayed on a document Jacket. See ["Viewing Document Properties" on page 72](#).

Importing documents or creating new documents from Templates includes selecting a document type. See ["Creating and Importing Documents" on page 40](#).

The document type determines which Checklist may be attached to a document, because Checklists usually differ for each document type. See ["Managing Document Checklists" on page 167](#).

The document type is also an attribute that can be selected during a search. See ["Advanced Searching for Documents" on page 208](#).

For security or organizational purposes, certain user groups might be limited to accessing only certain document types. See your system administrator.

About Document Numbers

By default, Gimmel Contract Management assigns document numbers when documents are created or imported. Document numbers may be sequential or they may be configured to generate specific numbers based on rules established by your organization. See your system administrator for your document numbering rules.

Most document numbering rules consist of a two or more letter prefix (such as **CN** for Contract, **AT** for Attachment or **CORP** for Corporate), a hyphen, a five-digit number, a hyphen; then a two-digit sub-number, and an **X.X** version number prefixed with a **v** (including both major and minor versions). Some examples are:

- CN-00031 v1.1
- CN-00031-01 v1.0



Creating and Importing Documents

Documents can be created directly in Gimmel Contract Management and existing documents can be imported (brought into) Gimmel Contract Management.

During import, a document can be defined as a: document, a Related document (Master, Subordinate, Reference, Attachment or Amendment), a Template or a Clause.

Additionally, other documents can be imported only by a business administrator. See the separate *Gimmel Contract Management 6.9 Business Administrator Guide*.

Users have these options for creating and importing documents:

- Creating a new document using the **New Document**  button. See [“Creating a New Document by Applying a Template.”](#)
- Importing an existing document using the **Import**  button. See [“Importing Documents” on page 43.](#)

Scanning is also used to import documents, but this option is not listed here because importing scanned documents is not a Gimmel Contract Management user task. However, a scanned document can be used to replace a checkedOut document. See [“Assigning a Scanned Document as Current Version of Another Document” on page 57.](#)

Incomplete new documents can be completed at any time. See [“Completing Incomplete Documents” on page 46.](#)

Creating a New Document by Applying a Template

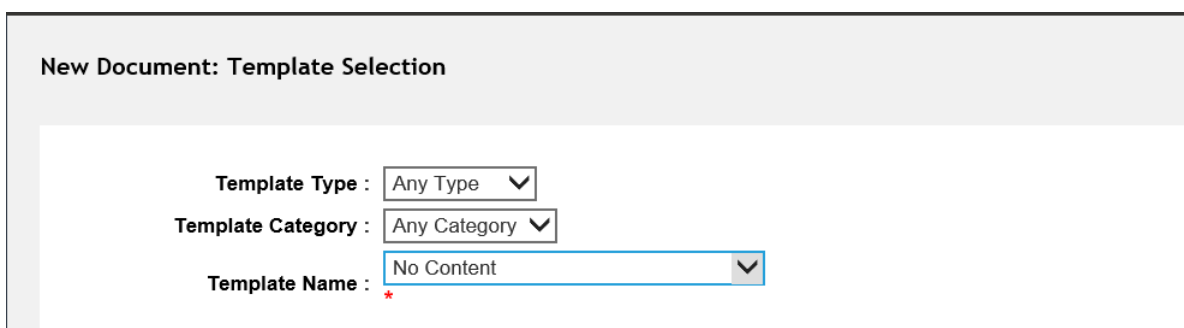
Gimmel Contract Management allows creating documents using the **New Document** button to select an existing Template for the new document.

A *document* is any file (contract, Attachment, spreadsheet, memo, graphic, and so on) with content that resides in Gimmel Contract Management.

Create a New Contract or Other Document

- 1 Click the **Documents** button on the top right and browse to the Cabinet or folder where the document will be stored after it is created.
- 2 Click the **New Document** button. The New Document Template Selection window displays (Figure 3-1).

Figure 3-1 New Document Template Selection



New Document: Template Selection

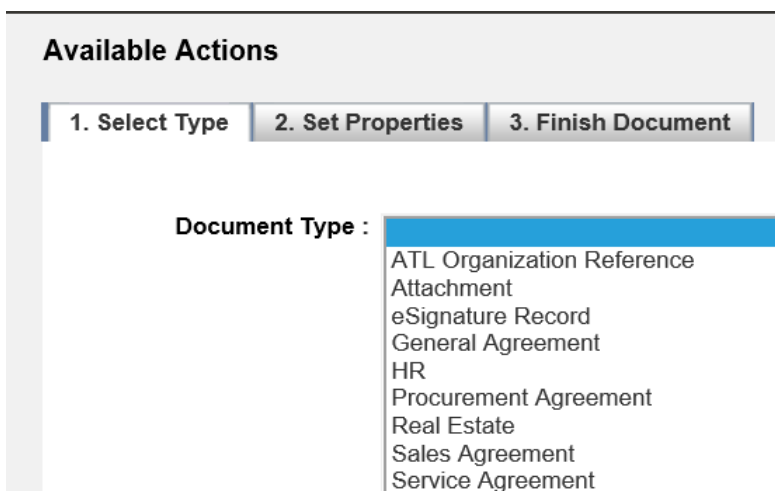
Template Type :

Template Category :

Template Name : *

- 3 Templates display to assist in the new document creation process. Your organization's Template types, categories and names will be unique.
 - A In **Template Type**, select a type from the menu. Selections chosen here "filter" what selections will be available in the **Template Category** and **Template Name** menus.
 - B In **Template Category**, select a category from the menu. Again, selections chosen here filter which selections will be available in the **Template Name** menu.
 - C In **Template Name**, select a Template from the menu.
- 4 Click **Next**. The **Select Type** tab displays (Figure 3-2). Your organization's document types will be unique.

Figure 3-2 Select Type Tab



- 5 In **Document Type**, select from the menu.
- 6 Click **Next**. If your organization's template has any clauses, the **Select Clauses** tab will appear.
- 7 Make your selections in the **Select Clauses** tab. Click **Next**.
- 8 The **Set Properties** tab (Figure 3-3) and/or the Enter Info tab might or might not display (depending on system configuration). Often, **no** changes need to be made to these fields.

More detail: The Enter Info and Set Properties tabs are linked. Information entered or changed in an Enter Info field will enter or change in the same field (if that field exists) on the Set Properties tab, and vice versa. This linkage eliminates entering or editing the same information in two fields on two different tabs.

Figure 3-3 Set Properties Tab

Apply Template: Blank Word 97 / 2000 Document

1. Select Type 2. Set Properties 3. Finish Document

Type: Attachment

▼ Info

Document Title : Blank Word 97 / 2000 Document

Category : [dropdown] *

Status : Draft *

Keywords : [Edit](#)

Document Number : To Be Assigned

More detail: A red asterisk * indicates a required field.

9 Click **Next**. The **Finish Document** tab displays (Figure 3-4).

Figure 3-4 Finish Document Tab

Apply Template: Amendment - Purchase

1. Enter Info 2. Finish Document

Action To Take When Finished

Save Only

Save, then Open Dashboard

Save, then View Document

Save, then Edit Document

Save, then Route Document

[Click Here To Preview Document](#)

Previous Next Finish Cancel

10 Click **Click Here To Preview Document**. A read-only copy of the new document displays in the creating application.

More detail: **Click Here To Preview Document** does **not** create and/or save the new document. It is important to preview all documents. If document numbers are used, the act of previewing the document embeds the appropriate document number into the file.

11 Close the document read-only window. The **Finish Document** tab displays (Figure 3-4).

12 In **Action To Take When Finished:**

A Select **Save Only** if you know the document is correct and you don't want to view it **OR**

B Select **Save**; then click **Open Dashboard** if you know the document is correct and you do want to immediately view its dashboard **OR**

- C Select **Save**; then click **View Document** if you know the document is correct and you do want to view the document **OR**
 - D Select **Save**; then click **Edit Document** if you know the document is to be saved, but it needs to be edited **OR**
 - E Select **Save**; then click **Route Document** if you know the document is to be saved, and it does not need to be edited, but does need to be immediately routed.
- 13 Click **Finish**. The **Documents** view displays with the new document listed in the folder selected in [step 1](#).

Importing Documents

The most common document imported into Gimmel Contract Management is a contract in either MS Word format (DOC) or Adobe Portable Document Format (PDF). However, Gimmel Contract Management can import documents of any type, from spreadsheets to web pages to graphics to sound files, and can import more than one file with one import action.

A *document* is any file (contract, attachment, spreadsheet, memo, graphic, etc.) with content that resides in Gimmel Contract Management.

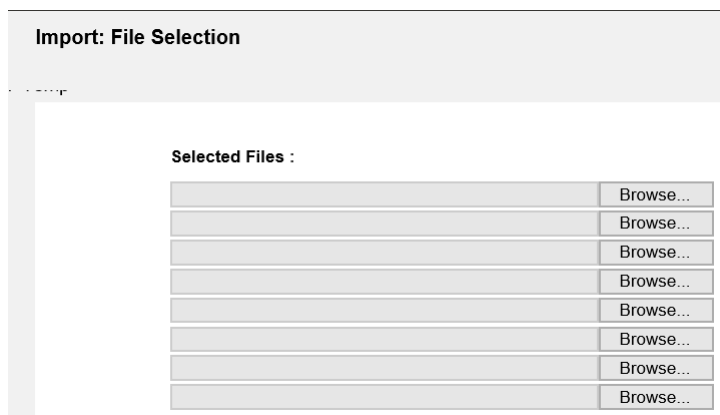
More detail: Gimmel Contract Management imports documents into the Tab, Cabinet and/or folder currently active. It is a “best practice” to import a document into your Personal cabinet. Later, Auto File the document which moves it into the correct Cabinet/folder combination when the document is ready to be accessed by all users with the appropriate security permissions. See [“Auto File a Document” on page 65](#) and [“Moving, Copying and Linking Items Inside Gimmel Contract Management” on page 85](#).

ALERT! HTTP File Transfer is the default Gimmel Contract Management method of importing files. Please note that drag and drop is **not** available when using HTTP File Transfer. However, users can be enabled to use the alternate file transfer method, UCF (which supports drag and drop), by adding users as members of the `ucf_file_transfer` role. See your system administrator.

Import a Document

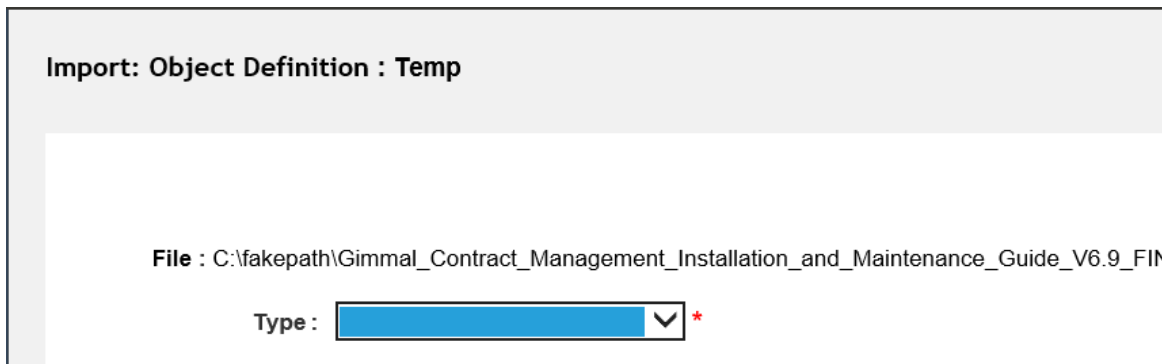
- 1 Click the **Documents** button and browse to the Cabinet or folder where the document to be imported will be stored.
- 2 Click the **Import** button. The **Import File Selection** window displays ([Figure 3-5](#)).

Figure 3-5 Import File Selection



- 3 Click **Browse** to add file(s).
- 4 Browse to the file to be imported.
- 5 Select the desired file and click **Open**. The file to be imported appears in the **Selected Files** field.
- 6 Repeat Steps 3 to 5 until all the files that you want to import are selected.
- 7 Click **Next**. The **Import Object Definition** window displays (Figure 3-6).

Figure 3-6 Import Object Definition Window



Import: Object Definition : Temp

File : C:\fakepath\Gimmel_Contract_Management_Installation_and_Maintenance_Guide_V6.9_FIN

Type : *

More detail: The document type **Attachment** is used when attaching supporting documents to a document or contract that already exists in Gimmel Contract Management.

- 8 From the **Type** menu, select the document type. Your available document types could vary. See ["About Document Types" on page 38](#).
- 9 Click **Next**. The dialog box that appears next varies depending on the **Type** of document that you selected.
- 10 Complete all required fields.

More detail: A red asterisk * indicates a required field. Properties for each type of document displayed will vary according to business requirements and the document type selected.

- A If needed, click **Keywords Edit**. The Keywords dialog box displays. See [Figure 3-7](#).

Figure 3-7 Keywords Dialog Box

The screenshot shows a dialog box titled "Keywords". It contains two main sections. The first section, "Enter new value:", features a text input field and an "Add" button. The second section, "Keywords :", features a list box and four buttons: "Move Up" (up arrow), "Move Down" (down arrow), "Edit", and "Remove".

- B Enter each keyword in the **Enter new values** field and click **Add**.
- C Click **Move Up** or **Move Down**, if needed. Click **Edit** or **Remove** if needed.
- D Click **OK**. The **Import Object Definition** window displays.
- 11 Click **Finish** to save the properties and complete the import process. The imported document(s) are added to the Cabinet or folder selected in [step 1 on page 43](#).

Locating a Document after Import

- 1 If you forgot to browse to your Personal Cabinet before starting the import process and you are uncertain where the imported document has been stored, use the **Search** button on the upper right of the window to locate the document.
- 2 After locating the document, file it in the correct Cabinet and folder automatically using Auto File. See ["Auto File a Document" on page 65](#) and ["Moving, Copying and Linking Items Inside Gimmel Contract Management" on page 85](#).

Completing Incomplete Documents













If document creation was not finished, Gimmel Contract Management will indicate an incomplete document with the **Creation process was not completed**  icon.

An incomplete new document can be completed at any time by editing it; then checking it back in or it may be deleted (by users with sufficient permissions).

Complete an Incomplete New Document

- 1 Navigate to the incomplete document identified by the **Creation process was not completed** icon (Figure 3-8).

Figure 3-8 Uncompleted New Document

 <u>Document Number</u>	<u>Name</u>	<u>Date Modified</u>
CN-00006	 -- (CN-00006 v 1.0)	  Apr 25, 2016
 CN-00007	 -- (CN-00007 v 1.0)	  May 11, 2016
 CN-00009	 -- (CN-00009 v 1.0)	  Apr 4, 2016

- 2 Right-click the document name and select **Check Out**. The incomplete document is checked out.
- 3 Right-click the document name and select **Check In**. The **Check In** window displays.
- 4 Complete any needed fields.
- 5 Click **OK**. The **Creation process was not completed** icon is removed from the document listing.
- 6 Right-click the document name and select **Edit**.
- 7 Edit the document; then check it in. See ["Checking In and Changing a Document Version"](#) on page 52.

Managing Documents and Document Properties

This chapter presents the following topics:

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Managing Documents

Managing documents includes taking these actions: view, edit, check in and out, cancel check out, version (if created by a Template), delete, find all locations, save a local copy, email as an attachment or link, export document listings, Auto File, subscribe/unsubscribe, signoff and add/remove jacket graphics. Some users might **not** have access to all of these actions.

Related documents are managed the same way any other document is. For more about Related documents, see [Chapter 6, "Managing Related Documents"](#).

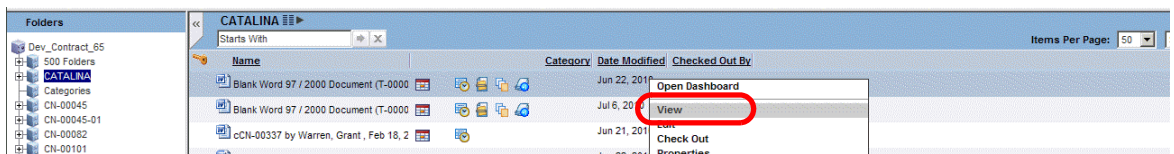
Viewing a Document

Viewing a document displays the document in read-only mode. Read-only allows document availability to other users for viewing or check out and editing (if necessary) while you or any other users are viewing the document.

View a Read-Only Document from the Documents View

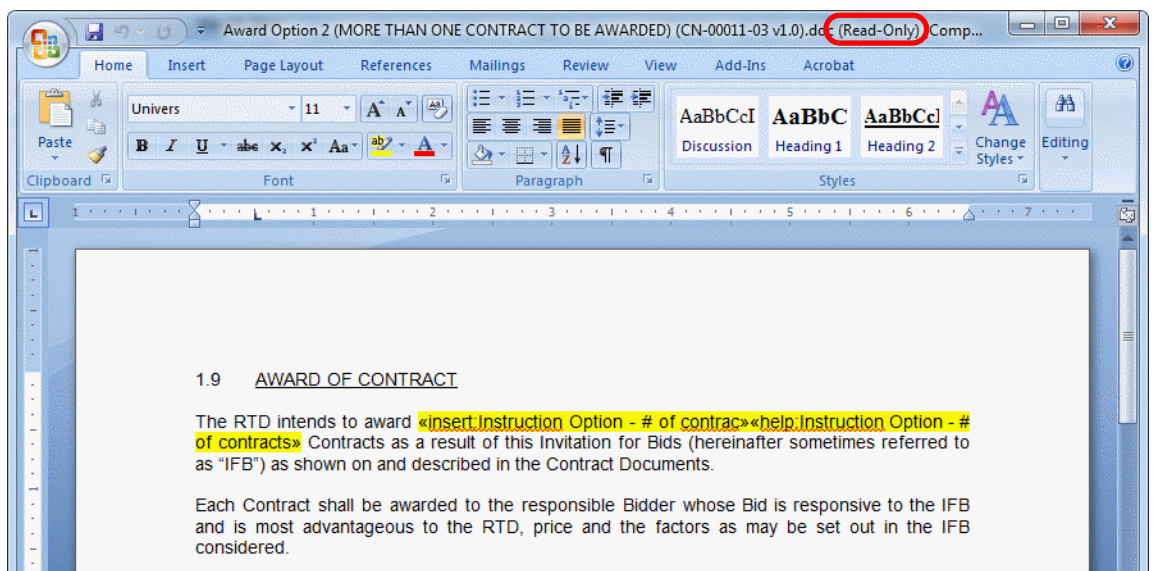
- 1 Click the **Documents** button on the upper right of the window and navigate to the document to view or click the document in Search Results.
- 2 Right-click the document name; then select **View** (Figure 4-1).

Figure 4-1 View Document



The document is opened in read-only mode in Microsoft Word (in this example) (Figure 4-2).

Figure 4-2 Document Opened with Microsoft Word – Read-Only Mode



- 3 When finished viewing the document, close the document and the application. The Documents view displays.

View a Read-Only Document from the Document Dashboard


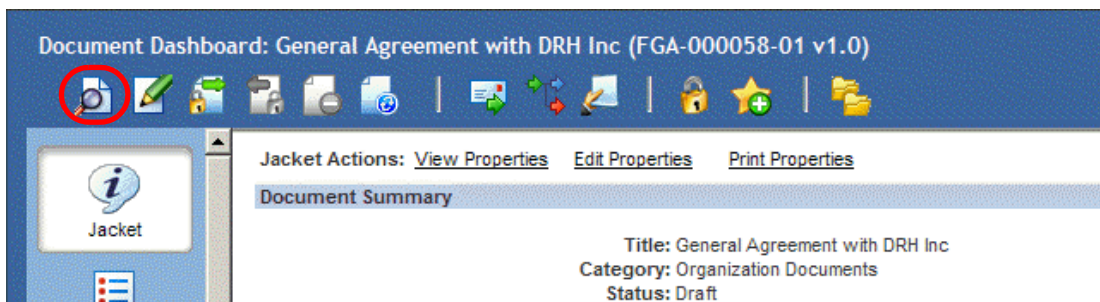
- 1 Right-click the document name; then select **Open Dashboard**
OR
Double-click the document name. The document dashboard displays.
- 2 Click the View  button on the top left of the document dashboard window (Figure 4-3).

Figure 4-3 Viewing a Document from the Document Dashboard



The document is opened in read-only mode in Microsoft Word (in this example). See Figure 4-2.

- 3 When finished viewing the document, close the document and the application. The Documents view displays.

View Document Titles Only with Restricted Browse

If Restricted Browse is enabled for certain users, those users **cannot** view the document dashboard.

More detail: Applies only to those users assigned restricted browse permissions.

- 1 Click the **Documents** button and navigate to the document title to view in either the **Personal** or **Cabinets** tab.
- 2 *If needed:* Right-click the document title to view available Actions menu selections. **View, Edit, Check Out, Save a Local Copy, Open Dashboard, Delete** and **Properties** selections are **not** available.

Editing a Document

Editing a document opens the document's native application for changing its content **and** triggers an automatic document check out. During check out, others may **not** edit the document. After editing is complete, check in the document to place the edited version back in Gimmel Contract Management, making it available again for others to edit. See "[Checking In and Changing a Document Version](#)" on page 52.

Users may also cancel their document check, thereby losing any editing changes. See "[Canceling Document Check Out](#)" on page 55.

Check Out a Document

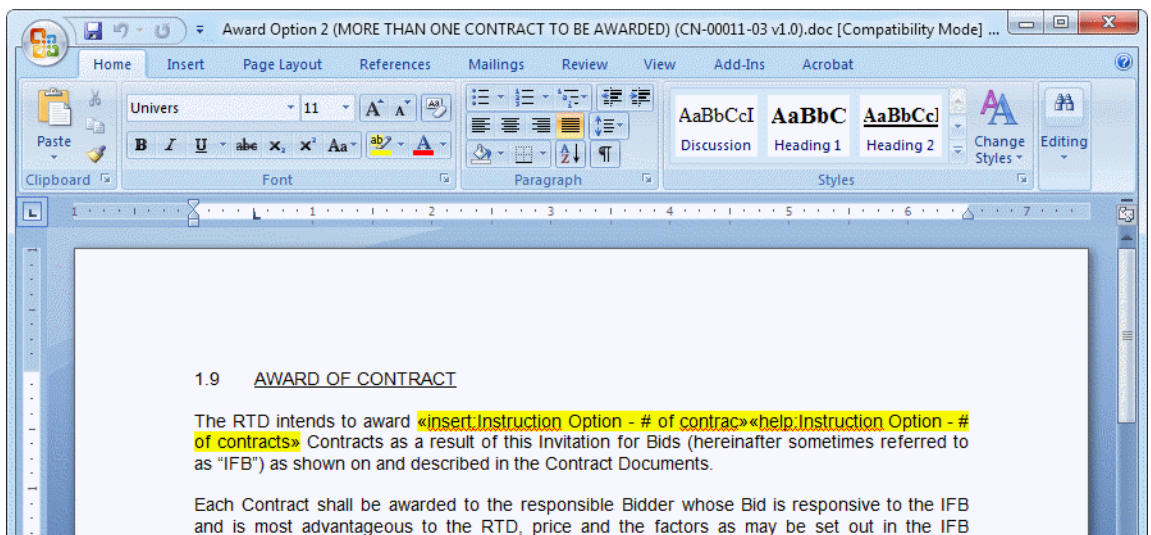
- 1 Navigate to the document to check out.
- 2 Right-click the document name; then select **Check Out**. The view refreshes; then displays the **Checked out by you** icon and displays the **Checked out by (user name)** icon on the document dashboards of all other users, thereby prohibiting check out by any other user. Check out does **not** launch its native application.

More detail: To check out a document from its dashboard, click the **Check Out** button, which also does **not** launch its native application. An alternate method is to check out a document is from its Versions window. See “Managing Document Versions” on page 97.

Edit a Document

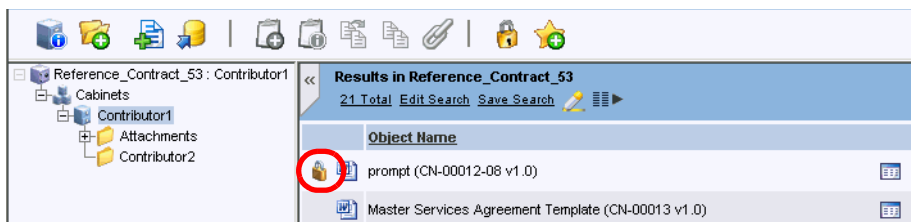
- 1 Navigate to the document to edit or click the document in Search Results.
- 2 Right-click the document name; then select **Edit**
OR
 On the document dashboard, click the **Edit** button to open the document in its native format. Selecting **Edit** triggers an automatic check out of the document to you (Figure 4-4).

Figure 4-4 Document Opened with Microsoft Word – Edit



- 3 Edit the document using Word tools.
- 4 Save and close the document. While the document is checked out for editing, the document is **not** available for editing to other users. The document name for other users displays a **Checked out by (user name)** icon (Figure 4-5).

Figure 4-5 Checked Out by (User Name) Icon



- 5 *If needed:* After editing, see [“Checking In and Changing a Document Version” on page 52](#) to check in the document to make your edited version available to others. To view all versions of a document, see [“Managing Document Versions” on page 97](#).

Checking In and Changing a Document Version

The **Check In** selection is available **only** if the document has been checked out or is being edited. Editing a document includes an automatic document check out.

More detail: If using the default HTTP File Transfer, the checked out document is stored **wherever the editing user saved it**. During check in, a document **other** than the checked out document can be selected, which replaces the edited checked out document with another document.

More detail: If using the **optional** UCF File Transfer, the checked out document is **automatically** placed in the C:\Documents and Settings\your name\Documentum\Checkout folder on your personal computer, which ensures that only the checked out document can be checked in.

If you have previously closed a checked out document, go to the Checkout folder on your personal computer, open and edit the document; then check it in.

To replace the checked out document with another document, see [“Checking In a Document from an External File Location \(UCF Only\)” on page 54](#).

During the check in process, the document editing can be saved as a major or minor version.

Check In a Document

Before beginning

Ensure that the document is checked out, saved and closed.

- 1 Navigate to the document to check in or click the document in Search Results.
- 2 Right-click the document name; then select **Check In**. The Check In window displays. See [Figure 4-6](#).


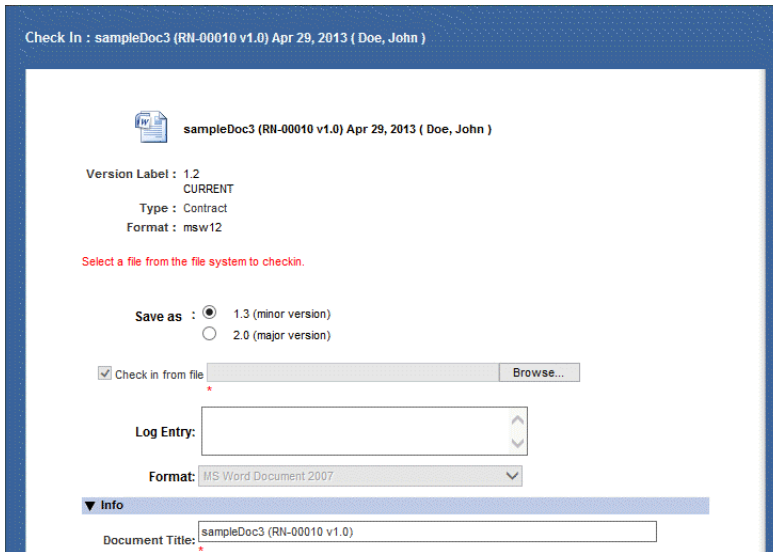
More detail: To check in a document from its dashboard, click the **Check In**  button. An alternate method is to check in a document from its Versions window. See [“Managing Document Versions” on page 97](#).

Figure 4-6 Check In



More detail: The properties displayed in the Check In window will vary with client configuration.

3 In **Save as**, if minor editing was done, select **x.x (minor version)**.

If major editing was done, select **x.0 (major version)**.

The definition of major and minor editing is determined by each organization.

4 In the **Check in from file** check box, click **Browse** to locate where the edited file was saved and select the file.

More detail: Any other file may be selected for check in, thereby replacing the originally checked out file.

5 Click **Open**.

6 Enter information for all necessary property fields.

More detail: A red asterisk * indicates a required field.

A *If needed:* click **Keywords Edit**. The Keywords window displays (Figure 4-7).

Figure 4-7 Keywords



B In the **Enter new value** field, enter the keyword and click **Add**. Click **Move Up** or **Move Down** if needed. Click **Edit** or **Remove** if needed.

C Repeat for each new keyword.

D Click **OK**. The Check In window displays.

7 Click **OK** to complete the document check in. The document is now available to all users and the **Checked out by you** icon is removed from the document name in the document dashboard. In the Actions menu, **Check Out** has replaced **Check In**.

Checking In a Document from an External File Location (UCF Only)

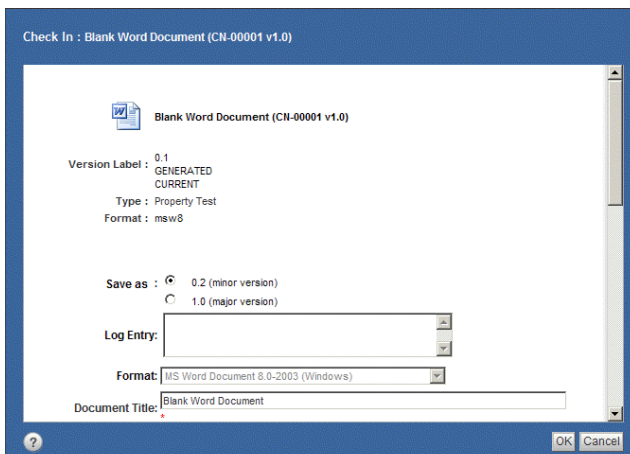
A document stored in Gimmel Contract Management can be overwritten by another document currently stored in an external file system. Use **Check in from file** to check in a document from an external location which **replaces** the currently checked out document with a completely different document.

Check In a Document from an External File Location

- 1 Navigate to the checked out document.
- 2 Right-click the document name; then select **Check In**.

More detail: To check in a document from its dashboard, click the **Check In** button. An alternate method is to check in a document is from its Versions window. See ["Managing Document Versions" on page 97](#).

Figure 4-8 Check In



3 Complete all required fields. Your properties and displayed tabs will differ.

4 Scroll to the bottom of the Check In window and click **Show options**. More options display (Figure 4-9).

Figure 4-9 Check In From File



5 Select the **Check in from file** check box.

- 6 Click **Browse** to locate the external file to replace the checked out file and click **Open**.
- 7 Enter any necessary properties on the Check In window.
- 8 Click **OK**. The external document is checked in, overwriting the content of the previously checked out file (replacing the original document) and the Document view displays.

Canceling Document Check Out

To **not** save your editing changes, cancel your document check out (indicated by the **Checked out by you** icon).

ALERT! You **cannot** cancel the document check out of another user. If another user's document check out needs to be cancelled, contact that user or the business administrator.

Cancel Check Out of a Document

Before beginning

Ensure that you are canceling the check out from the same computer used to check out the document.

More detail: If using UCF File Transfer, you will be canceling check out of the document that now resides in your system's **C:\Documents and Settings\your name\Documentum\Checkout** folder.

- 1 Navigate to the checked out document.
- 2 Right-click the document name; then select **Cancel Check Out**.
 - A The first time the user cancels a check out, the Cancel Check Out window displays (Figure 4-10).


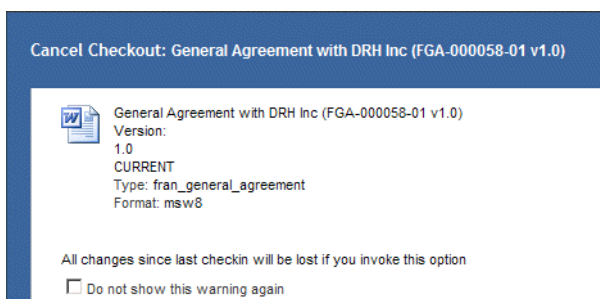
More detail: To cancel check out of a document from its dashboard, click the **Cancel Checkout**  button. An alternate method is to cancel check out of a document is from its Versions window. See "Managing Document Versions" on page 97.

Figure 4-10 Cancel Check Out




- B *If needed:* select **Do not show this warning again** to disable display of this warning for all your future cancel document checkout actions.
- C Click **OK**.

ALERT! Clicking **OK** discards all changes made to the document after it was checked out.

The document check out is canceled. The **Checked out by you** icon is removed from the document name in your document dashboard and the **Checked out by (user name)** icon is removed from all other user dashboards. On document Actions, only **Check In** displays.

Versioning a Template-Created Document

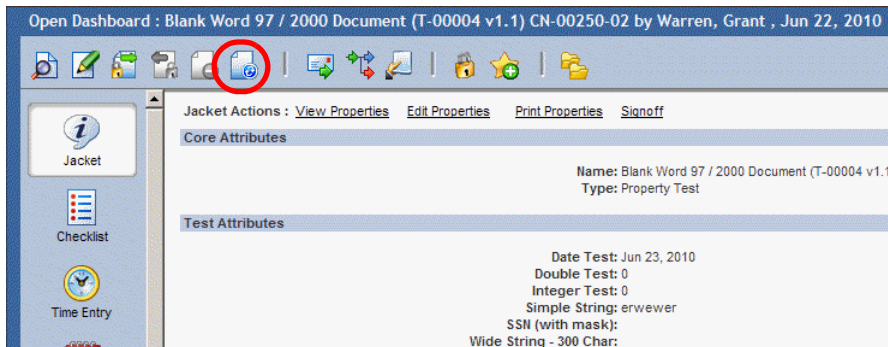
Click the **Version Using Original Template**  button to create a new version of an existing document, if the existing document was originally created using a template.

More detail: The **Version Using Original Template** button is inactive if the selected document was not originally created using a template. See ["Importing Documents" on page 43](#).

Create a Version of a Document Created with a Template

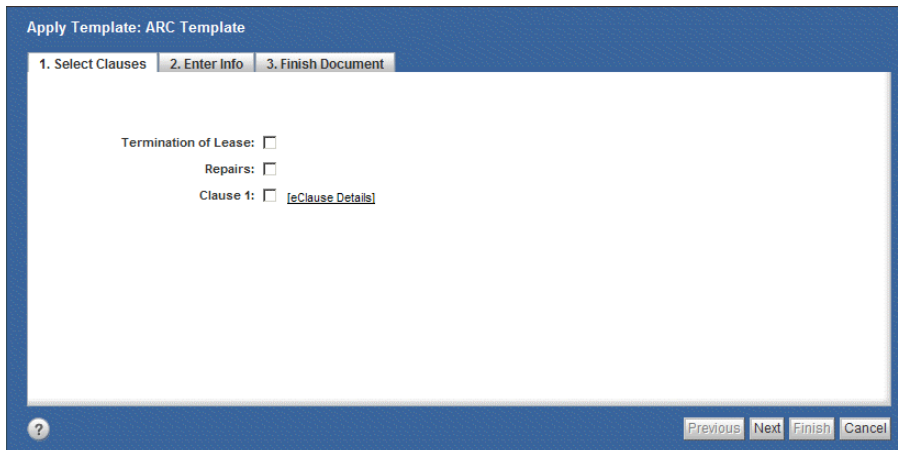
- 1 Navigate to the document created with a template.
- 2 Right-click the document name; then select **Open Dashboard**
OR
Double-click the document name. The document dashboard displays ([Figure 4-11](#)).

Figure 4-11 Document Dashboard



- 3 Click the **Version Using Original Template** button. The Apply Template window displays. Your Apply Template window displays different tabs because the tabs displayed are determined by the original template. See [Figure 4-12](#).

Figure 4-12 Apply Template



- 4 Complete all displayed tabs. See “Creating a New Document by Applying a Template” on page 40.
- 5 On the **Finish Document** tab, click **Finish**. The document dashboard displays, with the version incremented to the next minor version, for example, version 1.3 changed to version 1.4.
 - A *If needed*: edit the properties of the new version. See “Editing Document Properties” on page 73.

More detail: The **Version Using Original Template** button can also be used to create versions of documents (see “Managing Document Versions” on page 97), Related Documents (see Chapter 6, “Managing Related Documents”) and Amendments originally created with a Template (see “Assigning, Creating, and Importing Related Documents” on page 118) by clicking the **Version Using Original Template** button on the selected Attachment, Related Document, or Amendment dashboard.

Assigning a Scanned Document as Current Version of Another Document

If a document’s type was assigned as im_scanned during the scanning process, its content can replace the content and the properties of another document, **without** importing or checking out and checking in the other (original) document. All scanned documents are usually saved in a Cabinet named Scanned Documents.

When a contract has been approved, signed, and scanned into Gimmel Contract Management, use this procedure to quickly ‘assign as current version’ the scanned document.

ALERT! This assigning process **cannot** be reversed.

Assign a Scanned Document as the Current Version of Another Document

More detail: Only document type im_scanned can be assigned to an existing document. The scanned document **must** have content (to replace the existing document’s content).

- 1 Click the **Documents** button, and find and select the Scanned Documents folder.
- 2 Right-click the name of the scanned document that will replace the existing (original) document; then select **Assign as Current Version**. The Select Original Document window displays (Figure 4-13).

Figure 4-13 Assign as Current Version

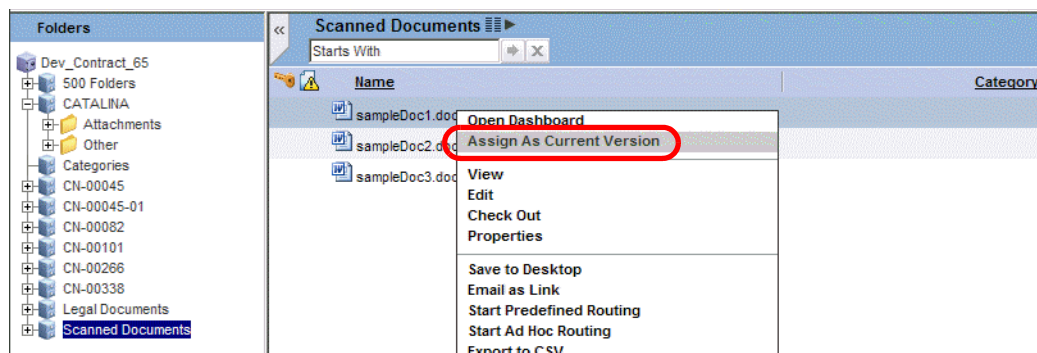
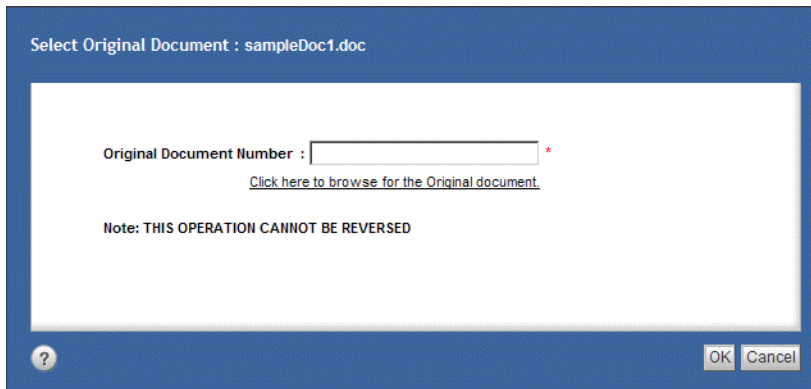
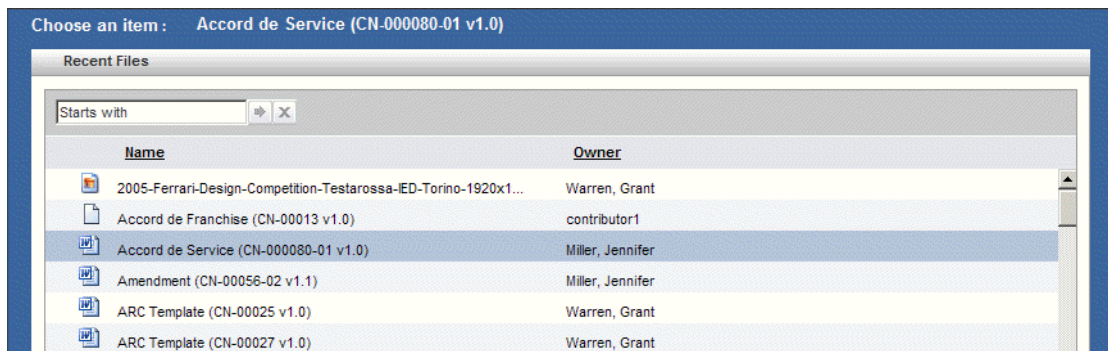


Figure 4-14 Select Original Document



- 3 Enter the **Original Document Number** (if known).
 - A If the original document number is not known, click **Click here to browse for the Original document**. The Choose an item window displays (Figure 4-15).

Figure 4-15 Choose an Item



- B Click the original document to be replaced by the scanned document's content.
- 4 Click **OK**. The Select Original Document window displays with the original document number displayed.
- 5 Click **OK**. The scanned document's content is now also the original document's content and the document version is incremented up one minor version. The scanned document becomes the current version of the original document.
 - A *If needed*: view the document's Versions to confirm that the scanned document is labeled as CURRENT and right click; then select **View** to confirm the correct, assigned content. See "Managing Document Versions" on page 97.

Deleting a Document

Some users **cannot** delete documents due to insufficient permissions.

ALERT! You **cannot** undo deleting a document. Deleting the document will **not** remove the Related Documents, Obligations or Reminders for the deleted document.

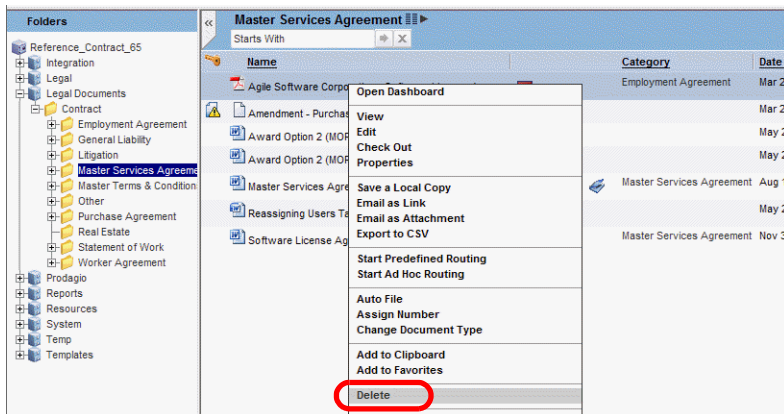
Before beginning

Ensure that the document to delete is not checked out. If you checked out the document, check it in. See [“Checking In and Changing a Document Version” on page 52](#) OR cancel the check out. See [“Canceling Document Check Out” on page 55](#).

Delete a Document

- 1 Navigate to the document to delete.
- 2 Right-click the document name; then select **Delete**. The Delete window displays ([Figure 4-16](#)).

Figure 4-16 Delete a Document



- 3 Select **Selected Version** or **All Versions**. See [Figure 4-17](#).

Figure 4-17 Delete



More detail: If the document to be deleted is a link, the Delete window will also display:

Links: Just the link to “XXXX” location. See [“Move, Copy or Link Clipboard Item or Items to a New Location” on page 91](#).

- 4 If selecting **All Versions**, additional options may display:
 - A Select **Delete Attachments** to also delete all Attachments to the document.
 - B Select **Keep Attachments** to retain (not delete) all Attachments to the document.
- 5 Click **Delete**. The selected version or all versions of the document (and its Attachments) are deleted from Gimmal Contract Management. The Documents view displays.

Finding All Locations of a Document

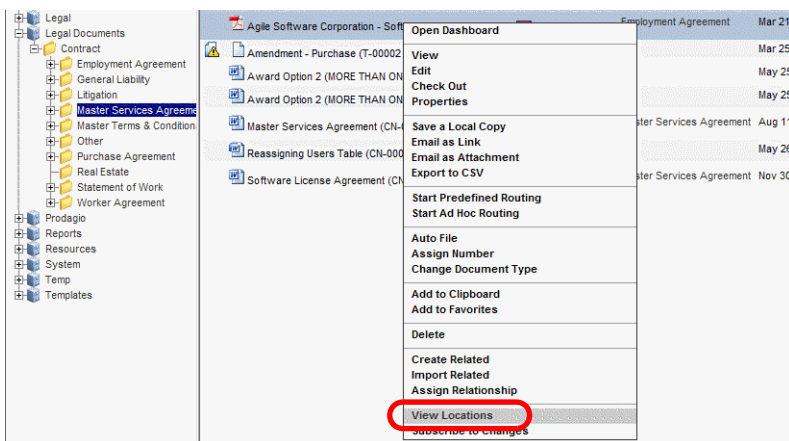
Use View Locations to quickly find *all* the locations where the same document is stored in the Cabinet and folder in the **Cabinets** tab.

More detail: View Locations does **not** find any item found in the Favorites tab or the Subscriptions tab, because items in these tabs are shortcuts. View Locations also does **not** find any item currently in the logged-in user's Personal tab.

Find and View All Locations of a Document

- 1 Navigate to any one location of the document or click the document in Search Results.
- 2 Right-click the document name; then select **View Locations** (Figure 4-18).

Figure 4-18 View Locations



The Locations window displays, with all locations of the selected document listed. See Figure 4-19.

Figure 4-19 Locations



- 3 Click **Go to Location** for the location you want to view. The document location displays.

A *If needed*: Click **Add to Favorites**. See “Managing Favorites” on page 80.

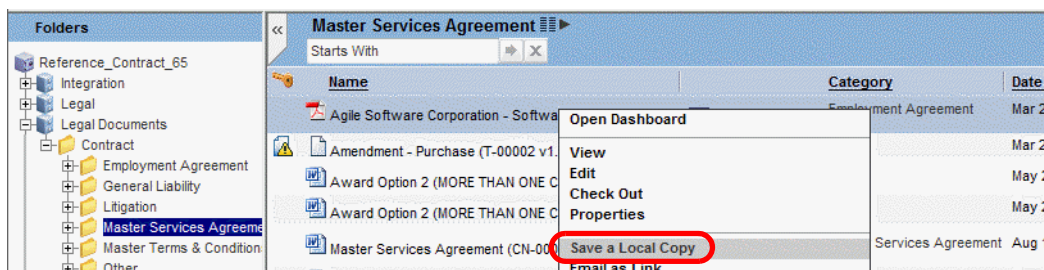
Saving a Local Document Copy

A copy of any Gimmel Contract Management document can be saved to the logged in user’s local system. Local is defined as anywhere the logged in user can save the document copy, usually including a local hard drive and certain locations on the organization’s intranet.

Save a Local Document Copy

- 1 Navigate to the document to be saved locally or click the document in Search Results.
- 2 Right-click the document name; then select **Save a Local Copy** (Figure 4-20).

Figure 4-20 Save a Local Copy



- 3 Select a location to save the document copy.
- 4 Save the copy. A copy of the document is placed in the selected local location.

Emailing Documents as Attachments

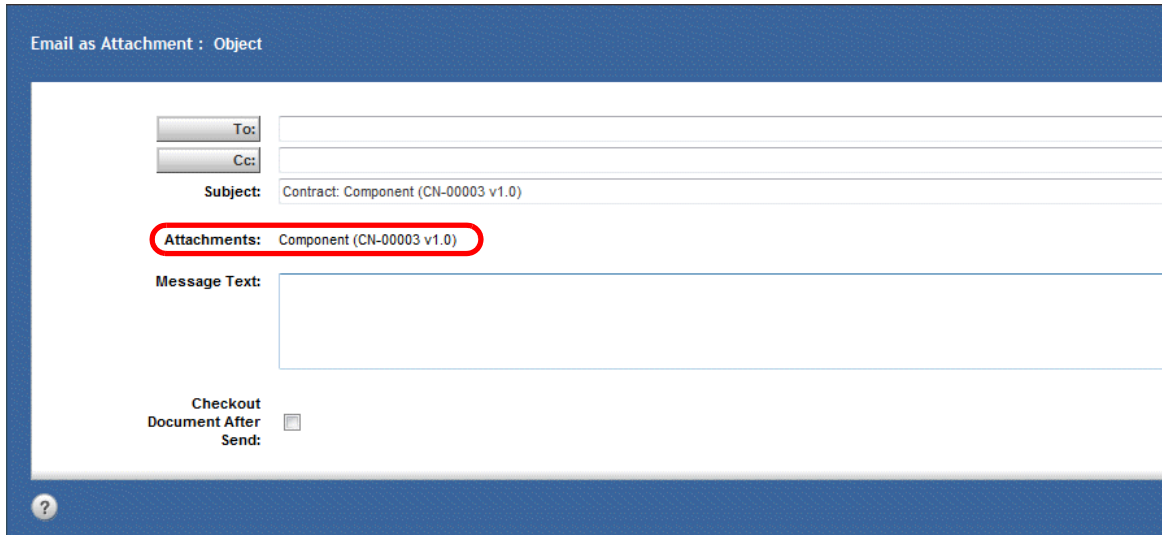
Documents stored in Gimmel Contract Management can be emailed directly to Gimmel users as email Attachments, and also to individual contacts previously identified in some configurations. See “Managing Document Contacts” on page 103. Emailing documents as Attachments can be initiated either from the document title or from the document dashboard. Two or more documents may be included as Attachments in an email.

More detail: Emailing Documents as Attachments can be disabled by the business administrator. See the separate *Gimmel Contract Management V6.9.1 Business Administrator Guide*.

Email Document(s) as Attachment(s) from the Document Name

- 1 Right-click the document name (including in Search Results), (control-click for non-adjacent documents or shift-click for adjacent documents); then select **Email as Attachment**. The Email as Attachment window displays (Figure 4-21).

Figure 4-21 Email as Attachment

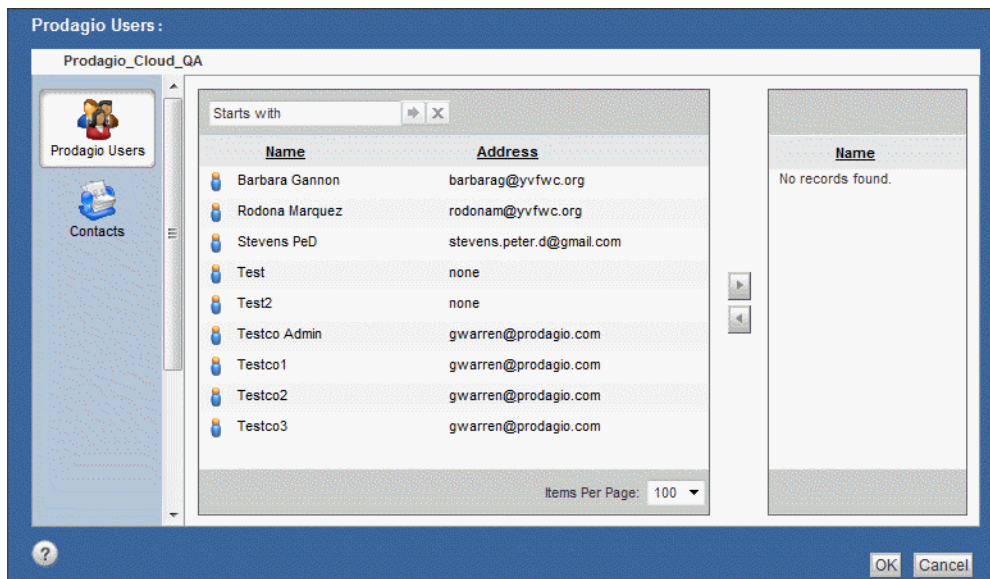


- 2 Click **To** or **CC**. The Gimmel Users window displays, with either the **Gimmel Users** or **Contacts** button selected (Figure 4-22).

More detail: The listed Contacts were previously added to the selected document. See “Managing Document Contacts” on page 103.

More detail: If Gimmel Contract Management email recipients should receive the email, click the **Gimmel Users** button and only Gimmel users display.

Figure 4-22 Prodagio Users



- A *If needed*: further filter the list of email recipients by entering a letter(s) in the Starts with field and the **Search by Name** button. Only names beginning with the entered letter(s) display.
- 3 Under the **Name** column, click the desired email recipient (s) and click the **Add** button to add that name to the recipient list. Repeat for each recipient.
- 4 Click **OK**. The Email as Attachment widow displays, with the selected recipient(s) displayed in **To** and/or **Cc**.

More detail: Enter your name in the **Cc** field if you also want email notification or want to see the Attachment.

- 5 The **Subject** information is already completed. Edit this information, if necessary.

More detail: If more than one document is attached to the email, the Subject information is listed as Multiple Documents.

- 6 In **Attachments**, the selected document(s) are automatically listed.

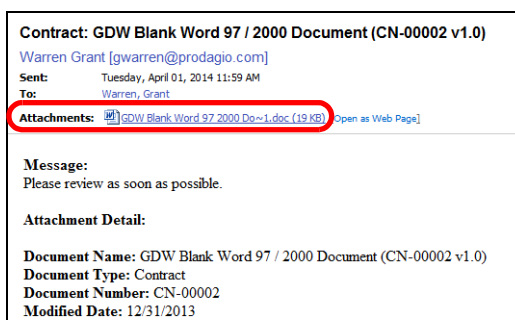
- 7 Enter any **Message Text**.

- 8 In **Checkout Document After Send**, select to automatically check out the document after it is sent. See ["Checking In and Changing a Document Version" on page 52](#).

More detail: If more than one document is attached to the email, this check out option displays, but is disabled.

- 9 Click **OK**. The email with Attachment(s) is sent to the recipient address(s) with a user-readable user name and the actual email address in the From field. The document's Audit Trail is updated. See ["Managing the Document Audit Trail" on page 99 \(Figure 4-23\)](#).

Figure 4-23 Email As Attachment



Email a Document as an Attachment from the Document Dashboard

- 1 Click the **Documents** button and open the document dashboard.
- 2 Click the Email button. The Email as Attachment window displays.
- 3 Click **To** or **CC**. The Choose a user/group window displays, with either the **Contacts** or **Gimmel Users** button selected ([Figure 4-22 on page 62](#)).
- 4 Continue with Step 3 of ["Email Document\(s\) as Attachment\(s\) from the Document Name" on page 61](#) and complete all steps.

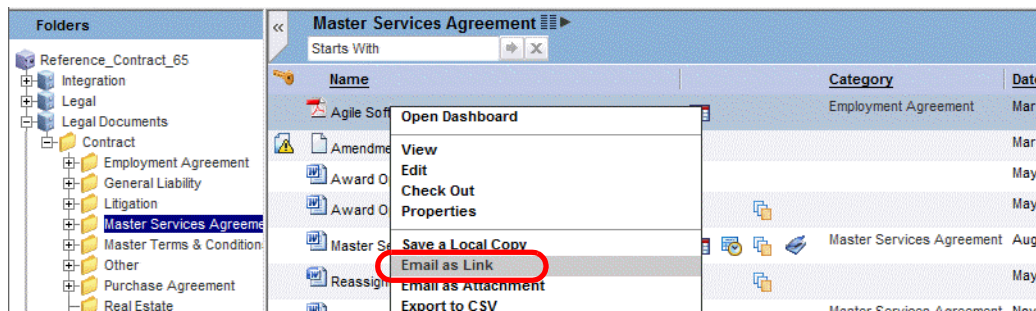
Emailing Documents as Links

Any document or group of documents may be sent to an email recipient as a link in the body of the email.

Email Documents as a Link

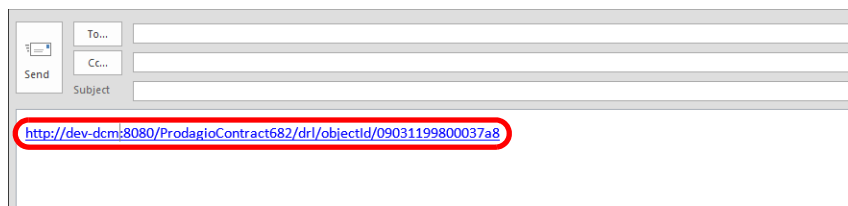
- 1 Navigate to the document(s) to be emailed as a link or click the document in Search Results.
- 2 Right-click the document name(s) to be emailed as link, (control-click for non-adjacent documents or shift-click for adjacent documents); then select **Email as Link** (Figure 4-24).

Figure 4-24 Email as Link



A new email opens, with each selected document represented by a link in the body of the email (Figure 4-25).

Figure 4-25 Email as Link



- 3 Address the email and send it. When opened by the Gimmal Contract Management recipient, clicking each link will launch Gimmal Contract Management and open the linked document's dashboard.

Exporting Listings to .csv-Formatted File

In most views and tabs displaying a listing, the document Actions allows exporting all pages of the entire listing to a .csv-formatted file.

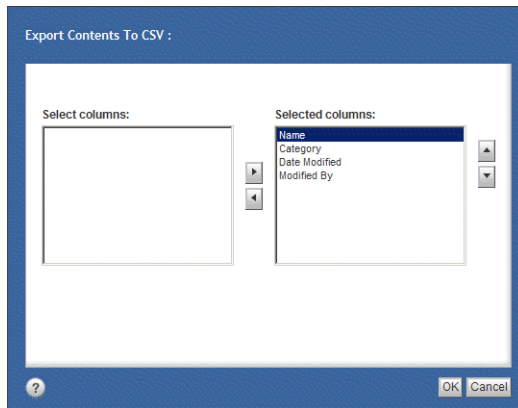
Before beginning

To control which columns export and the order in which they export, see "Changing the Displayed Columns" on page 30.

Export Listings to .csv-Formatted File

- 1 On any view or tab displaying items in the standard listing, select one or more items or click any document in Search Results.
- 2 Right-click any item name; then select **Export to .csv**. The Export Contents To .csv window displays (Figure 4-26).

Figure 4-26 Export Contents To CSV Window




- A By default, all the listing column headings will be included in the export. To remove a heading from the export, select it; then move it to the **Select columns** pane.
- 3 Click **OK**. The Open MyCsvFile.csv message displays.
 - 4 Click **Open**. The exported listing displays in .csv spreadsheet format.
 - 5 Save the exported file. The previous window displays.

Auto File a Document

Documents are stored in the Cabinet or folder highlighted when the document was created or imported, such as in folders in your **Personal** Cabinet.

At a later time, the document may need to be Auto Filed (moved) to its 'proper' location. Auto File makes the document available to all users by moving it to its correct folder in the **Cabinets** tab. Use Auto File to automatically move the document to the folder location determined by the document's current document category and document type properties (metadata). The properties used to determine the Auto File location were determined by the business administrator.

More detail: The **Auto File**  button displays on the document dashboard of documents **not yet** Auto Filed. If the Auto File button does **not** display on a document dashboard, that document has already been Auto Filed.

Two Auto File system settings control Auto File behavior. See "To Edit Auto File Settings" in the *Gimmel Contract Management 6.9 Business Administrator Guide*.

Auto File a Document

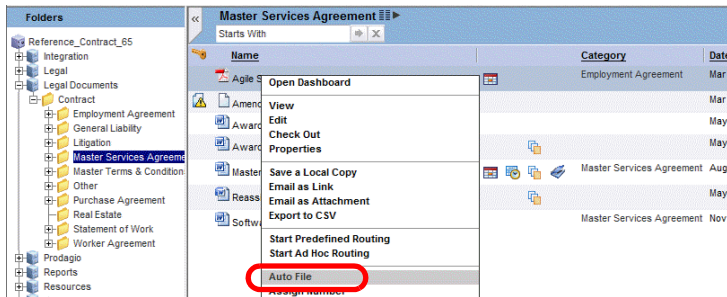
Before beginning

The selected document must **not** be checked out and **must** display the **Auto File** button.

More detail: The set of permissions automatically applied to a document by Auto File is also applied to all versions of that document.

- 1 Navigate to the document to be Auto Filed and either:
 - Right-click the document name; then select **Auto File** (Figure 4-27).

Figure 4-27 Auto File



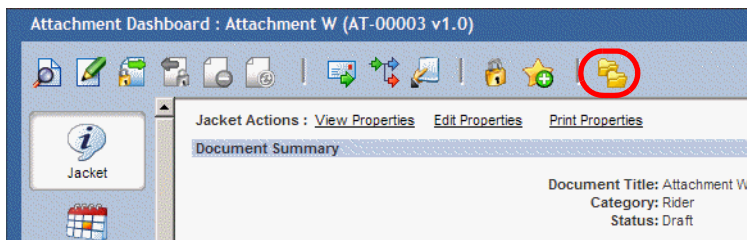
OR

- Double-click the document name; then click the **Auto File** button.

OR

- Right-click the document name; then select **Open Dashboard**; then click the **Auto File** button (Figure 4-28).

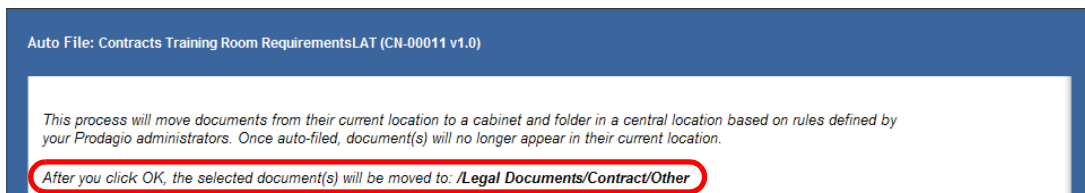
Figure 4-28 Auto File Button



More detail: The properties of the document determine the Auto File path location by applying the correct Auto File rule. If necessary, new folders are created automatically if the needed folder does not exist.

An Auto File message displays indicating where the document will be filed. The Auto File message varies, depending upon client configuration and/or existence of Attachments to the document (Figure 4-29).

Figure 4-29 Auto File Message



- 2 Click **OK**. The document is filed in the location indicated.

ALERT! When a Subordinate or Attachment is created for a parent document (found using Search) that is in another user's Personal cabinet, the Subordinate or Attachment is Auto Filed to the current user's Personal cabinet. See "Creating Related Documents" on page 121.

Subscribing to a Document

To be alerted whenever any checked in **content** changes are made to a document by any user, *subscribe* to that document. All the documents to which you have subscribed are listed on the Subscriptions tab of the Documents view. See "Subscriptions Tab" on page 16.

Each subscriber will receive both an Subscription email notification and a My Tasks view **Checked In** notification when subscribed to document is checked in by any user. See Chapter 10, "Managing My Tasks."

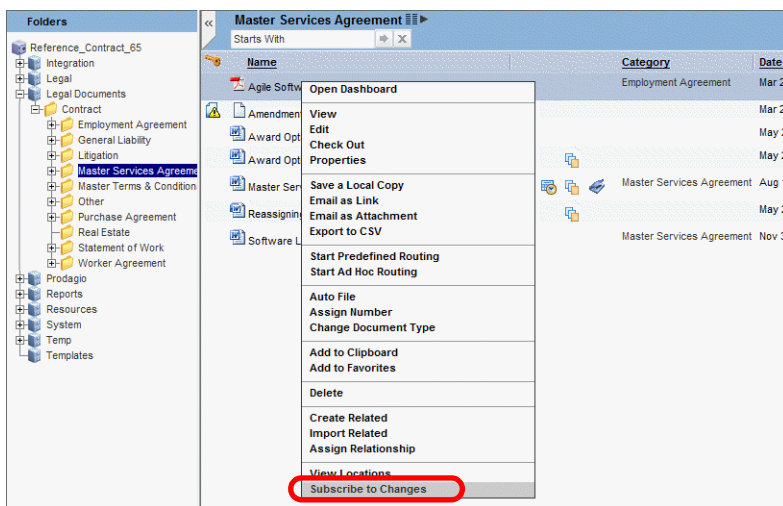
At any time, a subscribing user can unsubscribe to any document to remove it from their Subscriptions tab and to stop both email and My Tasks view notifications when checked in content changes are made by any user.

More detail: Only documents of the **legal document** type and of the **legal attachment** type can be subscribed to. Property changes to subscribed documents do **not** generate email and My Tasks notifications.

Subscribe to a Document

- 1 Navigate to the document to subscribe to on the Personal, Cabinets, or Favorites tabs.
- 2 Right-click the document name to display the document Actions (Figure 4-30).

Figure 4-30 Subscribe to a Document



- 3 Select **Subscribe to Changes**. The document is listed on your Subscriptions tab and you will be immediately notified on your My Tasks view and by an email each time any user has **checked in** the subscribed to document.

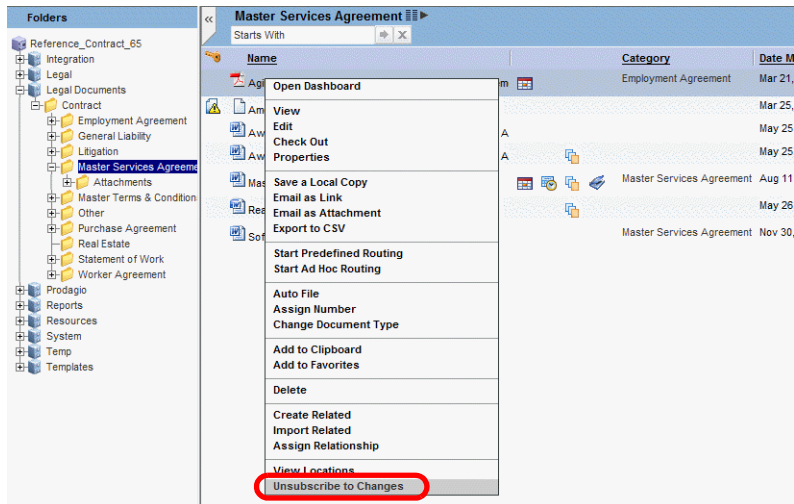
Unsubscribe from a Document

Before beginning

Only currently users subscribed to documents can be unsubscribed.

- 1 Navigate to a currently subscribed document on the Personal, Cabinets, Subscriptions, or Favorites tabs.
- 2 Right-click the document name to display the document actions (Figure 4-31).

Figure 4-31 Unsubscribe from a Document



- 3 Select **Unsubscribe to Changes** to immediately stop email and My Tasks notifications when document content is changed by other users and to remove the document from your Subscriptions tab listing.

Sign off a Document

Documents can be configured to require a written Signoff, sometimes including an Approve or Review signoff reason, plus a confirming password. Signoff is commonly used during Ad Hoc and Predefined Routing and with Checklist items.

Signoff also records a Signoff event in the Audit Trail. See [“Managing the Document Audit Trail” on page 99](#).

Signoff also can be defined as a required step to complete an item on a Checklist or required to close an Obligation. See [“Completing a Checklist Item” on page 179](#) and [“Close an Obligation from the Obligation Window” on page 162](#).

Signoff a Document

- 1 Double-click the document name
OR
 Right-click the document name; then select **Open Dashboard**. The selected document's Properties window (Jacket) displays (Figure 4-36 on page 72).
- 2 Click **Signoff**. The Signoff window displays (Figure 4-32).

Figure 4-32 Signoff

- 3 In **Signoff Reason**, select from the menu.
- 4 In **Password**, enter your password.
- 5 In **Comment**, enter a comment. The dynamic progress bar displays the percentage of total available characters entered.
- 6 Click **OK**. Signoff is complete and the document Jacket displays. A Signoff event is also recorded in the Audit Trail.

Adding and Removing Jacket Graphics

Each contract Jacket may display images to aid in quick contract identification (Figure 4-34 on page 70).

Gimmel Contract Management supports the graphic formats listed in Table 5.

Table 5 Supported Jacket Graphic Formats

.bmp	Bitmap
.gif	Graphics Interchange Format
.jpg .jpeg	Joint Photographic Experts Group
.png	Portable Network Graphics
.tif .tiff	Tag Image File Format

Before beginning

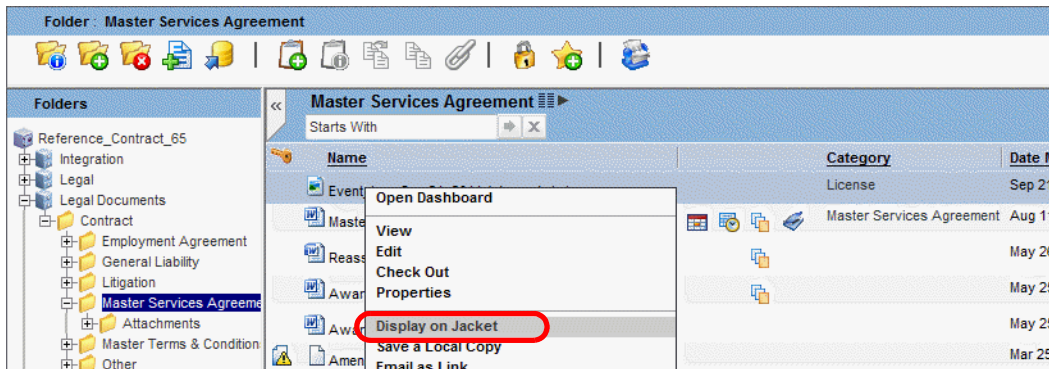
Before a graphic image can be displayed on the Jacket, it must be recorded in one of the supported graphic formats and as a Related document Attachment category. See “Creating Related Documents” on page 121.

Add a Graphic to a Document Jacket

- 1 Double-click the document name to add a graphic to its Jacket.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays (Figure 2-3 on page 19).
- 2 Click the **Related Documents** button. The Related Documents window displays, listing all Related documents for the selected document, including the graphic Attachment.

- 3 Right-click the name of the graphic Attachment to be displayed on the Jacket; then click **Display on Jacket** (Figure 4-33).

Figure 4-33 Display on Jacket




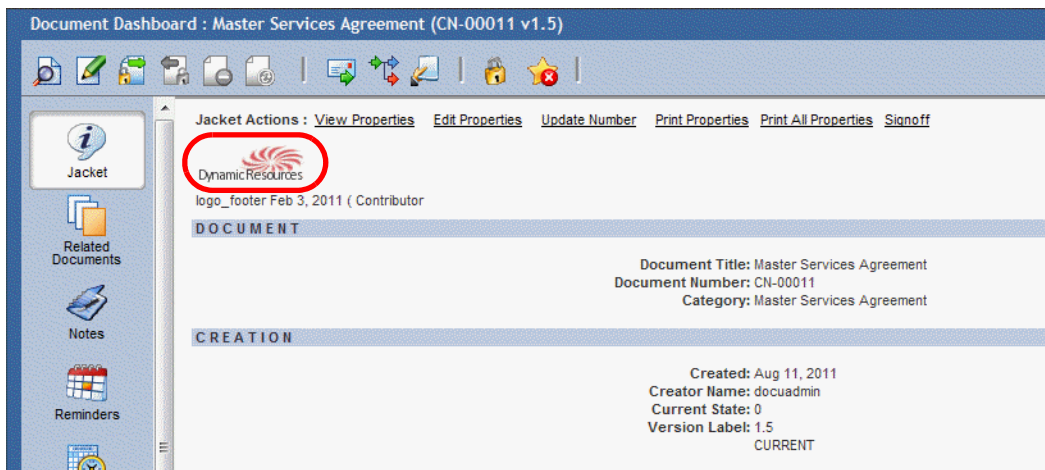
- 4 Click the Jacket  button. The document dashboard Jacket and its graphic displays, with the graphic's file name directly under the graphic (Figure 4-34).

Figure 4-34 Jacket Graphic



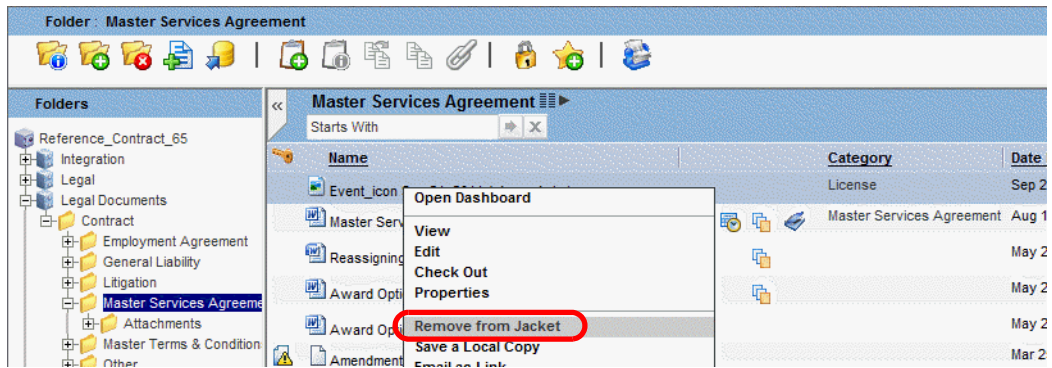
Remove a Graphic from a Document Jacket

Before beginning

A graphic must already be displayed on a Jacket.

- 1 Double-click the document name to remove a graphic from its Jacket
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays. See Figure 2-3 on page 19.
- 2 Click the **Related Documents** button. The Related Documents window displays, listing all Related documents for the selected document, including the graphic Attachment.
- 3 Right-click the name of the graphic Attachment displayed on the Jacket; then select **Remove from Jacket** (Figure 4-35).

Figure 4-35 Remove from Jacket



- 4 Click **Close**.
- 5 *If needed:* click the **Jacket** button. The document dashboard Jacket displays, with its graphic removed.

Managing Document Properties

All documents include document properties. Document *properties* are discreet pieces of descriptive information about a document such as the author, title, creation date, document category, and so on. Sometimes, these document properties are called *metadata* or *attributes*. Document properties are distinct from document content, and can be used to both describe a document and to locate it.

The properties for one or more documents may be viewed, edited and printed. Both document content and document properties can be searched. See [Chapter 11, "Searching Documents."](#)

Viewing Document Properties

At any time, users may view the properties of any document. Users **cannot** view the properties of more than one document at the same time.

View Document Properties

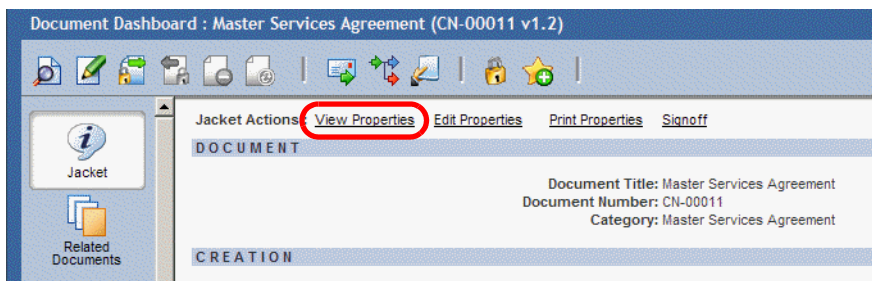
- 1 Right-click the document name; then select **Properties**

OR

Double-click the document name. The document dashboard (Jacket) displays ([Figure 4-36](#)).

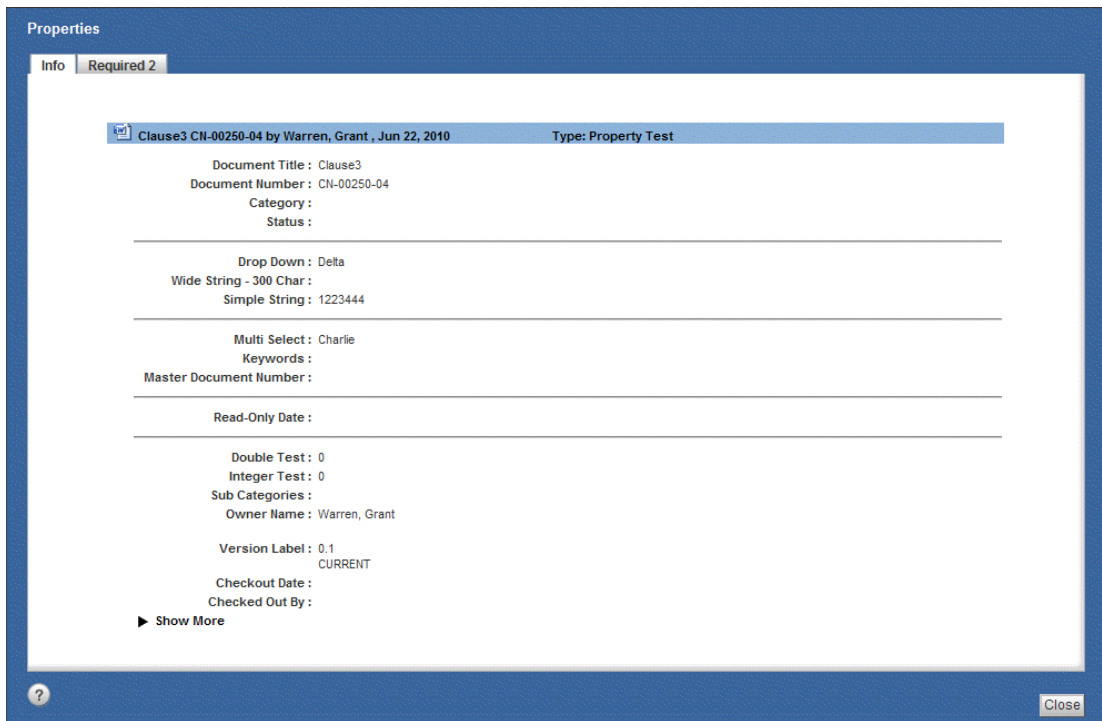
The properties and tabs are specified by your business administrator, so they could differ from this example

Figure 4-36 Example Document Jacket



- 2 Click **View Properties**. The Properties window displays ([Figure 4-37](#)).

Figure 4-37 View Properties



- 3 View the properties; then click **Close**. The document dashboard displays.

Editing Document Properties

Most document properties can be edited at any time by users with sufficient permission levels.

Edit Individual Document Properties

- 1 Right-click the document name; then select **Properties**. The editable Properties window displays (Figure 4-38).
OR
Double-click the document name. The document's Properties window (Jacket) displays (Figure 4-36 on page 72). Click **Edit Properties**. The editable Properties window displays. The properties and tabs differ (Figure 4-38).

Figure 4-38 Edit Properties

The screenshot shows a 'Properties' dialog box with the following fields and values:

- Document Title: Clause3
- Document Number: CN-00250-04
- Category: [Dropdown]
- Status: [Dropdown]
- Drop Down: Delta
- Wide String - 300 Char: [Text Field]
- Simple String: 1223444
- Multi Select: Edit, Charlie
- Keywords: Edit
- Master Document Number: [Text Field]
- Read-Only Date: [Text Field]
- Double Test: 0
- Integer Test: 0
- Sub Categories: Edit
- Owner Name: Warren, Grant
- Version Label: Edit, 0.1, CURRENT
- Checkout Date: [Text Field]
- Checked Out By: [Text Field]

2 Complete all property fields.

- A Some Property windows might display **Edit** to allow Property Lookup and to select large number of property entries. Click **Edit** to display a window allowing entry of a search word or phrase; then click **Lookup** in the top pane to list all matching entries.
- B In the top pane, select the entries to be added; then click **Add** to move the selected entries to the bottom pane.
- C In the bottom pane, click (if needed) **Move Up** or **Move Down**, **Edit**, or **Remove** property entries.
- D When all entries in the bottom pane are correct, click **OK**. The Properties window displays.

3 Click **OK** to save the all Properties field changes. The Documents view displays.

Edit Multiple Document Properties

Two or more documents may be selected at the same time for properties editing. However, only their *shared* document properties will display for editing. A change made to one property will also be made to the same property in all the selected documents.

More detail: Selecting documents all of the same document type will display *all of their properties* for editing. Selecting documents of different types will display *only their shared document properties* for editing.

More detail: Documents displayed in Search Results can also be selected for subsequent multiple property editing. See “Manage Search Results” on page 212.

- 1 Control-click the document name of each of the selected documents, right-click; then select **Properties**. The Properties window displays (Figure 4-39). The properties and tabs will differ depending on the documents selected (Figure 4-37 on page 73).

Figure 4-39 Edit Multiple Properties

Properties: Info

Info

Multiple Objects
Listed below are the common editable values for the selected objects.
Values changed in this dialog will be applied to all selected objects.

Document Title: [Multiple values] *

Category: [Multiple values]

Status: [Multiple values]

Expiration Date: [Multiple values] 12:00:00 AM

Party: [Multiple values]

Legal Attorney: [Multiple values]

Keywords: [Edit](#)

Document Number: [Multiple values]

Owner Name: [Edit](#) [Multiple values]

Version Label: [Edit](#) [Multiple values]

Checkout Date:

Checked Out By:

► Show More

? OK Cancel

- 2 Edit any of the displayed shared property fields.
- 3 Click **OK** to save the Properties field changes. The Documents view displays. The edited properties for **all** the selected documents are now changed.

Edit Document Properties Using Lookups

The Property window of some document types might display the **Lookup** button after certain fields. Lookups enable searching and automatic entry of information in one or more related fields. For example, a Lookup on an employee’s name can populate many other employee identification property fields.

More detail: Which document types display Lookups, and which Lookup populates which field(s) is configured by the business administrator. Lookups require the Administrator selecting the **Enhanced Property Display Setting**. See the separate *Gimmel Contract Management 6.9.1 Business Administrator Guide*.

- 1 Right-click the document name; then select **Properties**. The editable Properties window displays (Figure 4-38 on page 74).
OR
Double-click the document name. The document's Properties window (Jacket) displays; then click **Edit Properties**. The editable Properties window displays (Figure 4-38 on page 74).
- 2 Click a **Lookup** button. The Lookup Search window displays (Figure 4-40).

Figure 4-40 Lookup Search

The screenshot shows a 'Properties' window for document 'GEN-00018 - Prodigio Cloud Document Types and Standard Fields - (CN-00104 v1.0)' of type 'HR Employee'. It features a 'Lookup' section with three text input fields for 'Employee #', 'Employee Last Name', and 'Employee First Name', along with 'Search', 'Clear', and 'Close' buttons. A 'Clear Returned Properties' link is also visible. Below the inputs is a table with columns: 'Employee #', 'Employee Last Name', 'Employee First Name', 'Preferred Name', 'HR Job Title', and 'Department'. The table currently displays 'No records found.'

- 3 Enter search information in any of the Lookup fields. Different Lookups will display different fields.
- 4 Click **Search**. All matching Lookup information displays in the Search Results.
- 5 Double-click a search result. The Properties window displays, with all the related Lookup fields populated with the selected Search Results.
- 6 Click **OK**. The property changes are saved and the Documents view displays.

Edit Document Properties Using the Datagrid

The Property window of some document types may display a table-like Datagrid instead of separate Property fields. Because of their 'table' format, Datagrids simplify and speed entry of repetitive and related Property information. For example, a Datagrid for an employee can include the various and different terms and conditions of employment, such as bonuses, shift premiums, automatic increases, conditions for penalties, etc.

More detail: Not all document types display the Datagrid. Which document types display Datagrids is configured by the business administrator. Datagrids require the Administrator selecting the **Enhanced Property Display** Setting. See the separate *Gimmel Contract Management 6.9.1 Business Administrator Guide*.

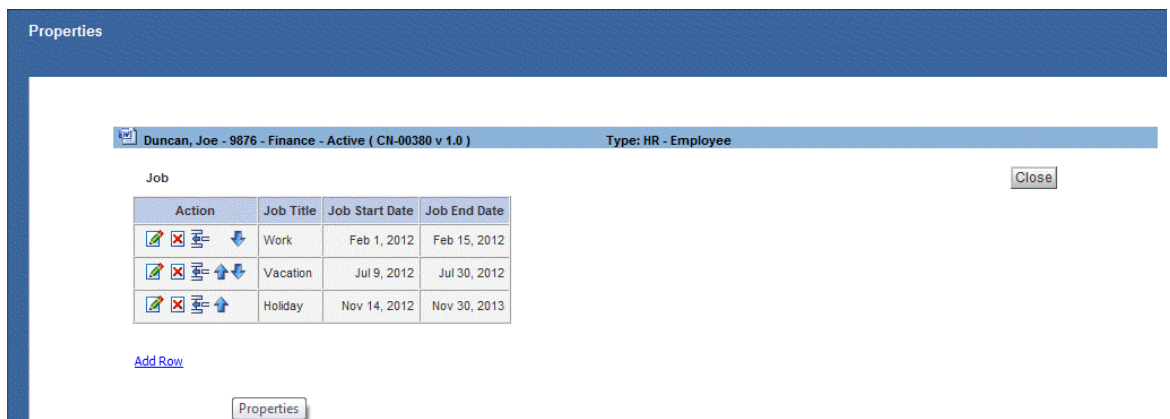
- 1 Right-click the document name; then select **Properties**. The editable Properties window displays (Figure 4-38 on page 74).
OR
 Double-click the document name. The document's Properties window (Jacket) displays; then click **Edit Properties**. The editable Properties window displays (Figure 4-38 on page 74).
- 2 Scroll to view a Datagrid (Figure 4-41).

Figure 4-41 Typical Datagrid




- 3 To begin adding information to the blank Datagrid rows and fields, click **Edit**. The Datagrid Properties window displays (Figure 4-42).

Figure 4-42 Selected Datagrid Properties



- 4 To create a new Datagrid row, click **Add Row**. The Datagrid editing window displays (Figure 4-43).

Figure 4-43 Datagrid Editing

- 5 Complete all fields; then click **Save**. The Selected Datagrid window displays (Figure 4-42).
 - A To edit a row, click a row's **Datagrid Edit** button, edit, and save the row.
 - B To insert a row above an existing row, click the existing row's **Datagrid Insert**  button, edit and save the inserted row.
 - C To change the sequence of a row in the Datagrid, click its **Up** button or **Down** button.
 - D To delete a row, click the row's Datagrid **Delete** button.
- 6 Click **Save**. The Datagrid Properties window displays, with the edited properties displayed.
- 7 Click **Close**. The Properties window displays with its edited Datagrid.
- 8 Click **OK**. The Documents view displays.

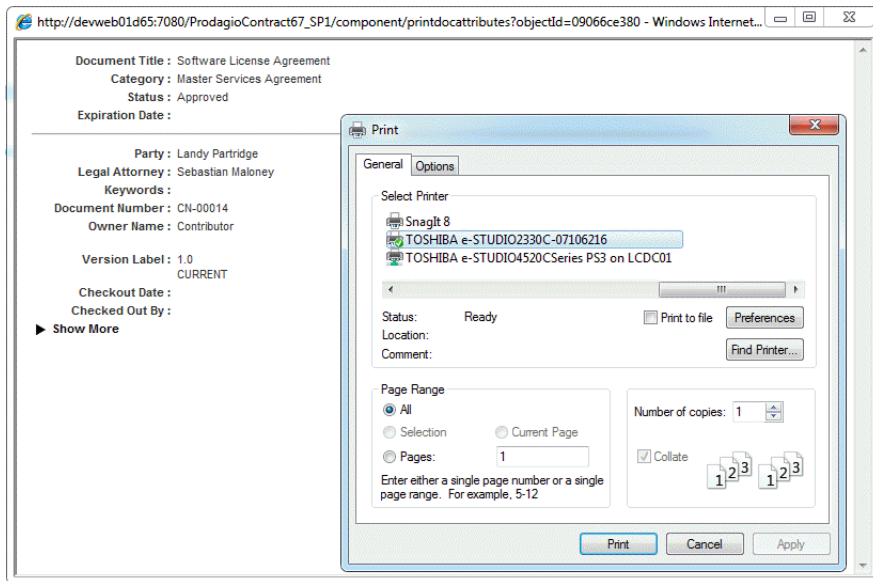
Printing Document Properties

Document properties can be printed at any time. For some users, only some of the properties will print. Most document properties lists are quite lengthy.

Print Document Properties or Print All Properties

- 1 Right-click the document name; then select **Open Dashboard**.
OR
Double-click the document name. The selected document's Properties window (Jacket) displays (Figure 4-36 on page 72).
- 2 Click **Print Properties** or **Print All Properties**. A printer-friendly view of the document Jacket displays for **Print Properties**, and an alphabetical listing of the same data displays for **Print All Properties**. The view is immediately covered by the Print window (Figure 4-44).

Figure 4-44 Print Properties



- 3 Click **Print**. The document Jacket properties are printed on the default printer.
- 4 Click the X on the upper right corner to close the printer-friendly view.

Managing Favorites

Just as a web browser allows you to store a list of favorite web sites, Gimmel Contract Management allows you to keep a list of favorite items, such as documents, Cabinets, or folders that you refer to frequently. Adding an item or items to Favorites makes it faster to navigate to the item later by eliminating navigating through the folder structure. An entire group of documents, stored in one Cabinet or in one folder, may also be added to your Favorites tab.

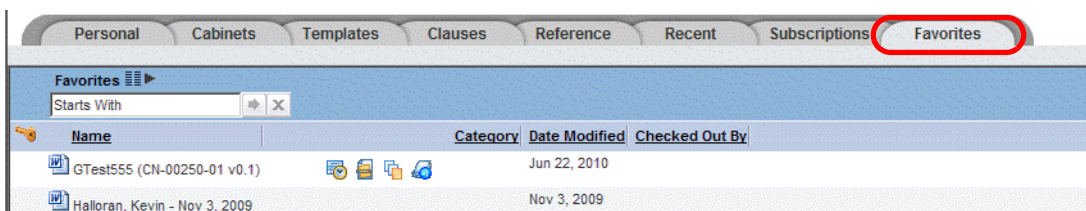
Each user can configure Gimmel Contract Management to display their most recent Favorites in **bold italic** and to display the **Date Added** column to the **Favorites** tab. See ["Identifying Recent Favorites"](#) on page 81.

When you no longer require quick access to an item or items, remove the item or items from the Favorites tab. Removing an item from the Favorites tab removes only that shortcut to the item, not the original item.

View the All Favorites Listing

- 1 In the Documents view, click the **Favorites** tab. All your Favorites items display ([Figure 4-45](#)).

Figure 4-45 All Favorites

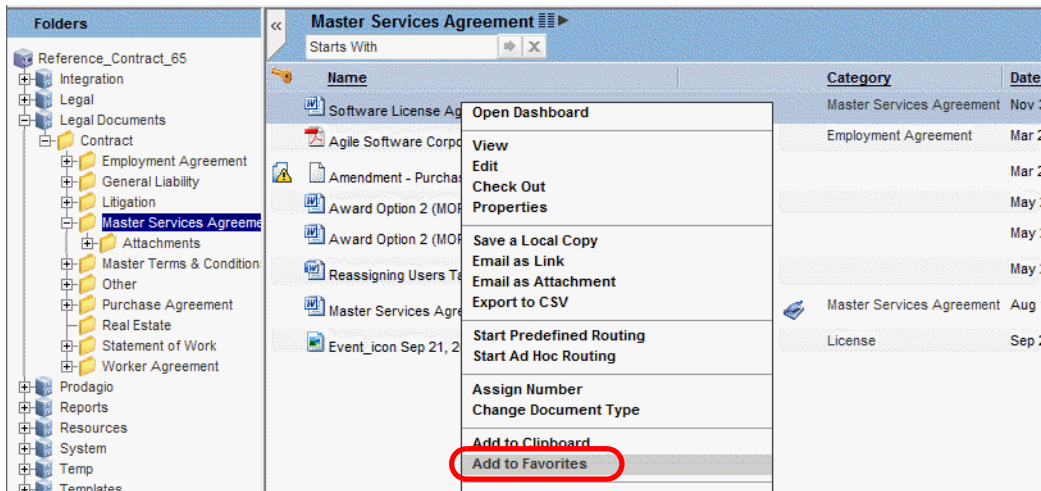


Adding Favorite Items

Add an Item or Items to Favorites from a Listing

- 1 To add one item to Favorites from a listing, click the item name. The selected item highlights in medium blue.
OR
- 2 To add adjacent items to Favorites: click the first item, hold the Shift key and click the last adjacent item. For non-adjacent items: hold the Ctrl key and click each non-adjacent item. Each selected item highlights in medium blue.
- 3 Right-click any highlighted item and select **Add to Favorites** ([Figure 4-46](#)). The item(s) are added to the Favorites tab.

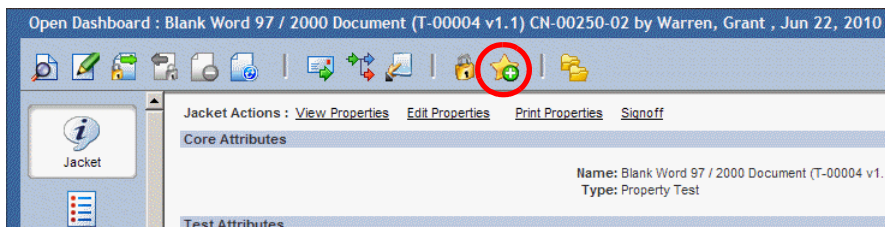
Figure 4-46 Add an Item to Favorites from a Tab



Add an Item to Favorites from the Document Dashboard

- 1 In a listing, right-click the document name; then select **Open Dashboard**
OR
Double-click the document name. The document dashboard displays (Figure 4-47).

Figure 4-47 Add an Item to Favorites from the Document Dashboard



- 2 Click the **Add to Favorites** button. The item is added to the **Favorites** tab and the dashboard now displays the **Remove from Favorites** button.

Add a Cabinet or Folder to Favorites

- 1 Click the **Documents** button and click to highlight the Cabinet or folder to add to Favorites.
- 2 Click the **Add to Favorites** button to add the Cabinet or folder to the **Favorites** tab and the view now displays the **Remove from Favorites** button.

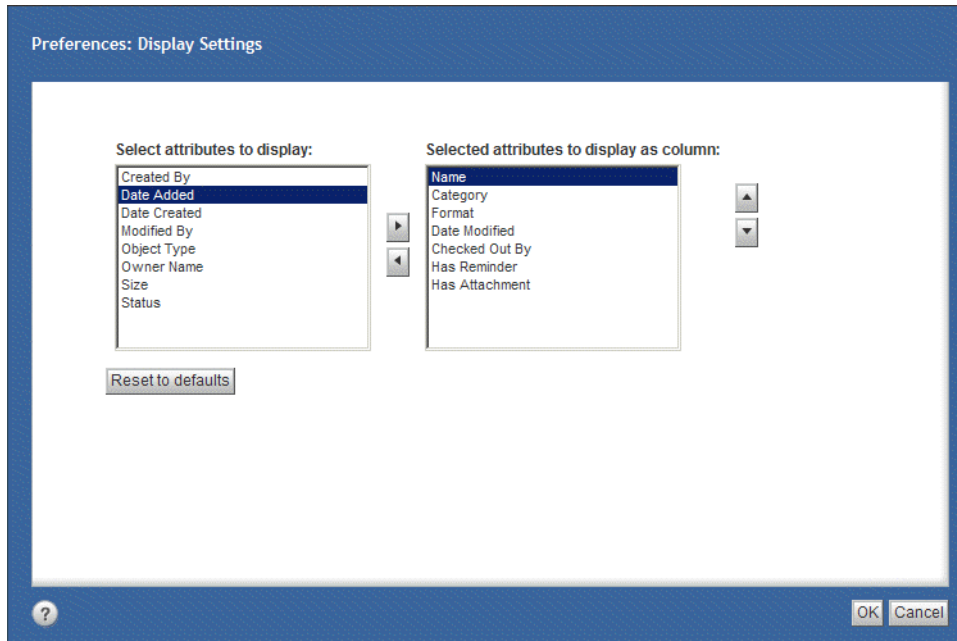
Identifying Recent Favorites

By adding the **Date Added** column to the Favorites tab, each recently added Favorite will list the date it was added and will display in **bold italic**. In most configurations, after seven days, the Favorite name reverts to the standard font.

Identify Recent Favorites

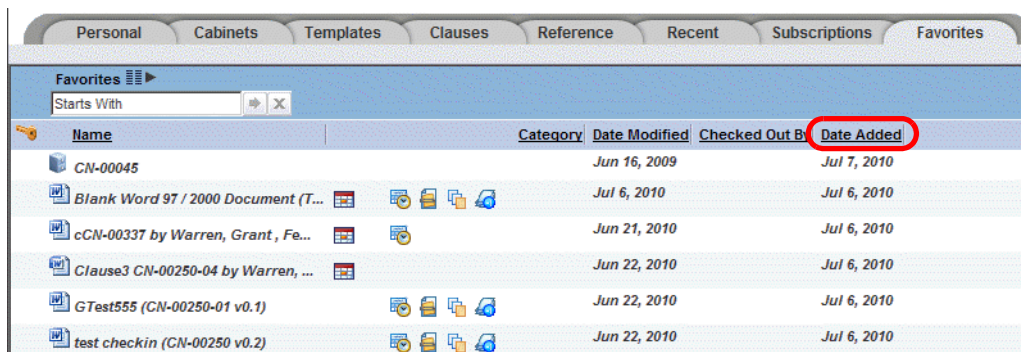
- 1 In the Documents view, click the **Favorites** tab. All Favorites items display. See [Figure 4-45 on page 80](#).
- 2 Click the **Column Preferences** button. The Preferences Display Settings window displays ([Figure 4-48](#)).

Figure 4-48 Preferences Display Settings



- 3 In the **Select attributes to display** pane, click **Date Added**; then click the **Add from List** button to move it to the **Selected attributes to display as column** pane. For details, see ["Changing the Displayed Columns" on page 30](#).
- 4 Click **OK**. The **Date Added** column displays on the Favorites tab, and any item recently added as a favorite during the last seven day displays in **bold italic** ([Figure 4-49](#)).

Figure 4-49 Recent Favorites



Removing Favorite Items

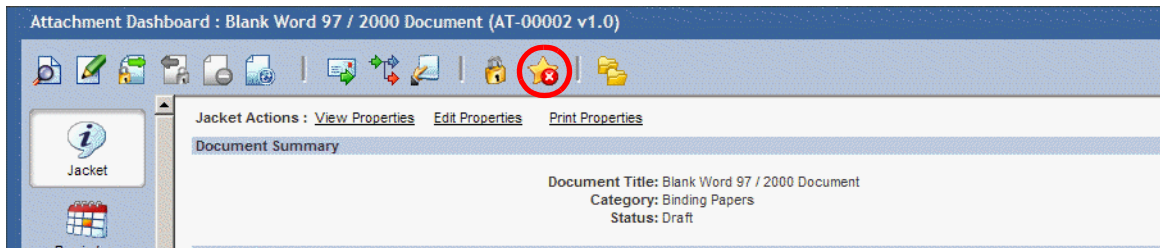
Before beginning

The item must already be a Favorite.

Remove a Favorites Item from the Document Dashboard

- 1 Right-click the document name; then select **Open Dashboard**.
OR
Double-click the document name. The document dashboard displays (Figure 4-50).

Figure 4-50 Remove an Item from Favorites from the Document Dashboard

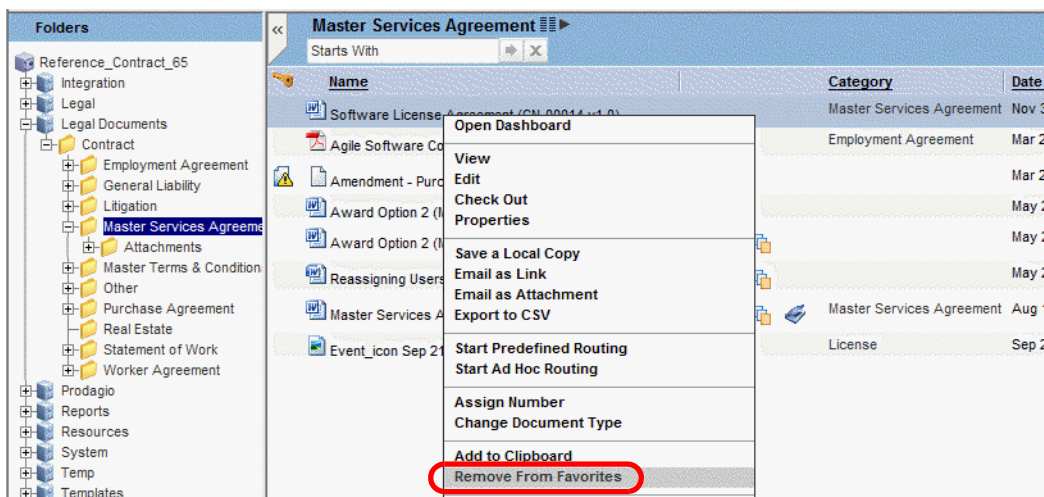


- 2 Click the **Remove from Favorites** button. The Favorites item is removed from the Favorites tab, but is not removed from Gimmel Contract Management. The dashboard now displays the **Add to Favorites** button.

Remove a Favorites Item or Items from the Cabinets or Personal Tab

- 1 Click the **Cabinets** or **Personal** tab containing the item or items to remove from Favorites.
- 2 To remove one item from Favorites, click the item name. The selected item highlights in medium blue.
OR
- 3 To remove adjacent items: click the first item, hold the Shift key and click the last adjacent item. For non-adjacent items: hold the Ctrl key and click each nonadjacent item. Each selected item highlights in medium blue.
- 4 Right-click any highlighted item; then select **Remove from Favorites** (Figure 4-51).

Figure 4-51 Remove a Favorites Items from a Tab

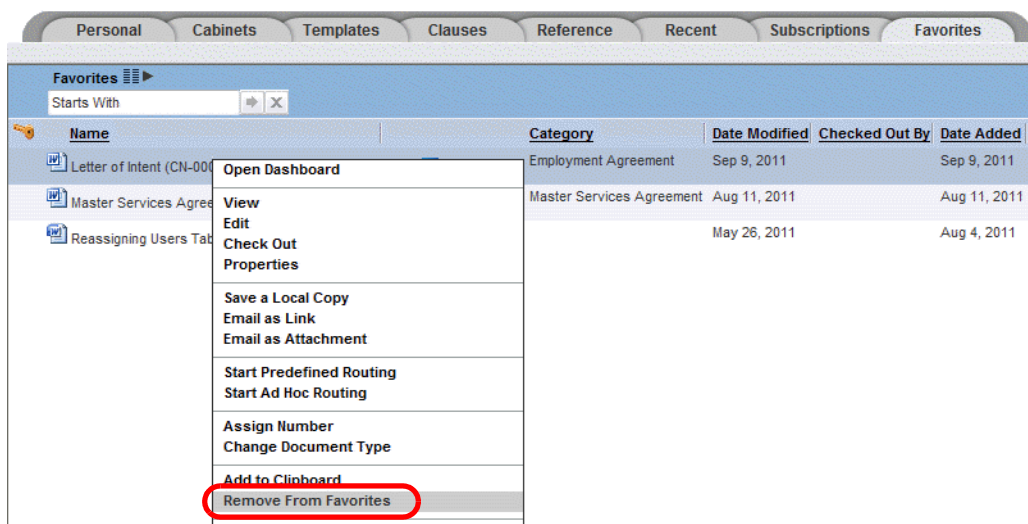


The Favorites item is removed from the Favorites tab.

Remove a Favorites Item or Items from the Favorites Tabs

- 1 Click the **Favorites** tab in either the **Documents** view or the **My Tasks** view.
- 2 To remove one item from Favorites, click the item name. The selected item highlights in medium blue
OR
- 3 To remove adjacent items: click the first item, hold the Shift key and click the last adjacent item. For non-adjacent items: hold the Ctrl key and click each non-adjacent item. Each selected item highlights in medium blue.
- 4 Right-click any highlighted item; then select **Remove from Favorites** (Figure 4-52).

Figure 4-52 Remove a Favorites Item from the Favorites Tab



The selected Favorites item(s) are removed only from the Favorites tab, but are **not** removed from their current Cabinet and folder location in Gimmal Contract Management.

Moving, Copying and Linking Items Inside Gimmel Contract Management

An item or items can be moved, copied or linked from any Cabinet or folder location in Gimmel Contract Management to any other Cabinet or folder location within Gimmel Contract Management by right-clicking, holding; then dragging the item's button or title to the new location; then selecting an action from the document Actions.

More detail: The assigned permissions of some users may not permit moving, copying or linking items inside Gimmel Contract Management.

This method of moving, copying and linking items does **not** involve the Clipboard. See [“Moving, Copying and Linking Items Using the Clipboard” on page 89](#) for a moving, copying and linking items involving the Clipboard.

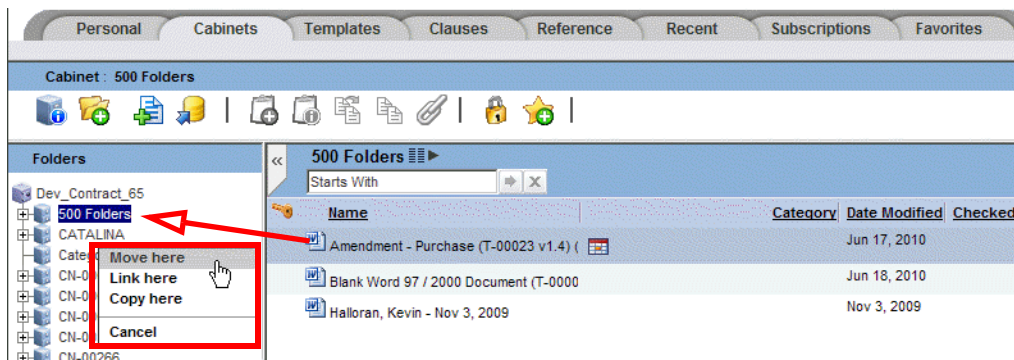
Move an Item or Items

Moving items only moves the item from the current location to the new location. It does **not** also create and leave a copy of the item in the original location.

More detail: To create and leave a copy of the item in the original location, use [“Copy an Item or Items” on page 86](#).

- 1 Open the folder structure to display the folder to receive the moved item or items.
- 2 Navigate to the view listing the item or items to move.
- 3 To move one item, right-click **and hold** the item name. The selected item highlights in medium blue
OR
- 4 To move adjacent items: click the first item, hold the Shift key and click the last adjacent item. For non-adjacent items: hold the Ctrl key and click each non-adjacent item. Each selected item highlights in medium blue.
- 5 Right-click **and hold** any highlighted item.
- 6 Drag the cursor to the Cabinet and folder location where you want to move the item or items. The Cabinet or folder name will highlight.
- 7 Release the mouse. Document Actions display ([Figure 4-53](#)).

Figure 4-53 Move Item



- 8 Select **Move here**. The item or items are moved to the highlighted location.
- 9 To cancel moving the item or items, select **Cancel**.

Copy an Item or Items

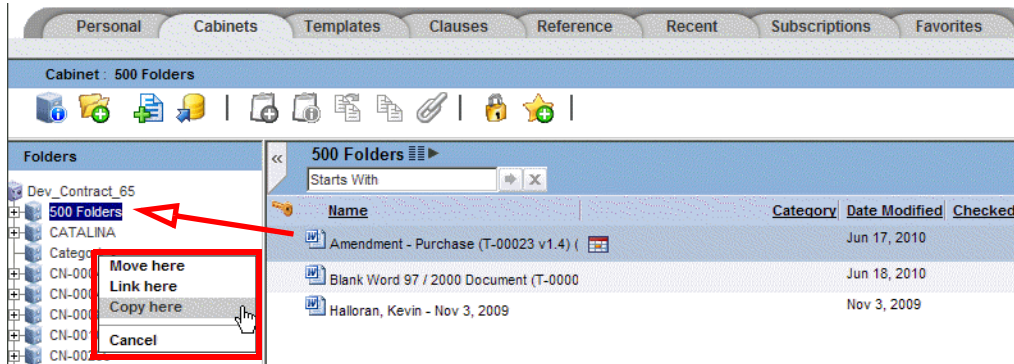
Copying items leaves each item in its original location, makes a copy of each item, and places the copies in the new location. The items are now in two locations in Gimmel Contract Management.

More detail: The copied item or items **not** shortcuts, so any change made to the item in one location will **not** also automatically be made to the item in the other location.

To ensure that a change made to an item in one location is made in all other locations of the same item, use "[Link an Item or Items](#)" on page 87.

- 1 Open the folder structure to display the folder to receive the copied item or items.
- 2 Navigate to the view listing the item or items to copy.
- 3 To copy one item, right-click **and hold** the item name. The selected item highlights in medium blue
OR
- 4 To copy adjacent items: click the first item, hold the Shift key and click the last adjacent item. For non-adjacent items: hold the **Ctrl** key and click each nonadjacent item. Each selected item highlights in medium blue.
- 5 Right-click **and hold** any highlighted item.
- 6 Drag the cursor to the Cabinet and folder location where you want to copy the item or items. The Cabinet or folder name will highlight.
- 7 Release the mouse. Document Actions display ([Figure 4-54](#)).

Figure 4-54 Copy Item



8 Select **Copy here**. The item or items are copied to the highlighted location.

A To cancel copying the item or items, select **Cancel**.

Link an Item or Items

More detail: To enable linking an item or items, the **Allow Link/Shortcut Use** must be selected by the business administrator. See the separate *Gimmel Contract Management 6.9 Business Administrator Guide*.

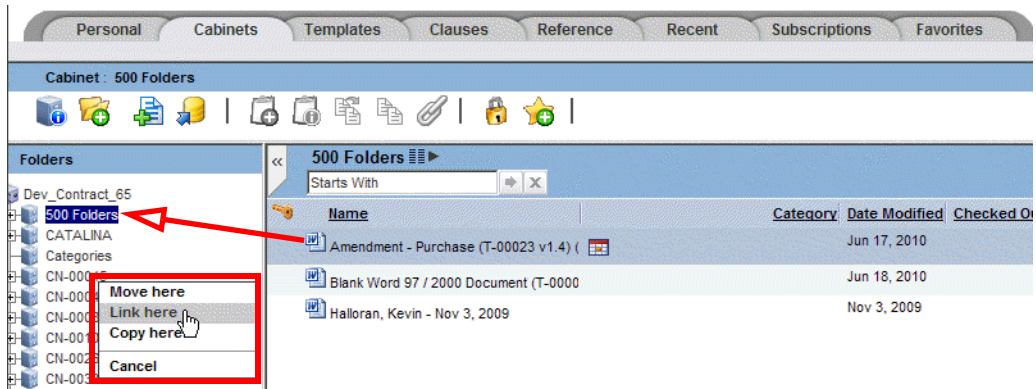
Linking an item or items leaves the item or items in its original location, makes a link (shortcut) of each item, and places each link in the new location. The item or items are now in two locations in Gimmel Contract Management.

More detail: The copied item or items **are** a shortcut, so any change made to the item in one location **will** also automatically be made to the item in the other location(s) of the same item.

To ensure that a change made to an item in one location is **not** made in all other locations of the same item, use ["Copy an Item or Items" on page 86](#).


- 1 Open the folder structure to display the folder to receive the linked item.
- 2 Navigate to the view listing the item or items to link.
- 3 To link one item, right-click **and hold** the item name. The selected item highlights in medium blue
OR
- 4 To link adjacent items: click the first item, hold the **Shift** key and click the last adjacent item. For nonadjacent items, hold the **Ctrl** key and click each nonadjacent item. Each selected item highlights in blue.
- 5 Right-click **and hold** any highlighted item.
- 6 Drag the cursor to the Cabinet and folder location where you want to link the item or items. The Cabinet or folder name will highlight.
- 7 Release the mouse. Document Actions display ([Figure 4-55](#)).

Figure 4-55 Link Here



- 8 Select **Link here**. The item or items are linked to the highlighted location.
- 9 To cancel linking the item or items, select **Cancel**.

Moving, Copying and Linking Items Using the Clipboard

Each Gimmel Contract Management user has their own **Clipboard** . Use the Clipboard to move, copy or link documents, folders and Cabinets shortcuts (links “pointing” to the original item) to any other cabinet/folder location in Gimmel Contract Management.

- **Move** – removes the item from its current location and places it in its new location.
- **Copy** – creates a copy of the item (with a new, unique number) and places that copy in its new location. The original item remains in its original location.
- **Link** – creates a shortcut link to the original item in the new location. The original item remains in its original location.

All items currently in the Clipboard are **deleted** at each log out. Because the Clipboard contains only shortcuts, the actual items (where ever they are) are **not** deleted.




Moved, copied and linked items can be always be found using Search. However, the document number of a copied item no longer matches the original number, so searches for matching document numbers won't find any copies. See [Chapter 11, “Searching Documents.”](#)

Items in two or more locations can always be found using **View Locations**. See [“Finding All Locations of a Document” on page 60.](#)

More detail: The assigned permissions of some users may not permit moving, copying or linking a Cabinet using the Clipboard.

More detail: The system parameter **Enforce Auto File** alters moving and copying functionality. The system parameter **Allow Link/Shortcut Use** enables or disables linking. See the separate document *Gimmel Contract Management 6.9.1 Business Administrator Guide*.

Basic Moving, Copying and Linking Items Steps Using the Clipboard

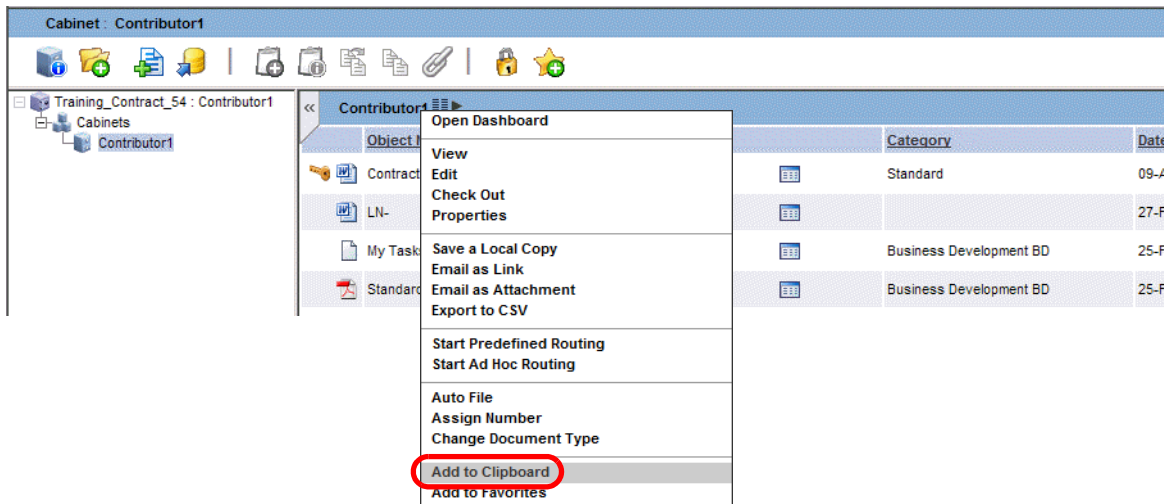
1. Add an item or items to the Clipboard. These are the items that will be moved, copied or linked. See [“Add an Item or Items to the Clipboard” on page 89.](#)
2. Click to highlight the new Cabinet or folder location for the item or items already added to the Clipboard.
3. Click the **Move Here**  button, the **Copy Here**  button or the **Link Here**  button on the folder action bar to move, copy or link the item or items.

Add an Item or Items to the Clipboard

- 1 Navigate to the item or items to be added to the Clipboard or click the item or items in Search Results.
- 2 To add one item, right-click **and hold** the item name. The selected item highlights in medium blue.

- 3 To add adjacent items to the Clipboard: click the first item, hold the **Shift** key and click the last adjacent item. For nonadjacent items: hold the **Ctrl** key and click each nonadjacent item. Each selected item highlights in blue.
- 4 Right-click any selected item name; then select **Add to Clipboard** or click the **Add to Clipboard** button (Figure 4-56).

Figure 4-56 Add to Clipboard




A link of the item or items is added to your Clipboard. The original item or items remains in its original location. An unlimited number of moving, copying and linking actions may be taken on the same item or items.

To verify that the item or items have been added to the Clipboard, see [“View Items on the Clipboard”](#) on page 90.

Add a Folder or Cabinet (and All Its Contents) to the Clipboard

More detail: The assigned permissions of some users may not permit adding a Cabinet to the Clipboard.

- 1 Navigate to; then select the folder or the Cabinet to be added to the Clipboard.
- 2 Right-click the document name; then select **Add to Clipboard** or click the Add to Clipboard  button. The selected folder or Cabinet (and all its content) is added to the Clipboard. See [Figure 4-56](#).
 - A To verify that the folder or Cabinet has been added to the Clipboard, see [“View Items on the Clipboard”](#).

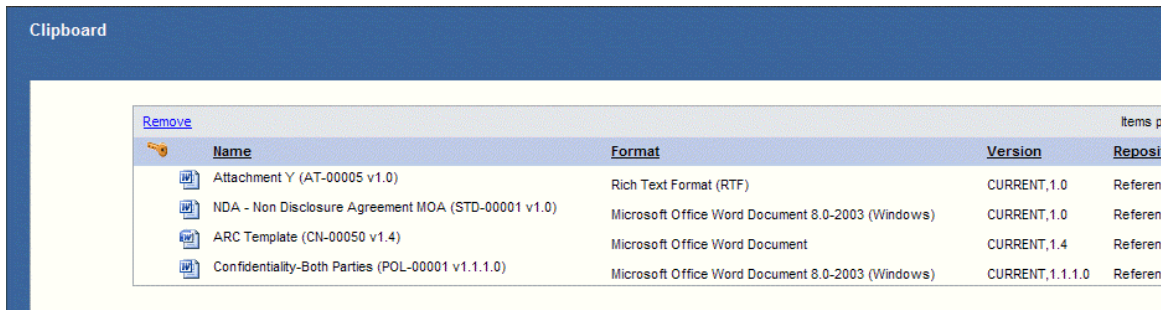
View Items on the Clipboard

Before beginning

At least one item (document, folder or Cabinet) must already be in the Clipboard. If no items are in the Clipboard, the **View Clipboard** button is inactive.

- 1 In the Documents view, click the **View Clipboard** button. The Clipboard window displays and lists all current Clipboard documents, folders and Cabinets (Figure 4-57).

Figure 4-57 Clipboard



- 2 After viewing the Clipboard items, click **Close**.

Move, Copy or Link Clipboard Item or Items to a New Location

Before beginning

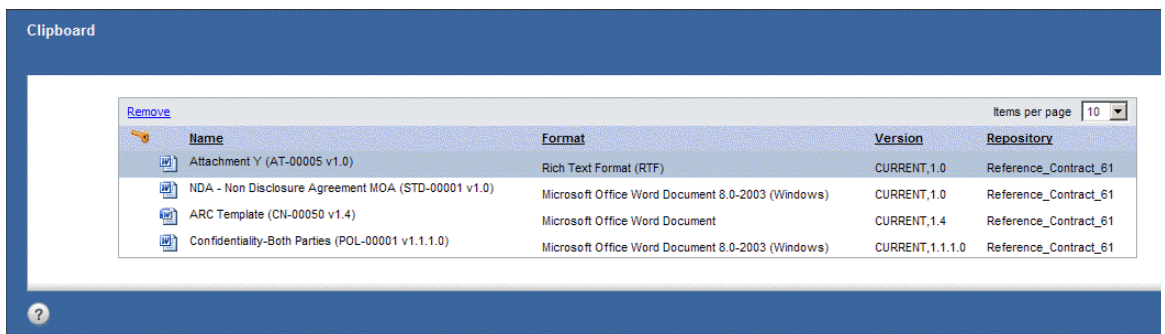
At least one item must already be in the Clipboard. If no items are in the Clipboard, the **Clipboard** button is inactive.

Ensure that **only** the items to move, copy or link are currently in the Clipboard, because **all** Clipboard items will be moved, copied or linked **without** being selected.

More detail: Moving **does** remove the item from the Clipboard. Copying or linking items to another location does **not** remove those items from the Clipboard. To remove items from the Clipboard, see ["Remove an Item or Items from the Clipboard"](#) on page 92.

- 1 In the **Documents** view, click the **View Clipboard** button. The Clipboard window displays and lists all current Clipboard items (Figure 4-58).

Figure 4-58 Clipboard Items




- 2 Confirm that **all** the items in the Clipboard are items to be moved, copied or linked.
- 3 Click **Close** to close the Clipboard window.
- 4 Click to highlight the target Cabinet or folder (usually in the **Cabinets** tab) to receive the selected Clipboard items to be moved, copied or linked.
- 5 Click the **Move Here** button, **Copy Here** button, or **Link Here** button.

The item(s) are moved or copied (with a unique number) or linked to the selected location. Moved items are no longer in the Clipboard. Copied or linked items remain in the Clipboard.

Remove an Item or Items from the Clipboard

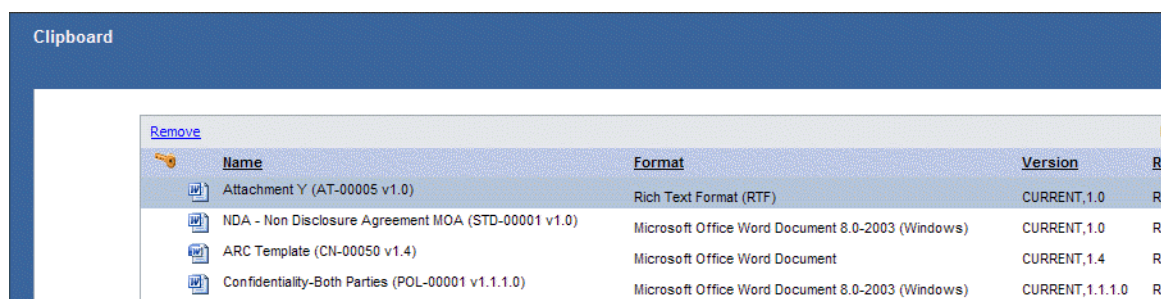
Before beginning

At least one item must already be in the Clipboard. If no items are in the Clipboard, the Clipboard  button is inactive (grayed-out).

More detail: Logging out also removes all items in a user's Clipboard.

- 1 In the Documents view, click the **View Clipboard** button. The Clipboard window displays (Figure 4-59).

Figure 4-59 Remove an Item or Items from the Clipboard



- 2 To remove one item from the Clipboard, right-click **and hold** the item name. The selected item highlights in blue.
OR
- 3 To remove adjacent items: click the first item, hold the Shift key and click the last adjacent item. For nonadjacent items, hold the **Ctrl** key and click each nonadjacent item. Each selected item highlights in blue.
- 4 Click **Remove**.
- 5 Click **Close**. All selected item(s) are removed from the Clipboard.

Managing Document Dashboard Features

This chapter includes the following topics:

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View, Edit, and Print Document Properties	92
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Using the Jacket

The Jacket provides a summary of an individual document.

View a Jacket

- 1 In the Document view, browse to the document that you want to view.
- 2 Click the **Dashboard** button. The Jacket view is first (Figure 5).

The business administrator configures the Jacket for your site, so the links at the top and the details shown about the document could be different from this example.

Figure 5 Example Jacket View of a Document



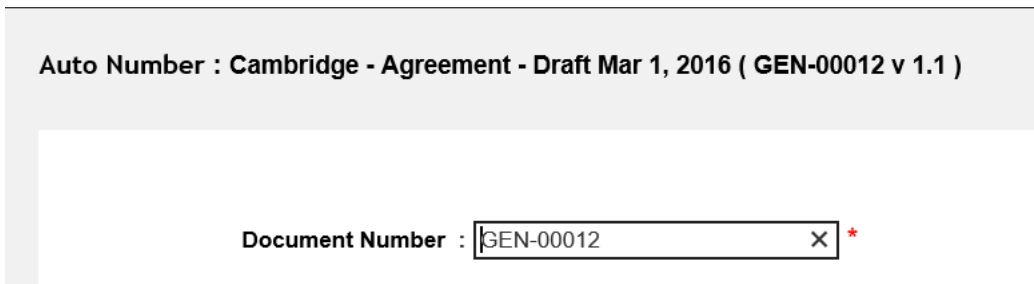
View, Edit, and Print Document Properties

- 1 See the following sections for more information about these tasks: “[View Document Properties](#)” on page 72, “[Edit Individual Document Properties](#)” on page 73, and “[Print Document Properties or Print All Properties](#)” on page 78.

Update a Document Number

- 1 In the Document view, browse to the document that you want to view.
- 2 Click the **Dashboard** button. The Jacket view is first (Figure 5).
- 3 Click the **Update Number** link. The Auto Number dialog box displays (Figure 5-1).

Figure 5-1 Auto Number Dialog Box



- 4 Edit the **Document Number** field.
- 5 Click **OK**.

View a Custom Report

Your company's business administrator can link specific reports to specific documents to appear on either the Jacket and/or the Datagrid main view.

- 1 In the Document view, browse to the document that you want to view.
- 2 Click the **Dashboard** button. The Jacket view is first (Figure 5).
- 3 Click the link to the custom report. For example, in the Jacket view shown in Figure 5, the **Assigned Reports Complete** report link appears. The dialog box to specify the report parameters displays (Figure 5-1).

Figure 5-2 Sample Custom Report Dialog Box



- 4 Set the parameters to get the report that you want.
- 5 Click **OK**. The report displays.

Managing Document Notes

Use Notes to add permanent notes to a document for others to view. All users can view the Notes of all other users. Notes can be categorized.

In various views and tabs, documents with one or more Notes display the **Notes** button next to the document's name.

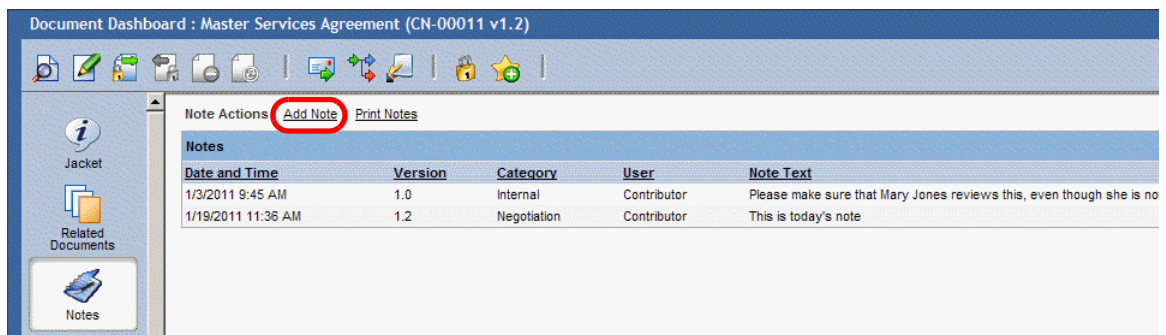
More detail: Notes text **cannot** be changed; however, a Notes **category** can be changed. See "Manage Document Notes and Notes Categories" on page 95.

ALERT! Once saved, a Note **cannot** be changed or deleted.

Add Notes to a Document

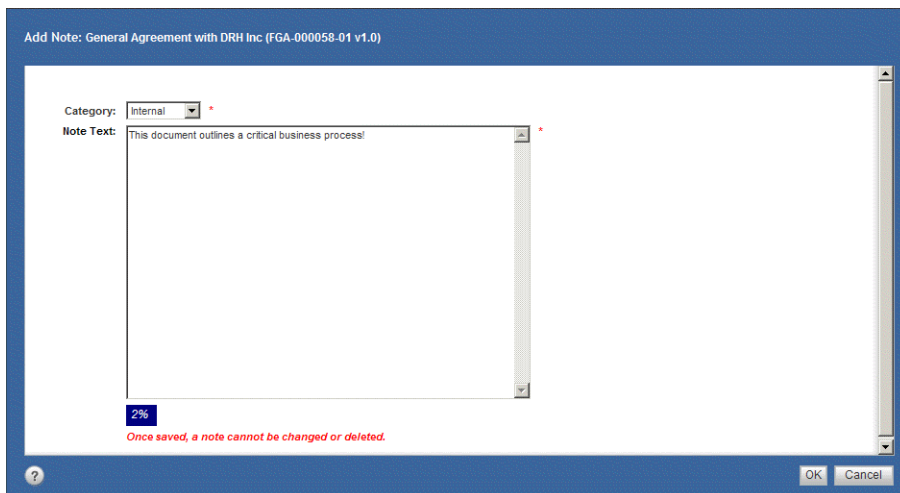
- 1 Double-click the document name to have Notes added
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.
- 2 Scroll down and click the **Notes** button. The Notes window displays (Figure 5-1).

Figure 5-1 Notes



- 3 Click **Add Note**. The Add Note window displays (Figure 5-2).

Figure 5-2 Add Note



- 4 In **Category**, select a category from the menu. Available category selections are determined by the customer configuration.
- 5 In **Note Text**, enter the Notes. The dynamic progress bar displays the percentage of total available characters entered.
- 6 Click **OK**. The Notes window displays the newly added note for the selected document. The **Notes** button displays after the document name.

ALERT! Once saved, a Note **cannot** be changed or deleted.

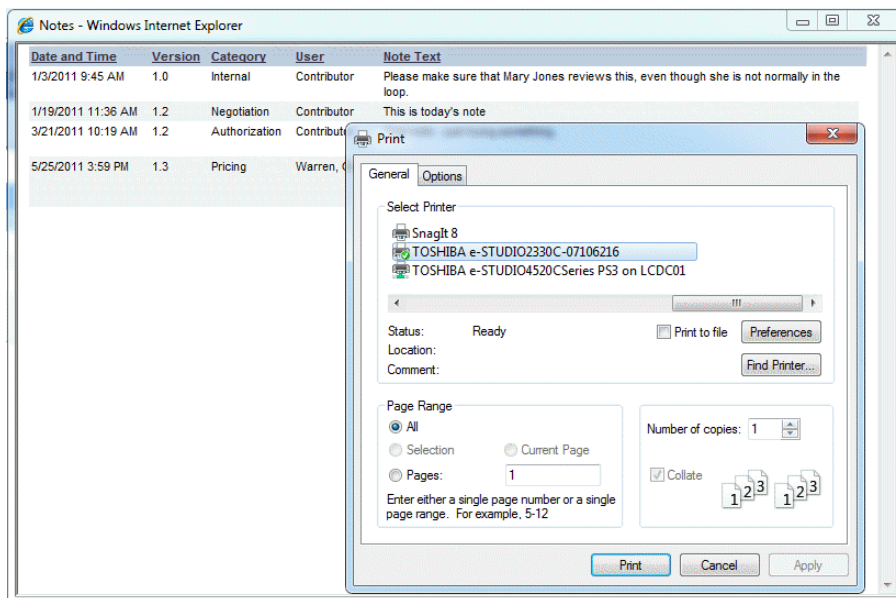
Print All Notes for a Document

Before beginning

A Note must exist before it can be printed.

- 1 Double-click the document name with Notes requiring printing
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.
- 2 Click the **Notes** button. The Notes window displays, listing all Notes for the selected document. See [Figure 5-1 on page 94](#).
- 3 Click [Print Notes](#). A printer-friendly view of all the document's Notes displays; then is immediately covered by the Print window ([Figure 5-3](#)).

Figure 5-3 Printing Notes



- 4 Click **Print**. The document's Notes are printed on the default printer.
- 5 Close the printer-friendly view.

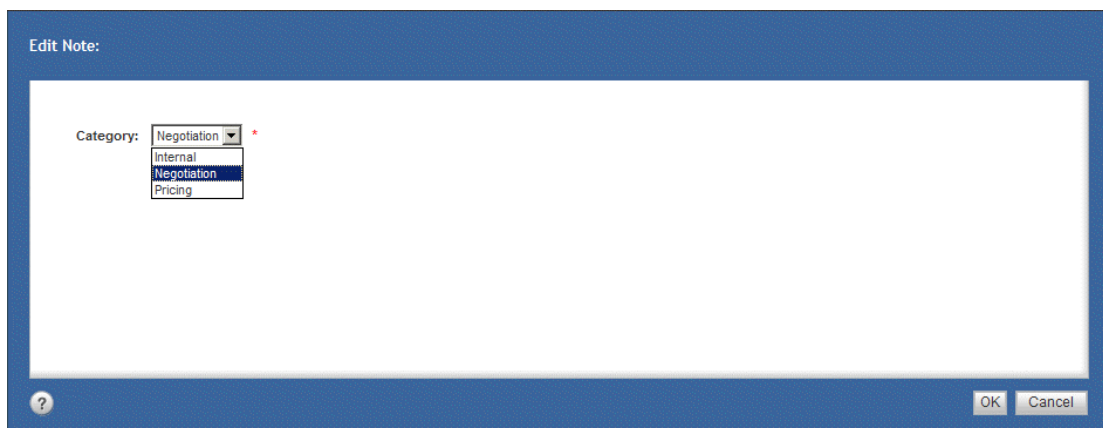
Manage Document Notes and Notes Categories

Before beginning

A document must contain at least one Note before it can be managed.

- 1 Double-click the document name with the Notes to be managed
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.
- 2 Click the **Notes** button. The Notes window displays, listing all Notes for the selected document (Figure 5-1 on page 94).
 - A Click any column heading to sort the Notes. Click the heading again to reverse the sort.
 - B To display more Notes, in **Items Per Page**, select **10**, **50** or **100** from the menu.
 - C To filter the list by category, in All Categories, select from the menu.
- 3 To *edit category*, double-click
OR
Right-click; then select **Edit Category** of the Note requiring the Category change (Figure 5-1 on page 94). The Edit Note window displays (Figure 5-4).

Figure 5-4 Edit Note



- A Select a Category from the menu. Available selections are determined by the customer configuration.
 - B Click **OK**. The Notes window displays, with the selected Note's Category changed.
- 4 To *export* a document's Notes to a .csv-formatted file, right-click; then select **Export to CSV**. See "Exporting Listings to .csv-Formatted File" on page 64.

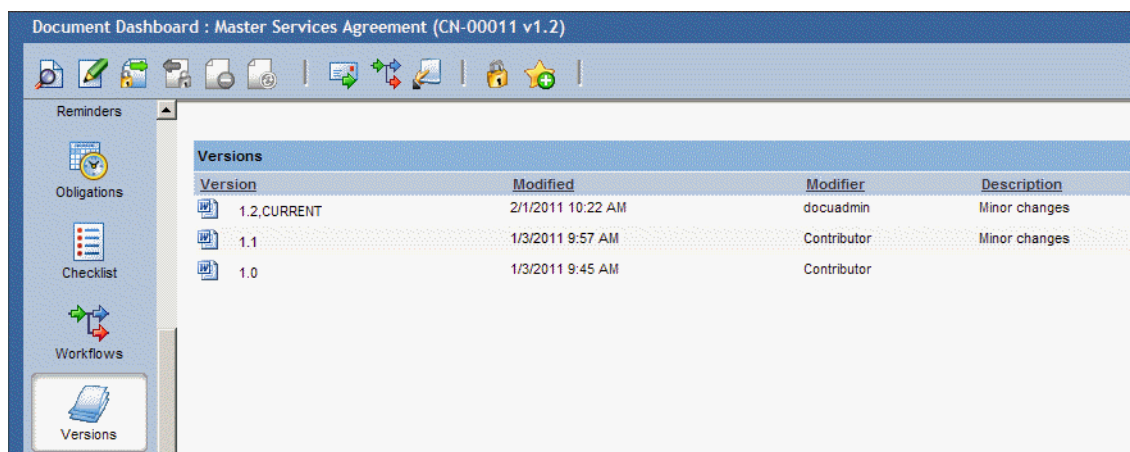
Managing Document Versions

View all versions of a saved document with the **Versions** dashboard. Other right-click document actions are also available from this Versions dashboard.

Manage Document Versions

- 1 Double-click the document name with versions to be viewed or managed
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays (Figure 2-3 on page 19).
- 2 Scroll down and click the **Versions** button. The Versions window displays (Figure 5-5).

Figure 5-5 Versions




Version	Modified	Modifier	Description
1.2, CURRENT	2/1/2011 10:22 AM	docuadmin	Minor changes
1.1	1/3/2011 9:57 AM	Contributor	Minor changes
1.0	1/3/2011 9:45 AM	Contributor	

- A In long Versions lists, click any column heading to sort the versions. Click the heading again to reverse the sort.

More detail: Document versions are controlled by Gimmel Contract Management architecture and by the permission levels of users.

- 3 To *view the version*, double-click **OR** right-click; then select **View** of the selected document version. The selected document version displays.

A Close the document and displaying application. The Versions window displays.
- 4 To *view version properties*, see “[View Document Properties](#)” on page 72.
- 5 To *edit* the version, right-click; then select **Edit** or **Check Out**. See “[Checking In and Changing a Document Version](#)” on page 52.
- 6 To *save a local version copy*, see “[Saving a Local Document Copy](#)” on page 61.
- 7 To *email a version as a link*, see “[Email Documents as a Link](#)” on page 64.
- 8 To *email a version as an Attachment*, see “[Email Document\(s\) as Attachment\(s\) from the Document Name](#)” on page 61.

- 
- 9 To *route a version*, see ["Routing Documents"](#) on page 132 and ["Routing Documents with Predefined Routing"](#) on page 138.
 - 10 To *export a version listing to a CSV-formatted file*, see ["Exporting Listings to .csv-Formatted File"](#) on page 64.
 - 11 To *auto file a version*, see ["Auto File a Document"](#) on page 65.
 - 12 To *add a version to the Clipboard*, see ["Add an Item or Items to the Clipboard"](#) on page 89.
 - 13 To *add/remove a version to/from Favorites*, see ["Managing Favorites"](#) on page 80.
 - 14 To *view and go to all locations of a version*, see ["Find and View All Locations of a Document"](#) on page 60.

Managing the Document Audit Trail

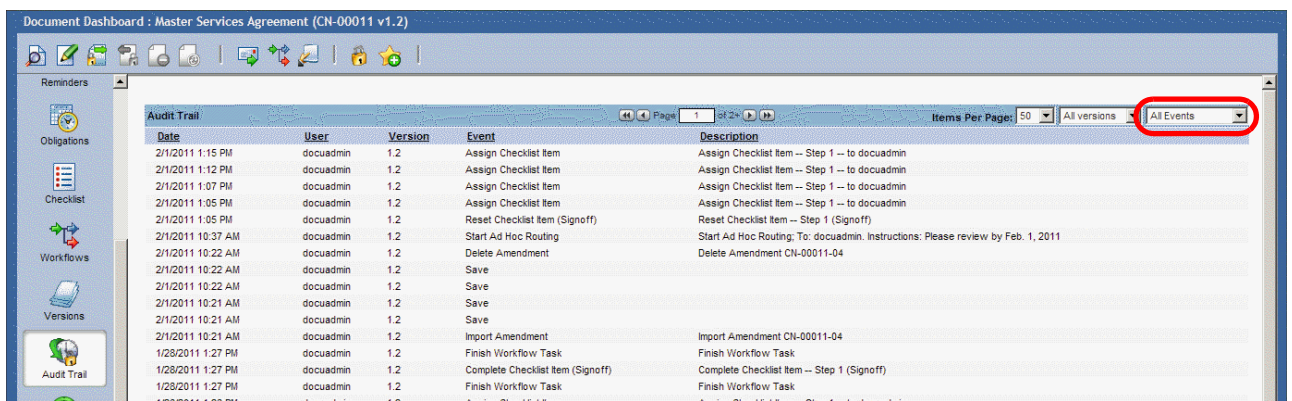
The Audit Trail lists all the actions that have been taken on a document. Most Gimmel Contract Management user document actions are automatically recorded in the Audit Trail as an entry. Audit Trail entries are read-only; they **cannot** be edited or deleted.

Manage a Document Audit Trail

- 1 Double-click the document name with Audit Trail to be viewed
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays. See [Figure 2-3 on page 19](#).
- 2 Scroll down and click the **Audit Trail** button. The Audit Trail window displays all entries for viewing. See [Figure 6](#).

More detail: If you do not have sufficient permissions to display this information, see your business administrator.

Figure 6 Audit Trail



- 3 Sort the entries with the version and event filters to display only versions and events matching the filter selection. The last selected event is remembered when Audit Trail is next opened.
 - A In long Audit Trail lists, click any column heading to sort the Audit Trail entries. Click the heading again to reverse the sort.
- 4 Export the Audit Trail listing to .csv. See ["Exporting Listings to .csv-Formatted File"](#) on page 64.
- 5 After viewing the document Audit Trail, click **Close**. The previous window displays.

Displaying Document Property History

A document property is one field of information, required or not required, consisting of a property name and its unique property information. All document properties accept information and store that information as part of the document.

Document properties take different forms. Some typical forms are empty fields (which request information), menu fields (which require a selection), time fields (which require a date to be entered or selected from a calendar), check boxes (checked or cleared), uneditable fields (with information provided automatically), true or false fields, link fields, etc. When grouped together, all the properties and their information are the non-content part of the document.

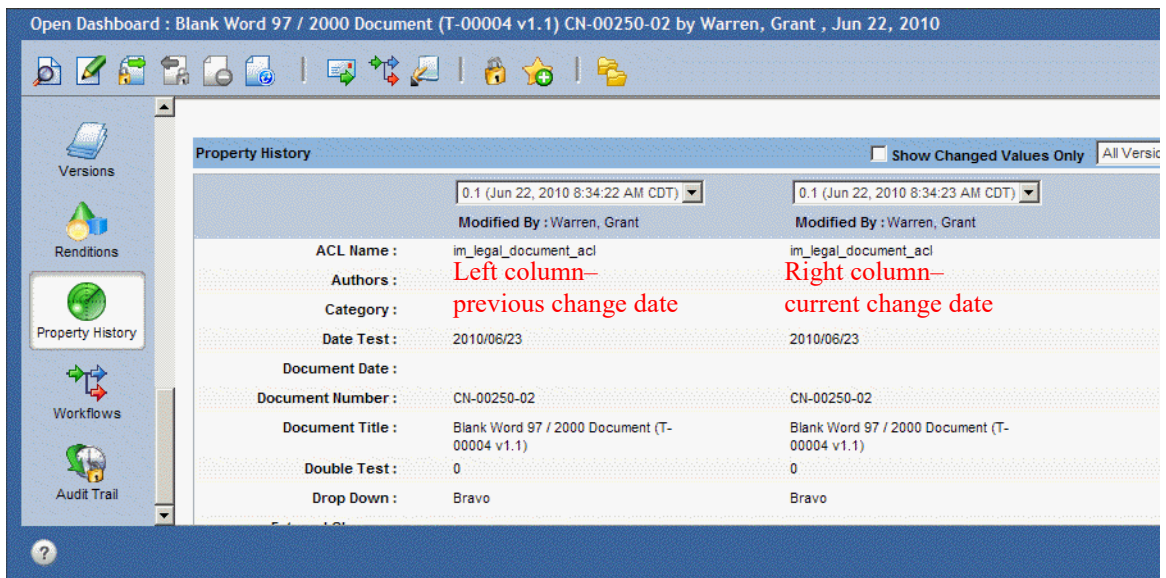
Essentially, keeping documents current involves updating many different document properties, often including successive changes for just one document property. Often, the history of *what* property was changed *when* needs to be known.

Document Property History provides a way to review the complete history of every property in a document, as well as "backtracking" to view when each property change was made.

View Document Property History

- 1 Double-click the document name with Property History to be viewed
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays (Figure 2-3 on page 19).
- 2 Scroll down and click the **Property History** button. The Property History window displays columns of all Property History versions (Figure 5-1).

Figure 5-1 Property History

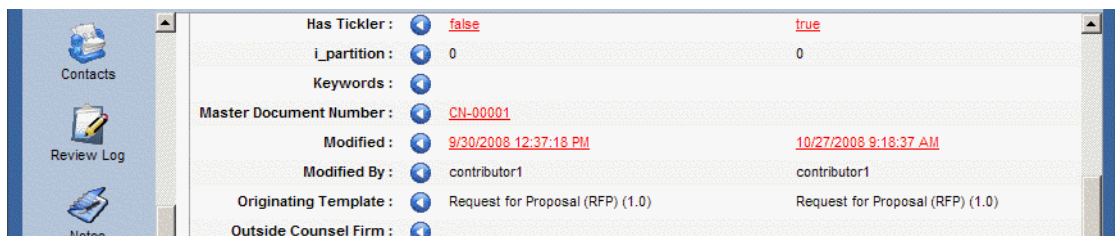


This Property History window normally displays two “change date columns” for each document property name, allowing a comparison to be made. When this window is first opened, the most *current* date any property changes were made is listed in the right column. The left column lists the date the next *previous* change was made. If attributes in both columns match, no attribute changes occurred on either date for that property.

- 3 To look **back** into history from the current date, click the **Go Back** button. This action replaces the right column with the left column and displays the next previous date as the new left column. In other words, columns “scroll” horizontally, moving into view from the left and moving out of view on the right with each click of the **Go Back** button.
- 4 To look **forward** into history toward the future from the date in the right column, click the **Go Forward** button. This action replaces the left column with the right column and display the next future date as the new right column. In other words, columns scroll horizontally, moving into view from the right and moving out of view on the left with each click of the **Go Forward** button.

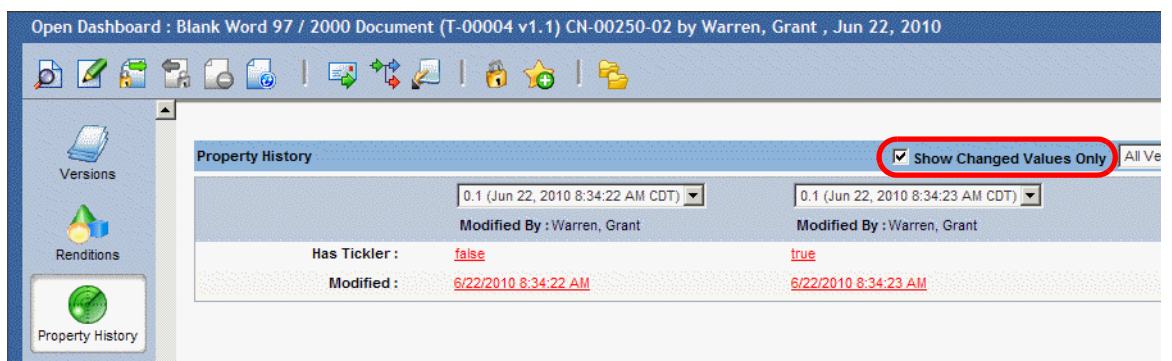
Changed property information displays in underlined red (Figure 5-2).

Figure 5-2 Changed Property Information



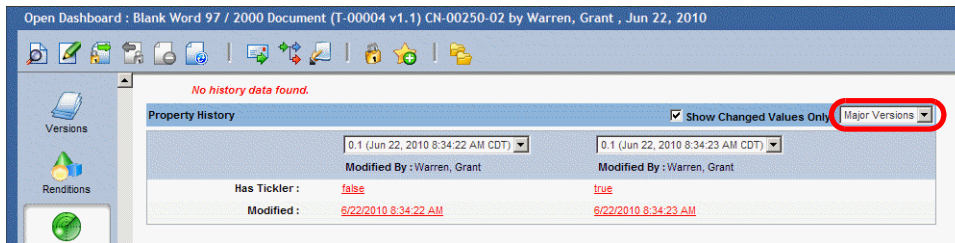
- 5 To view only changed property information between any two dates, select **Show Changed Values Only** (Figure 5-3).

Figure 5-3 Show Changed Property Information Only



- 6 The default Property History view is All Versions. To view only Major Versions or Minor Versions, select from the menu (Figure 5-4).

Figure 5-4 Property Information: Major or Minor Versions



If no major or minor versions are found, **No history data found** displays.

7 After viewing Property History, click **Close**. The previous window displays.

Managing Document Contacts

Manage contact information for any individual or organization related to a contract or document with Contacts. Contact information may be added, assigned and imported. At any time, existing Contacts can be viewed, edited, and deleted.

There are two types of Contacts:

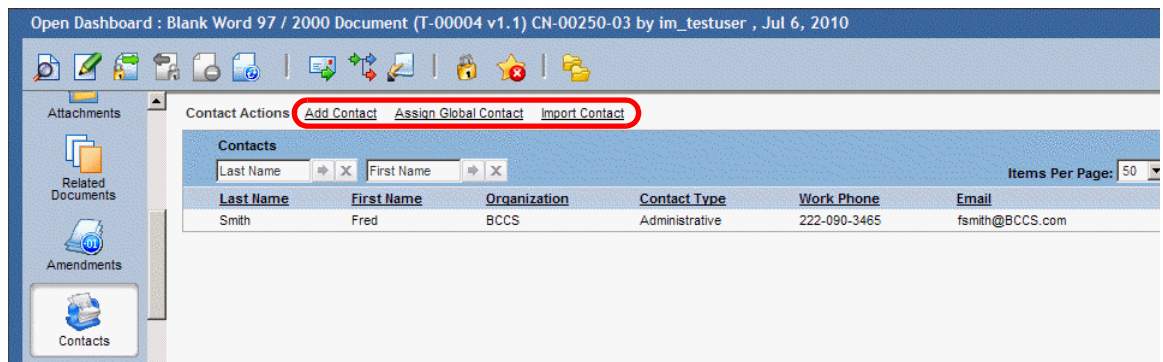
- Document Contacts: Specific to a document, created by users
- Global Contacts: Available to all repository users for assigning to one or more documents, created by Administrators

More detail: Global Contacts only display if the logged in user is assigned to the prodagio_admin role and the Business or system administrator has created Global Contacts.

Add a Contact to a Document

- 1 Double-click the document name adding the contact
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays (Figure 2-3 on page 19).
- 2 Scroll down and click the **Contacts** button. The Contacts window displays (Figure 5-5).

Figure 5-5 Contacts



- 3 Click **Add Contact**. The Contacts window displays (Figure 5-6).

Figure 5-6 Contacts

General

Last Name : First Name :
Organization : Contact Title :
Contact Type :

Phone/Email/Fax

Work Phone : Fax :
Cell Phone : Email :
Home Phone :

Address

Address Line 1 :

- 4 Enter contact information in the fields in the **General, Phone/Email/Fax** and **Address** areas.
- 5 Click **OK**. The Contacts information is stored with the selected document.

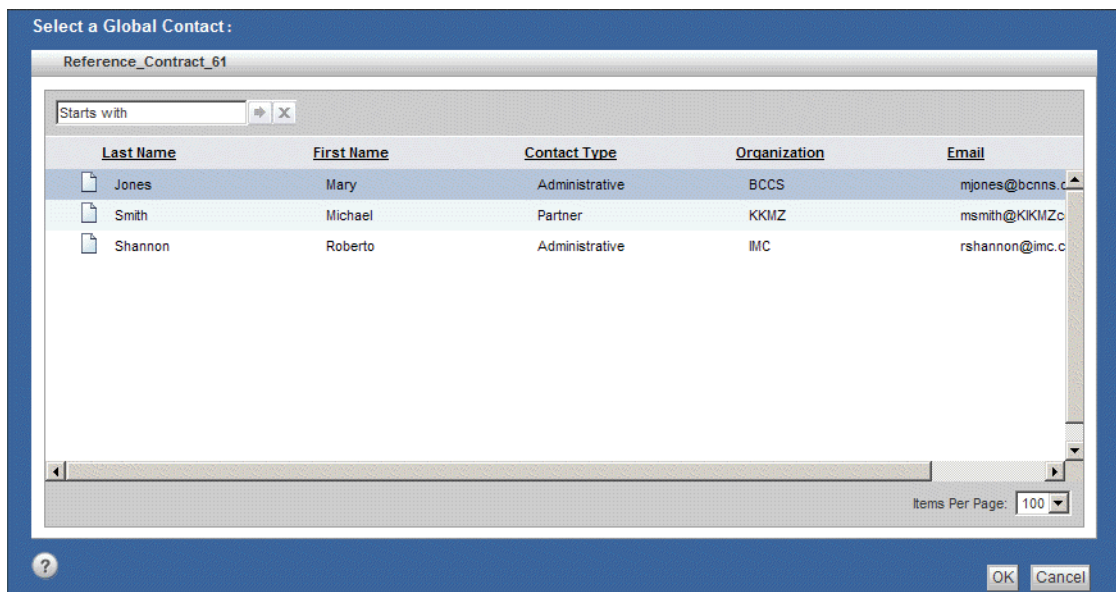
Assign Global Contacts to a Document

Global Contacts are contacts already created by the business administrator for subsequent assigning to one or more documents.

More detail: Global Contacts can only be assigned by Administrators with the prodagio_contact_admin role. Nonadministrators **cannot** create Global Contacts and do not display the **Global Contacts** button. See the separate *Gimmel Contract Management 6.9. Business Administrator Guide*.

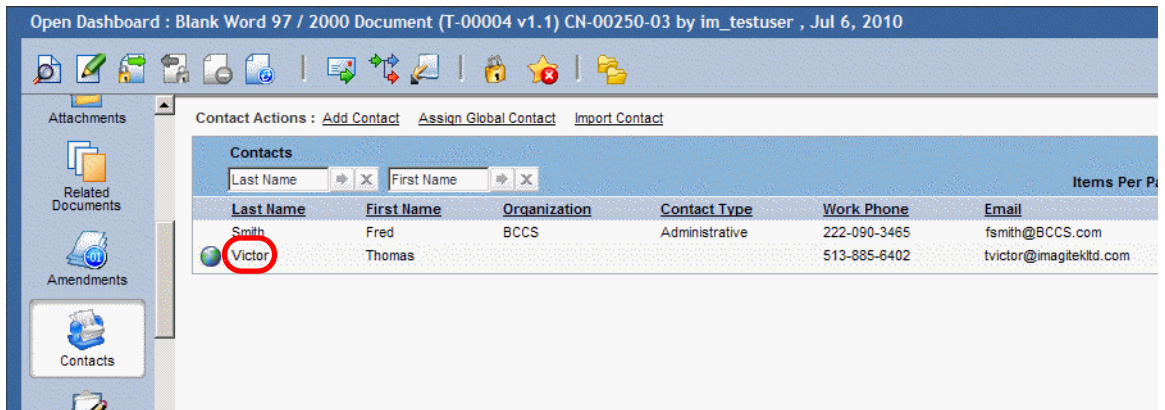
- 1 Double-click the document name to receive the Global Contact.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.
- 2 Scroll down and click the **Contacts** button. The Contacts window displays, listing all current Global Contacts.
- 3 Click **Assign Global Contact**. The Select a Global Contact window displays (Figure 5-7).

Figure 5-7 Select a Global Contact



- 4 Click the Global Contact(s) to be assigned.
- 5 Click **OK**. The Contacts window displays and the selected Global Contact(s) are assigned to the selected document and prefixed with the **Assigned Global Contact** button (Figure 5-8).

Figure 5-8 Assigned Global Contact



Import Contacts for a Document

A properly formatted .csv file to use for Contact importing is provided with the Gimmel Contract Management installation and contains the correct Contacts headers in the correct sequence. Copy this file; then update it with your Global Contacts prior to importing.

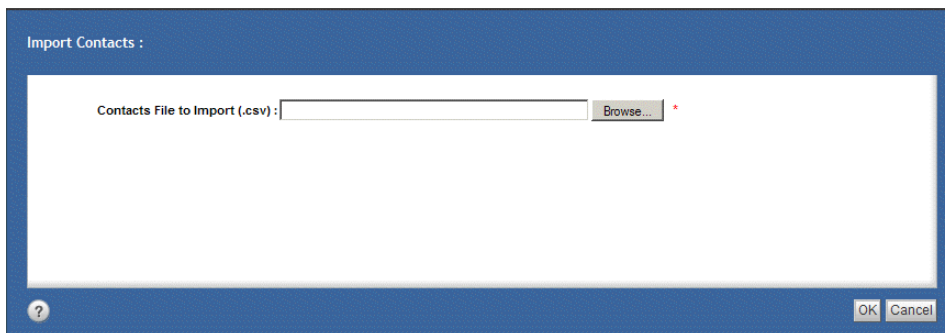
- 1 Double-click the document name to receive the imported contact(s).

OR

Right-click the document name; then select **Open Dashboard**. The document dashboard displays (Figure 2-3 on page 19).

- 2 Scroll down and click the **Contacts** button. The Contacts window displays.
- 3 Click **Import Contact**. The Import Contacts window displays (Figure 5-9).

Figure 5-9 Import Contacts

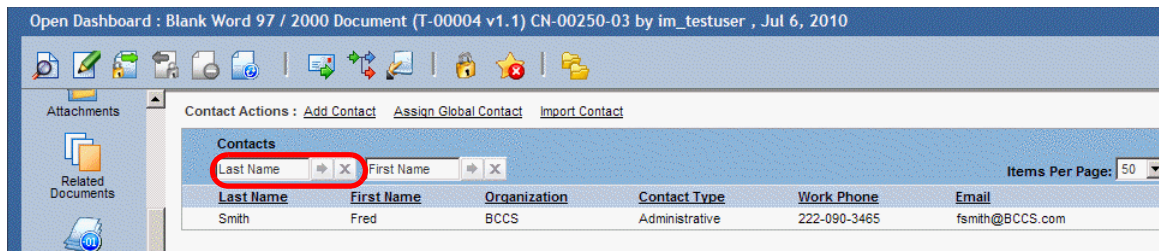


- 4 In **Contacts File to Import (.csv)**, click **Browse** to find the contact file to import.
- 5 Select the previously-prepared Contacts file to import.
- 6 Click **OK**. The Contacts window displays, with the selected file listed in the **Contacts File to Import (.csv)** field.
- 7 Click **OK**. The document's Contacts window displays and the imported Contacts are added to the selected document.

Manage Contacts and Global Contacts for a Document

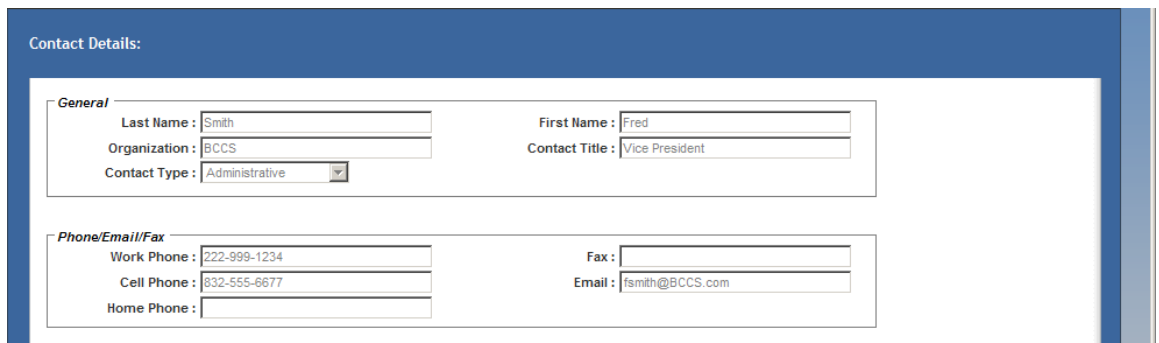
- 1 Double-click the document name with the Contacts information to view, edit or delete
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays (Figure 2-3 on page 19).
- 2 Scroll down and click the Contacts button. The Contacts window displays (Figure 5-10).

Figure 5-10 Contact Links



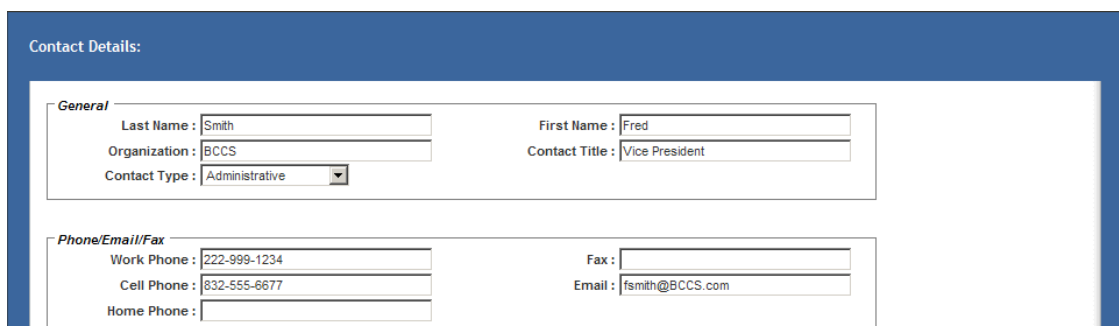
- A *If needed*: to filter the list of Contact names, enter the first few letters in the **Last Name** field and in the **First Name** field and click the **Search by Name** button. To clear the search and display all Contact names, click the **Clear** buttons.
- 3 To *view*, double-click the entry **OR** right-click; then select **View** to view the uneditable Contacts information in the displayed Contact Details window (Figure 5-11).

Figure 5-11 Contact Details



- A When done viewing, click **OK**.
- 4 To *edit*, right-click; then select **Edit**. The Contact Details window displays (Figure 5-12).

Figure 5-12 Contact Details: Edit



- A Edit any field.
- B When completed, click **OK**. The changes are saved.
- 5 To *delete*, right-click; then select **Delete** to delete the Contacts information. The Delete Contact window displays (Figure 5-13).

Figure 5-13 Contact Details: Delete

The screenshot shows a window titled "Delete Contact: Object" with a blue header. The window contains two sections: "General" and "Phone/Email/Fax".

General

Last Name :	Smith	First Name :	Fred
Organization :	BCCS	Contact Title :	Vice President
Contact Type :	Administrative		

Phone/Email/Fax

Work Phone :	222-999-1234	Fax :	
Cell Phone :	832-555-6677	Email :	fsmith@BCCS.com
Home Phone :			

- A Click **Delete**. The Contact for the selected document is deleted.
- 6 To *export* a document's Contact details to .csv, right-click; then select **Export to .csv**. See "Exporting Listings to .csv-Formatted File" on page 64.

About Managing Workflows for a Document

Any document can be part of a workflow; in fact, the same document is often involved with one or more workflows. The **Workflows** button on the document dashboard of the selected document displays all the **current** workflows involving the selected document, both Predefined and Ad Hoc, and provides details and the status of each workflow and workflow status. See [Chapter 7, "Routing Documents"](#).

The individuals involved with a workflow are:

- The workflow manager: Designates the workflow creator
- The workflow supervisor: Creates the workflow
- The workflow initiator: Starts the workflow (the workflow supervisor does not **have** to start the workflow and users **cannot** start workflows)
- The users: Assigned individual workflow tasks (often, you and other users)

Document Workflow Statuses

Document workflow statuses include:

- Dormant: indicates a workflow that has been started, but is not yet active
- Running: indicates the workflow has been started, is currently active and is not currently Halted or Terminated.
- Halted: indicates a started workflow which was active, but currently has been stopped (Halted)
- Terminated: indicates a running workflow which has been halted (**Terminated**).
- Finished: indicates a workflow that has been Terminated normally

Workflows with the status of Terminated and Dormant are also listed, but no managing actions can be taken.

Managing Workflows for a Document

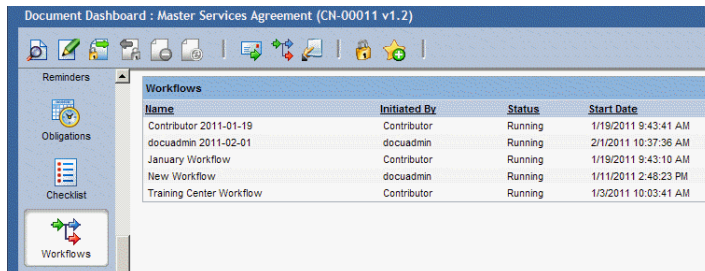
A user can manage a document's workflows by:

- Viewing all the workflows for a document
- Displaying filtered workflows for a document by status
- Viewing a workflow instance
- Viewing details of a workflow
- Displaying filtered workflow tasks by status
- Saving a workflow details summary report
- Saving a filtered or unfiltered workflow details audit report
- Exporting a workflows listing to .csv

[View all Workflows for a Document](#)

- 1 Double-click the document name with workflows to be viewed
OR
 Right-click the document name; then select **Open Dashboard**. The document dashboard displays. See [Figure 2-3 on page 19](#).
- 2 Scroll down the left side and click the **Workflows** button. The Workflows window displays ([Figure 5-14](#)).

Figure 5-14 Workflows



More detail: If no workflows are listed, the selected document is not currently involved in any workflows.

Each workflow is displayed on one line, and lists the workflow **Name**, **Initiated By**, **Status**, **Start Date**, **Active Task Name** and all **Performers**.

- 3 After viewing the document's workflows and status, click **Close**. The previous window displays.

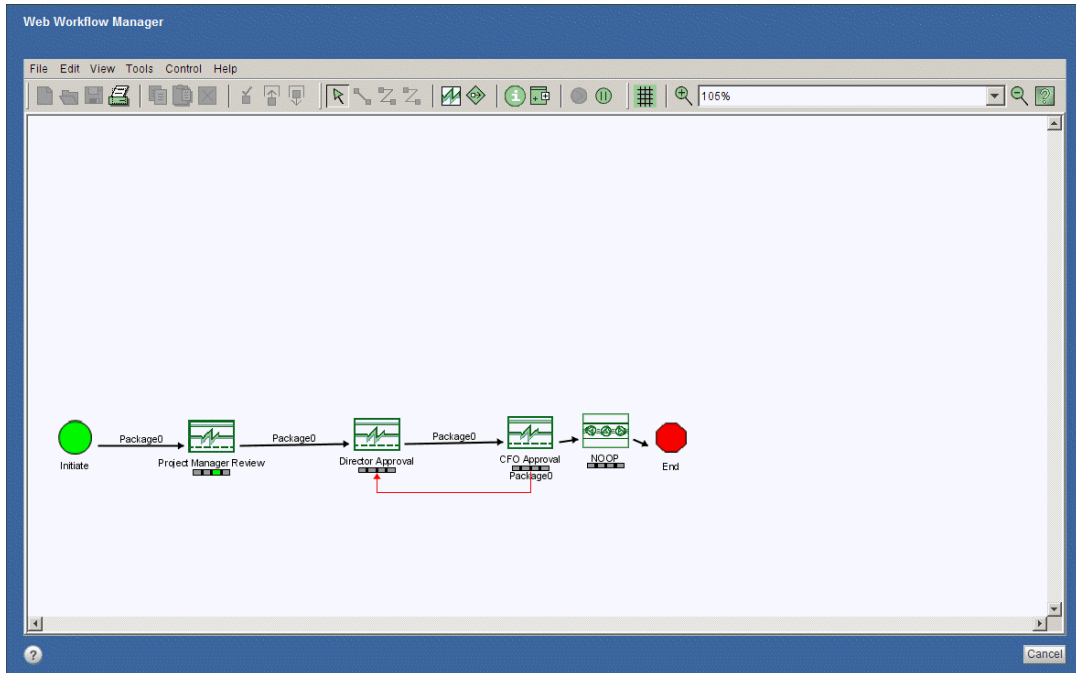
Filter Document Workflows by Status

- 1 With a document's Workflows window open (see "[View all Workflows for a Document](#)"), in the All field, select Dormant, Running, Halted or Terminated from the menu. See [Figure 5-14](#). Only workflows matching the selected status display.
- 2 Click **Close**. The document dashboard displays.

View a Workflow Instance

- 1 With a document's Workflows window open (see "View all Workflows for a Document"), right-click a workflow; then select **View Instance**. The Web Workflow Manager window displays a graphical representation of the workflow instance (Figure 5-1).

Figure 5-1 Web Workflow Manager: Instance



- 2 After viewing, click **Cancel**. The Workflows window displays.

View Details of a Workflow

- 1 With a document's Workflows window open (see "View all Workflows for a Document" on page 108), right-click a workflow; then select **Details**. The Workflow Reporting Details View window: **Summary** tab displays (Figure 6).

Figure 6 Workflow Reporting Details: Summary

Task Name	Status	Action	Performer(s)	Comment(s)	Receive Date	Complete Date
Project Manager Review	Pending		Osinulu, Christian...		12/8/09 4:57 PM	
Director Approval	Future		Osinulu, Christian...			
NOOP	Future		Supervisor			
CFO Approval	Future		Warren, Grant			

- 2 After viewing the details, click **Cancel**. The My Workflows window displays.

Filter Document Workflow Tasks by Status

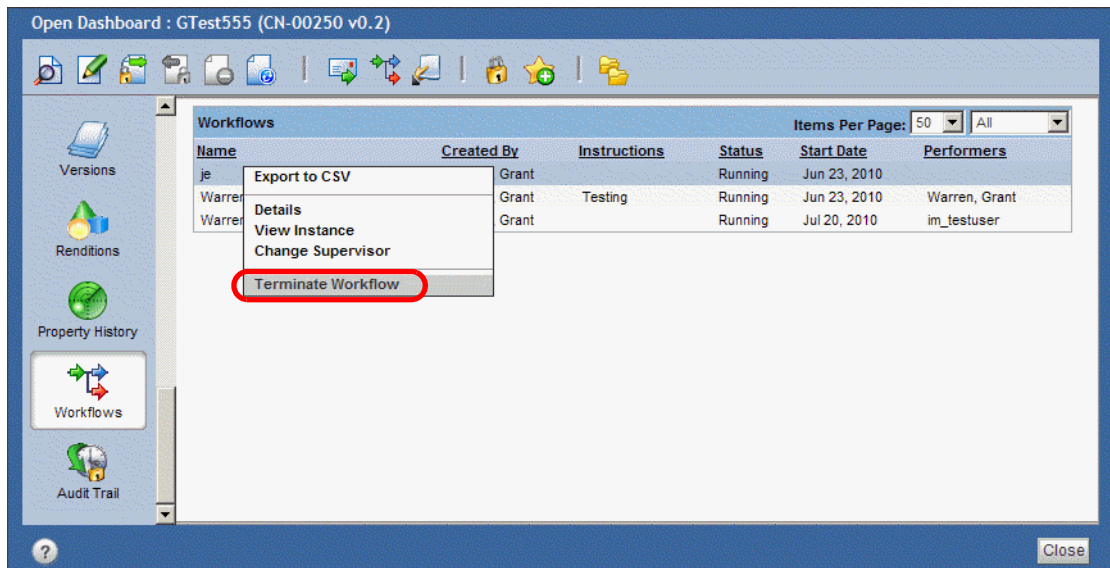
- 1 With a document's Workflows window open (see "View all Workflows for a Document" on page 108), right-click a workflow; then select **Details**. The Workflow Reporting Details view window: **Summary** tab displays (Figure 6).
- 2 In the **All Tasks** field, select *Current Tasks* or *Overdue Tasks* from the menu. Only workflows matching the selected task status display.
- 3 Click **Close**. The Workflows window displays.

Terminate a Document Workflow

More detail: Terminate Workflow may **not** be available to all users.

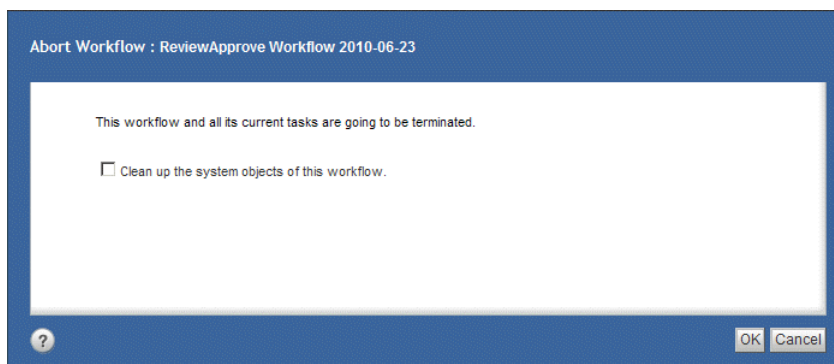
- 1 With a document's Workflows window open (see "View all Workflows for a Document" on page 108), right-click a workflow; then select **Terminate Workflow**. See Figure 5-1.

Figure 5-1 Terminate Workflow



The Abort Workflow window displays. See Figure 5-1.

Figure 5-1 Abort Workflow



A *If needed*: Select Clean up the system objects of this workflow to remove all related workflow objects or deselect to allow related workflow objects to remain for possible auditing and validation.

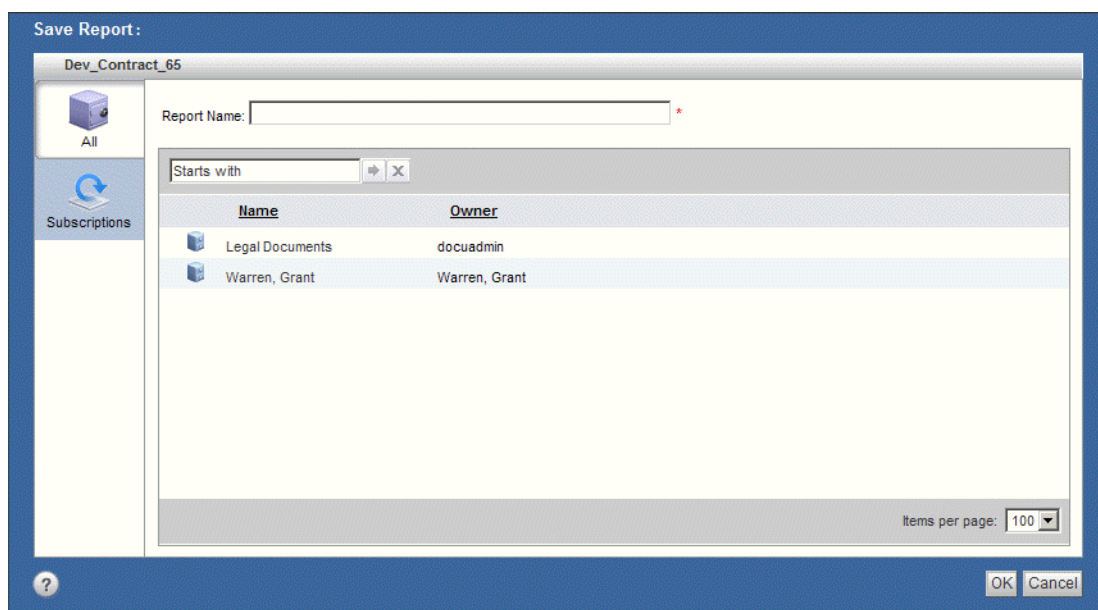
2 Click **OK**. The Workflows window displays, and the selected workflow status is listed as Terminated.

Save a Workflow Details Summary Report

1 With a document's Workflows window open (see "View all Workflows for a Document" on page 108), right-click a workflow; then select **Details**. The Workflow Reporting Details view window: **Summary** tab displays. Figure 6 on page 110.

2 Click **Save Report**. The Save Report window displays (Figure 5-2).

Figure 5-2 Save Report



3 Double-click the All Cabinet name or double-click the Subscriptions Cabinet name containing the folder in which to store the workflow details summary report.

4 Double-click a folder name.

5 Enter a Report Name.

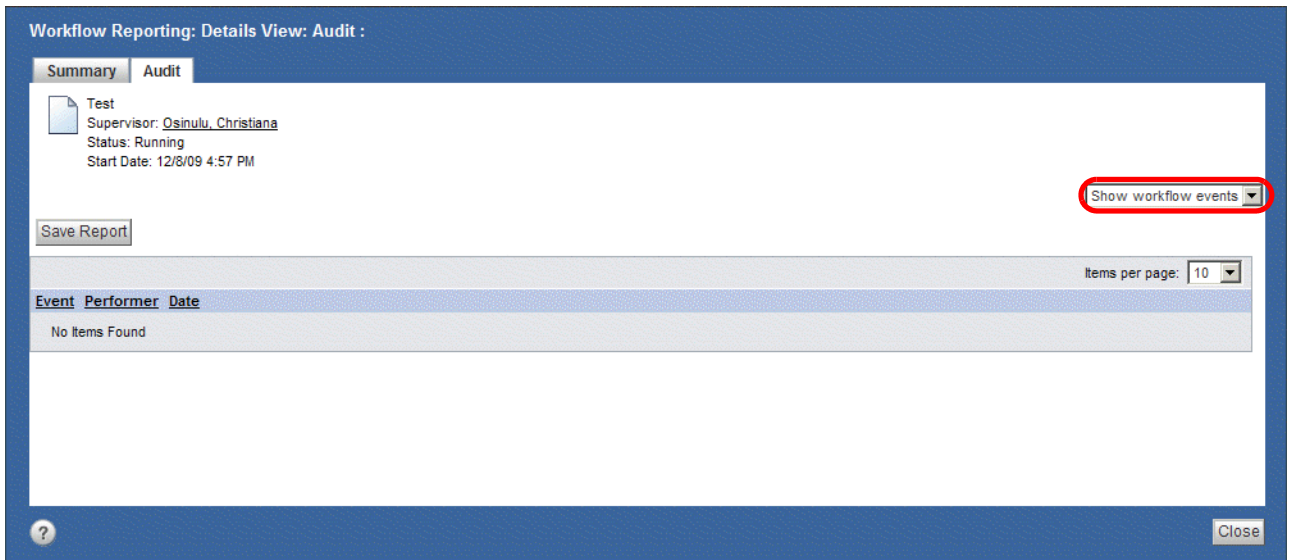
6 Click **OK**. The Workflow Reporting Details: Summary window displays, and the workflow details summary report is saved with the entered name in the selected Cabinet and folder.

Save a Workflow Details Audit Report

1 With a document's Workflows window open (see "View all Workflows for a Document" on page 108), right-click a workflow; then select **Details**. The Workflow Reporting Details: **Summary** tab displays (Figure 6 on page 110).

2 Click the **Audit** tab. The Workflow Reporting Details View Audit window displays (Figure 6).

Figure 6 Workflow Reporting Details View Audit



- A *If needed:* select Show wf & doc events from the default Show workflow events. Click **Save Report**. The Save Report window displays.
- 3 Double-click the All Cabinet name or double-click the Subscriptions Cabinet name containing the folder in which to store the workflow details view audit report (Figure 5-2 on page 112).
- 4 Double-click a folder name.
- 5 Enter a **Report Name**.
- 6 Click **OK**. The Workflow Reporting Details: **Summary** window displays and the workflows details view audit report is saved with the entered name in the selected Cabinet and folder.

Export Workflows to .csv

See "Exporting Listings to .csv-Formatted File" on page 64.



Managing Related Documents

This chapter presents the following topics:

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About Related Documents

Any document can be related to another document using the Related Documents feature on each document dashboard. In various views and tabs, documents with one or more Related documents display the **Related Documents** button next to the document name (Figure 6-1).

Figure 6-1 Related Documents in Documents View

There are five different categories of Related document relationships that can be established:



- **Master:** one document in a *superior* relationship to the selected document — documents can only have one master.
- **Subordinate:** any document you put in an *inferior* relationship, making the current document its only master — use for important related contracts.
- **Reference:** any document you determine to be related to the current document and any other — use for related authority or source documents.
- **Attachment:** any document to be stored in a connected Attachments folder — use for related email, correspondence, pictures and similar documents.

Certain Attachment documents in graphical formats can also be displayed on a document Jacket.

See [“Adding and Removing Jacket Graphics” on page 69](#).

- **Amendment:** any document you wish to share the same document number, but the number is appended with -01, -02, etc.

More detail: Due to configuration settings, some of these Related document categories might **not** display.

Three or more documents can be related: the selected document, one or more Related documents and one Master document. Any document can be related to any other document, and some Related document categories can be related to more than one document.

All Related document categories can be either *assigned*, *created*, or *imported* by the users. For exceptions, see [Table 6](#).

Table 6 Related Document Categories and Available Actions

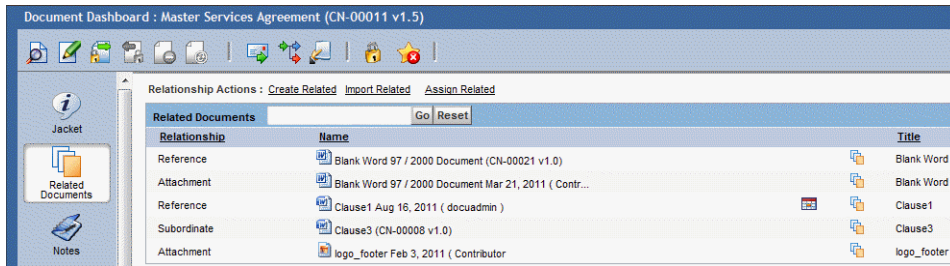
	Yes	No	No
Master	Yes	No	No
Subordinate	Yes	Yes	Yes
Reference	Yes	No	No
Attachment	Yes	Yes	Yes
Amendment	No	Yes	Yes

When assigning, creating and importing all categories of Related documents (except Amendments), the newly Related document will be identified with a new, distinct document number. See ["About Document Numbers" on page 39](#). Depending on permissions, all Related documents can be viewed and edited.

View Related Documents

- 1 Click the **Related Documents** button after a document name to display that document's Related Documents window (Figure 6-2).

Figure 6-2 Related Documents



- 2 Right-click a Related document name; then select **View**. The Related document displays.
- 3 After viewing the Related document, click **Close**. The Related document closes and the Related Documents window displays.

Search, Filter and Sort Related Documents

Often, the list of Related documents is lengthy and needs to be filtered to quickly find the needed Related document.

- 1 Click the **Related Documents** button after a document name. The Related Documents window displays (Figure 6-2).
- 2 In the **Related Documents** field, enter the first few characters of the Related document name (Figure 6-3).

Figure 6-3 Search Related Documents



More detail: The Related Documents field searches these properties: **Name**, **Category**, and the Keywords properties. The Related Documents field is case insensitive.

- 3 Click **Go**. Only Related document names with characters matching the entered search characters display.

- A Click **Reset** to clear the Related Documents search characters and to display all Related documents.
- 4 To filter Related documents, in the All Relationships filter, selected a Related document type from the menu.
 - A To clear the All Relationships filter, select All Relationships from the menu.
- 5 To filter Related documents, in the All Categories filter, selected a Category from the menu.
 - A To clear the All Categories filter, select All Categories from the menu.
- 6 To sort any filtered or unfiltered Related document listings, click a column heading. Click the heading again to reverse the sort.
- 7 To clear the current Related documents search and filters and display all Related documents, click **Reset**.

Remove a Related Document Relationship

Remove Relationship *only* removes the Related document's *relationship* to the document it is currently related to; the Related document itself is **not** deleted and remains in its original Cabinet and folder location.

Before beginning

At least one document must be listed in the Related Documents window.

- 1 Click the **Related Documents** button after a document name to display then Related Documents window.
- 2 Right-click the Related document name and select **Remove Relationship**. The Related document no longer displays.

ALERT! If you remove the relationship of an Attachment document, the Attachment document is moved to your home Cabinet and is **not** placed in the Attachments folder.

Delete a Related Document

Deleting a Related document in the Related Document window removes the document from the repository.

Before beginning

At least one document must be listed in the Related Documents window.

- 1 Right-click the Related document name to be deleted; then select **Delete**. The Delete window displays (Figure 6-4).

Figure 6-4 Delete a Related Document



- 2 Select Selected Version or All Versions.
- 3 Click **Delete**. The Related Documents window displays, with the deleted Related document no longer listed and it is removed from the repository.

View Related Document Properties

See ["View Document Properties"](#) on page 72.

Edit Related Document Properties

See ["Edit Individual Document Properties"](#) on page 73.

Assigning, Creating, and Importing Related Documents

On the dashboard's Related Documents window assign, create or import all categories of Related documents.

Assigning a Related Document

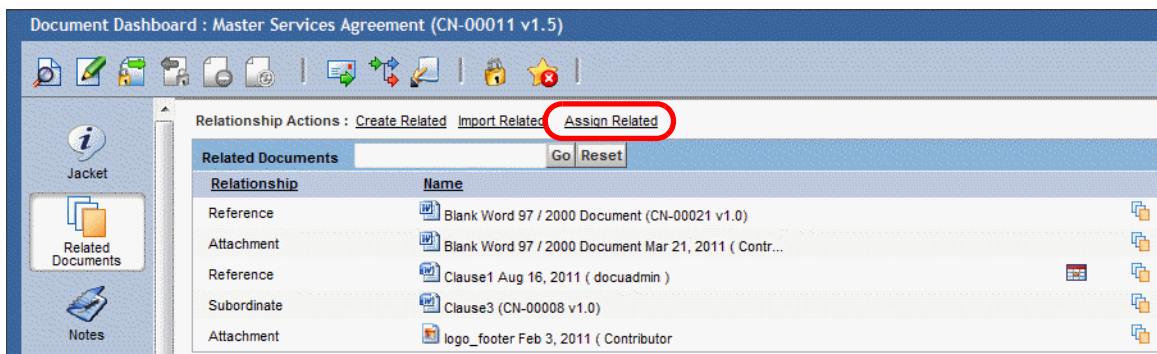
Assign a Related document from a document dashboard or from some tabs.

Up to four categories of Related documents can be assigned to a document: Master, Subordinate, Attachment, and Reference.

Assign a Related Document Relationship: Master, Subordinate, Attachment or Reference

- 1 Right-click the document name (including Search Results); then select **Assign Related**
OR
From the document dashboard, click the **Related Documents** button after a document name. The Related Documents window displays (Figure 6-5).

Figure 6-5 Related Documents – Assign Related

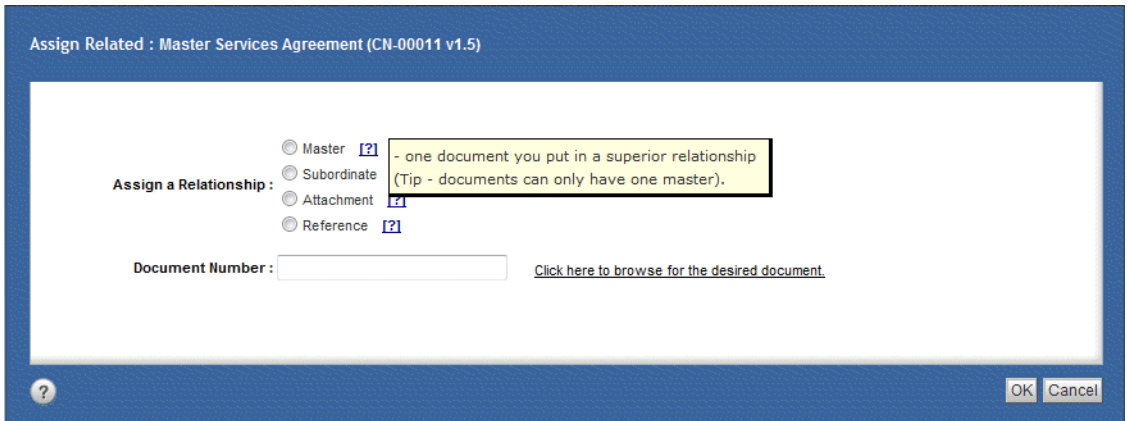


A Click **Assign Related**. The Assign Related window displays all possible Related document relationships (Figure 6-6).

OR

From the Personal, Cabinets, Recent, Subscriptions and Favorites tabs, right-click a document name; then select **Assign Relationship**. The Assign Related window displays all possible Related document relationships (Figure 6-6).

Figure 6-6 Assign Related



- 2 In **Assign a Relationship**, select Master, Subordinate, Attachment or Reference. A description of the selected relationship displays.

More detail: A **Master** is one document in a *superior* relationship to the selected document — documents can only have one master. If a Master is already assigned, this relationship is inactive.

Subordinate is any document you put in an *inferior* relationship, making the current document its only master — use for important related contracts.

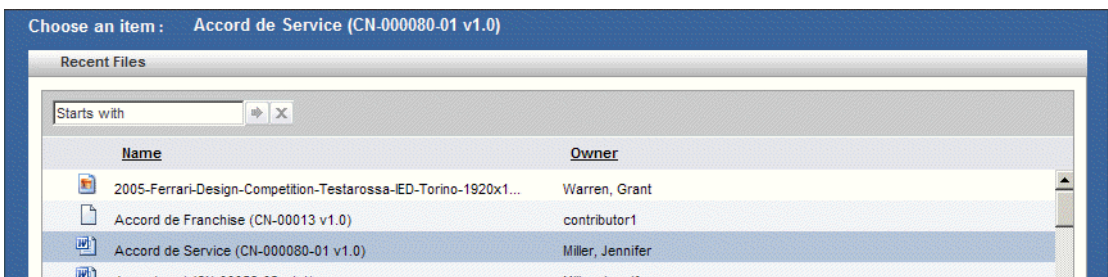
Attachment is any document to be stored in a connected Attachments folder — use for related email, correspondence, pictures and similar documents.

Reference is any document you determine to be related to the current document and any other — use for related authority or source documents.

- 3 Enter the **Document Number** (if known) and click **OK**.
OR

- A If the Related document number is not known, **Click here to browse for the desired document**. The Choose an item window displays (Figure 6-7).

Figure 6-7 Choose an Item



- B Click a desired Related document and click **OK**. The Assign Related window displays.

More detail: To assign a Related document that is **not** in the Choose an item window, click **Import Related** on the Related Documents window. See “[Import a Related Document: Subordinate, Attachment or Amendment](#)” on page 125.

- 4 Click **OK**. The Related Documents window display the newly assigned document relationship.

Assigning a Group of Related Documents

Search results display listings of all documents meeting the search parameters. See [Chapter 11, "Searching Documents"](#). Often, some or all of these documents need to be assigned as a Related document group to another document.

Up to four categories of Related documents can be assigned to a document: Master, Subordinate, Attachment and Reference.

Assign a Group of Related Documents

- 1 Display the listing of documents, some or all which will become Related documents.
- 2 To select the specific documents to be assigned as related, Shift-click adjacent documents and/or Ctrl-click non-adjacent documents. See ["Access the Shared Document Actions of One or More Items"](#) on page 30.
- 3 Right-click; then select **Assign Relationship**. The Assign Related window displays ([Figure 6-8](#)).

Figure 6-8 Related Documents – Assign Related Documents



- 4 In **Assign a Relationship**, select Master, Subordinate, Attachment, or Reference. A description of the selected relationship displays.

More detail: A **Master** is one document in a *superior* relationship to the selected document — documents can only have one master. If a Master is already assigned, this relationship is not available (grayed out).

Subordinate is any document you put in an *inferior* relationship, making the current document its only master — use for important related contracts.

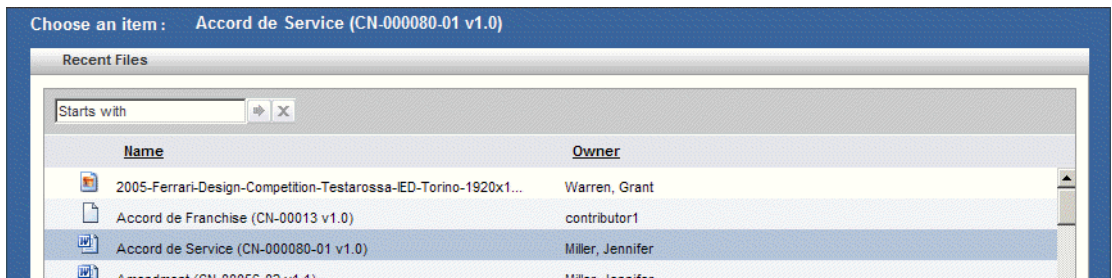
Attachment is any document to be stored in a connected Attachments folder — use for related email, correspondence, pictures and similar documents.

Reference is any document you determine to be related to the current document and any other — use for related authority or source documents.

- 5 Enter the **Document Number** (if known) and click **OK**.
OR

- A If the Related document number is not known, **Click here to browse for the desired document**. The Choose an item window displays (Figure 6-9).

Figure 6-9 Choose an Item

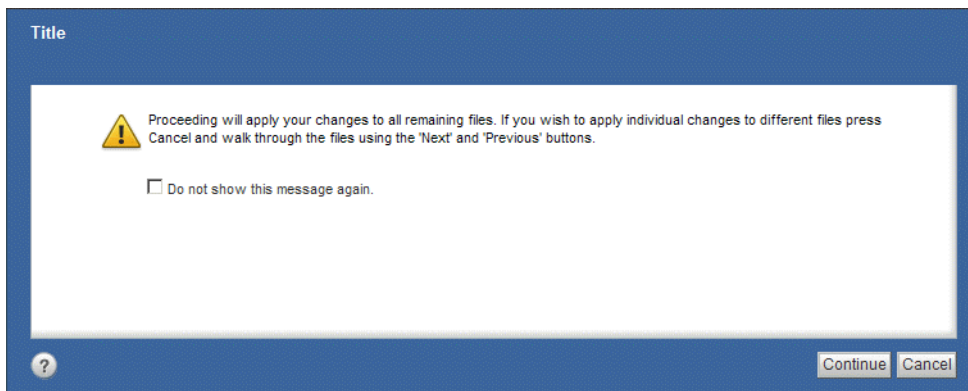


- B Click the document to which the previously selected documents are to be related and click **OK**. The Assign Related window displays with the Document Number displayed.

More detail: To assign a Related document that is **not** in the Choose an item window, click **Import Related** on the Related Documents window. See [“Import a Related Document: Subordinate, Attachment or Amendment” on page 125](#).

- 6 Click **Finish**. An Alert displays (Figure 6-10).

Figure 6-10 Related Document – Alert



- A Click **Continue** to apply the changes to all selected documents.
OR
- B Click **Cancel** to apply the changes individually to each file with **Previous** and **Next**.
- 7 Click **Finish**. All selected documents are now related (with the assigned relationship) to the document identified by its document number.

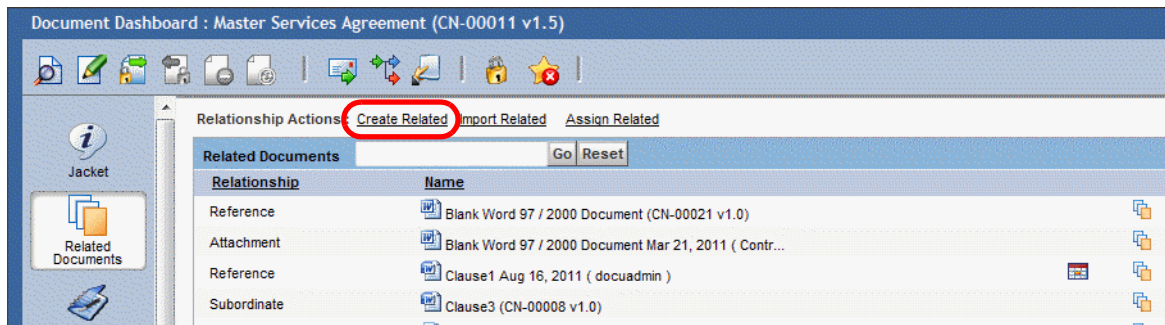
Creating Related Documents

Three categories of Related documents can be created: Subordinate, Attachment, and Amendment.

Create a Related Document: Subordinate, Attachment or Amendment

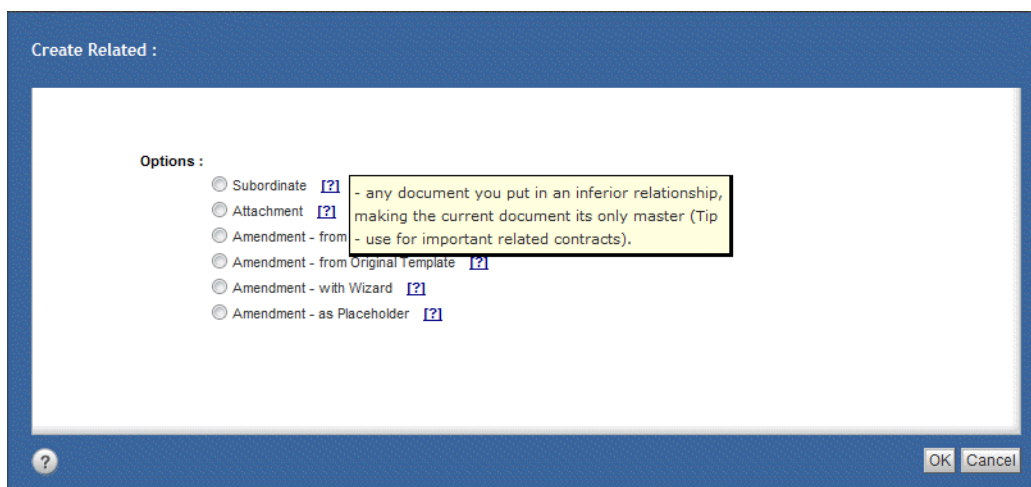
- 1 Right-click the document name (including in Search Results); then select **Create Related**
OR
From the document dashboard, click the **Related Documents** button after a document name. The Related Documents window displays (Figure 6-11).

Figure 6-11 Related Document – Create Related



- 2 Click **Create Related**. The Create Related window displays (Figure 6-12).

Figure 6-12 Create Related



- 3 In **Options**, select Subordinate, Attachment, or Amendment – from Copy, Amendment – from Original Template, Amendment – with Wizard or Amendment – as Placeholder. For Amendment selections, See ["Creating an Amendment" on page 123](#). A description of the selected relationship displays.
- 4 Click **OK**.
- 5 Follow the steps in the New Document Template Selection window to create the new document, ending with the **Finish Document** tab. For more details, see ["Importing Documents" on page 43](#).

The newly created Related document is listed in the Related Documents window either as a Subordinate, Attachment, or Amendment document.

ALERT! When a Subordinate or Attachment is created for a parent document (found using Search) that is in another user's Personal cabinet, the Subordinate or Attachment is Auto Filed to the current user's Personal cabinet. See ["Auto File a Document" on page 65](#).

Creating an Amendment

Create Amendments to your documents using four different methods:

- **Create from Copy:** creates an exact duplicate of the current document as an Amendment, including the same document name, but with a –01 suffix added. Use to generate an Amendment that is a duplicate of the original document, including retaining **all** the same document properties. After creating the copy, edit the document to meet the requirements of the Amendment.
- **Create from Original Template:** creates an Amendment *if* the document you are creating was originally created from a Template. Use to generate an Amendment based on the same Template that was used to create the original document. If no Template was used, the default will be blank. **None** of the original document's properties are retained.
- **Create with Wizard:** creates an Amendment from any Template. Use to generate an Amendment based on any available Template. **None** of the original document's properties are retained.
- **Create as Placeholder:** creates an Amendment without inheriting any 'parent' properties by creating a 'place' for the document; then populating this placeholder Amendment document with the needed properties. **None** of the original document's properties are retained.

Regardless of the method used to create an Amendment, the new Amendment copy will be identified with a unique numbered suffix, –01, –02, and so on. See ["About Document Numbers" on page 39](#). Depending on permissions, all Amendments can be viewed and edited.

Create an Amendment using Create from Copy

Create from Copy is a one-click method of creating an exact duplicate of a document, and labeling it as an Amendment.

- 1 Click the Related Documents button after a document name
OR
Open the document dashboard and click the **Related Documents** button. The Related Documents window displays.
- 2 Click **Create Related**. The Create Related window displays ([Figure 6-12 on page 122](#)).
- 3 Select **Amendment - from Copy**. If needed, hover the cursor over the **Question** button to view your organization's definition of *Amendment*.
- 4 Click **–**. An exact duplicate of the document is made and listed as an Amendment **and** is also listed in the same folder as the document it is amending. The Amendment document number matches the original document number, but includes a suffix incremented by 1.

Create an Amendment using Create from Original Template

Before beginning

Create from Original Template is displayed only if the document was originally created from a Template.

- 1 Click the **Related Documents** button after a document name
OR
Open the document dashboard and click the **Related Documents** button. The Related Documents window displays.
- 2 Click **Create Related**. The Create Related window displays ([Figure 6-12 on page 122](#)).

- 3 Select **Amendment - from Original Template**. If needed, hover the cursor over the **Question** button to view your organization's definition of Amendment.
- 4 Click **OK**. The Apply Template window displays.
- 5 Complete the fields in the Apply Template window tabs. See ["Importing Documents" on page 43](#).
- 6 Click **Finish**. A new document is created using the original Template (including the information entered in the fields), is listed as an Amendment and is also listed in the same folder as the document it is amending. The Amendment document number matches the original document number, but includes a suffix incremented by 1.

Create an Amendment using Create with Wizard

Use **Create with Wizard** to create a new Amendment based on the selected Template.

- 1 Click the **Related Documents** button after a document name.
OR
Open the document dashboard and click the **Related Documents** button. The Related Documents window displays.
- 2 Click **Create Related**. The Create Related window displays ([Figure 6-12 on page 122](#)).
- 3 Select **Amendment - with Wizard**. If needed, hover the cursor over the **Question** button to view your organization's definition of *Amendment*.
- 4 Click **OK**. The New Document Template Selection window displays.
- 5 Select a **Template Type**, **Template Category** and **Template Name** from the menus. See ["Creating a New Document by Applying a Template" on page 40](#).
- 6 Click **Next**.
- 7 Complete the fields in the displayed tabs.
- 8 Click **Finish**. A new document is created using the selected Template (including the information entered in the fields), is listed as an Amendment and is also listed in the same folder as the document it is amending. The Amendment document number matches the original document number, but includes a suffix incremented by 1.

Create an Amendment as Placeholder

Use **Create as Placeholder** to create a new Amendment that will act as a placeholder until its document properties can be added.

- 1 Click the **Related Documents** button after a document name.
OR
Open the document dashboard and click the **Related Documents** button. The Related Documents window displays.
- 2 Click **Create Related**. The Create Related window displays ([Figure 6-12 on page 122](#)).
- 3 Select **Amendment - as Placeholder**. If needed, hover the cursor over the **Question** button to view your organization's definition of *Amendment*.

- 4 Click **OK**. A new document is created as a placeholder, is listed as an Amendment and is also listed in the same folder as the document it is amending. The Amendment document number matches the original document number, but includes a suffix incremented by 1.
- 5 Because the document is automatically checked out, check in the document, which will provide the document properties and make the document available to all users.

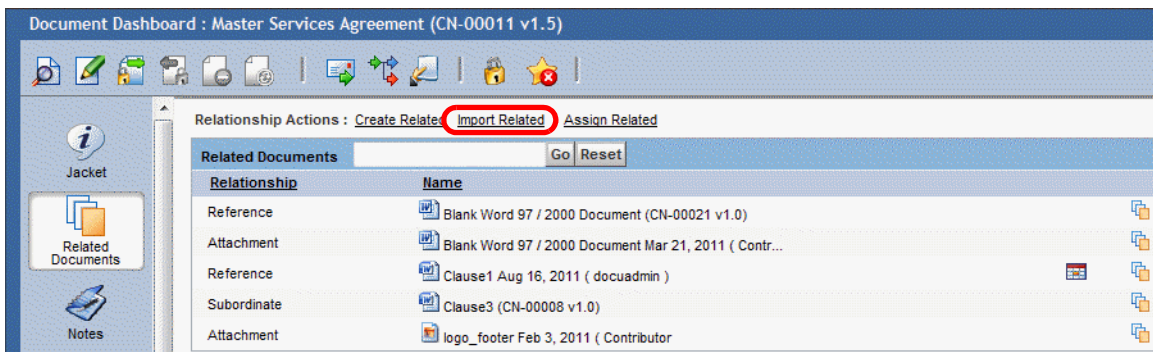
Importing Related Documents

Three categories of Related documents can be imported: Subordinate, Attachment, and Amendment.

Import a Related Document: Subordinate, Attachment or Amendment

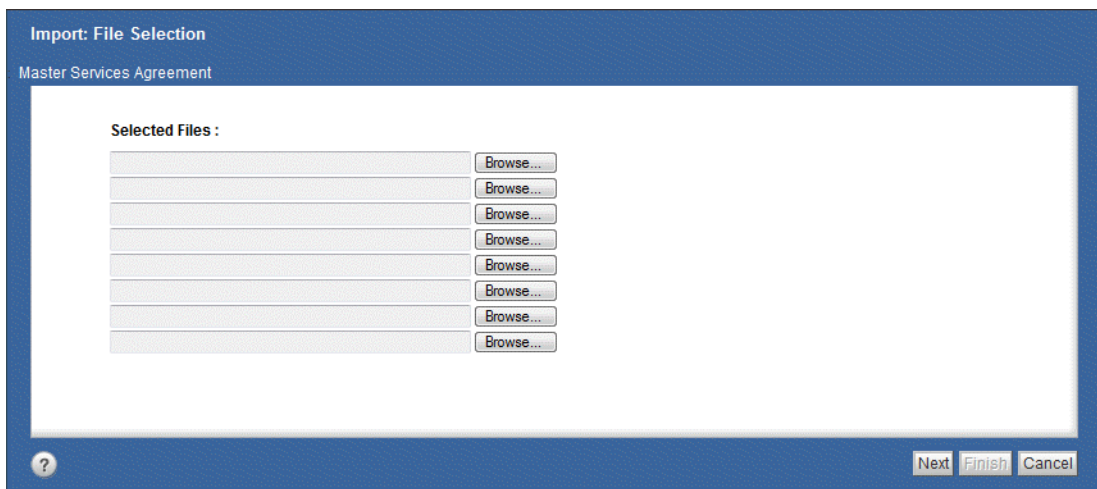
- 1 Right-click the document name (including Search Results); then select **Import Related**.
OR
From the document dashboard, click the **Related Documents** button after a document name. The Related Documents window displays (Figure 6-13).

Figure 6-13 Related Documents – Import Related



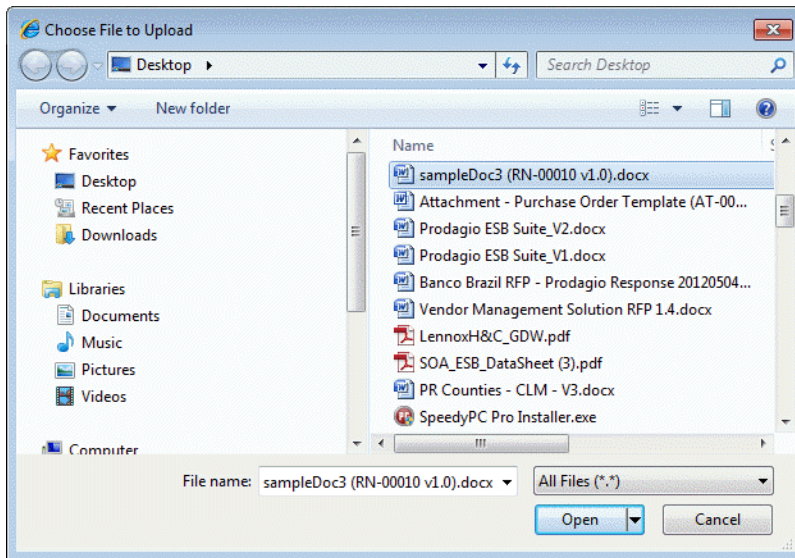
- 2 Click Import Related. The Import File Selection window displays (Figure 6-14).

Figure 6-14 Import File Selection



- 3 Click **Browse** to add file(s). The **Choose File to Upload window displays** (Figure 6-15).

Figure 6-15 Choose File to Upload



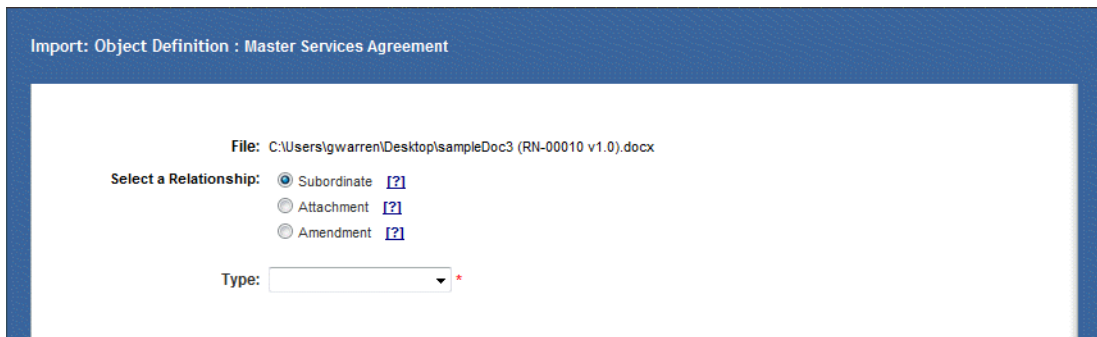
- 4 Browse to the file to be imported.
- 5 Select the desired file and click **Open**. The Import File Selection window is displayed with the file to be imported in its **Selected Files** field (Figure 6-16).

Figure 6-16 Import File Selection with File Selected



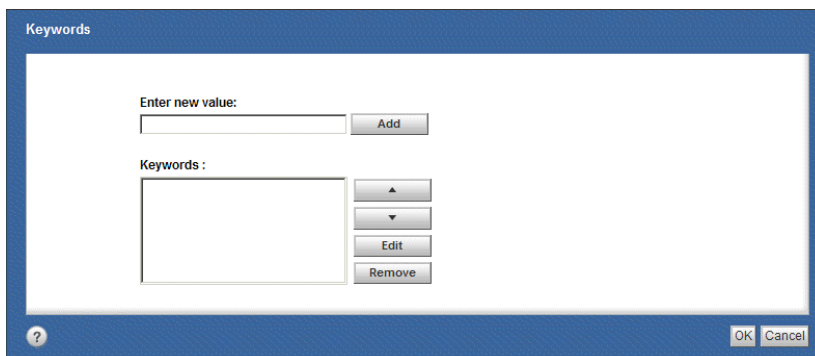
- 6 Click **Next**. The Import Object Definition window displays (Figure 6-17).

Figure 6-17 Import Object Definition



- 7 Select **Subordinate**, **Attachment**, or **Amendment**. A description of the relationship displays.
- 8 In **Type**, select from the menu.
- 9 Click **OK**. Additional fields might display (Figure 6-19 on page 128).
- 10 Complete these fields.
 - A *If needed*: click **Keywords Edit**. The Keywords window displays (Figure 6-18).

Figure 6-18 Keywords



- B In the **Enter new values** field, enter the keyword and click **Add**. Click **Move Up** or **Move Down**, if needed. Click **Edit** or **Remove**, if needed.
- C Repeat for each new keyword.
- D Click **OK**.
- 11 *If needed*: to copy all the parent document property values to this imported document, click **Copy Values from Master**. All values are copied (Figure 6-19).

More detail: Datagrid values are **not** copied. Gimmel Contract Management **either** copies property values from the master document to the imported Related document (**if** property names match exactly) **or** (if so configured), will only copy properties flagged with an 'inherit' value in the Category field (set with Composer). See your system administrator for more details.

Figure 6-19 Copy Values from Master

Import: Object Definition : Master Services Agreement

File: C:\Users\lgwarren\Desktop\sampleDoc3 (RN-00010 v1.0).docx

Select a Relationship: Subordinate [?] Attachment [?] Amendment [?]

Type: Attachment *

▼ Info

Document Title: sampleDoc3 (RN-00010 v1.0) *

Category: *

Status: Draft *

Keywords: [Edit](#)

Document Number: To Be Assigned

Owner Name: [Edit](#)

Version Label:

Checkout Date:

Checked Out By:

[?](#)

- 12 Click **Finish**. A new Related document is created and listed as a Subordinate, Attachment, or Amendment document to its parent document.

Managing Related Document Tasks and Features

All document management tasks apply to Related documents via the right-click Actions of the selected document including:

- To manage Related Documents, see [“Managing Documents” on page 49](#).
- To route Related Documents via Ad Hoc or Predefined routing, see [“Route a Document or Documents via Ad Hoc Routing” on page 134](#) and [“Route a Document via a Predefined Routing” on page 138](#).
- To add Related Documents to the Clipboard, see [“Moving, Copying and Linking Items Using the Clipboard” on page 89](#).
- To add to and remove Related Documents from Favorites, see [“Managing Favorites” on page 80](#).

See [Chapter 5, “Managing Document Dashboard Features”](#).



Routing Documents

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Routing Documents

The process of updating, validating, and approving documents and their content often involves different individual and groups. Routing sends a document along a path of various users, with each user expected to take an action involving the routed document. After an action is taken, the document can move to the next user in the routing and continue until the routing is complete.

To send the document for action to all those required, Gimmel Contract Management uses two types of document routing: **Ad Hoc** routing and **Predefined** routing.

To compare Ad Hoc routing features and Predefined Routing features with Reminders, Notifications, Obligations, and Checklists features, see [Table 12 on page 188](#).

Predefined Routing is described in [“Routing Documents with Predefined Routing” on page 138](#). Ad Hoc Routing is described next.

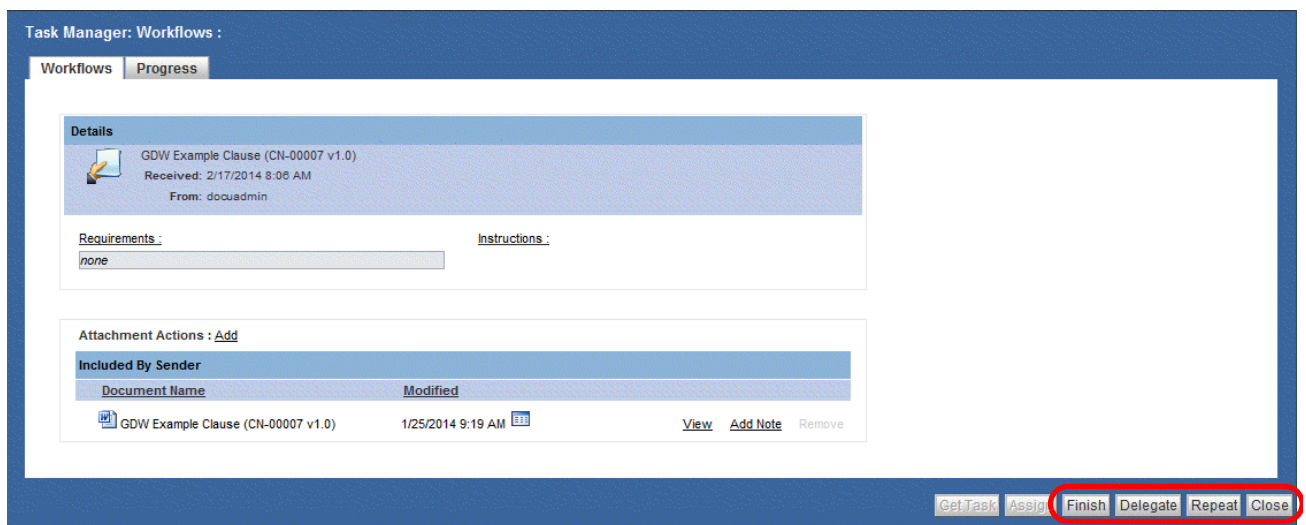
Routing Documents with Ad Hoc Routing

Ad Hoc Routing is 'on-the-spot' routing which allows selecting various routing options including:

- Routing to two or more users or groups all at the same time or sequentially, one after the other
- Sending rejections back to the routing creator and/or to the previous routing recipient
- Returning to the routing creator as the last routing step
- Requiring signoff to confirm taking an action

The options selected control which buttons display on the routing recipient's Task Manager Workflows window (Figure 7).

Figure 7 Task Manager Workflows



Clicking a Task Manager button performs that action and sends the appropriate email. The button functions are:

Finish: Finish the task. Displays only if Send to users sequentially is selected and Allow reject to me and Allow reject to previous performer are deselected.

Repeat: Select another user to repeat the task. Displays only if Send to users sequentially is deselected.

Reject: Reject the task to the previous performer and **Finish** the current task. Displays only if Allow reject to me and/or Allow reject to previous performer (is) are selected.

Close: Close the task with no action taken. Always displays.

Delegate: Send your current task to another user. Always displays.

Return to me and Require signoff, whether selected or not, do not change displayed buttons.

Button display is **not** affected by the number of routing recipients in the Ad Hoc routing. Table 7 displays various routing selections and the buttons each selection displays.

Table 7 Ad Hoc Routing Selections


<input type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer
<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me	<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me
<input type="checkbox"/> Require signoff	<input type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff
Displayed Task Manager buttons Finish, Repeat, Close for these four selections			
<input checked="" type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer
<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me	<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me
<input type="checkbox"/> Require signoff	<input type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff
Displayed Task Manager buttons Finish, Delegate, Close for these four selections			
<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input type="checkbox"/> Allow reject to previous performer
<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me	<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me
<input type="checkbox"/> Require signoff	<input type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff
<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input checked="" type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input checked="" type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input checked="" type="checkbox"/> Allow reject to previous performer	<input checked="" type="checkbox"/> Send to users sequentially <input checked="" type="checkbox"/> Allow reject to me <input checked="" type="checkbox"/> Allow reject to previous performer
<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me	<input type="checkbox"/> Return to Me	<input checked="" type="checkbox"/> Return to Me
<input type="checkbox"/> Require signoff	<input type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff	<input checked="" type="checkbox"/> Require signoff
Displayed Task Manager buttons Forward, Reject, Delegate, Close for these eight selections			

Route a Document or Documents via Ad Hoc Routing

1 Right-click the document name (including in Search Results):

- Select **Start Ad Hoc Routing**

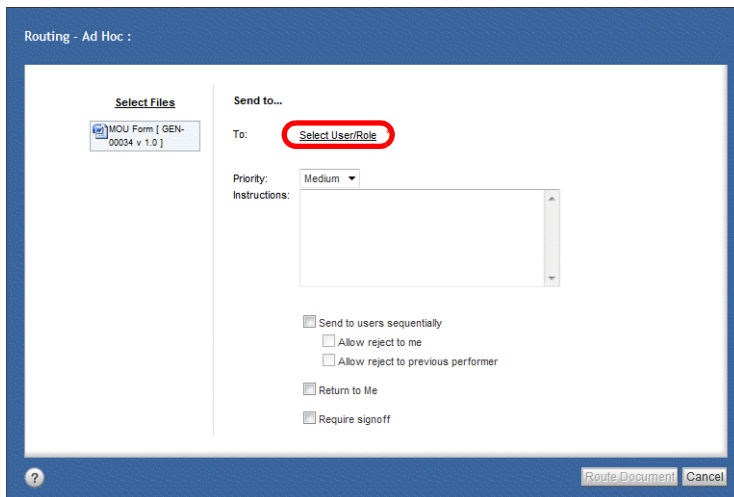
OR

Double-click the document name, and on the document dashboard, click the **Start Ad Hoc Routing**  button.

or

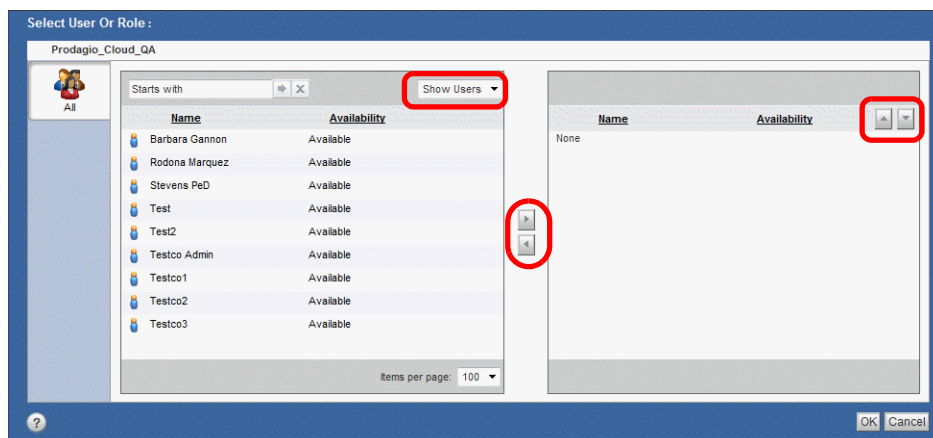
- Select **Open Dashboard**, and on the document dashboard, click the **Start Ad Hoc Routing** button. The Routing Ad Hoc window displays (Figure 7-1).

Figure 7-1 Routing – Ad Hoc



2 Click **Select User/Role**. The Select User Or Role window displays (Figure 7-2).

Figure 7-2 Select User or Role



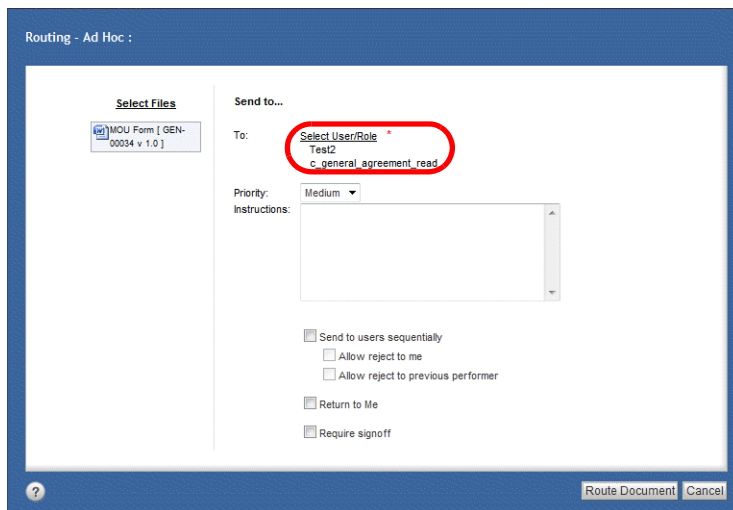
3 Select either Show Users or Show Roles from the menu.

More detail: Only users with “inline passwords” display who are **not** super_users and whose login names **do** not begin with dm_ or im_. Super_users see *inline password* users whose login names **not** begin with dm_.

- A Further filter the list of users or roles by entering a letter(s) in the Starts with field and the **Search by Name** button.
- 4 Under the **Name** column, click the desired routing recipient (s) and click the **Add** button to add that name to the recipient pane.
- 5 If necessary, reorder the list of routing recipients to determine the order in which the selected recipients receive the routed document.
 - A To select a routing recipient to move up or down, click the recipient’s name in the right-side **Name** pane; then click the **Move Up List** button or **Move Down List** button. Click again, if necessary.
 - B Repeat for each recipient until all recipients are in the correct routing order.

- 6 To remove a user as a recipient, click the name in the right-side **Name** pane and click the **Remove** button.
- 7 When all routing recipients are in the right-side **Name** pane in the receiving order of first (top) to last (bottom), click **OK**. The Document Routing window displays with the selected users or roles listed (Figure 7-3).
- 8 *If needed*, to include an additional document with this routing, click **Select Files**. Navigate through the folders to the needed file, click it; then click the **Add** button to move that file to the right pane and click **OK**. The additional document is listed under **Select Files**.

Figure 7-3 Routing Ad Hoc – Users and Roles Completed



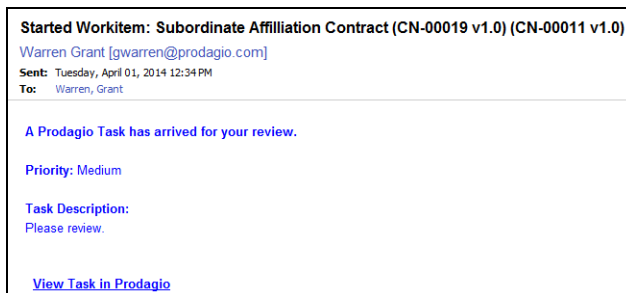
- 9 After all routing recipients have been selected, choose among the following Ad Hoc Routing optional actions (see Table 7 on page 134):
 - To route to all recipients simultaneously, deselect Send to users sequentially.
 - To route the document one-by-one, in the order listed, select Send to users sequentially.
 - To allow the recipient to reject the document back to you, select Allow reject to me.
 - To allow the recipient to reject the document back to the previous routing recipient in the **Send to** list, select Allow reject to previous performer.
- 10 If the document should be returned to you at the end of the route, select Return to Me.
- 11 If the Ad Hoc routing task completion should be confirmed with a signature, select Require signoff to display **Sign Off Required** on the Finish and Forward windows. See “Sign off a Document” on page 68.
- 12 Click **Route Document** to begin the Ad Hoc routing. The Document view displays. The first routing recipient will receive the Ad Hoc task as a Workflow task and its instructions in their Gimmel Contract Management My Tasks list (Figure 8).

Figure 8 Gimmel Contract Management My Tasks List

Priority	Subject	Item Name	From	Date Received	Status	Inst
	ward Option 2 (MORE THAN ONE CONTRACT TO BE AWARDED) (dormant	docuadmin	2/12/2014 8:22 PM	Dormant	
	Checklist Item Complete - Blank Word 97 / 2000 Document (CN-0000	Blank Word 97 / 2000 Document (CN-00001 v1.0)	docuadmin	12/30/2013 12:41 PM	Rev	Rev
	Checklist Item Incomplete - Blank Word 97 / 2000 Document (CN-00	Blank Word 97 / 2000 Document (CN-00001 v1.0)	docuadmin	12/31/2013 8:16 AM	Rev	Rev
	Checklist Item Reassigned - Blank Word 97 / 2000 Document (CN-00	Blank Word 97 / 2000 Document (CN-00001 v1.0)	docuadmin	1/2/2014 8:34 AM	Mus	Mus
	Checklist Item Reassigned - Blank Word 97 / 2000 Document (CN-00	Blank Word 97 / 2000 Document (CN-00001 v1.0)	docuadmin	1/3/2014 10:12 AM	Inct	Inct

In addition, the recipient(s) receive an email notification with a link to the document in Gimmel Contract Management. The email task notification allows the routing recipient to link directly to the task with **View Task in Gimmel Contract Management** (Figure 7-1).

Figure 7-1 Workflow Task Email Notification



More detail: Each document routed with Ad Hoc Routing adds an Audit Trail entry. See “[Managing the Document Audit Trail](#)” on page 99.

If the completed document is intended to override a document stored in Gimmel Contract Management, use the procedure described in “[Checking In and Changing a Document Version](#)” on page 52.

To view **all** workflow tasks involving you, see [Chapter 10, “Managing My Tasks”](#).

Routing Documents with Predefined Routing


Predefined routes must be set up by a system administrator or business administrator and made available to Gimmel Contract Management users. A Predefined route is a **fixed** document routing “workflow” followed by all documents utilizing that route; often, the routing recipients (individual users or groups) eligible to receive the routed document are also limited by the Predefined route.

Predefined routes can be simple (a few tasks for a few specific users) or more complicated (many tasks sent to many different users or groups), some of which are determined by the person starting the routing workflow.

The example Predefined routing described next will **not** exactly match any of your organization’s pre-defined routing workflows.

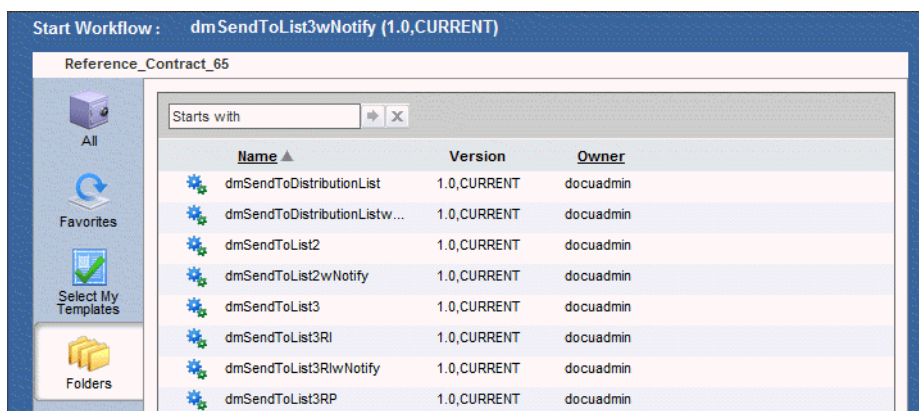
To compare Predefined routing features with Reminders, Notifications, Obligations, and Checklists tasks, see [Table 12 on page 188](#).




Route a Document via a Predefined Routing

- 1 Right-click the document name (including in Search Results):
 - Select **Start Predefined Routing**
OR
Double-click the document name, and on the document dashboard, click the **Start Predefined Routing**  button.
 - or**
 - Select **Open Dashboard**, and on the document dashboard, click the **Start Predefined Routing** button.

The Start Workflow window lists available named Predefined workflows under the **All** Cabinet ([Figure 7-2](#)).

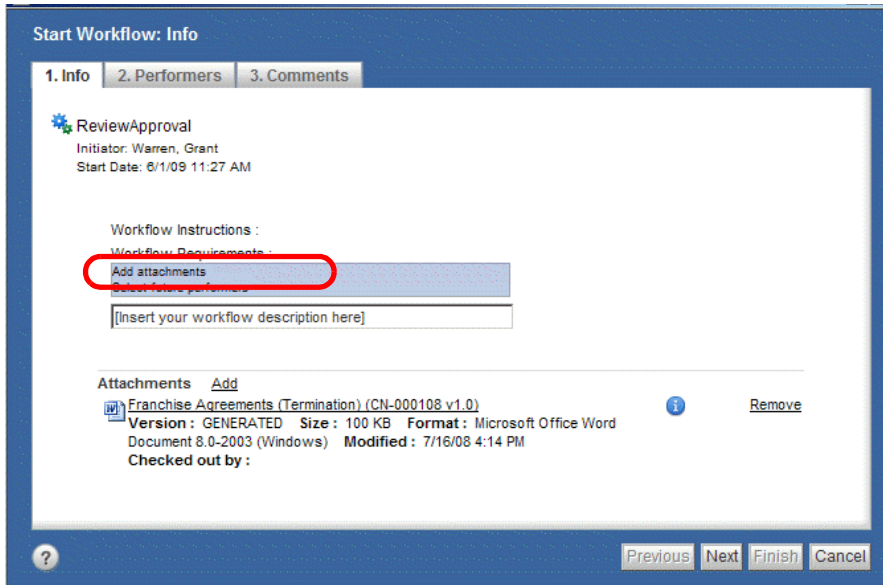
Figure 7-2 Start Workflow



- A To display all favorite Predefined routes, click the **Workflow Favorites**  button.
- B To display your Templates, click the **Select My Templates**  button.
- C To display all Documentum folders (which might house additional Predefined routes), click the **Documentum Folders**  button.

- 2 Select the Predefined routing name to apply to the selected document.
- 3 Click **OK**. The Start Workflow – **Info** tab displays (Figure 7-3).

Figure 7-3 Start Workflow – Info



- 4 Enter a unique workflow description in the field.

More detail: The selected document to be routed is automatically listed as an Attachment. Click **Add** to add another Attachment. Click **Remove** to remove any unwanted Attachment.

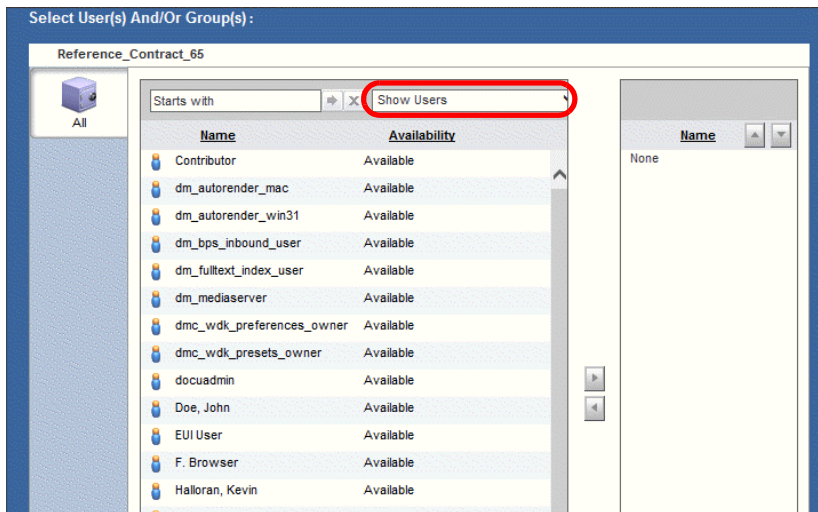
- 5 Click **Next**. The Start Workflow – **Performers** tab displays (Figure 7-4).

Figure 7-4 Select Workflow – Performers



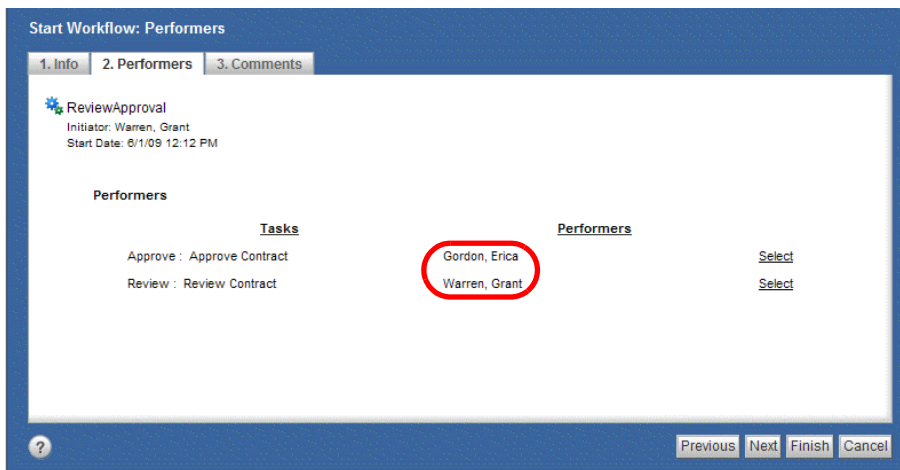
- 6 Click Select for the first task. The Select User window displays (Figure 7-5).

Figure 7-5 Selecting Routing Performers



- 7 In the Show Users, Groups And Roles field, select Show Users from the menu. Only users display.
 - A Further filter the list of users by entering a letter(s) in the Starts with field and the **Search by Name** button.
 - 8 Under the **Name** column, select the desired routing recipient.
 - 9 Some Predefined workflows allow more than one recipient for a task. Use Ctrl-click to select additional recipients.
 - A If necessary, reorder the list of routing recipients to determine the order in which the selected recipients receive the document.
 - B To select a routing recipient to move up or down, click the recipient's name in the right-side **Name** pane; then click the **Move Up List** button or **Move Down List** button.
 - C Repeat for each recipient until all recipients are in the correct receiving order.
 - 10 Click **OK**. The Select Workflow Performers window displays, with the selected name listed under Performers (Figure 7-6).
 - 11 Repeat the performer selection process for each task.
- More detail:** Each task must be assigned a user before **Next** becomes active.

Figure 7-6 Performers Selected



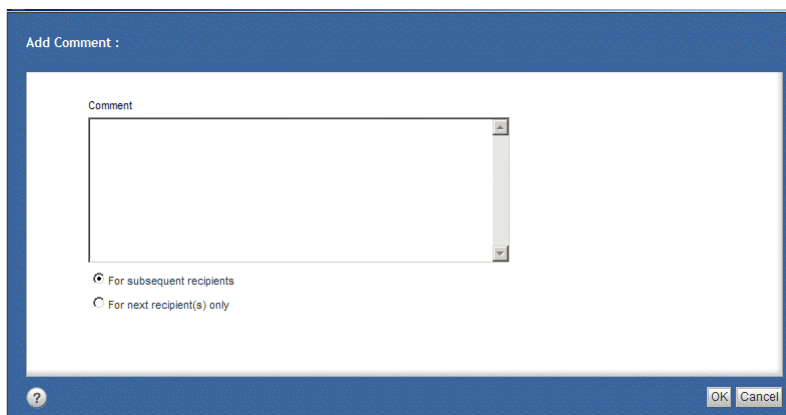
12 Click **Next**. The Start Workflow – **Comments** tab displays (Figure 7-7).

Figure 7-7 Workflow Comments



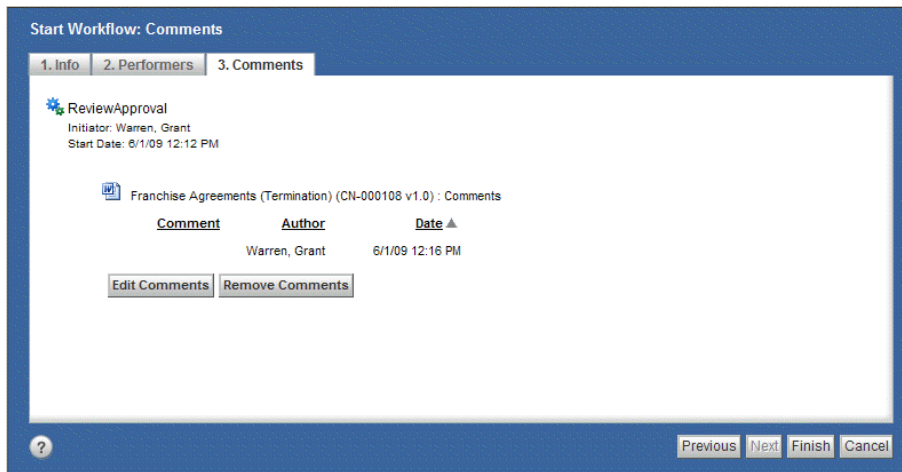
13 *If needed:* To add a comment, click **Add Comments**. The Add Comment window displays (Figure 7-8).

Figure 7-8 Add Comments



- A Enter any comments.
 - B To allow all workflow routing performers to view the comment, select For subsequent recipients.
 - C To allow only the next workflow routing performer(s) to view the comment select For next recipient(s) only.
- 14 Click **OK**. The Start Workflow – **Comments** tab displays.
- 15 *If needed*: Click **Edit Comments** or **Remove Comments** (Figure 7-9).

Figure 7-9 Edit/Remove Routing Comments



- 16 Click **Finish**. The document begins its Predefined routing workflow.

The first routing recipient will receive their Predefined task as a **Workflow** task and its instructions in their Gimmel Contract Management My Tasks list (Figure 8 on page 137).

In addition, the recipient receives an email notification with a link to the document in Gimmel Contract Management (Figure 7-1 on page 137).

If the completed document is intended to override a document stored in Gimmel Contract Management, use the procedure described in “Checking In and Changing a Document Version” on page 52.

To view all workflow tasks involving you, see Chapter 10, “Managing My Tasks”.

More detail: Each document routed with a Predefined routing adds an Audit Trail entry. See “Managing the Document Audit Trail” on page 99.