Chapter 8

Managing Reminders and Obligations

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Managing Reminders

Reminders are useful "memory jogs" for yourself or others to take some action on a particular document. For example, add a Reminder to help you or others to remember to periodically review a contract prior to renewal. Taking an action on a Reminder is **not** required. In various views and tabs, documents with one or more Reminders display the **Reminders** button next to the document's name. See Figure 4 on page 14.

Reminders include:

- the ability to add the Reminder to the recipient's email calendar
- an email sent to each Reminder recipient
- automatic placement of Reminders on the recipient's My Tasks view

From their My Tasks view, a user may also change a Reminder **Notification Date**. See "Performing Reminders, Obligations and Checklist Tasks" on page 196.

To compare Reminder features with Notifications, Checklists, Obligations, and Workflow tasks, see Table 12 on page 188.

More detail: **Automated Reminders** also exist for some object types. See *Gimmal Contract Management 6.9.1 Business Administrator Guide*. Automated Reminders were set up with Automated Reminder rules created by the business administrator and apply to object types rather than only to an individual contract or document. Automated Reminders are date field based, and do not require user action to create or initiate. Automated Reminders may be reopened after completion by the owner, recipient or business administrator. For example, an old renewal contract might be reinstated, so its Automated Reminders will need to be reopened.

Reminder Statuses

Reminder statuses control who may take what action during each status:

- **Scheduled**: Set to occur in the future. No email or task notification has been sent.
- **Open**: Has been sent to recipients via email and to their My Tasks view.
- **Completed**: Has been completed by a user. A completed Reminder will be removed from the user's My Tasks view, but it cannot be deleted.

Table 8 Reminder Actions Available for Each Reminder Status

Scheduled	owner, BA	owner, BA	no one	no one
Open	owner, BA 'write'* recipient	No one	owner, BA 'write'* recipient	no one
Completed	no one	no one	no one	owner, BA, 'write'* recipient
	*any one with write permissions for the Reminder's document type			‡Automated Reminders only

Adding a Reminder

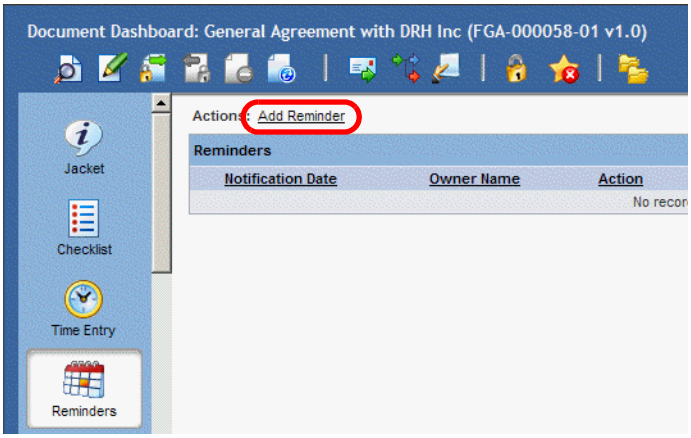
When a Reminder is added to a document, a task is scheduled to occur at some date in the future. On that date, an email message describing the task will be sent to the specified recipients and the task will be added to their My Tasks lists. These tasks will serve to remind recipients of the event and manage the document more effectively. Additionally, if a Reminder is created with **Add to Outlook Calendar**, each user can select to add that event to their Outlook calendar.

Add a Reminder

A Double-click the document name. If a document name already displays a Reminders button, click its Reminders button.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

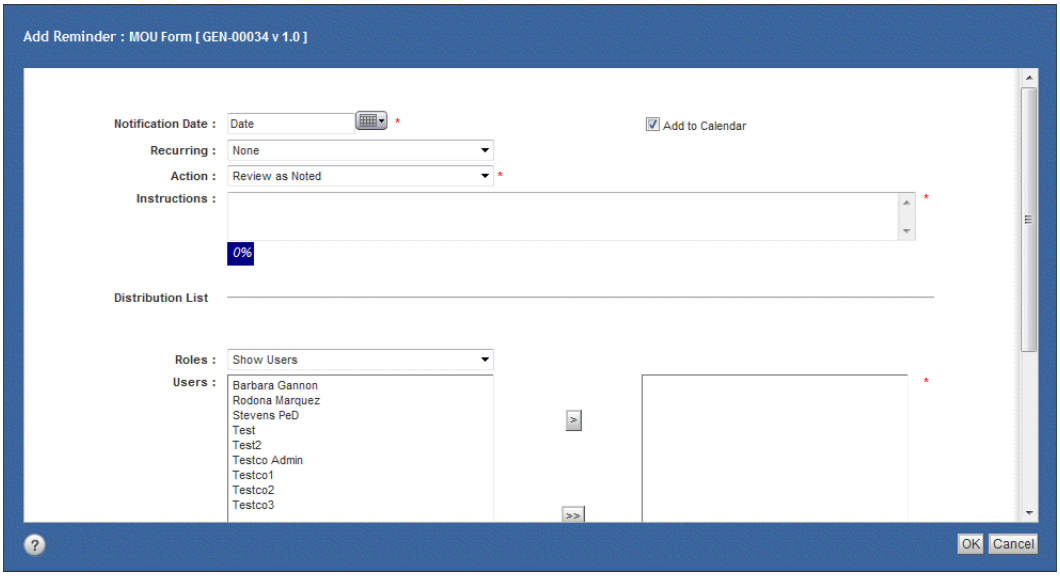
1 Click the **Reminders** button. The Reminders window displays (Figure 8-1).

Figure 8-1 Reminder



2 Click Add Reminder. The Add Reminder Details window displays. See Figure 8-2.

Figure 8-2 Add Reminder Details



3 Enter the following Reminder details:

A In **Notification Date**, enter the date when user(s) will be sent the Reminder email for the specified document. The Notification Date must be set to a date equal to or later than the current date.

B In **Recurring**, select a frequency from the menu to determine how often the Reminder email is generated and sent to those on the distribution list. Recurring selections include: None (default), Weekly, BiWeekly (every two weeks), Monthly, Semi-Monthly (twice a month), Quarterly, Semi-Annually (twice a year), Annually.

C In **Action,** select from the menu the type of review action which will be listed on the Reminder email. Action selections include: Review as Noted (default), Review for Assignment, Review for Option Exercise, Review for Payment, Review for Performance, Review for Renewal, Review for Termination.

More detail: The Action field menu selections may vary for each document type.

D In **Instructions**, enter any other information for everyone on the distribution list to see. The dynamic progress bar displays the percentage of total available characters entered.

4 In the **Roles** menu, **Show Users** is preselected. **Show Roles** might also be selected.

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 do **not** begin with dm_. If Show Groups is selected, all groups prefixed with im_ or ucf_file_transfer are not displayed.

5 In the **Users** pane, select user(s), and click the **Add** button to add that user to the list of recipient(s) in the right pane.

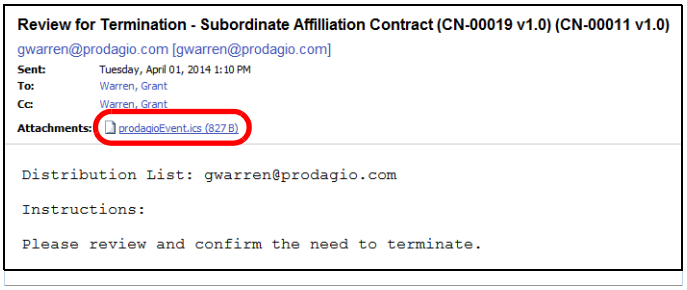
More detail: To select non-adjacent recipients, hold down the **Ctrl** key while clicking each recipient's name in the list. All displayed users have at least read (view only) rights.

6 *If needed:* **select Add to Outlook Calendar** to send an email to all users selected in the **Users** pane.

7 Click **OK**. The email to add the Reminder to the recipient's Outlook Calendar is sent immediately, even if the Notification Date is a future date. See Figure 8-3.

More detail: To add the Reminder to their individual calendars, each user must first open their email. Gimmal Contract Management does **not** automatically add Reminders to individual Outlook calendars. See "Add a Reminder to a Recipient Outlook Calendar" on page 147.

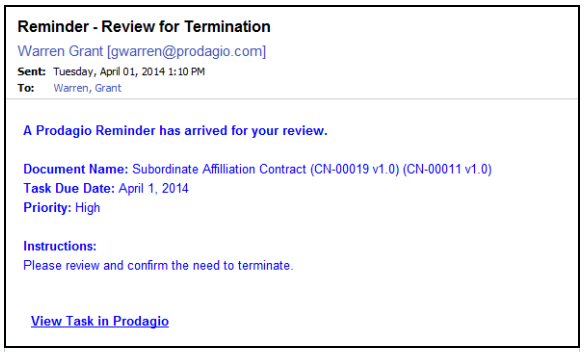
Figure 8-3 Email – Adding a Reminder to the Recipient's Outlook Calendar



On the selected **Notification Date**, the Reminder is displays on the recipient's My Tasks list and an email is sent to the recipient. See Figure 8-4. The email Reminder presents:

- The action to be taken in the **Subject** area
- Detailed **Instructions**
- The View Task in Gimmal Contract Management link to directly go to the task in the My Tasks view of Gimmal Contract Management (Figure 8-4).

Figure 8-4 Reminder Email Notification



Add a Reminder to a Recipient Outlook Calendar

1 Open the Reminder email.

2 Double-click the **Gimmal Contract ManagementEvent.ics** button in the Attachments line to open the Attachment (Figure 8-3 on page 147). The Opening Mail Attachment window displays.

3 Click **Open**. The scheduler notice displays in the Outlook Calendar.

4 Click **Save and Close** in the Outlook scheduler event. The Reminder date is added to the recipient's Outlook calendar.

Managing Document Reminders

Managing Reminders for a document through its document dashboard includes:

- Viewing a document's Reminders list
- View and edit individual Reminder details
- Closing, deleting and reopening Reminders and Automated Reminders

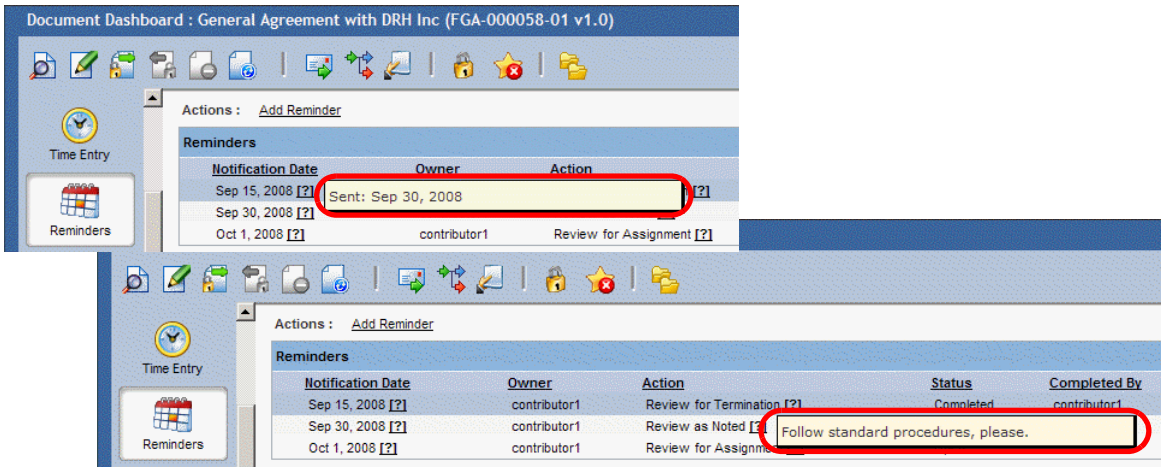
Manage Document Reminders

1 Navigate to the document with the Reminders to view.

2 Click the **Reminders** button next to the document name. The Reminder window displays, listing all Reminders for the selected document. See Figure 8-1 on page 145.

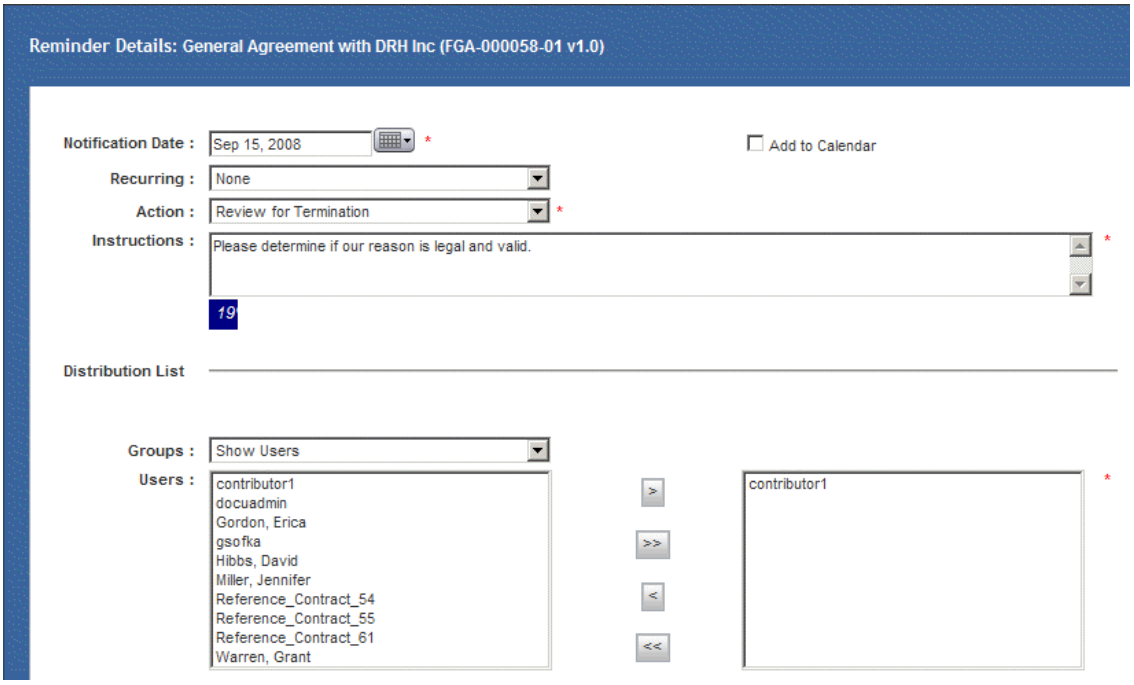
3 View additional Notification Date and Action details by hovering the cursor over the **Details** button of the selected Reminder (Figure 8-5).

Figure 8-5 Reminder Notification Date and Action Details



4 To *view* or *edit* a Reminder, double-click the Reminder **OR** right-click; then select **View** or **Edit**. The Reminder Details window displays (Figure 8-6).

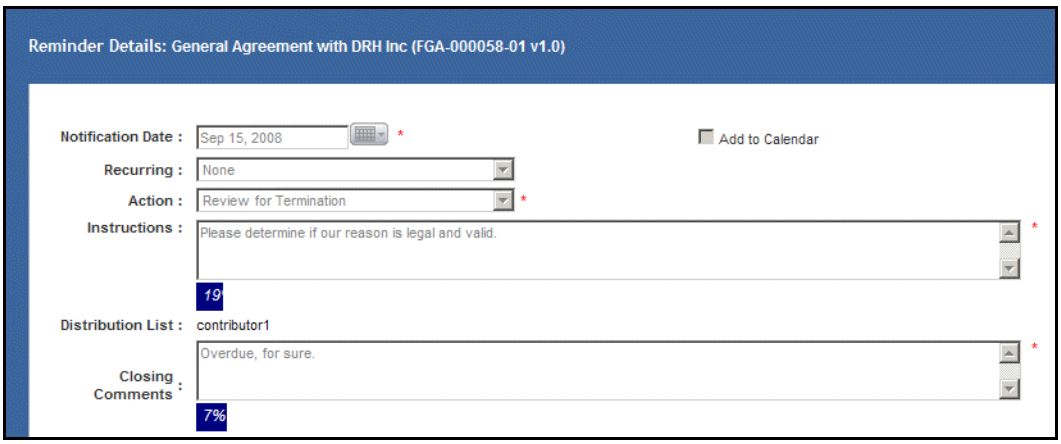
Figure 8-6 Reminder Details – Editable



5 Edit the Reminder if the **Status** is Open or Scheduled.

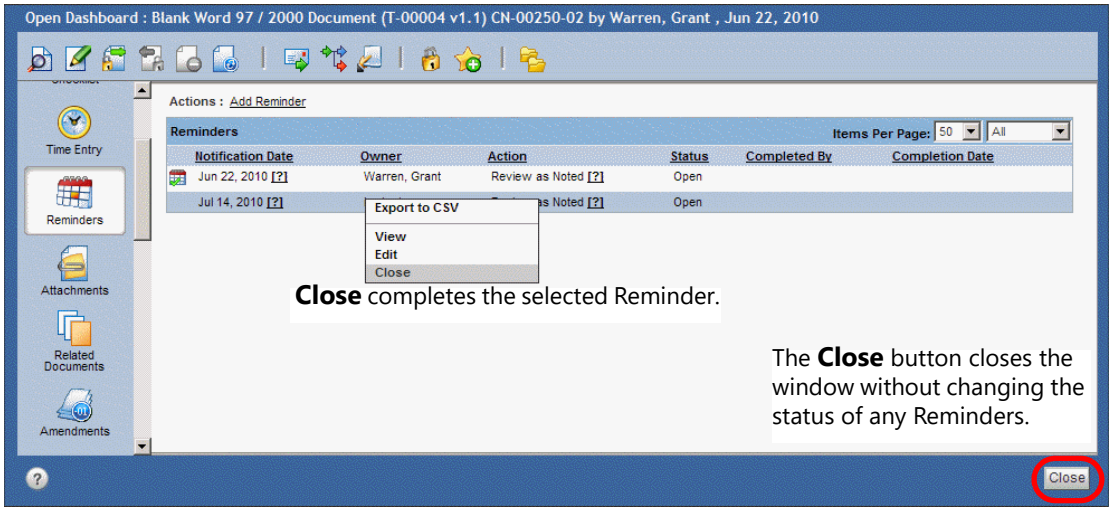
A If the Reminder **Status** is Completed, the details of the Reminder **cannot** be edited. See Figure 8-1.

Figure 8-1 Reminder Details – Uneditable



6 When finished editing or viewing, click **OK** or **Cancel**. The Reminder window displays (Figure 8-2).

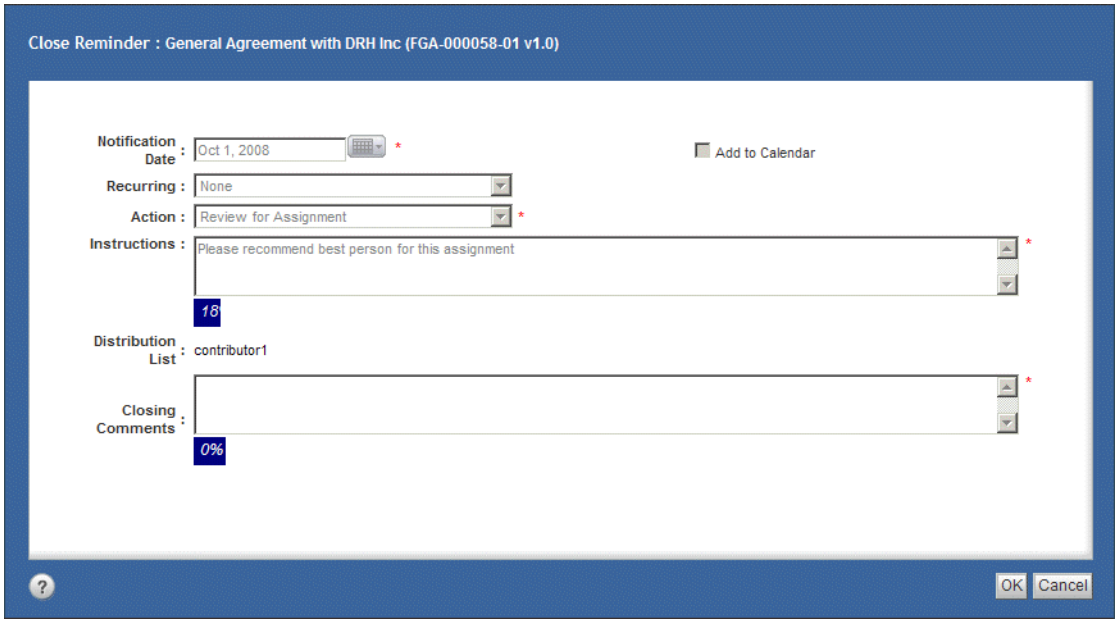
Figure 8-2 Reminder Window – Close



7 When the activity noted in the Reminder has been completed or if the Reminder is no longer needed, right-click; then click **Close**. The Close Reminder window displays (Figure 8-3).

More detail: Only a Reminder's owner, recipient or designated business administrator can **close** a Reminder. See Figure 8-3.

Figure 8-3 Close Reminder Window



8 In **Closing Comments**, enter the reason the Reminder is being closed.

9 Click **OK**. The Reminder window displays, with Completed status.

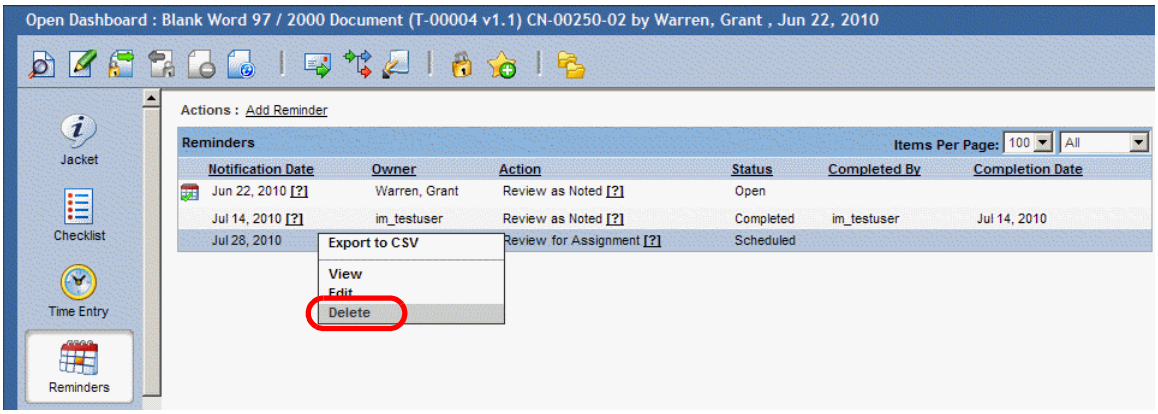
Delete a Reminder

More detail: Only the business administrator or the owner of the Reminder with a Scheduled status can **delete** Reminders.

1 Right-click the Reminder name; then select **Delete**.

2 When deleted, the Reminder is removed from the recipient's My Tasks list (Figure 8-4).

Figure 8-4 Deleting a Reminder



Delegate Future Reminders to Others

See "Setting Your Workflow Availability" on page 203.

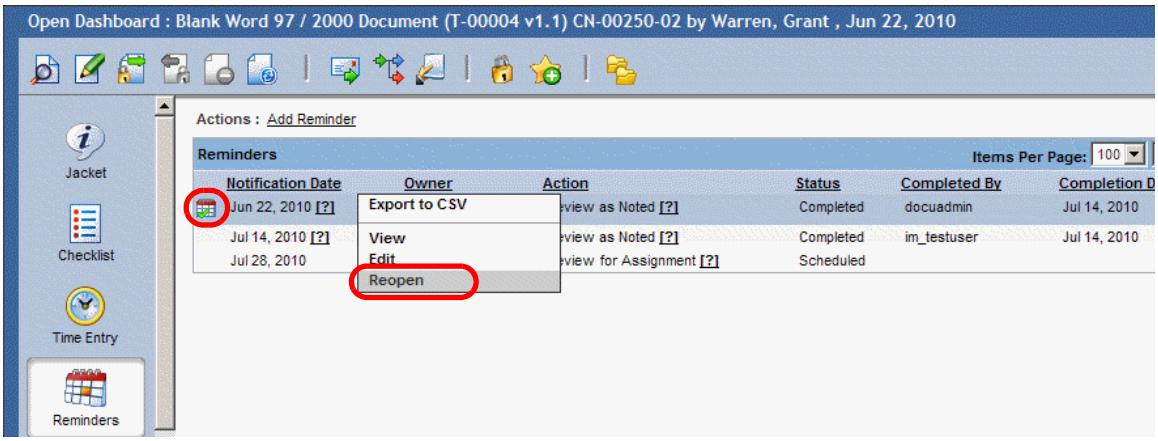
Reopen a Closed Automated Reminder

Some closed displayed Reminders were generated as Automated Reminders and display the **Automated Reminder** button. Automated Reminders can be reopened.

1 Navigate to the document with the Automated Reminder to reopen.

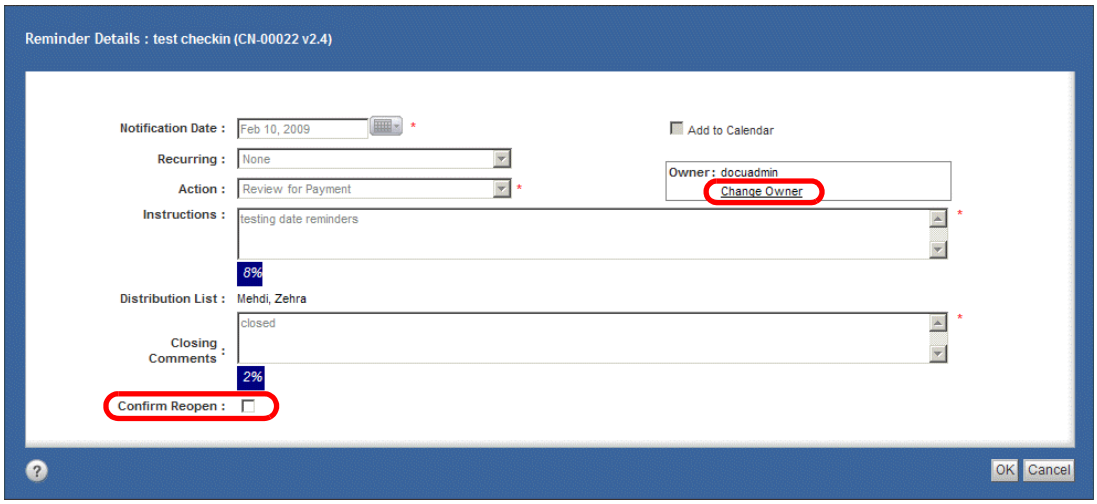
2 Click the **Reminders** button next to the document name. The Reminder window displays, listing all Reminders for the selected document (Figure 8-5).

Figure 8-5 Reopen an Automated Reminder



3 Right-click; then select **Reopen** of any Reminder with the **Automated Reminder** button. The Reminder Details window displays (Figure 8-6).

Figure 8-6 Reminder Details



A *If needed:* click **Change Owner** and select a new owner from the Choose a user window.

More detail: **Change Owner** displays only if you have been assigned the prodagio_admin role, are the Reminder owner, or are the Reminder recipient.

4 Select **Confirm Reopen** to force your review of the decision to reopen this Reminder.

5 Click **OK**. The Reminders window displays. The Automated Reminder opens. The Automated Reminder continues to track changes and send Automated Reminder notifications as if it never had been closed.

Export a Document Reminders Listing to .csv File

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

Managing Obligations

Obligations are tasks that **must** be completed in order to meet the legal requirements of a contract. Obligations can completed by taking an action and closing them, but require a signature. See your system or business administrator to determine how often and how individual Obligations are sent. For example, two Obligations for a new or updated contract could include a legal review and a signed approval.

In various views and tabs, documents with one or more Obligations display the **Obligations** button next to the document's name. See Figure 4 on page 14.

Obligations include:

- The ability to add the Obligation to your email calendar
- Categorizations as *financial* (related to money) or *non-financial* (not related to money)
- Aemail sent to each Obligation recipient or create obligations with no recipients
- Automatic placement of Obligations on the recipient's My Tasks list
- Special properties to further describe the Obligation and the ability to view deleted Obligations
- Reporting capability to allow managers to provide reports of upcoming or historical Obligations

From their My Tasks view, a user may also change an Obligation **Due Date**. See "Performing Reminders, Obligations and Checklist Tasks" on page 196.

To compare Obligation features with Notifications, Reminders, Checklists and Workflow tasks, see Table 12 on page 188.

Obligation Statuses

Obligations statuses control who may take what action during each status:

- **Scheduled**: An Obligation that is set to occur in the future. No email or task notification has been sent.
- **Open**: An Obligation that has been sent to recipients via email and to their task list in their My Tasks view.
- **Completed**: An Obligation that a user has completed. A completed Obligation will be removed from the user's My Tasks view.
- **Deleted**: An Obligation that a user has deleted. Users may manually delete an Obligation.

Table 9 Obligation Actions Available for Each Obligation Status

Scheduled	'write' users	'write' users	'write' users
Open	'write' users	'write' users	'write' users
Completed	no one	no one	no one
Deleted	no one	no one	no one

Adding an Obligation

Obligations can be added:

- Individually from the Obligations window of the document dashboard and/or
- In a group by importing a properly .csv-formatted Obligation spreadsheet.

When adding Obligations, define predetermined properties such as recurrence, dollar amounts, and other data required by the organization.

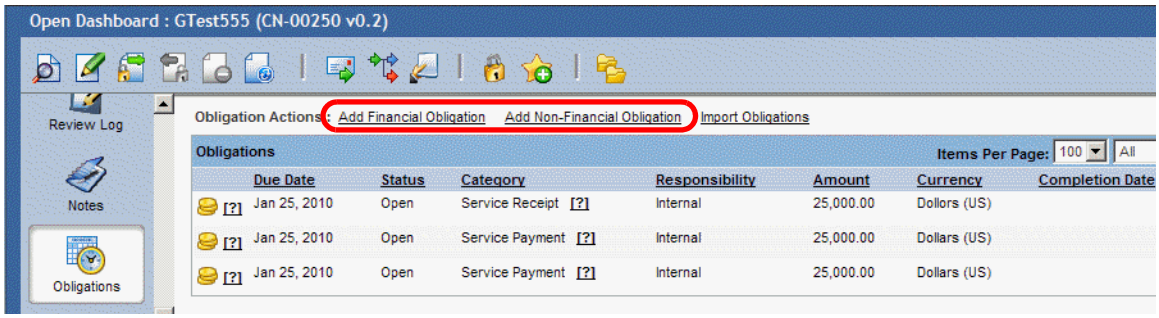
Add a Financial or Non-Financial Obligation

1 Double-click the document name
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Obligations** button. The Obligations window displays. See Figure 8-7.

A If a document name already displays an **Obligations** button, click it.

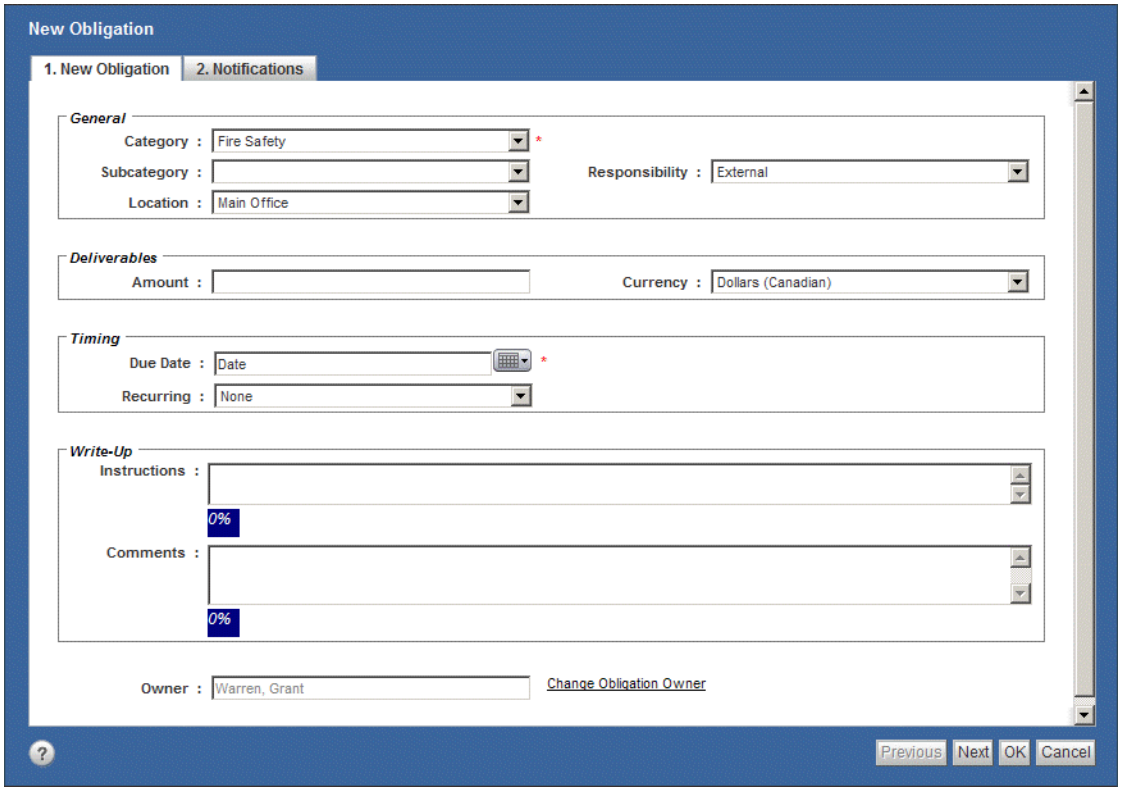
Figure 8-7 Adding an Obligation



3 Click Add Financial Obligation to add a financial Obligation or click Add Non-Financial Obligation to add a non-financial Obligation. The New Obligation window displays (Figure 8-8).

More detail: The Financial and Non-Financial Obligations Details windows differ in the labels in their Deliverables sections and usually also have differing sets of Categories.

Figure 8-8 New Obligation – New Obligation Tab



4 Enter the relevant information about the Obligation in the **General**, **Deliverables**, **Timing,** and **Write-Up** sections. The dynamic progress bar displays the percentage of total available characters entered in the **Instructions** and **Comments** fields.

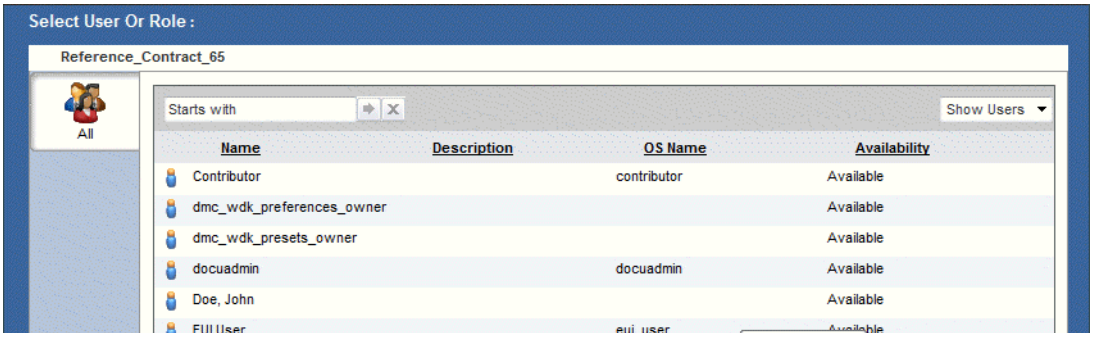
5 In **Due Date**, enter the date when user(s) will receive the Obligation email for the specified document. The **Due Date** must be set to a date equal to or later than the current date.

6 Select a **Recurring** frequency from the menu to determine how often the Obligation email is generated and sent to those on the distribution list.

A If a **Recurring** frequency was selected, the **Total Obligations** field displays. Enter the total number of times the Obligation will be sent.

7 *If needed:* click **Change Obligation Owner** if the current **Owner** is not accurate. The Select User or Role window displays (Figure 8-9).

Figure 8-9 Choose a User

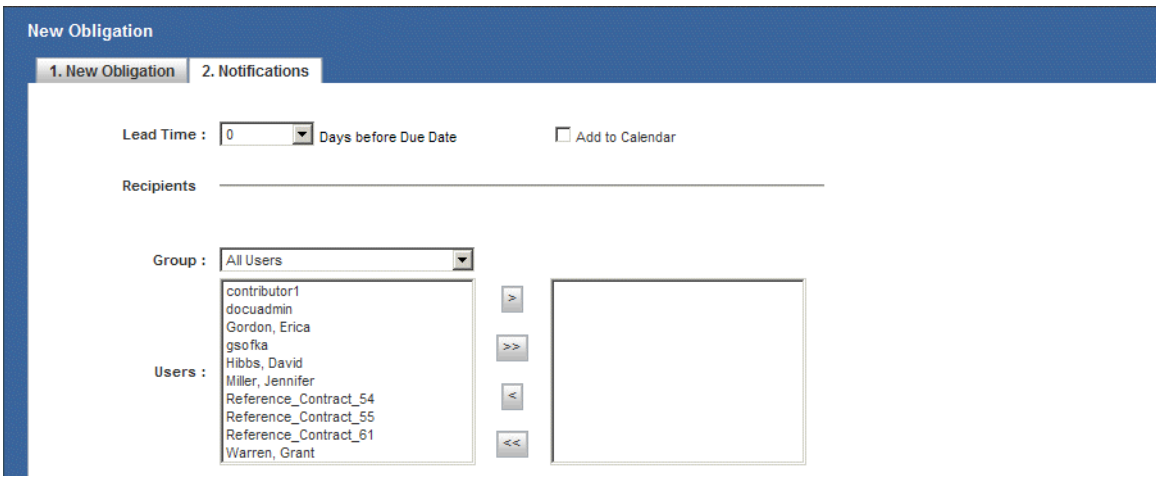


A Find a user using either the Starts with or the Show Users or Show Roles filters; then click to select the user or role to become the owner of this Obligation.

B Click **OK**. The New Obligation window displays, with the new owner displayed in the **Owner** field.

8 Click **Next**. The **Notifications** tab displays (Figure 8-10).

Figure 8-10 New Obligation – Notifications Tab



A In **Notification Date**, select from the menu Days before Due Date the number of days of advance notice Obligation recipients should receive.

More detail: The available Days before Due Date are configured by your business administrator using the selection list Obligation Lead Time.

B Select **Add to Outlook Calendar** to allow recipients to add the date(s) for the Obligation to their Outlook calendars.

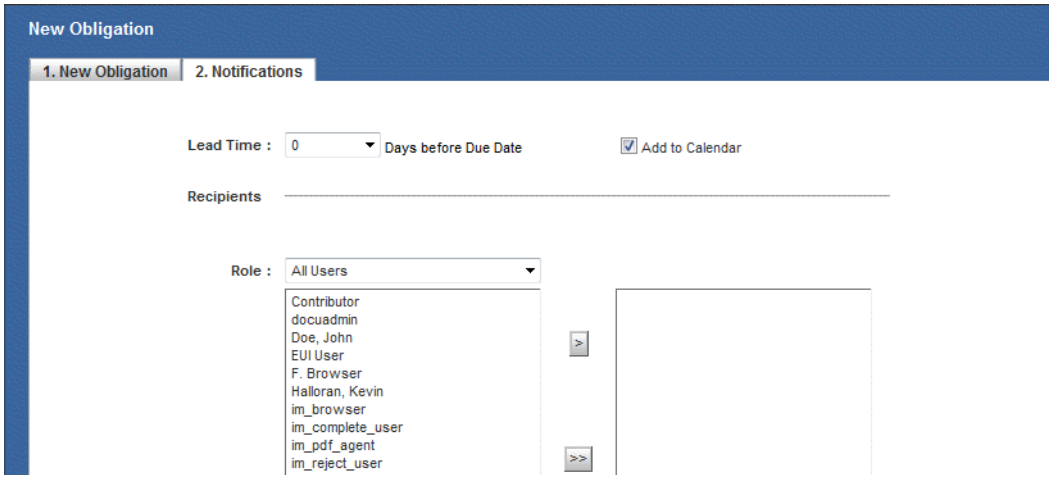
9 In the **Group**, select **All Users** or **All Roles** from the menu.

10 Selecting one or more users or roles is **optional.** Select user(s) or role(s), and click the **Add** button to add your choices to the list of Obligation emails recipient(s) in the right pane (Figure 8-10).

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 do **not** begin with dm_. If All Groups is selected, all groups prefixed with im_ or ucf_file_transfer are not displayed.

11 To select nonadjacent recipients, hold down the **Ctrl** key while clicking each recipient's name in the list. All displayed users have at least read (view only) rights.

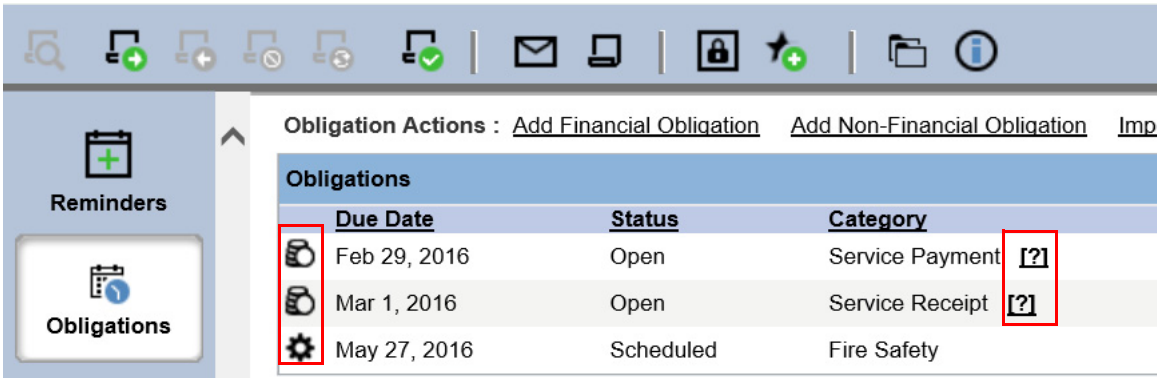
Figure 8-11 Recipients of an Obligation



12 Click **OK**. All Obligations for the selected document display in the Obligations dashboard (Figure 8-12).

- Non-financial Obligations are indicated by the icon. *If needed:* hover the cursor over the [?] of the document with a Non-Financial Obligation to read the instructions.
- Financial Obligations are indicated by the icon. *If needed:* hover the cursor over the [?] of the document with a Financial Obligation to read the instructions.

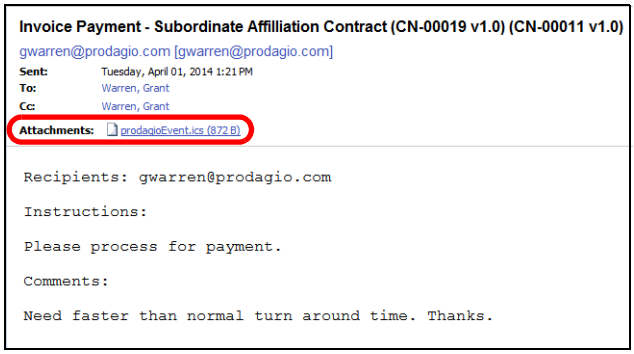
Figure 8-12 Obligations



The email to add the Obligation to the recipient's Outlook Calendar is sent immediately, even if the Notification Date is a future date (Figure 8-13). The actual Obligation is not sent until the Notification Date. See Figure 8-14.

More detail: To add the Obligation to their individual calendars, each user must first open their email. Gimmal Contract Management does **not** automatically add Obligations to individual Outlook calendars.

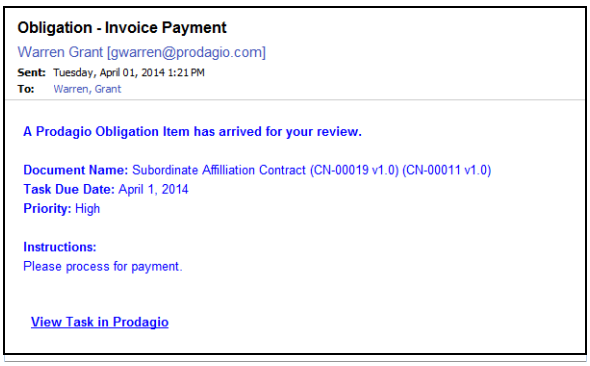
Figure 8-13 Email – Adding an Obligation to the Recipient's Outlook Calendar



On the selected **Notification Date**, the Obligation displays on the recipient's My Tasks list and an email is sent to the recipient (Figure 8-14). The email Obligation presents:

- Detailed **Instructions**
- Detailed **Comments**
- The View Task in Gimmal Contract Management link to directly go to the task in the My Tasks view of Gimmal Contract Management (Figure 8-14)

Figure 8-14 Obligation Email Notification



Add an Obligation to a Recipient Outlook Calendar

1. Open the Obligation email.
2. Double-click the Gimmal Contract ManagementEvent.ics button in the Attachments line to open the Attachment (Figure 8-3 on page 147). The Opening Mail Attachment window displays.
3. Click **Open**. The scheduler notice displays in the Outlook Calendar.
4. Click **Save and Close** in the Outlook scheduler event. The Obligation date is added to the recipient's Outlook calendar.

Import Obligations as a Group from a Spreadsheet

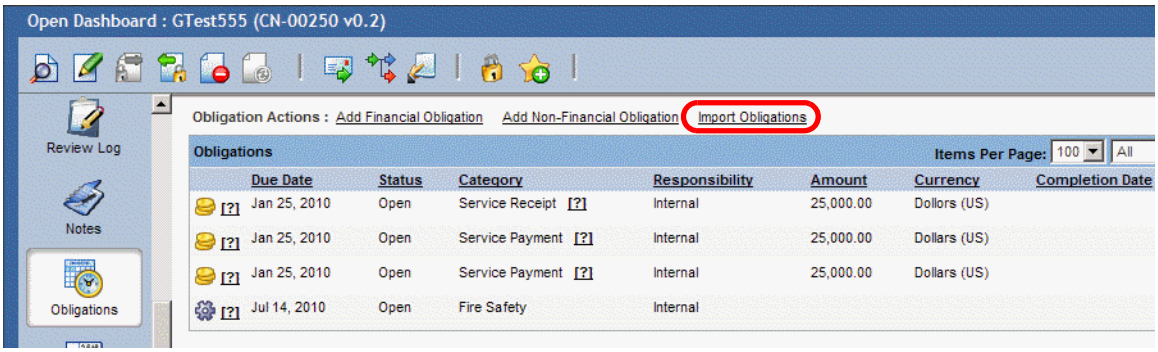
A file properly .csv-formatted to use for Obligations importing is provided with the Gimmal Contract Management installation and contains the correct Obligations headers in the correct sequence. Copy this file; then update it with your Obligations before importing.

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Obligations** button. The Obligations window displays. Scroll down if the button is not visible (Figure 8-15).

A If a document name already displays an Obligations button, click it.

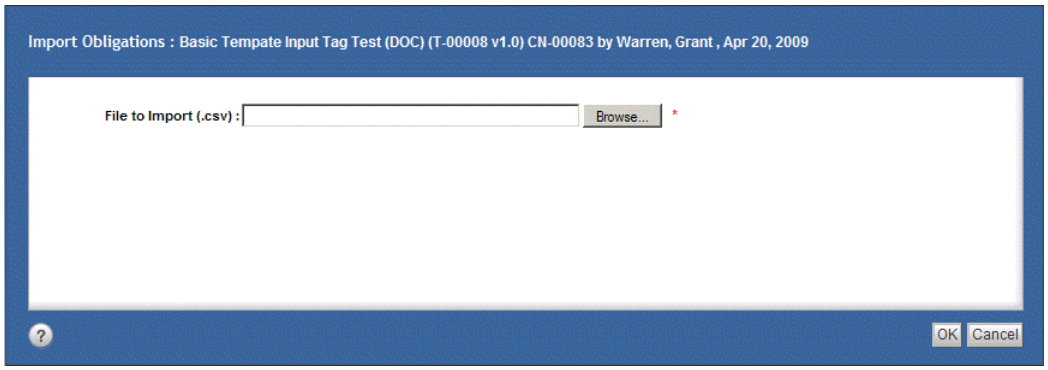
Figure 8-15 Import Obligations



3 Click Import Obligation to import a group of both financial and non-financial Obligations from the prepared spreadsheet. The Import Obligations window displays. See Figure 8-16.

More detail: The Financial and Non-Financial Obligations Details windows differ in the labels in their Deliverables sections and usually also have differing sets of Categories.
The Total Obligations field displays only when a selection has been made in the Recurring menu.

Figure 8-16 Import Obligations



4 In **File to Import (.csv)**, click **Browse** to find the previously-prepared Obligation file in .csv format to import.

5 Select the file to import.

6 Click **OK**. The Import Obligations window displays, with the selected file listed in the **Obligations File to Import (.csv)** field.

7 Click **OK**. The document's Obligations window displays and all Obligations from the imported spreadsheet are added to the selected document.

More detail: Two date formats (**MM/dd/yyyy** and **MM/dd/yy**) are accepted. Imported Obligations with incorrect date formats will be listed as errors.

Managing Document Obligations

Managing Obligations for a document through its document dashboard includes:

- Viewing or editing an Obligation or Obligation Series
- Deleting Obligation (Table 9 on page 153)
- Viewing all of a document's deleted Obligations
- Viewing all of a document's Financial and Non-Financial Obligations
- Closing and exporting Obligations to .csv files

View or Edit an Obligation or Obligation Series

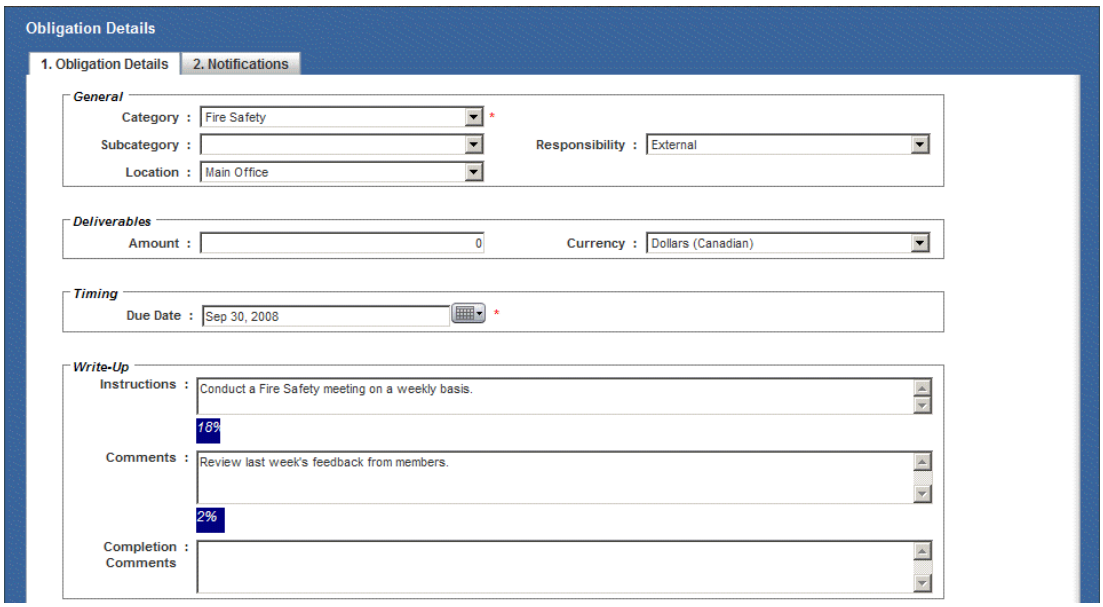
1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Obligations** button. The Obligations window displays (Figure 8-7 on page 154).

A If a document name displays an **Obligations** button, click it.

3 To *view* or *edit* an Obligation, double-click the Obligation and select **View** or **Edit**. The Obligation Details window displays (Figure 8-17).

Figure 8-17 Obligation Details



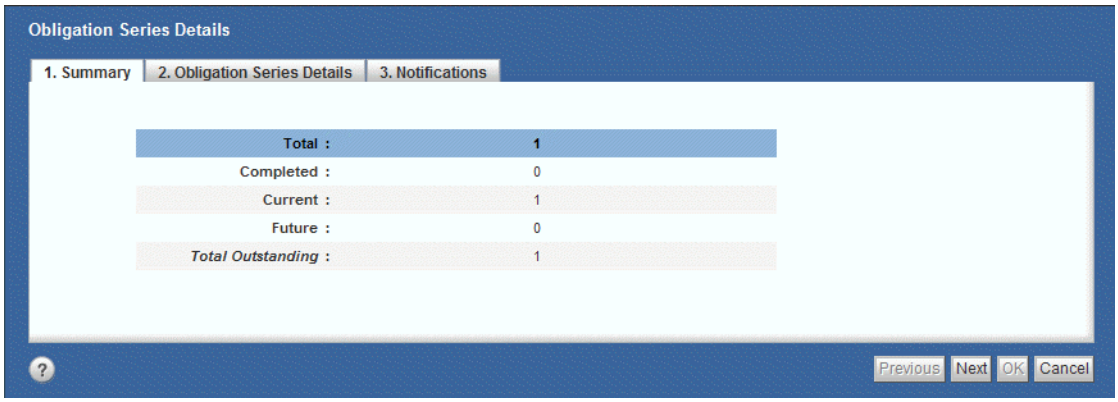
4 Click the **Notifications** tab.

5 Make all changes.

6 Click **OK**. The Obligations list displays, with editing changes saved.

7 To view all Obligations in a *series*, right-click; then select **Series.** The Obligation Series Details window displays three tabs (Figure 8-18).

Figure 8-18 Obligations Series Details – Summary Tab



A The **Summary** tab lists:

- **Total**: Completed and Total Outstanding Obligations
- **Completed**: Number of Obligations that have been completed
- **Current**: Obligations due (or overdue) today: open, not closed and not in the future
- **Future**: Obligations open, due tomorrow or any day thereafter
- **Total Outstanding**: Current and Future Obligations: Obligations that are not closed

8 Click **Next**. The **Obligation Series Details** tab displays. This tab lists any edits you make to an Obligation while in this tab, which affects all remaining Obligations in the current series.

9 Make all necessary changes.

10 Click **Next**. The **Notifications** tab displays. This tab lists any edits you make to an Obligation while in this tab, which affects all remaining Obligations in the current series.

11 Make all necessary changes .

12 Click **OK** to save your changes. The Obligations list displays.

View All Financial or Non-Financial Obligations for a Document

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Obligations** button. The Obligation window displays.

A If a document name already displays an **Obligations** button, click it.

3 In the **All** field, select **Financial** or **Non-Financial** from the menu. A window listing all Financial Obligations or Non-Financial Obligations for the selected document displays (Figure 9).

Figure 9 Viewing a Document's Financial and Non-Financial Obligations

4 Click **Close**. The document listing displays.

Close an Obligation from the Obligation Window

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Obligations** button. The Obligations window displays.

A If a document name already displays an **Obligations** button, click it.

3 Right-click an Obligation; then select **Close**. The Signoff: Close Obligation window displays. See Figure 8-1.

Figure 8-1 Signoff

4 Verify your identify by entering your **Password**.

5 Enter **Comments**.

6 Click **OK**. The Obligations window displays, with the selected Obligation displaying a Completed status.

Delete an Obligation

More detail: Only Obligations with a Scheduled status can deleted.

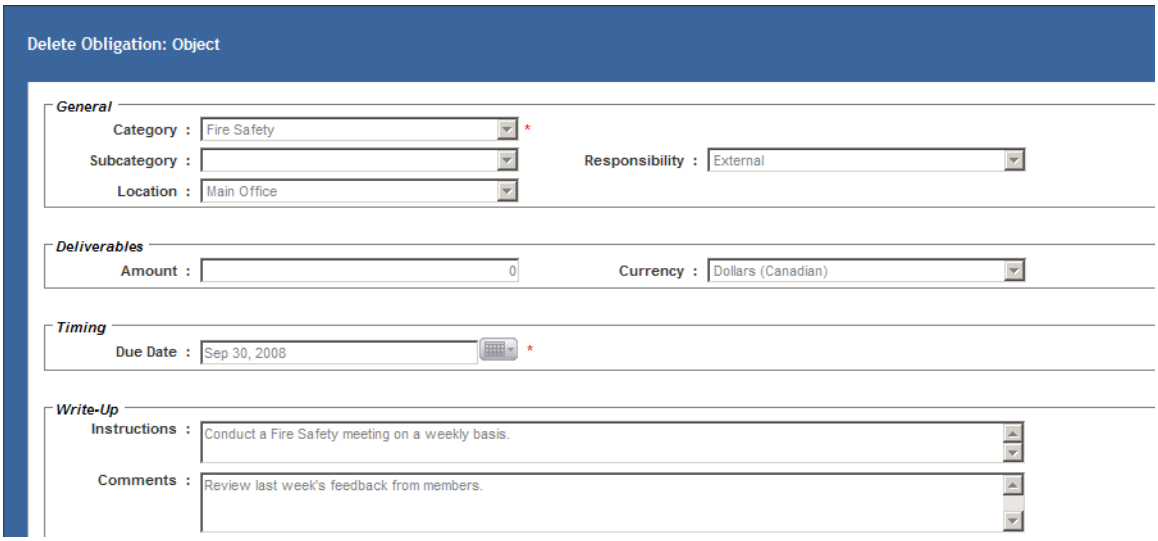
1 Double-click the document name
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Obligations** button. The Obligations window displays. See Figure 8-12 on page 157.

A If a document name already displays an **Obligations** button, click it.

3 Right-click an Obligation; then select **Delete**. The Delete Obligation Object window displays (Figure 8-2).

Figure 8-2 Delete Obligation



4 View the relevant information about the deleted Obligation in the **General**, **Deliverables**, **Timing** and **Write-Up** sections.

5 Click **Delete**. The selected Obligation is deleted and the Obligations window displays.

View Document Deleted Obligations

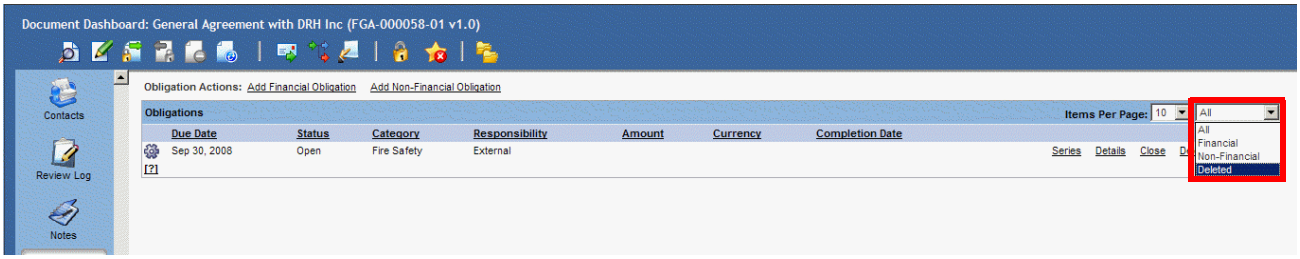
1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Obligations** button. The Obligations window displays.

A If a document name already displays an **Obligations** button, click it.

3 In the **All** field, select **Deleted** from the menu. A window listing all deleted Obligations for the selected document displays (Figure 9).

Figure 9 Viewing Deleted Obligations



4 Click **Close**. The document listing displays.

Delegate Future Obligations to Others

See "Setting Your Workflow Availability" on page 203.

Export a Document Obligations Listing to .csv-Formatted File

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

Chapter 9

Managing Checklists

This chapter includes the following topics:

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Managing Document Checklists 167
Attaching a Checklist to a Document 167
Select and Attach a Checklist to a Document 167
Refreshing a Checklist 168
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Removing a Checklist from a Document 168
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About Checklists

Each Checklist is a uniquely named set of to-do action items assigned to a contract. A Checklist lists all the required organizational processing items (steps) to be completed before a contract is considered fully processed according to current business rules and requirements. Checklists also control the *routing* of the contract to the various individuals or roles charged with completing required items or with signing approval for items. Checklists may or may not include user assignments.

Your organization can configure Checklists for some, all or none of its contracts. An unlimited number of different Checklists can be added to a contract.

More detail: Checklists are *created* by the business administrator, who defines different Checklists for each contract type. Only a business administrator may *delete* a Checklist, therefore making it unavailable to users for attaching to any contracts. See the separate *Gimmal Contract Management 6.9 Business Administrator Guide*.

After a Checklist is selected and attached to a document or contract, users and/or roles may be assigned from the Checklist window to take action on each item in the Checklist. An email notification is automatically sent to each user or role when each Checklist item is assigned. Assigned users (in certain conditions) may then take these actions:

- **Assign** the Checklist item to a user.
- **Reassign** the Checklist item, which unassigns the currently assigned user or role and assigns a new user or role.
- **Unassign** the Checklist item from the assigned user or role (restricted access).
- **Reset** the Checklist item which clears the assigned user or role and clears all actions already taken.
- **View Details** displays the uneditable property details of a Checklist item.
- **Complete** the assigned Checklist item.
- **Reject** the Checklist item.

All Checklist actions are automatically recorded in the document Audit Trail. See "Managing the Document Audit Trail" on page 99.

More detail: Checklist actions may also be performed from the My Tasks view. See "Performing Reminders, Obligations and Checklist Tasks" on page 196.

More detail: To compare Checklist features with Reminders, Notifications, Obligations, and Workflow tasks, see "Table 12Task Features Compared" on page 188.

Managing Document Checklists

Usually, one or more Checklists are available for each document type. Any available Checklist may be attached to any document of any type. One or more Checklists may be attached to a document.

Certain users are able to remove attached Checklists from documents. See "Removing a Checklist from a Document" on page 168.

A user may refresh checklists without closing the Document Dashboard. See ""Refreshing a Checklist" on page 168.

A user may print any Checklist. See "Printing Checklist Items" on page 169.

A user may export any Checklist to a .csv spreadsheet. See "Exporting Checklist Items" on page 170.

Attaching a Checklist to a Document

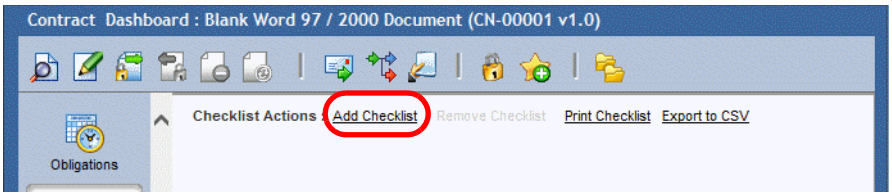
At any time, a user may attached one or more Checklists to a document. Checklists can also can be removed from the document by certain users *if* the Checklist meets certain conditions. See "Removing a Checklist from a Document" on page 168.

Select and Attach a Checklist to a Document

1 Double-click the document name
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

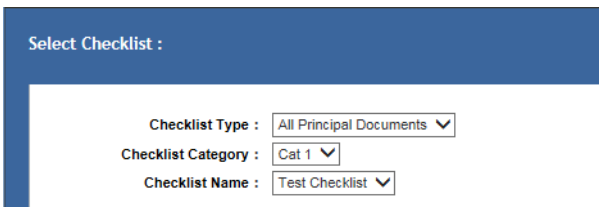
2 Click the **Checklist** icon. The Checklist window displays (Figure 9-1 on page 167).

Figure 9-1 Add Checklist



3 Click **Add Checklist**. The Select Checklist window displays, where you can select the new Checklist Type, Category, and Name. See Figure 9-2 on page 167.

Figure 9-2 Select Checklist



4 In **Checklist Type**, select a Checklist type from the drop-down list.

5 In **Checklist Category**, select a Checklist category from the drop-down list (if applicable).

6 In **Checklist Name**, select the needed Checklist from the drop-down list.

7 Click **OK**. The selected Checklist is attached to the selected document and the Checklist window displays the items in the selected Checklist ("Figure 9-4Remove Checklist").

More detail: If Checklist(s) are already attached to the document, the just-selected Checklist will be listed after the existing Checklist(s).

After selecting and attaching a Checklist, some of its items might **not** have been assigned to a user. To assign items, see "Assigning and Reassigning a Checklist Item".

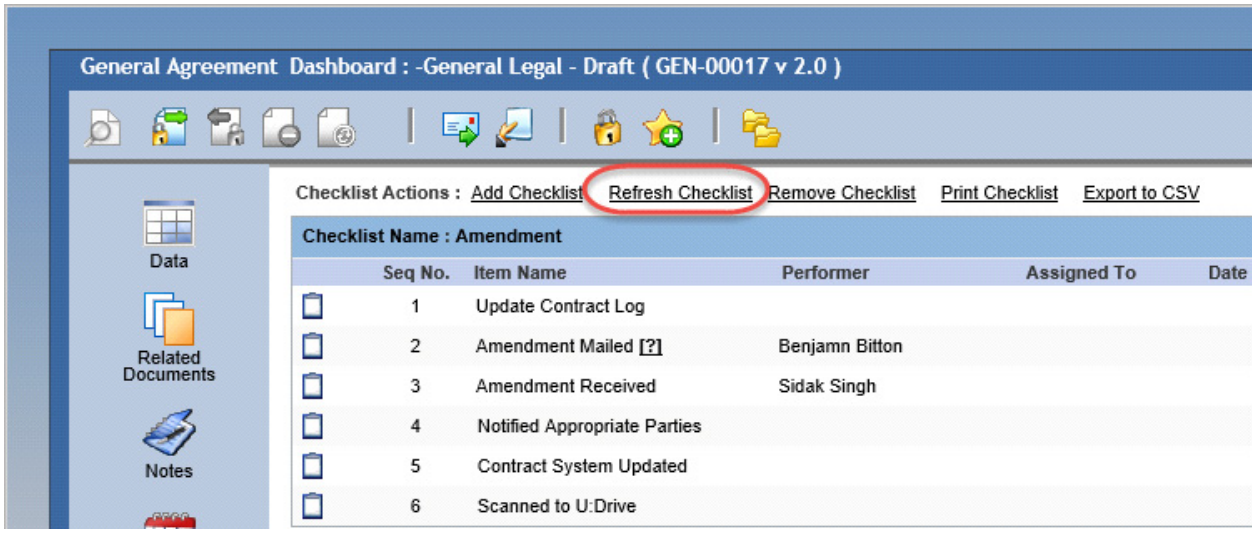
Refreshing a Checklist

At any time, a Checklist may be refreshed from the Document Dashboard to show the most recent activity.

Refresh Checklist

From the Checklist section of the document dashboard, clicking **Refresh Checklist** updates the Checklists(s) for the given document with the most recent activity from all users.

Figure 9-3 Refresh Checklist



Removing a Checklist from a Document

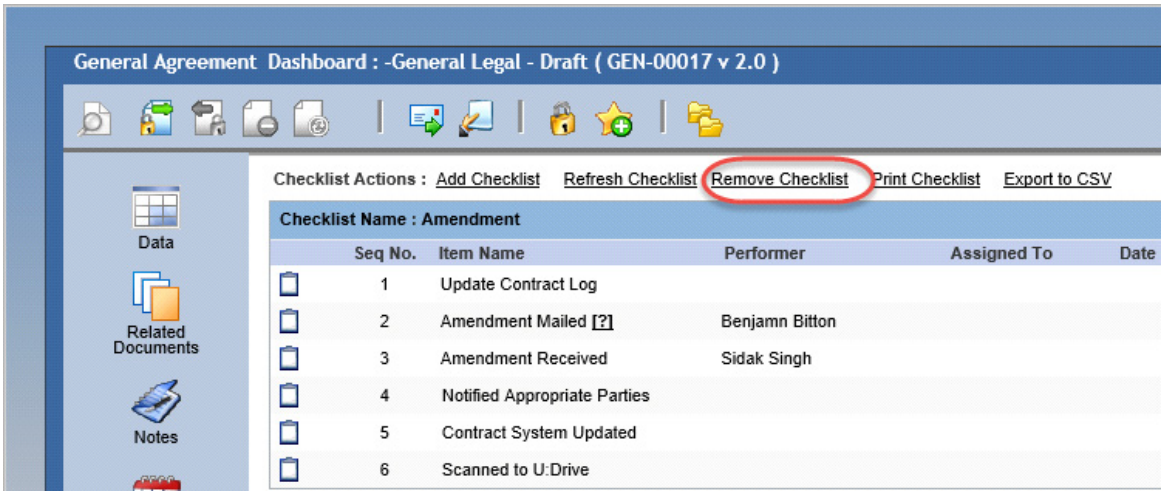
A user assigned to the checklist_remove role may remove a Checklist from a document. A Checklist must be attached to a document before it can be removed. See "Attaching a Checklist to a Document" on page 167.

Remove a Checklist from a Document

1 Double-click the document name
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

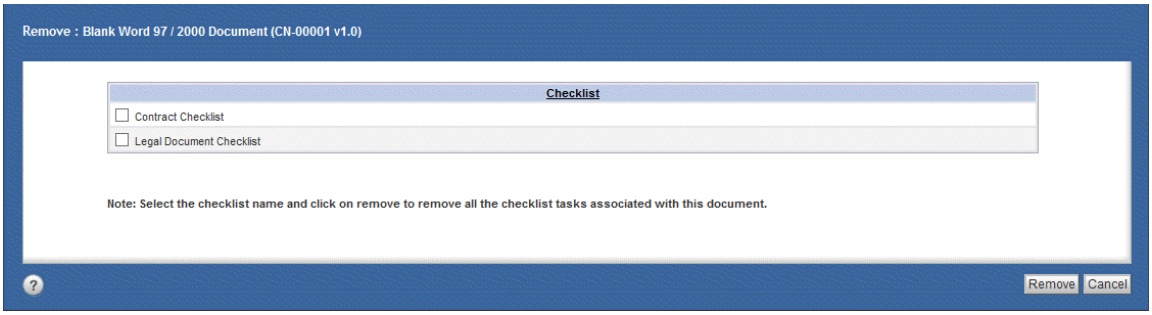
2 Click the **Checklist** button. The Checklist window displays (Figure 9-4).

Figure 9-4 Remove Checklist



3 Click **Remove Checklist**. The Remove window displays each Checklist currently attached to the selected document (Figure 9-5).

Figure 9-5 Remove Checklist



4 Select the Checklist(s) to remove.

5 Click **Remove**. The selected Checklist(s) and their tasks are removed from the selected document.

Printing Checklist Items

At any time, all Checklist items for a document can be printed.

Print a Document's Checklist Items

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Checklist** icon. The Checklist window displays (Figure 9-1 on page 167).

3 Click **Print Checklist**. A printer-friendly view of the document Checklists display, which is then immediately covered by the Print window.

4 Click **Print**. The document Checklists are printed on the default printer.

5 Close the printer-friendly view.

Exporting Checklist Items

At any time, all Checklist items for a document can be exported to a .csv-formatted file.

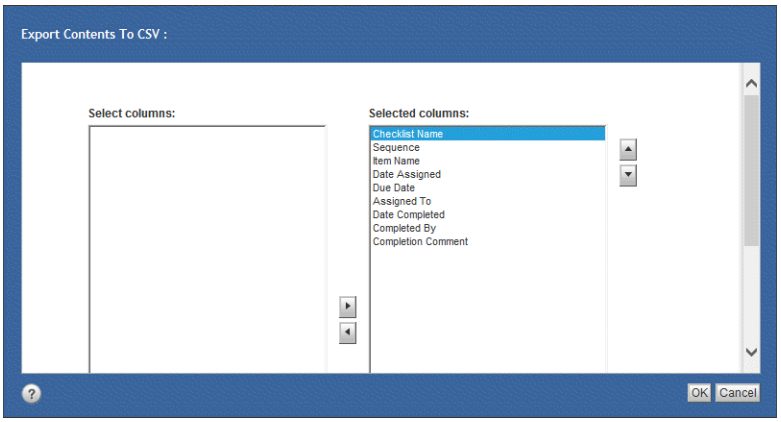
Export Checklist Items to .csv

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Checklist** button. The Checklist window displays (Figure 9-1 on page 167).

3 Click **Export to CSV**. The Export Contents To CSV window displays (Figure 9-6).

Figure 9-6 Export Contents To CSV



A By default, all the listed column headings will be included in the export. To remove a heading from the export, select it, and click the < button to move it to the **Select columns** pane.

4 Click **OK**. The Open MyCsvFile.csv message displays.

5 Click **Open**. The exported listing displays in .csv format.

6 Save or close the exported file. The Checklist window displays.

Managing Checklist Item Users

After an existing Checklist has been attached to a document, that Checklist's items can be assigned to users or roles. In addition to assigning roles, there are three related user assignment actions:

- **Reassign** a Checklist item to another user or role for action.
- **Unassign** a Checklist item (restricted access) from the assigned user or role.
- **Reset** a completed Checklist item, which also removes the user or role completing the item, making the item available again for assignment.

Some of these actions are not available at all times. What actions are available depend on selections made by the Checklist creator, if the item has or has not been completed, if the item has or has not been assigned, and the role of the user attempting action on the item. See Table 10.

Table 10 Checklist Assigning User Action Availability

Assign	**Allow Assignment Modification** is selected *and* Item has **not** been completed *and* Item has **not** been assigned
Reassign	**Allow Assignment Modification** is selected Item has been assigned Item has **not** been completed *and* Current user is member of the **Gimmal Contract ManagementAdmin** role *or* Current user is assigner, assignee, delegate, reject to
Unassign	**Allow Assignment Modification** is selected *and* Item has been assigned Item has not been completed *and* Current user is member of the **Gimmal Contract ManagementAdmin** role *or* Current user is assigner, assignee, reject to
Reset	**Allow Reset** is selected *or* Current user is member of the **Gimmal Contract ManagementAdmin** role *and* Item has been completed Current user is assigner, assignee

Assigning and Reassigning a Checklist Item

Each Checklist item must have a user or role assigned to it before an action can be taken. An already assigned item can be reassigned to another user or role.

- **Assign** a Checklist item to a user or role for action.
- **Reassign** a Checklist item, which unassigns the currently assigned user or role and assigns a new user or role to a Checklist item.

An email notification is sent to the user for each Checklist item assigned or reassigned.

More detail: Allowing late Checklist Assignments is the standard configuration. Late Assignments means that due dates for Checklist assignments are **not** required to be a future date.

Assign or Reassign a Checklist Item

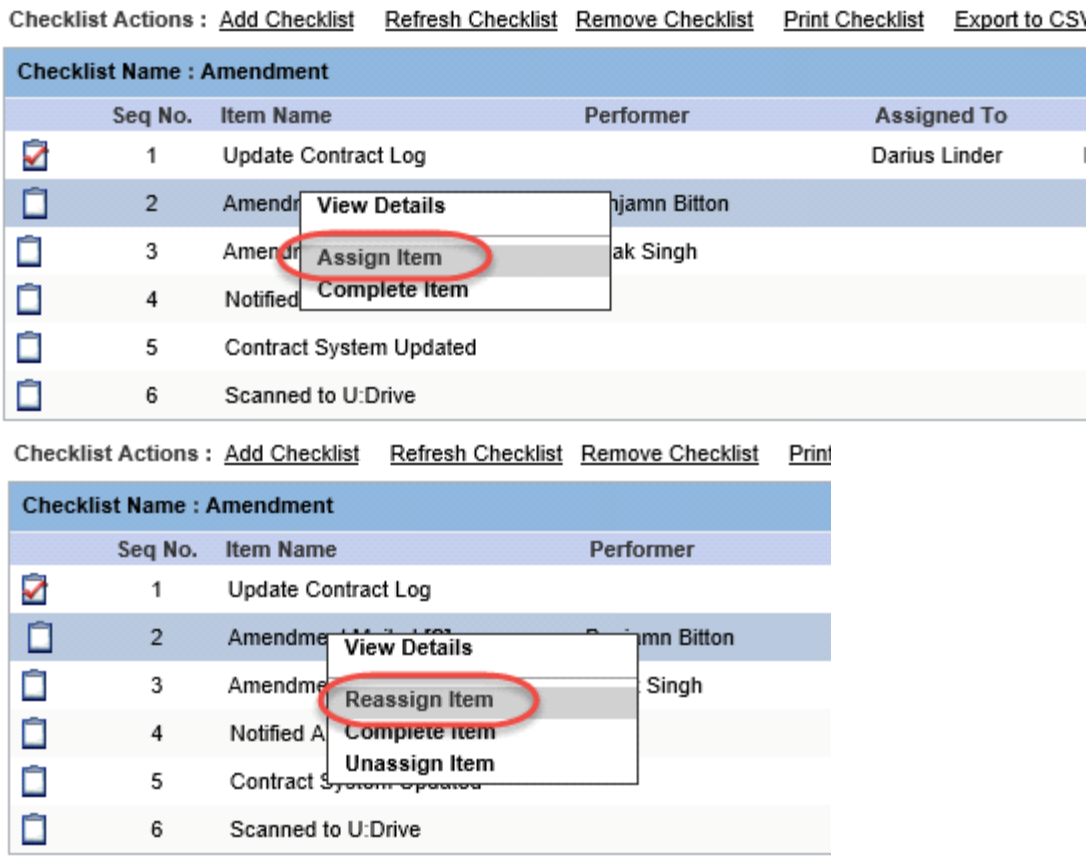
Before beginning

- A document must already have a Checklist attached to it. See "Select and Attach a Checklist to a Document" on page 167.
- Assigning and reassigning Checklist items are only available when certain conditions are met. See Table 10 on page 171.

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

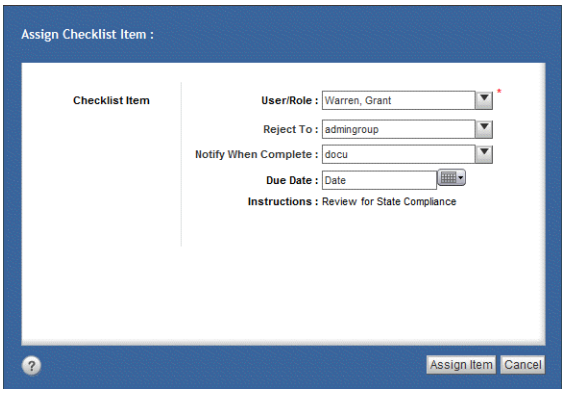
2 Click the **Checklist** button. The Checklist window displays (Figure 9-7).

Figure 9-7 Checklist Assign/Reassign



3 Right-click the Item Name; then select **Assign Item**. If the item is already assigned, right-click; then select **Reassign Item**. The Assign Checklist Item window displays (Figure 9-8).

Figure 9-8 Assign Checklist Item



4 In **User/Role**, from the drop-down list, select the user or role to assign to the item. The user or role may already be assigned. In some Checklists, this user or role **cannot** be modified.

5 *If needed:* In **Reject to**, from the drop-down list, select the user or role to receive a Checklist Item Rejected email notification when the Checklist item is rejected by the assigned/reassigned user or role. The Reject to user or role may already be assigned.

6 *If needed:* In **Notify When Complete**, from the drop-down list, select the user or role to receive a Checklist Item Complete email notification when this item is completed. The Notify When Complete user or role may already be assigned.

7 In **Due Date**, select the last date for the assigned user or role to take action on this item.

8 Click **Assign From**. The Checklist window redisplays, with the **Date Assigned**, **Due Date** and **Assigned To** columns listing the assigned/reassigned information (Figure 9-9).

Figure 9-9 Checklist Action Item Assigned/Reassigned

Checklist Actions : Add Checklist Refresh Checklist Remove Checklist Print Checklist Export to CSV

Checklist Name : Amendment

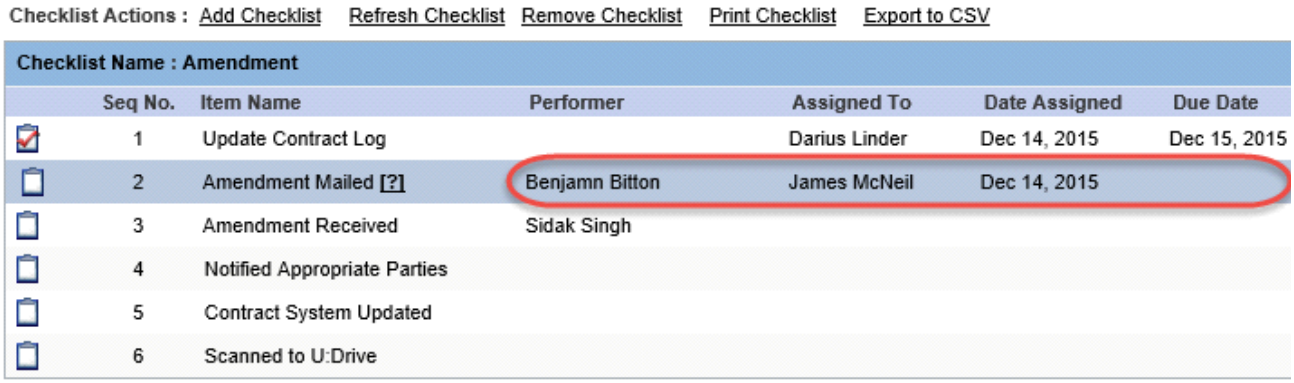
Seq No.	Item Name	Performer	Assigned To	Date Assigned	Due Date
1	Update Contract Log		Darius Linder	Dec 14, 2015	Dec 15, 2015
2	Amendment Mailed [?]	Benjamn Bitton	James McNeil	Dec 14, 2015	
3	Amendment Received	Sidak Singh			
4	Notified Appropriate Parties				
5	Contract System Updated				
6	Scanned to U:Drive				

Additionally, Checklist items could include a Signoff, which requires entering the user's password to mark an item as completed. See "Complete/Signoff a Checklist Item" on page 180.

After assign/reassign of a checklist, Gimmal Contract Management performs the following actions:

- The Checklist Item Assigned or Checklist Item Reassigned email is sent to all users in the **assigned to** or **reassigned** role (or each user's current delegate) and lists the Checklist's item assigned/reassigned date, task due date, task description and Jacket properties (Figure 9-10).
  - If the *assigned by* user for the Checklist task is a member of the role assigned to the Checklist task, the *assigned by* user will also receive the email.
- A Checklist Item Assigned/Reassigned event is recorded in the document's Audit Trail. See Appendix 5, "Managing the Document Audit Trail".

Figure 9-10 Checklist Item Assigned/Reassigned Email Notifications



9 Repeat this procedure for each Checklist item to be assigned/reassigned, starting with Step 3 on page 172.

Unassigning a Checklist Item

Assigned Checklist items could be unassigned **before** the currently assigned user or role has taken action on the item *if* the business administrator configured the Checklist to allow modifying assigned users and roles.

Unassign a Checklist Item

Unassigning Checklist items are only available when certain conditions are met.
See Table 10 on page 171.

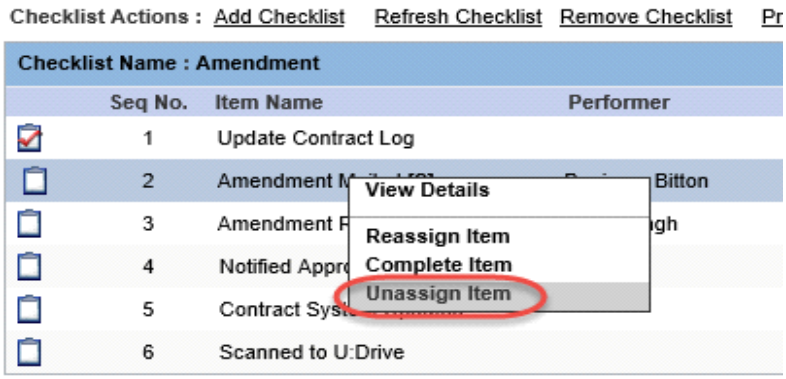
Before beginning

- A document must already have a Checklist attached to it. See "Select and Attach a Checklist to a Document" on page 167.
- Unassigning Checklist items are only available when certain conditions are met. See Table 10 on page 171.

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Checklist** button. The Checklist window displays (Figure 9-11).

Figure 9-11 Unassign Item



3 Right-click the Item Name; then select **Unassign Item**. The assigned user or role is unassigned (removed from the item).

A *If needed,* reassign the item. See "Assign or Reassign a Checklist Item" on page 172.

Resetting a Completed Checklist Item

Only a document's **completed** Checklist items can be reset (reopened) by the assigner. **Reset** clears the user or role assigned to the Checklist item and clears all actions taken on the item.

After resetting the item, it can be reassigned or remain unassigned.

More detail: Checklist item privileges restrict who can reset an item; restrictions are based on the 'assigned by' user, the 'assigned to' user, and their delegates (if any). See Table 10 on page 171.

Reset a Completed Checklist Item

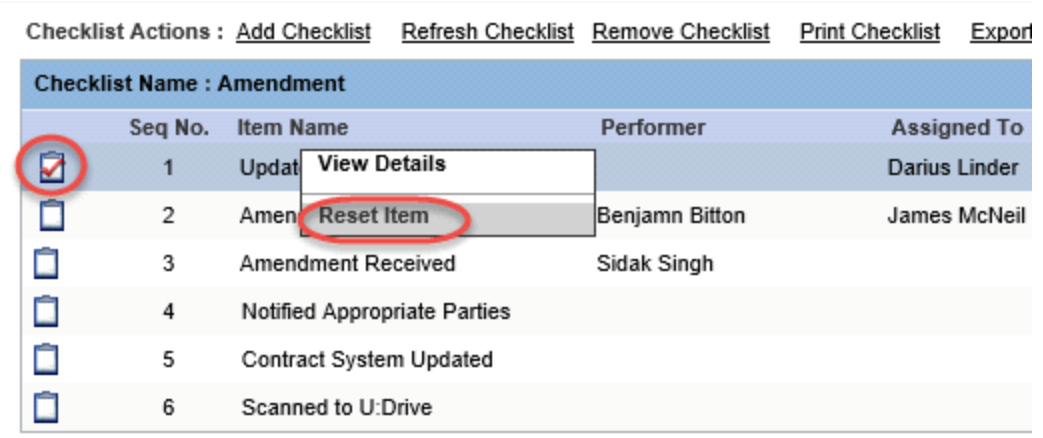
Before beginning

- A document must already have a Checklist attached to it. See "Select and Attach a Checklist to a Document" on page 167.
- Resetting Checklist items are only available when certain conditions are met. See Table 10 on page 171.

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Checklist** button. The Checklist window displays (Figure 9-12).

Figure 9-12 Reset Checklist Items from Checklist Window



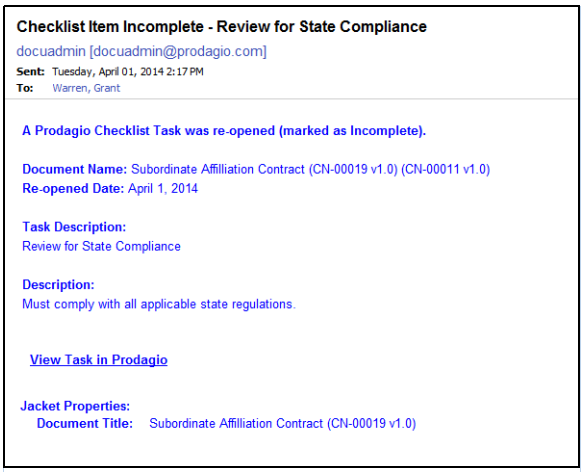
3 Click the Item Completion button of the item to deselect it.
OR
Right-click; then select **Reset Item**.

The item is now reset and is now unassigned.

After resetting, Gimmal Contract Management performs the following actions:

- A Checklist Item Incomplete email notification is sent to the *assigned by* user (or the *assigned by* user's current delegate) listing the Checklist's item resetting and including the reset date, task due date, task description and Jacket properties (Figure 9-13).
- The **Date Completed** and **Completed by** information is removed from the item in the Checklist window
- The Checklist Item Incomplete task is added to the 'assigned to' user's My Tasks view (or the 'assigned to' user's current delegate)
- A Reset Checklist Item event is recorded in the document's Audit Trail. See Chapter 5"Managing the Document Audit Trail".

Figure 9-13 Checklist Item Reset Email Notification



Delegating Future Checklist Items

Gimmal Contract Management allows each user to define their periods of unavailability. During each unavailable period, all *new* tasks assigned to you (including your Checklist items) will be directed to the user which you identified as your delegate. Because delegating affects **all** workflow tasks assigned to you, no right-click **Delegate Checklist Item** selection exists.

More detail: All *current* Checklist items on your My Tasks view will remain and will **not** be directed to your delegate.
After your unavailable period, all currently incomplete Checklist items sent to your delegate will **not** be returned to you.

Delegate Future Checklist Items to Others

See "Setting Your Workflow Availability" on page 203.

Managing Checklist Item Actions

The users or roles assigned to the Checklist item performs the task indicated by that item. These right-click tasks include:

- **View Details** of an existing Checklist item. No action is taken.
- **Complete** a Checklist item already assigned to the user or role
- **Reject** a Checklist item already assigned to the user or role

For the selected item, only the tasks currently available on the context menu display. Email notifications are automatically sent to all users and roles assigned to tasks.

- Some of these actions are not available at all times. What actions are available depend if the item has or has not been assigned or completed or rejected and the role of the user attempting action on the item. See Table 11

Table 11 Checklist Task Action Availability

Complete	Item has **not** been completed *and* Current user is member of the **Gimmal Contract ManagementAdmin** role If unassigned, any user may complete If assigned **and** current user is assignee
Reject	Item has **not** been completed Item has **not** been rejected *and* Current user is member of the **Gimmal Contract ManagementAdmin** role *or* Current user is assigner, assignee (*or* in assigner role), delegate
View Details	Always available

Viewing Checklist Item Details

All the individual property fields of a Checklist item can be viewed, in read-only format.

See Table 11.

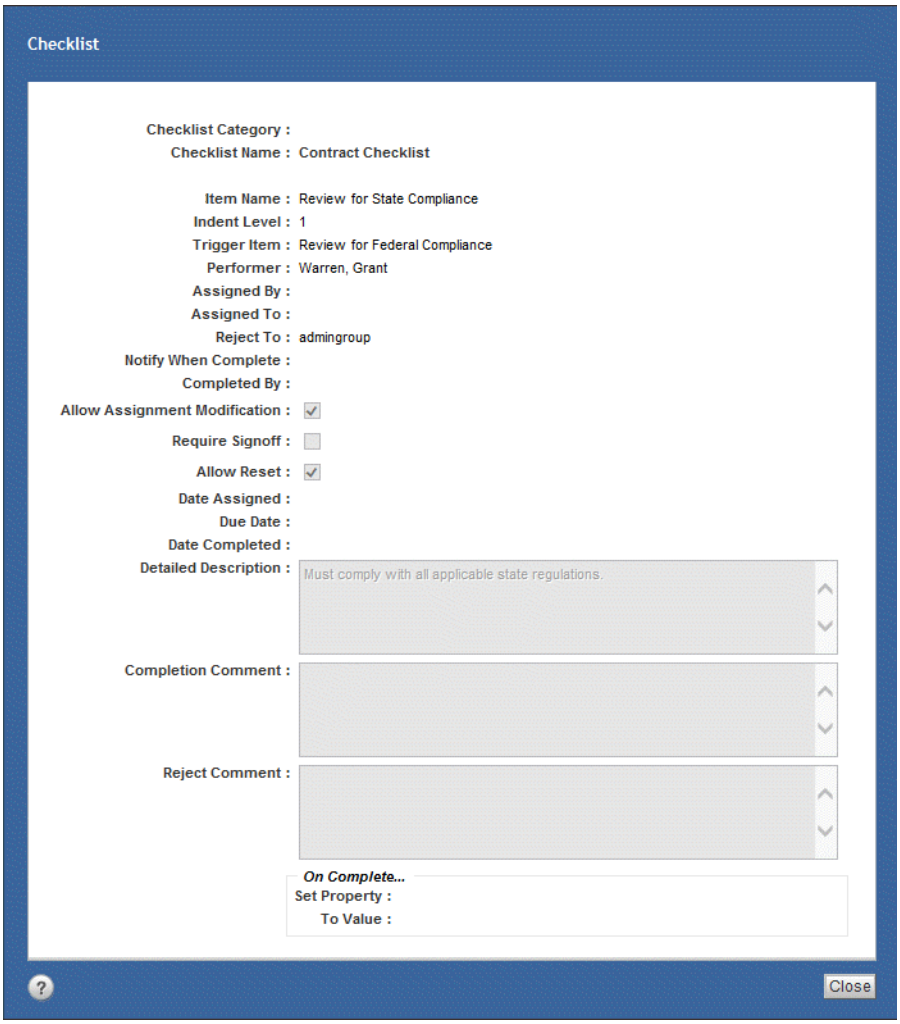
View Details of a Checklist Item

1 Double-click the document name
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Checklist** button. The Checklist window displays.

3 Right-click; then select **View Details**. The uneditable details of the selected Checklist item display (Figure 9-14).

Figure 9-14 View Checklist Details Window



4 Click **Close**. The Checklist Item window closes.

Completing a Checklist Item

A document's Checklist item may be completed, which indicates the task has been done by the assigned user. The Checklist item columns include the:

- **Checklist Name**: The name of the Checklist attached to the document
- **Seq No.**: The item number, indicating its position in the sequence of all current Checklist items
- **Item Name**: The item name, given to the item when the Checklist was created
- **Performer**: The user creating the item when the Checklist was created
- **Assigned To**: The name of the user or role assigned to the item
- **Date Assigned**: The date the item was assigned to a user or role
- **Due Date**: The date the item is due to be completed by the assigned user or role
- **Date Completed**: The date the user or role completed the item
- **Completed By**: The name of the user or role completing the item
- **Completion Comment**: The comments entered by the completing user

More detail: A Checklist item assigned to a user or role may also be completed or rejected from that user's My Tasks view **and** from the notification email. See "Performing Reminders, Obligations and Checklist Tasks" on page 196

Complete/Signoff a Checklist Item

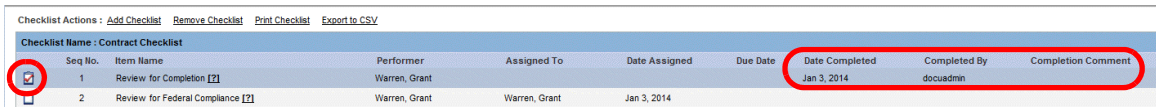
- A document must already have a Checklist attached to it. See "Select and Attach a Checklist to a Document" on page 167.
- Completing/signing off a Checklist item is only available when certain conditions are met. See Table 11 on page 178.

1 Double-click the document name.
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

2 Click the **Checklist** button. The Checklist window displays.

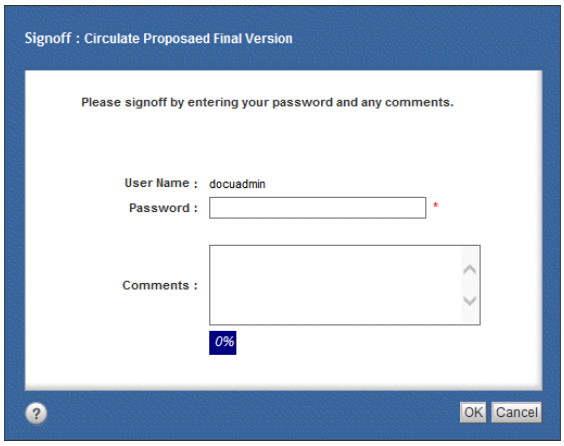
3 Select the **Item Completion** check box (Figure 9-15).
OR
Right-click; then select **Complete Item**. The **Date Completed** and **Completed By** columns display completion information.

Figure 9-15 Complete Checklist Item



A If the item includes the Signoff Required icon, right-click and select **Complete Item** to display the Signoff window (Figure 9-16).

Figure 9-16 Signoff Window



B In **Password**, enter your log in password.

C In **Comments**, enter Signoff comments. The dynamic progress bar displays the percentage of total available characters entered.

D Click **OK**. The Checklist window redisplays, and the item displays the Signoff Completed icon.

4 Click **Close**. The Checklist window closes.

After completion/signoff, Gimmal Contract Management performs the following actions:

- A Checklist Item Completed email notification is sent, listing the Checklist's item completion and including completed date, completed comments, task due date, task description and Jacket properties (Figure 9-17).
  - If a Checklist task is completed by one user, all users in the assigned role (or each user's current delegate) receive the Checklist Item Completed email.
  - If a Checklist task is completed by one user, the task will be automatically removed from the other users in the role who did **not** complete the task.
  - If the Checklist task *assigned by* user is a member of the role assigned the Checklist task, that 'assigned by' user will also receive the email.
  - If the Checklist task *assigned by* user is a member of the role assigned the Checklist task, **and** that *assigned by* user was selected in the **Notify When Complete** menu (see step 6 on page 173) when assigning the Checklist task, that user will receive two Checklist Item Completed emails and two associated Checklist Item Completed tasks: one email and task for being a role member and one email and task for selection in the **Notify When Complete** menu.
- The completed Checklist task is removed from the *assigned to* user's My Tasks view (if the *assigned to* user completed the task).
- If the completed Checklist task is a *trigger* for the next item, an email notification is sent to the users assigned to the next item.
- A Checklist Item Completed event is recorded in the document's Audit Trail. See "Managing the Document Audit Trail" on page 99.

Figure 9-17 Checklist Item Complete Email Notification

Rejecting a Checklist Item

A document's Checklist item may be rejected from the document's Checklist window. Rejection of a Checklist item assigns the item back to the original assigning user (or to the **Reject to** user, *if* assigned when the Checklist was created by the business administrator).

More detail: Certain Checklist tasks can also be rejected from the user's My Tasks view. See "Reject a Checklist Task from the My Tasks View" on page 198.

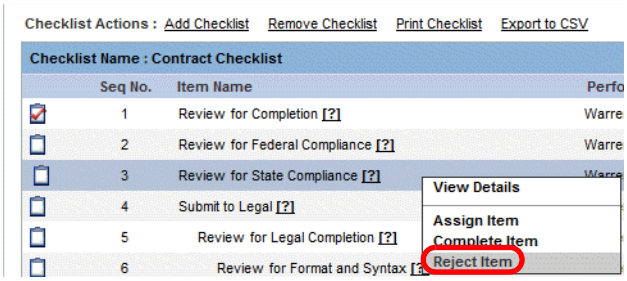
Reject a Checklist Item

- A document must already have a Checklist attached to it. See "Select and Attach a Checklist to a Document" on page 167.
- Rejecting a Checklist item is only available when certain conditions are met. See Table 11 on page 178.

1 Double-click the document name
OR
Right-click the document name; then select **Open Dashboard**. The document dashboard displays.

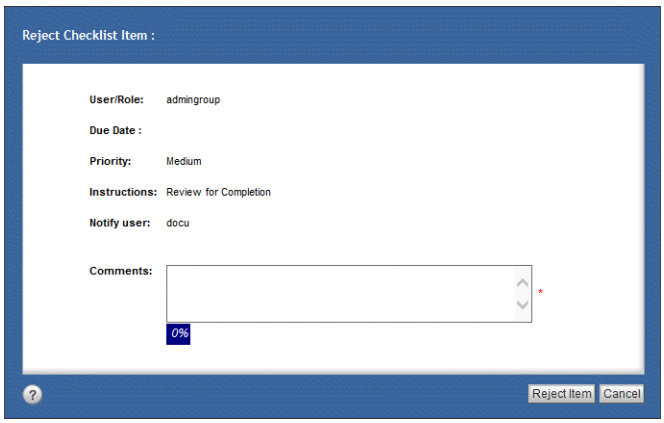
2 Click the **Checklist** button. The Checklist window displays (Figure 9-18).

Figure 9-18 Reject Checklist Item



3 Right-click; then select **Reject Item** of the item to be rejected. The Reject Checklist Item window displays (Figure 9-19).

Figure 9-19 Reject Checklist Item Window



4 In **Comments**, enter any comment.

5 Click **Reject Item**. The item is rejected to the assigning user and requires user action (or to the **Reject to** user, *if* assigned when the Checklist was created by the business administrator).

After rejection, Gimmal Contract Management performs the following actions:

- The Checklist window redisplays, with the Item Rejected icon. Hover over the question mark to display the rejection comments.
- A Checklist Item Rejected email notification is sent to certain others, listing the Checklist's item rejection and including reject date, reject comments, task due date, task description and jacket properties (Figure 9-20).
  - If a Checklist task is rejected, all users in the assigned role (or each user's current delegate) receive the Checklist Item Rejected email.
  - If a Checklist task is rejected by one user, the task will be automatically removed from the other users in the role who did **not** reject the task.
  - If the Checklist task *assigned by* user is a member of the role assigned the Checklist task, that 'assigned by' user will also receive the email.
  - If the Checklist task *assigned by* user is a member of the role assigned the Checklist task, **and** that 'assigned by' user was selected in the **Notify When Complete** menu (see step 6 on page 173) when assigning the Checklist task, that user will receive two Checklist Item Rejected emails and two associated Checklist Item Rejected tasks: one email and task for being a role member and one email and task for being selected in the **Notify When Complete** drop-down list.
- The Checklist task is sent back to the *assigned by* user.
- The rejected Checklist task is removed from the *assigned to* user's My Tasks view (if the *assigned to* user rejected the task)
- A Checklist Item Rejected event is recorded in the document's Audit Trail. See "Managing the Document Audit Trail" on page 99.

Figure 9-20 Checklist Item Rejection Email Notification

Chapter 10

Managing My Tasks

This chapter includes the following topics:

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Changing the Displayed My Tasks View Columns 187
Change and Save Columns 187
Comparing Task Features 188
Managing Notifications in the My Tasks View 190
Manage Notifications in My Tasks View 190
Viewing and Deleting Tasks in the My Tasks View 190
View Task Details in the My Tasks View 190
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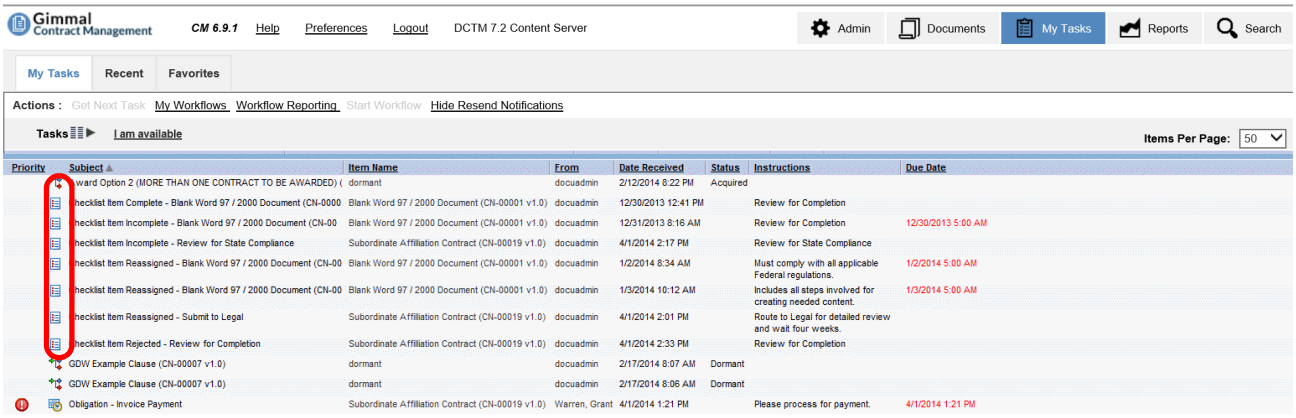
Complete a Reminder/Obligation/Checklist Task from the My Tasks/Email Notifications 196
Reject a Checklist Task from the My Tasks View 198
Change an Open Reminder or Obligation Date 199
Emailing Approval of Workflow Tasks from Mobile Devices 200
Approve or Reject a Workflow Task from a Mobile Device 200
Managing Subscription Notification Tasks and Emails 200
Manage Subscription Notification Tasks and Emails 201
Setting Your Workflow Availability 203
Set Your Workflow Availability 203

Managing Tasks with the My Tasks View

As a Gimmal Contract Management user, you are routinely asked to perform document-related tasks generated by yourself and by other users. These tasks were created as part of active *Reminders*, *Obligations, Workflows, Checklists* and document subscription *Notifications*.

All tasks involving you are sent to your **My Tasks** tab, which is accessed from the **My Tasks** view. Each user's My Tasks listing identifies the task **Priority**, **Subject**, **Item Name**, who sent the task (**From**), the **Date Received**, the task **Status** and any **Instructions**. Overdue tasks are in red under **Due Date** (Figure 10).

Figure 10 List of Tasks in My Tasks View



The My Tasks list is task-centric, not document-centric. It:

- Displays **all tasks** assigned to you, often including involved documents, which could have come from:
  - **Reminders**: Not requiring a response and involving only you. See "Managing Reminders" on page 144.
  - **Obligations**: Requiring a response and involving only you. See "Managing Obligations" on page 153.
  - Workflows: Requiring a response and usually involving yourself and others in a workflow. See Chapter 7, "Routing Documents".
  - **Checklists**: Requiring a response and usually involving yourself and others. See Chapter 9, "Managing Checklists".
  - **Notifications**: Not requiring a response and alerts you who has read or changed a document you have subscribed to. See "Subscribing to a Document" on page 67.
- Allows you to set your availability status so that the workflow process can bypass you when you are unavailable.

The actions available for a task change based on the type of task. For example, *Reminder* and *Notifications* tasks are simple reminders and Notifications. They do not generate the same windows and options as a required task routed to you by an *Obligation*, *Workflow* or a *Checklist*.

Each task also sends an email from the task creator to the task assignee.

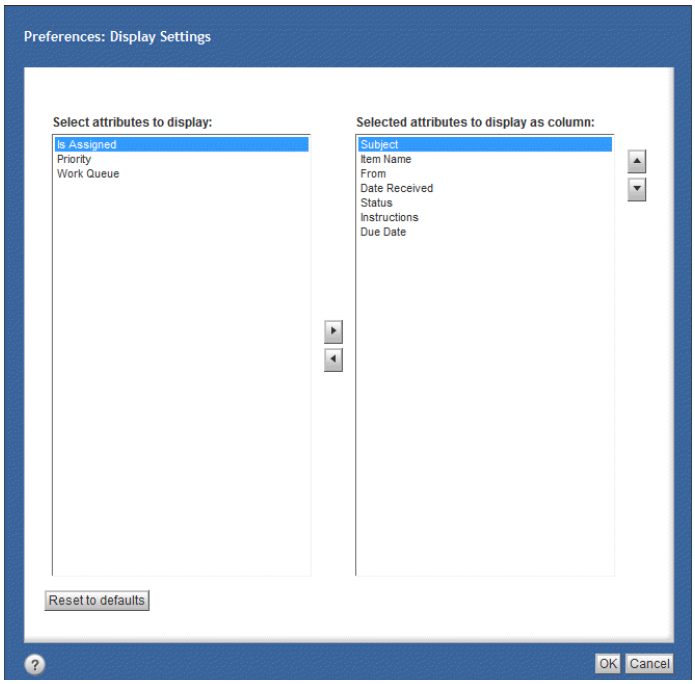
Changing the Displayed My Tasks View Columns

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

Change and Save Columns

1 On the My Tasks view, click the Column Preferences button. The Preferences Display Settings window displays (Figure 10-1).

Figure 10-1 My Tasks View 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** button to move the selected attribute to the **Select attributes to display** pane.

4 Select an attribute; then click the **Move Up List** button or **Move Down List** button to sort the attribute in the desired column order.

5 To save changes, click **OK**.

A *If needed:* to undo all changes, click **Reset to Defaults**.

Comparing Task Features

Reminders, Obligations, Workflows, Checklists, and Notification tasks each serve different functional purposes, but most share some subfunctions. All tasks and their details are compared in Table 12.

Table 12 Task Features Compared

Features	Major differences between each type of Task				
Major purpose	Action not required informal **Reminder**	Action required formal **Obligation**	Action required in sequence; controlled by **Routing**	Action required in any sequence; controlled by **Checklist**	Action not required informal **Notification** of a subscription
Document dashboard functions	**Add Reminder, View**, **Edit**, **Close**, **Export to CSV** *Restricted access:* **Delete**, **Reopen**	**Add Financial Obligation, Add Non-Financial Obligation, Import Obligations, View**, **Edit**, **Close**, **Export to CSV**, **Series** *Restricted access:* **Delete**	**Details**, **View Instance**, **Export to CSV**, **Change Supervisor**, **Terminate Workflow Save Report, Halt Workflow button, Terminate Workflow button**	**Add Checklist, Remove Checklist, Print Checklist, Export to CSV. Assign Item**, **Complete Item**, **Reset Item**	not applicable
My Task View functions	**Delete**, **View View**, **Add Note Complete**, **Close**	**View**, **Delete**, **Close**, **Export to CSV**, **View**, **Add Note**, **Complete**, **Close**	**History**, **View**, **Add Note, Finish, Delete, Close** *May include* **Repeat**, **Delegate, Forward**, **Reject**	**Delete**, **View**, **View**, **Add Note**, **Complete**, **Close** *Restricted access:* **Reopen**, **Reject Item**	**Delete**, **View**, **Close**
Task types	Automated Reminders (set up by business administrator)	Financial Non-Financial	Ad Hoc (flexible) Predefined (rigid)	can be subdivided into Types and Categories	None
Progress displayed	X	X	Y	X	X
Series / Scorecard	X	Y	X	X	X
Password required	X	Y	X	X	X
Notification Resend Interval	Y	Y	X	Y	X
Notification Resend Limit	Y	Y	X	Y	X
	Task Creation Information Details				
Priority: High or Medium or Low	No priority can be set	High priority set automatically	High, Medium or Low: assigner selects priority	High, Medium or Low: assigner selects priority	No priority can be set
Due Date required	X	Y	X	X	X

Table 12 Task Features Compared (continued)

Notification date	Y	Y	N	N	N
Recurring frequency	Y	Y	N	N	N
Action predefined	Y	N	N	Y in **Instructions**	N
Instructions	Y	Y	Y Ad Hoc only	✓ included with Checklist	N
Comments	N only during **Close**	Y	N	N	N
Signoff required	N	Y to Close	N	optional	N
Status categories	Scheduled Open Completed	Scheduled Open Completed Deleted	Dormant Acquired	None	None
Add to Calendar	Y	Y	N	N	N
Add to Calendar email sent	Y	Y	N	N	N
Recipient required	Y	N	Y	Y	Y
Multiple recipients	Y	Y	Y	Y group	N
Send to users sequentially	N	N	Y optional	does not apply	N
Allow reject to me	N	N	Y optional Ad Hoc	Y or N	N
Allow reject to previous performer	N	N	Y optional Ad Hoc	N	N
Return to me	N	N	Y optional Ad Hoc	N	N
Notify me when complete	N	N	N	Y	N
	Content of Recipient's Email Task Notification				
Email sent to each recipient or group	Y	Y	Y	Y only one recipient or group	N
Priority indicated	Y	Y	Y	N	N
Action named in Subject	Y	Y	Y	Y	N
Instructions	Y	Y	Y in Item Name	Y in Email title	N
Comments	N	Y	N	N	N
Task Sent Date	Y	Y	Y	Y	N
Task Due Date	Y	Y	N	Task Assigned Date	Y

Table 12 Task Features Compared (continued)

Task Description	Y	Y	Y	Y	Y
View Task in Gimmal Contract Management Link	Y	Y	Y	Y	Y
Jacket Properties	N	N	N	Y	N

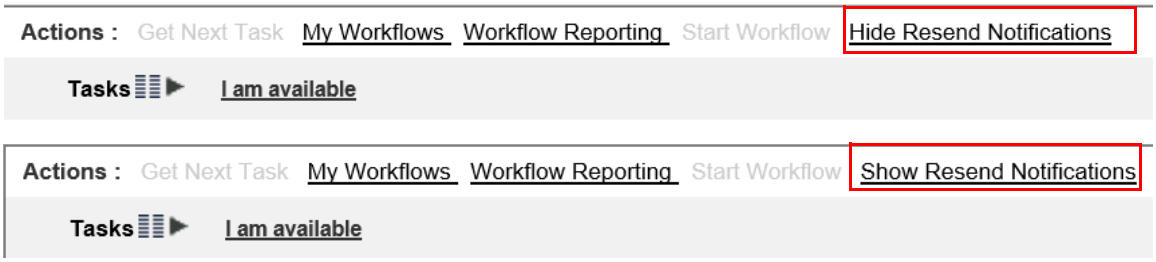
Managing Notifications in the My Tasks View

When a notification is sent to you regarding a task, it appears in the My Tasks view in addition to the task itself. If multiple notifications are sent, your view can become cluttered. You can select whether the Resend notifications appear in your My Tasks view, or only the original task. ✓û ü

Manage Notifications in My Tasks View

1 Click **Hide Resend Notifications** to hide the resent notifications, or click **Show Resend Notifications** to show them.

Figure 10-2 Show/Hide Resend Notifications



Viewing and Deleting Tasks in the My Tasks View

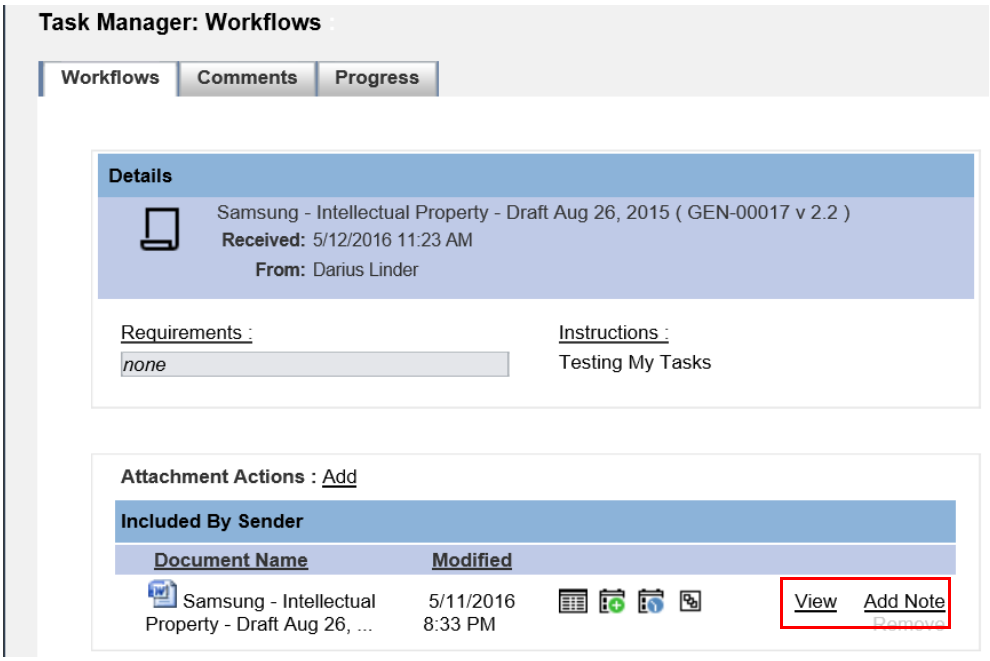
The My Tasks lists tasks involving you and were generated by Reminders, Notifications, Obligations, Workflows and Checklists. Workflow tasks **cannot** be deleted. See Table 12.

Certain tasks can also be completed. See "Performing Reminders, Obligations and Checklist Tasks" on page 196.

View Task Details in the My Tasks View

1 In the **My Tasks** view, right-click the task to view; then select **View**. The Task Manager Workflows window displays (Figure 10-3).

Figure 10-3 Task Manager – Workflows



A *If needed:* Click **Add Note** to add a Note. See "Managing Document Notes" on page 94.

B *If needed:* Click **View** to view the document included by the sender.

C *If needed:* Right-click the document name to display all available selections in the document Actions.

2 Click **Close** to close the window and leave the task in your My Tasks list.

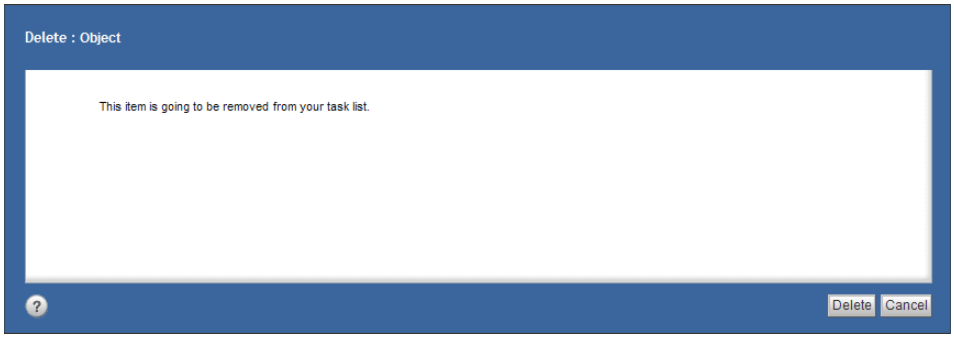
Delete a Task from the My Tasks View

More detail: Workflow tasks **cannot** be deleted.

1 In the My Tasks view:

- Right-click the task to delete; then select **Delete**. The Delete window displays (Figure 10-4).
  OR
- Double-click the task
  OR
- Right-click the task; then select **View**. The Task Manager – Workflows window displays (Figure 10-3). Click **Delete**. The Delete window displays. See Figure 10-4.

Figure 10-4 Delete Task



2 Click **Delete**. Your My Tasks list displays, with the selected task deleted.

Workflow Tasks

Workflow tasks are created by both Ad Hoc and Predefined workflows. See Chapter 7, "Routing Documents".

Workflow Statuses

Workflow tasks routed to you for an action have two statuses:

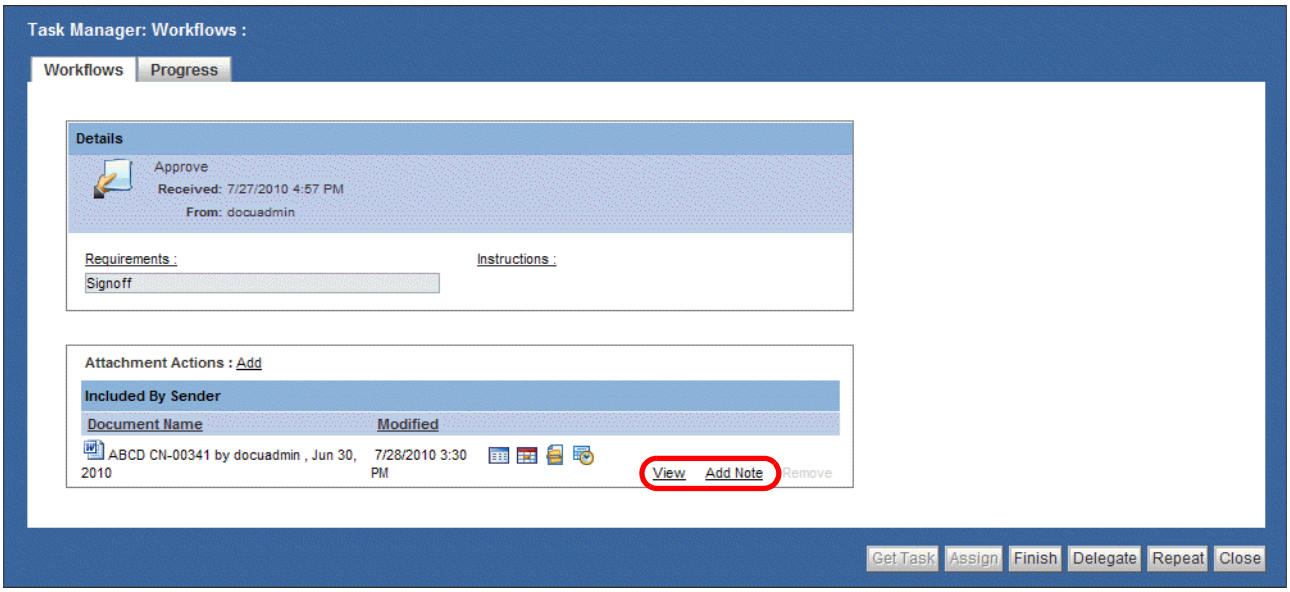
- *Dormant* – indicates you have not yet opened (viewed) the task
- *Acquired*– indicates you have opened (viewed), but not yet completed the task

Process a Workflow Task

1 Click the My Tasks view button. Your My Tasks list displays (Figure 10 on page 186).

2 Double-click the Workflow task
OR
Right-click the task; then select **View**. The Task Manager Workflows window displays, with Attachment details (Figure 11).

Figure 11 Task Manager Workflows



Later, when returning to the My Tasks list, the status of this task is *Acquired*. See "Workflow Statuses" on page 192.

3 *If needed:* in the **Included by Sender** listing of the Attachments area, click the available links and the displayed buttons (Figure 11).

A Click **View** to view the Attachment document. See "View Related Documents" on page 115.

B Click **Add Note** to add a Note to the Attachment document. See "Managing Document Notes" on page 94.

4 The following task actions may or may not be applicable to this Workflow task:

A To close the task and keep it in your My Tasks list, click **Close**.

B To finish (complete) the task and remove it from your My Tasks list, click **Finish**. See "Viewing Workflow Task History" on page 195.

C To delete the task and remove it from your My Tasks list, click Delete. See "Viewing Workflow Task History" on page 195.

5 *If needed:* tasks sent to you from a Predefined workflow (not an Ad Hoc workflow) may have *repeat* and *delegate* and *forward* capability, depending on how the Predefined workflow's tasks were configured. See "Assigning Predefined Workflow Tasks to Users".

More detail: The ability to repeat or delegate a task is determined by the Business or system administrator who created the workflow. If **Forward**, **Repeat**, and/or **Delegate** are available, these actions will display in the Task Manager Workflows window.

A To force the task to start again, click **Repeat** and assign the task to a user.

B To delegate the task to a different user, click **Delegate** and assign the task to a different user. Delegation is available only if the task has been routed to multiple recipients.

C To reject the task, click **Reject**.

D To forward the task to the next recipient, click **Forward** and send the task to the next recipient in the Predefined workflow. Forwarding is available only if the task has a next recipient available.

6 *If needed:* click the **Progress** tab. View the **Up coming** and the **History** information.

7 Click **Close to** close the task. Depending on the actions taken, the task may or may not display again in your My Tasks list.

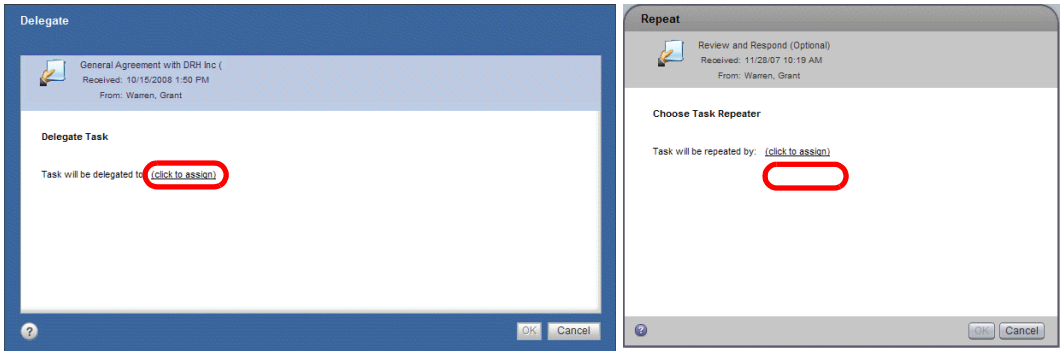
Assigning Predefined Workflow Tasks to Users

More detail: **Click to Assign** is only available if the system administrator established assigning ability when creating the Predefined workflow. See "Routing Documents with Predefined Routing" on page 138. **Click to Assign** is **not** available for any Ad Hoc workflow. See "Routing Documents" on page 132.

Assign Workflow Tasks to Users

1 In the My Tasks view, double-click the Workflow task.
OR
Right-click the task; then select View. Click either **Delegate** or **Repeat**. The Delegate or Repeat window displays. See Figure 10-1.

Figure 10-1 Delegate and Repeat Tasks

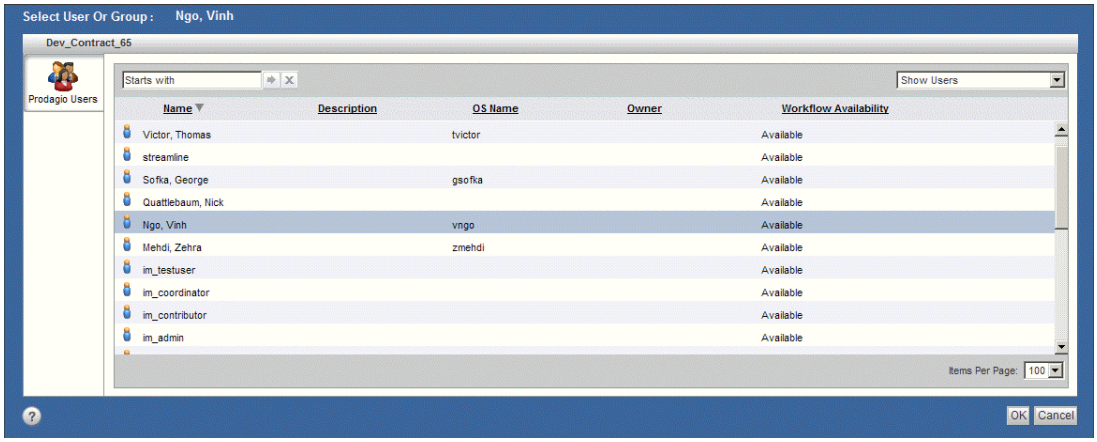


2 Click (**Click to assign**). The Select User or Group window displays. Find a user by using either of the following methods:

- Enter a letter(s) in the Starts with field and click the **Search by Name** button.
- In the Show Users, Groups and Roles field, select Show Users from the menu and scroll to find the user.

3 Click the selected user name (Figure 10-2).

Figure 10-2 Assigning a User to a Task



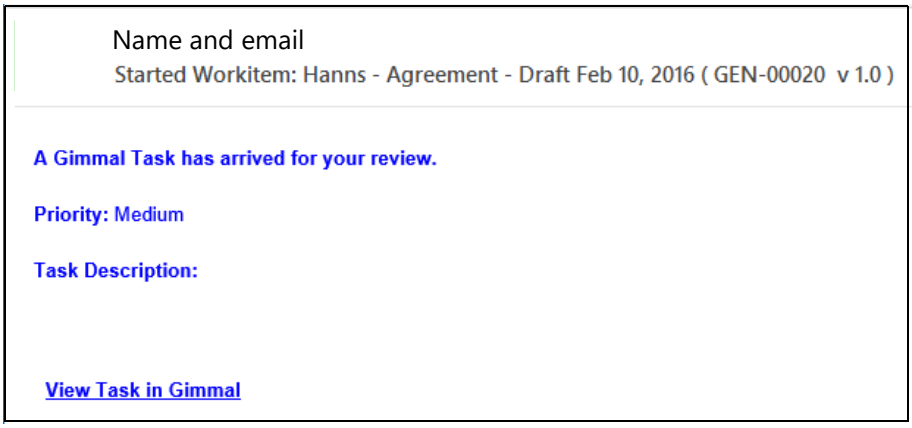
4 Click **OK**. The Delegate or Repeat window displays the assigned user.

5 Click **OK**. The My Tasks window displays, no longer listing the task selected.

Assigning the workflow item is now completed. Gimmal Contract Management performs the following actions:

- A Started Workflow email notification is sent to the assigned user listing the workflow's task and including a task description.
  If needed, click the **View Task in Gimmal Contract Management** link to directly go to the task in the My Tasks view of Gimmal Contract Management (Figure 10-3).

Figure 10-3 Started Workflow Email Notification



- The Workflow task is added to your My Tasks view
- A Start Ad Hoc Routing event is recorded in the document's Audit Trail. See "Managing the Document Audit Trail" on page 99.

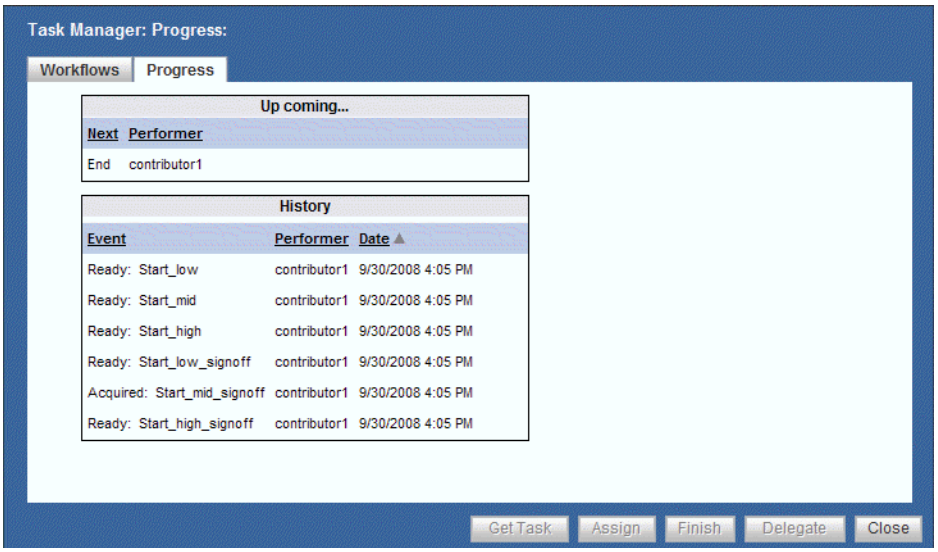
Viewing Workflow Task History

After a Workflow task has been acquired, its History displays the names of users who took action on a document and the names of any users still waiting for the document to be routed to them. This information can be viewed but not deleted and is part of the task's Audit Trail.

View the History of a Workflow Task

1 In the My Tasks view, right-click the task; then select **History**. The Task Manager – **Progress** tab displays (Figure 10-4).

Figure 10-4 History of a Workflow Task



2 View the **Up coming** and **History** information.

3 Click **Close**. The Task Manager closes.

Performing Reminders, Obligations and Checklist Tasks

Performing Reminder, Obligation and Checklist tasks includes viewing the task, taking an action to complete the task and finishing the task. Some Checklist tasks may also include a rejection action. If so configured, a user may also change certain dates in their Reminder and Obligation tasks in the Open status on their My Tasks view.

Begin performing a task action from the:

- My Tasks view
- Open email notification's **View Task in Gimmal Contract Management** link
- Open Reminder, Obligation and Checklist windows. See "Managing Document Reminders" on page 148, "Managing Document Obligations" on page 160 and "Managing Checklist Item Actions" on page 178.

Complete a Reminder/Obligation/Checklist Task from the My Tasks/Email Notifications

1 In the **My Tasks** view, double-click the task
OR
Right-click the task; then select **View**. Its Task Manager window displays (Figure 10-5).

or

2 From the open email notification, click **View Task in Gimmal Contract Management**.

A If **not** already logged in, the Gimmal Contract Management Log In window displays.

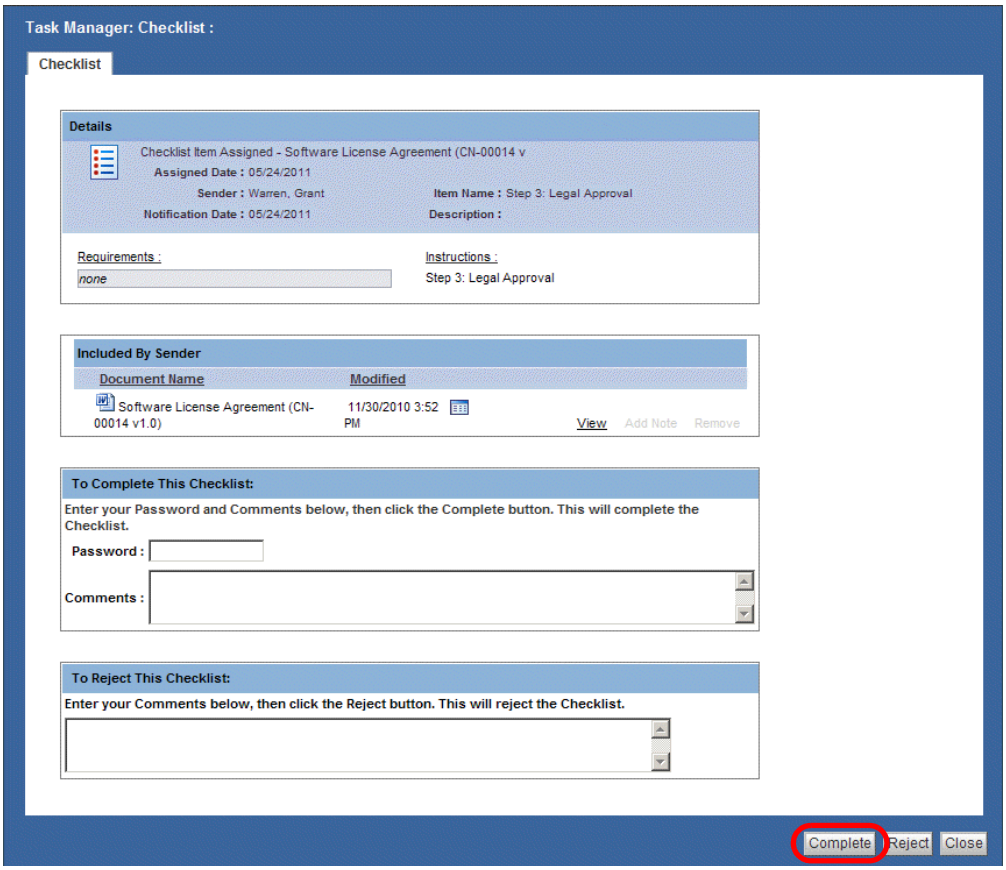
B Log in. The Task Manager window for the task displays (Figure 10-5).

or

A If already logged in, the My Tasks view displays.

B Click the F5 Refresh key. The Task Manager window for the task displays (Figure 10-5).

Figure 10-5 Completing a Task



3 *If needed:* click **View** to view the document included by the sender.

4 *If needed:* click **Add Note** to add a Note to the attached document. See "Managing Document Notes" on page 94.

5 In the **To Complete This Reminder, Obligation or Checklist** area, enter your **Password** (if displayed) and **Comments** to authenticate your signoff.

6 Click **Complete**. The Reminder, Obligation or Checklist task is completed and

- The completed task is removed from your My Tasks view.
- On the task window, the date completed is displayed.
- The task event is recorded in the document's Audit Trail. See "Managing the Document Audit Trail" on page 99.

Reject a Checklist Task from the My Tasks View

More detail: Certain Checklist tasks may also be rejected from the document's Checklist window. See "Rejecting a Checklist Item" on page 181.

More detail: Rejection is **disabled** if the assigned user is the same user as the assigning user.

1 In the **My Tasks** view, double-click the Checklist task
OR
Right-click the task; then select **View**. The Task Manager window for the task displays (Figure 10-6).

Figure 10-6 Rejecting a Checklist Task

A *If needed:* click **View** to view the document included by the sender and/or click **Add Note** to add a Note to the attached document. See "Managing Document Notes" on page 94.

2 In **To Reject This Checklist**, enter rejection comments.

3 Click **Reject**. The My Tasks view displays without the Checklist task listed.

Gimmal Contract Management performs the following actions:

- The Checklist task is sent back to the sender.
- The Checklist task is removed from your My Tasks view.
- A Reject Checklist Item event is recorded in the document's Audit Trail. See "Managing the Document Audit Trail" on page 99.

Change an Open Reminder or Obligation Date

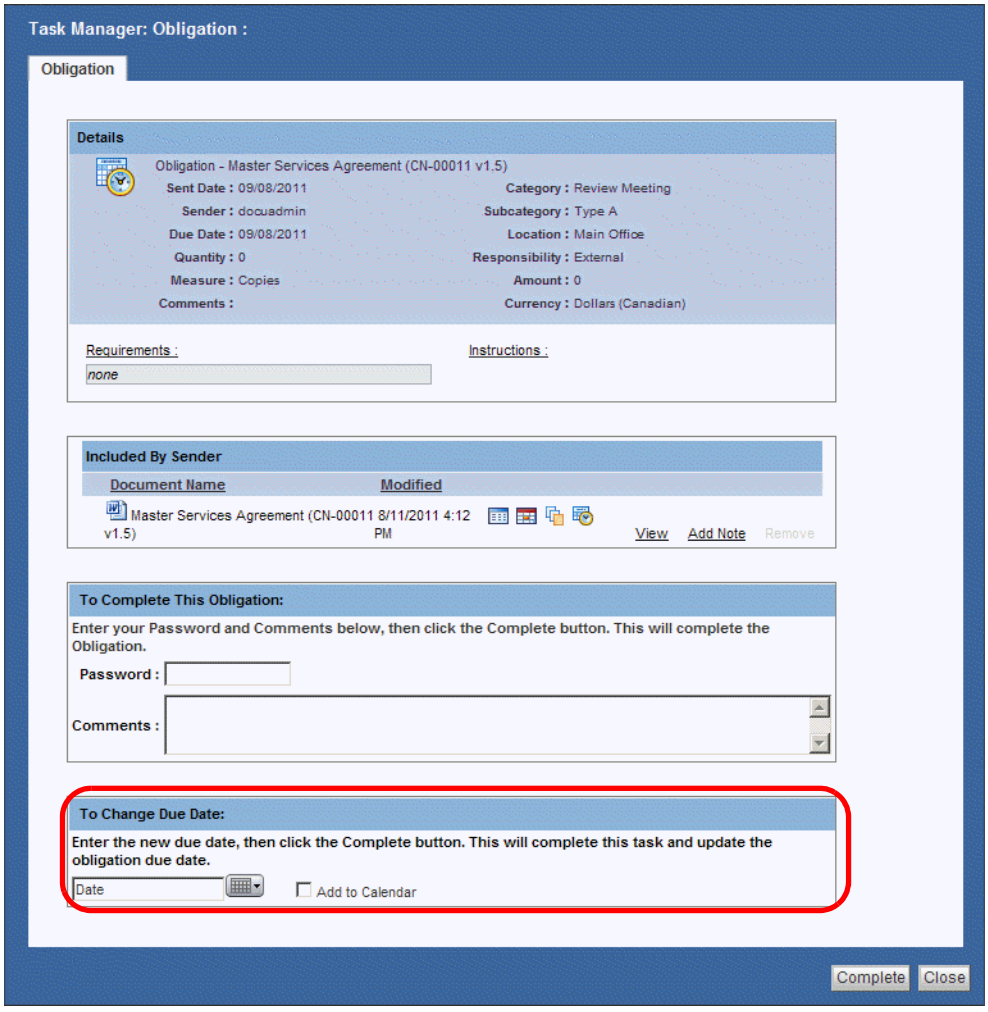
From their My Tasks view, users may change the Notification Date of Open status Reminders and the Due Date of Open status Obligations from the Reminder or Obligation Task Manager windows.

More detail: Enabling and disabling changing dates of open Reminders and Obligations is controlled by the business administrator. The default configuration is disabled. To enable changing Reminder and Obligation dates, see your business administrator.

More detail: Only dates of Reminders and Obligations in the Open status can be changed. Dates of Reminders and Obligations in the Scheduled status can only be changed by a business administrator or by the user who created the Reminder or Obligation.

1 In the **My Tasks** view, double-click the Reminder or Obligation task
OR
Right-click the task; then select **View**. Its Task Manager window displays (Figure 10-7).

Figure 10-7 Task Manager Obligation Due Date



2 In **To Change Due Date**, click the **Calendar** button to select a new Due Date (for Obligations) or to select a new Notification Date (for Reminders). Selecting a future date disables the **To Complete This Reminder/Obligation Password** and **Comments** fields on the Task Manager window.

A *If needed:* check Add to Calendar. If a Reminder or Obligation is created by selecting Add to Outlook Calendar, each user can choose to add this Reminder or Obligation task to their Outlook calendar.

3 Click **Complete**. The task is removed from your My Tasks view and will be listed again on your My Tasks view on the new future Reminder Notification Date, or in the case of Obligations, on the day the number of days *before* the Due Date indicated by the **Lead Time**.

Emailing Approval of Workflow Tasks from Mobile Devices

Approval emails include document Jacket properties, action links (Approve, Reject, Review, View Task in Gimmal Contract Management) and may include workflow Attachments.

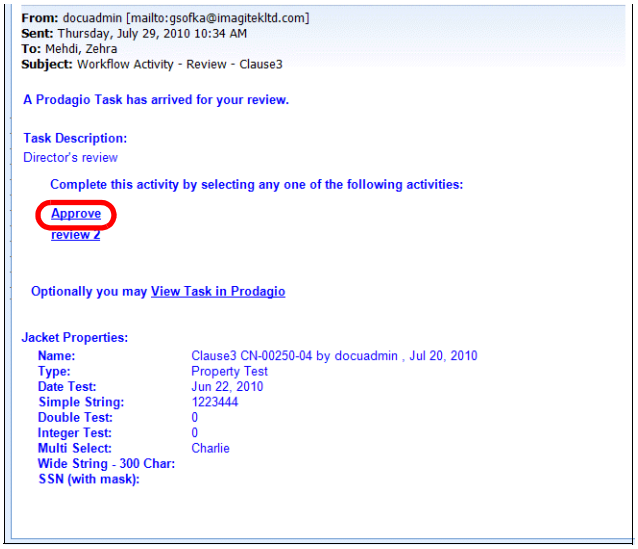
Approve or Reject a Workflow Task from a Mobile Device

Before beginning

To enable mobile device email approval or rejection, the Predefined workflow must include the task *Email Approval*. See your system administrator.

1 With the email opened, click a link in the email notification received on a mobile device to approve or reject a workflow task (Figure 10-8).

Figure 10-8 Email Workflow Approval on a Mobile Device



Managing Subscription Notification Tasks and Emails

All subscriptions generate a My Tasks task each time any user changes one of your subscribed documents. See "Subscribing to a Document" on page 67.

In the **My Tasks** view, subscription tasks display the **Notifications** button and the **Subject** Checked In: Document Name. These tasks can be viewed; then deleted.

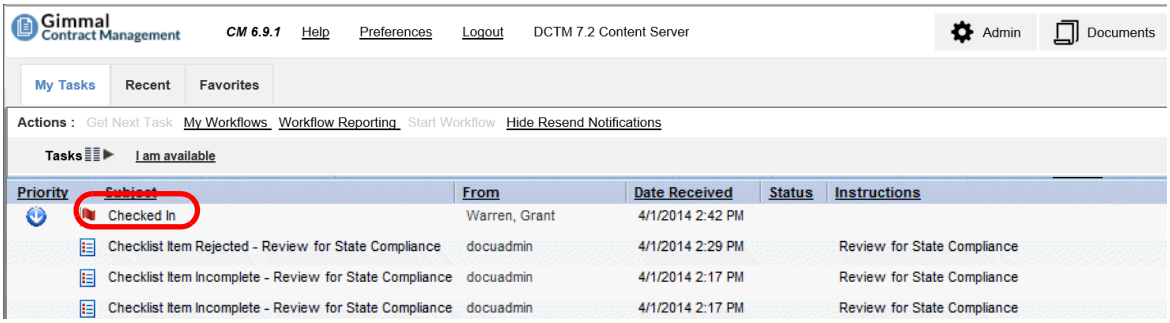
All subscription Notifications also generate and send an email to you each time any user changes one of your subscribed documents.

In your email system, emails with the subject line: *Checked In: (Document Name)* are Notification emails. Handle these email Notifications as you would any other email.

Manage Subscription Notification Tasks and Emails

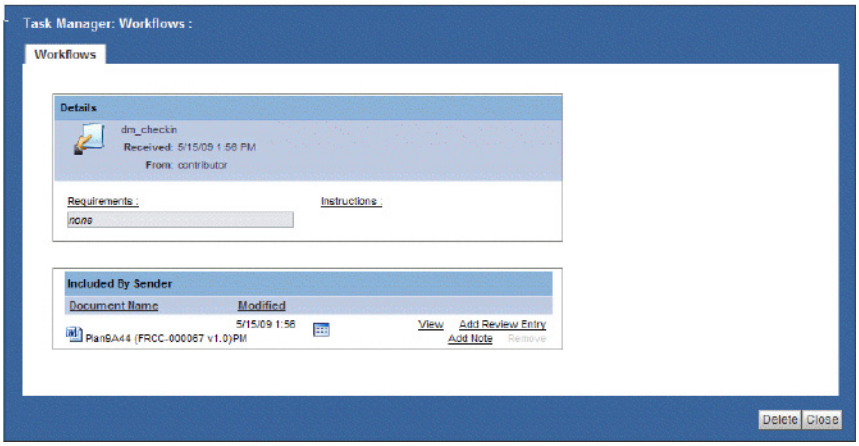
1 In the **My Tasks** view - **My Tasks** tab, find a task with the **Notifications** button and the **Subject** *Checked In* (Figure 10-9).

Figure 10-9 Subscription Notification



2 Right-click; then select **View** to display the Task Manager Workflows window for the checked in document (Figure 10-10).

Figure 10-10Task Manager Workflows for Subscribed Document



3 *If needed:* Click **View** to display a view of the document.

4 *If needed:* in Task Manager Workflows, click **Delete** to delete the Notification for the My Tasks view.

More detail: An alternate method to delete a Notification task: right-click; then select **Delete** on the My Tasks tab. See Figure 10-9.

5 In your email system, open the Notification email with the subject line: *Checked In: Document Title*.

A *If needed:* click the link in the email to view the task in Gimmal Contract Management (Figure 10-11).

Figure 10-11 Subscription Email Notification

B *If needed:* close the email.

Setting Your Workflow Availability

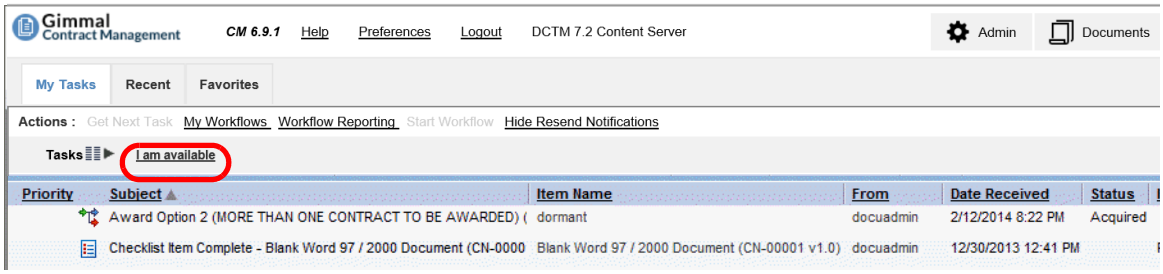
Gimmal Contract Management allows each user to define their periods of unavailability. During each unavailable period, any *new* Reminder, Obligation, Workflow and Checklist tasks and items assigned to you will be directed to the user which you identified as your delegate

More detail: All *current* tasks on your My Tasks view will remain and will **not** be directed to your delegate. After your unavailable period, all currently incomplete tasks sent to your delegate will **not** be returned to you.

Set Your Workflow Availability

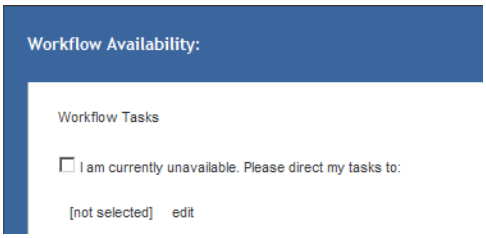
1 In the **My Tasks** view, click the **My Tasks** tab. See Figure 10-12.

Figure 10-12 My Tasks Tab Displaying Available Status



2 Click **I am available**. The Workflow Availability window displays (Figure 10-13).

Figure 10-13 Workflow Availability



3 To set your status to currently unavailable, select **I am unavailable. Please direct my tasks to:**

4 Click **edit** to select the user who should receive your tasks while you are unavailable. The Select User window displays. Find a user with one of the following methods:

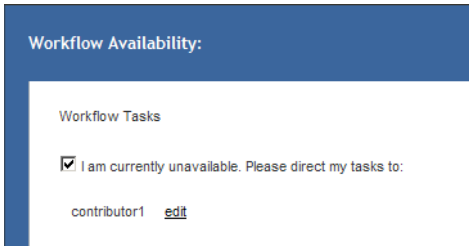
- Enter a letter(s) in the **Starts with** field and click the **Search by Name** button.

More detail: The letter should be the first letter of the person's FIRST name, and it is case-sensitive.

- In the **Show Users, Groups and Roles** field, select **Show Users** from the menu and scroll to find the user.

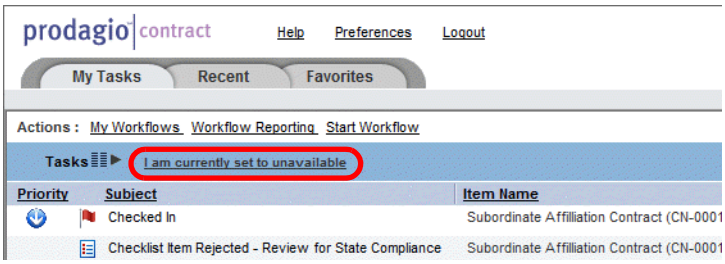
5 Click the user name of the person you want to select and click **OK**. The Workflow Availability window displays with the selected name listed (Figure 10-14).

Figure 10-14 Workflow Availability Status



6 Click **OK**. The **Z** tab displays with your status changed to **I am currently set to unavailable**. See Figure 10-15.

Figure 10-15 My Tasks Displaying Unavailable Status



More detail: Remember, when you become available again, change your status to **I am available** by reversing these steps.

Chapter 11

Searching Documents

This chapter includes the following topics:

Quick Searching for Documents 206
Quick Search for Documents 206
Advanced Searching for Documents 208
Search for Documents and Document Content 208
Managing Search Results 212
Manage Search Results 212
Change and Save Search Results Columns 213
Managing Search Results Tasks and Features 214
Saving Search Parameters 215
Save Your Search 215
Managing My Saved Searches 215
Manage My Saved Searches 215
Managing All Saved Searches 217
Manage All Saved Searches 217
Saving Searches as Templates 218
Save Searches as Templates 218

Quick Searching for Documents

Quick Search displays on the Documents view's **Personal** tab and **Cabinets** tab, and can also be used to limit (filter) what is displayed on each tab.

Quick Search provides "simple" searching for both indexed text and text properties in All Principal Documents that match entered search words.

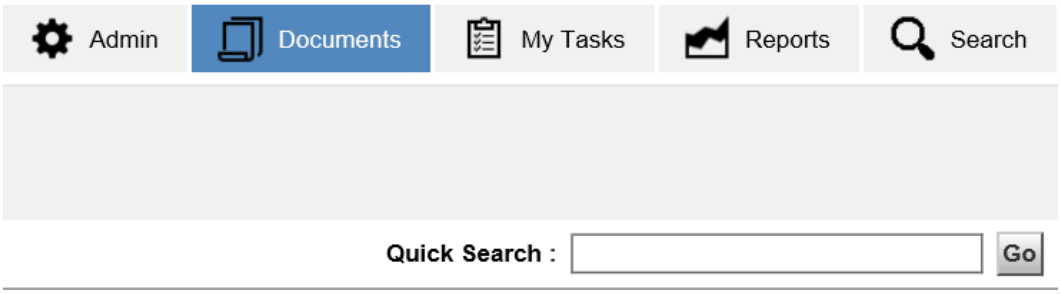
More detail: Quick Search is **not** a substitute for full document searching. See "Advanced Searching for Documents" on page 208.

More detail: Quick Search **always** searches these three document properties: Object Name, Title and Subject. Quick Search **may** search these two additional settings: Document Title and Document Number. Check with your system administrator which applies.

Quick Search for Documents

1 In the **Documents** view **Personal** or **Cabinets** tab, enter a word or phrases in the **Quick Search** field (Figure 11-1).

Figure 11-1Quick Search



2 To narrow the search, enter more than one word or phrase (case insensitive) and include one or more operator. See Table 13.

Table 13 Quick Search Operators

and	**Both** the entered words or phrases	Procurement and Services Agreement	Both Procurement and Services Agreement
or	**At least one** of the entered words or phrases	Procurement or Services Agreement	At least Procurement or Services Agreement
not	**The first** entered word or phrase, but **not the second** word or phrase	Procurement, not Services Agreement	Procurement, but not containing Services Agreement
" "	The **exact** word or phrase	"Services Agreement"	Services Agreement, but not Services only or Agreement only
( )	Left and right parenthesis ( ) with intervening spaces used for grouping (with operators **and**, **or** only, **not** cannot be applied before a parenthesis)	Procurement or (Services and Agreement not Limited) Format: A or (B and C not D) Note: Space after (and before)	Procurement or Services and Agreement, but not Limited, when Services and Agreement is not found

More detail: Nonsearchable characters (do **not** enter) are **& ~ () [] {} <> * ? ! " ' @ **
Search characters seen as **spaces** are **- / . , : ;**

3 Click **Go** or press the Enter key. All documents containing the word or phrases in their content or properties will display as Search Results (Figure 12 on page 211).

A *If needed:* save the Quick Search. See "Saving Search Parameters" on page 215.

B *If needed:* manage Quick Search results.

More detail: Using the Quick Search functions identically to completing only **Contains** on the Advanced Search – **General** tab. See "Managing Search Results".

Advanced Searching for Documents

Use Advanced Search to find and display any combination of search attributes, both content and properties.

The **Document Type** menu is filtered to the document types that you have at least read-only access to. The **Properties** menu is configurable and display only your organization's selections. Your Search may also be configured to search external sources of information.

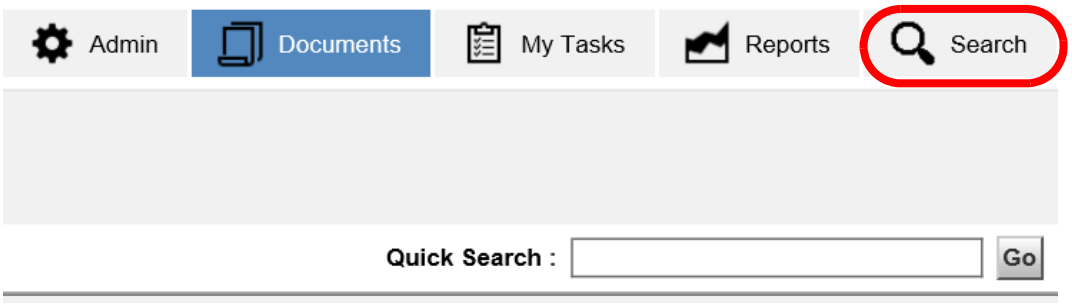
ALERT! If full-text searching is enabled, documents are indexed for full-text searching on a periodic basis **outside** of Gimmal Contract Management. Therefore, some recently-changed documents may **not** display immediately in the full-text search results.

More detail: Any user can access documents stored in any other user's Personal Cabinet by using Search. For example, if creating a search where the owner name is a user's name, the search results will display all documents owned by that user, including any documents in the user's Personal Cabinet.

Search for Documents and Document Content

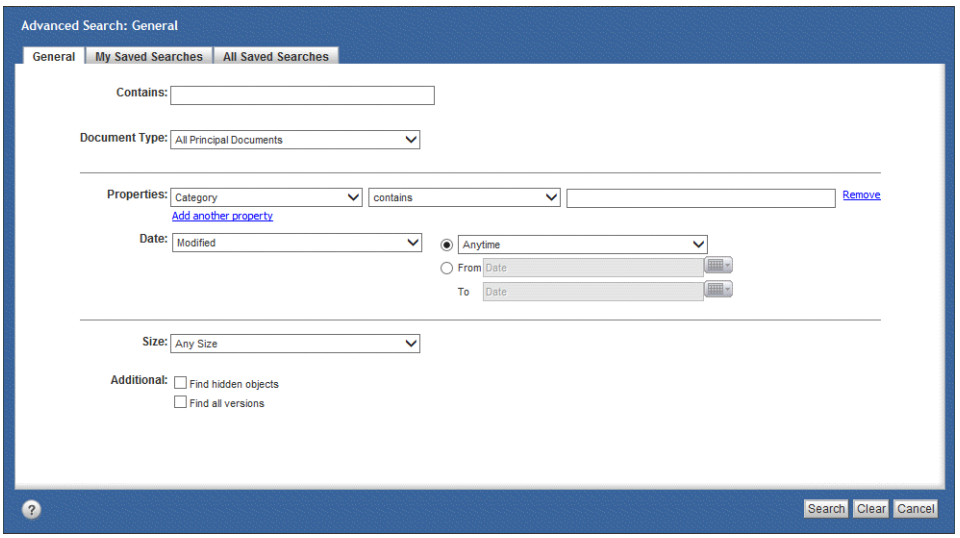
1 Click **Search** on the top menu bar (Figure 11-2).

Figure 11-2 Search Button



2 In the **Search** view, enter a search word or words that is included in document properties or document content in **Contains** (Figure 11-3.

Figure 11-3 Advanced Search – General Tab Window



More detail: *Contains* refers to a full-text search. An index server must be installed and configured to enable full-text searching.

3 In **Document Type,** select from the menu.

4 In the first **Properties**, select from the menu.

A In the middle Properties, choose an operator. See Table 14.

Table 14 Advanced Search Operators

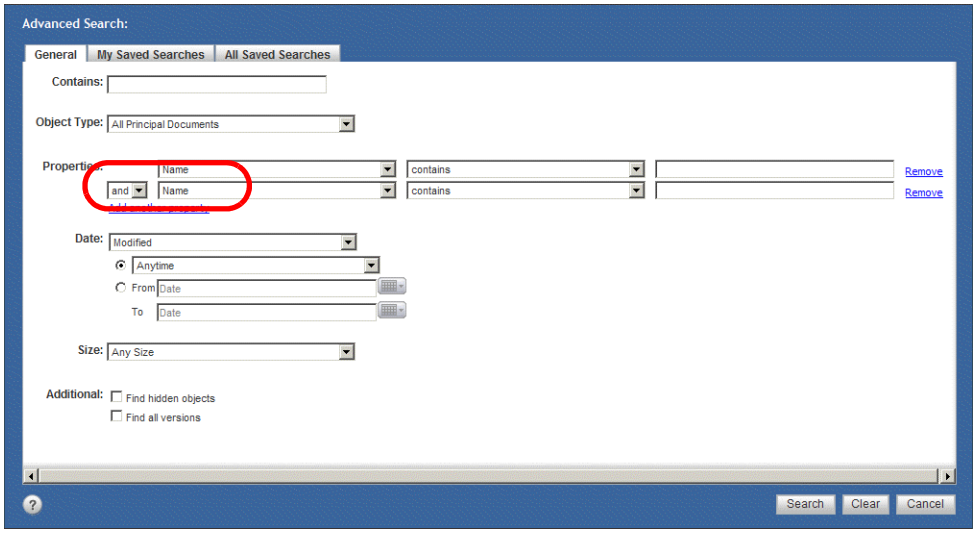
=equal to	Containing the **matching** number or string
<>not equal to	**Not** containing the matching number or string
<less than	**Smaller than** the number or string
<=less than or equal to	**Smaller than** or **matching** the number or string
>greater than	**Larger than** the number or string
>=greater than or equal to	**Larger than** or **matching** the number or string
begins with	Containing matches that **begin with** the search characters. Same as using a beginning wildcard.
ends with	Containing matches that **end with** the search characters. Same as using an ending wildcard.
contains	Containing matches that **contain** the search characters. Same as using beginning and ending wildcards.
does not contain	Containing matches that **do not contain** the search characters
in	**Containing property matches of at least one group** of the entered search characters. Separate each entered group with a comma.
not in	**Not containing property matches of a least one group** of the entered search characters. Separate each entered group with a comma.
is null	Containing property matches that contain **no value**
is not null	Containing property matches that contain **any value**

More detail: After choosing an operator, the third Properties could display a selection list.

B In the last Properties, enter information or select from its menu.

5 To search based on additional properties, click **Add another property**. Another three-field Property group is added. The **and or** operator field displays (Figure 11-4).

Figure 11-4 Configurable Object Type and Properties Search Options



A Select **and** to require the search results to match **both** the property value on this line **and** the property value on the previous line.

B Select **or** from the menu to require the search results to match **either** the property value on this line **or** the property value on the previous line.

More detail: If searching external sources, do **not** use the **or** operator between different property types. For example, a valid query is *Author contains Lewis **or** Author contains Twain*, (both property types are Author); but an invalid query is *Author contains Lewis **or** Name contains Knowledge Management* (Author and Name are different property types).

More detail: If adding three or more lines of properties, the order of searching follows the order of definition. Each time **and** or **or** is added, the previous operators are grouped together.
For example, in the query *Name contains Knowledge Management **and** Author contains Lewis **or** Author contains Twain*; then the results either must contain the documents whose name is Knowledge Management and whose author is Lewis or they must contain all the documents whose author is Twain.
To find all the documents whose name is Knowledge Management, and whose author is either Lewis or Twain, use this query *Author contains Lewis **or** Author contains Twain **and** Name contains Knowledge Management*.

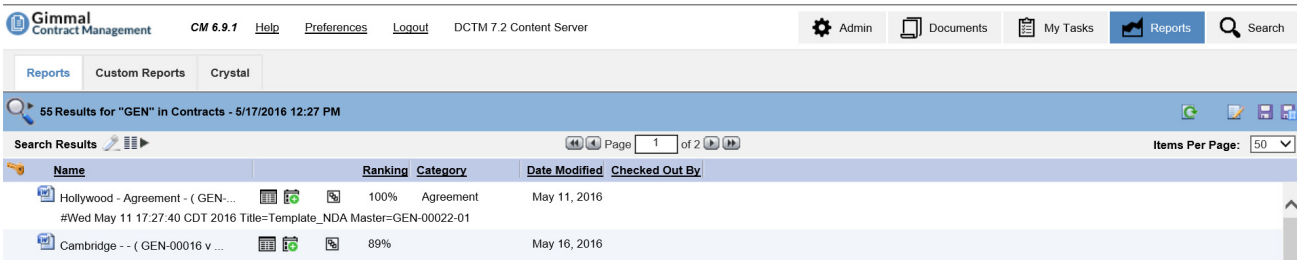
6 Complete the remaining properties.

A *If needed,* continue with **Date** and **Size**.

B *If needed:* to clear all properties and start over, click **Clear**.

7 After all parameters are entered, click **Search**. The results display as a list on the Documents view (Figure 12).

Figure 12 Search Results



More detail: All documents listed in the Search results have full functionality. It is **not** necessary to return to the Documents view to display a document.

More detail: The focus switches from the **Search** button on the top menu bar to the **Reports** button when the search is completed.

Managing Search Results

Often, Search Results require some changes before the results reflect exactly what is needed or what is expected. See Table 15 on page 212. To manage the Search Results, you can:

- Restart the results
- Edit the results
- Save the results
- Highlight the search content words
- Change and save Search Results columns

Table 15 Search Results Buttons

Buttons displayed in the Search Results blue header	
	Toggle Highlights. In each Search Result item, highlights the search words in yellow or removes the yellow highlighting.
	Column Preferences. Allows changing the columns which display and in what sequence they display.
	Restart Search. Allows restarting the search by displaying the most up-to-date Search Results.
	Edit Search. Allows editing the search by displaying the Advanced Search window.
	Save Search. Allows saving the search by displaying the Saving Your Search window.
	Save Search as Template. Allows saving searches as Templates with editable access to the saved Search fields. Only compatible with Advanced Searches.

Manage Search Results

Before beginning

Search results must exist. Create Search Results using:

- Quick Search. See "Quick Search for Documents" on page 206.
- create a new search in the **Search** view. See "Search for Documents and Document Content" on page 208.
- run an exiting **My Saved Searches**. See "Manage My Saved Searches" on page 215.
- run an exiting **All Saved Searches**. See "Manage All Saved Searches" on page 217.

1 To run the search again with the Search Results displayed, click the **Restart Search** button. See Figure 13.

2 To edit the Search results with the Search Results displayed, click the **Edit Search** button (Figure 13). The Advanced Search window displays. Modify the already-entered search parameters and click **Search**. See "Search for Documents and Document Content" on page 208.

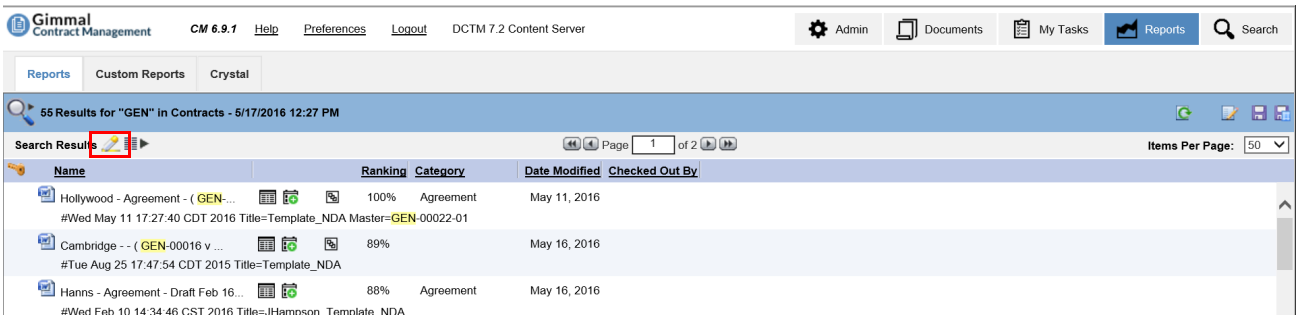
3 To save the Search results, click the **Save Search** button.

4 To edit the properties of one or more of the Search results (edit multiple document properties), select one or more Search result, right-click; then select **Properties**. The Properties - Multiple Objects window displays.

A Follow "Edit Multiple Document Properties" on page 74.

5 To highlight the Search results word or words previously entered in **Contains**, click the **Toggle Highlight** button (Figure 13).

Figure 13 Report Results Toggle Highlight

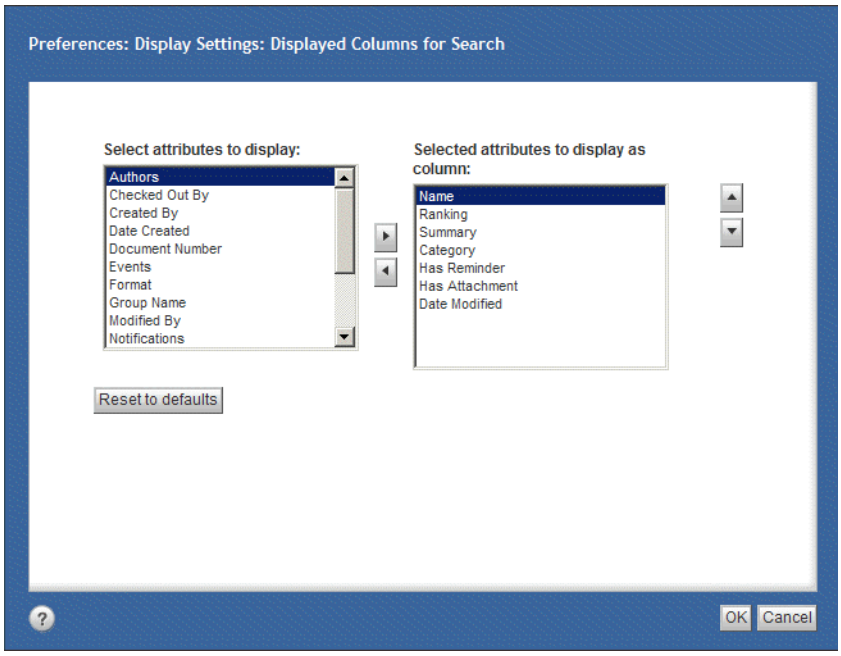


Change and Save Search Results Columns

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

1 With Search Results displayed, click the **Column Preferences** button. The Preferences Display Settings Displayed Columns for Search window displays (Figure 11-1).

Figure 11-1 Displayed Columns for Search



2 To add an attribute, in the **Select attributes to display** pane, click to select an attribute; then click the right arrow 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 left arrow to move the selected attribute to the **Select attributes to display** pane.

4 Select an attribute; then click the **Move Up List** button or **Move Down List** button to sort the attribute in the desired column order.

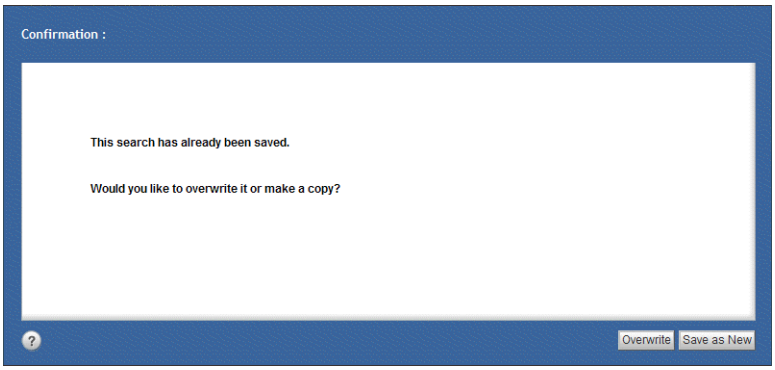
5 To save changes, click **OK**.

A *If needed:* to undo all changes, click **Reset to Defaults**.

More detail: Column changes made to the current Search Results are retained for all subsequent searches until columns are changed again.

6 *In needed:* Click the **Save Search** button. The Confirmation window displays (Figure 11-2).

Figure 11-2 Confirmation



7 To replace the new column preferences over the existing saved search, click **Overwrite**. The column changes are saved.

8 To save the new column preferences as a new search, click Save **as New**. The search is saved with the same name.

A To change the search name, click **Search** and continue with "Save Your Search" on page 215.

Managing Search Results Tasks and Features

Many document management tasks apply to the documents in Search Results via the right-click Actions including:

- to manage Search Results documents, see "Managing Documents" on page 49.
- to route Search Results documents via Ad Hoc or Predefined routing, see Chapter 7, "Routing Documents".
- to add Search Results documents to the Clipboard, see "Moving, Copying and Linking Items Using the Clipboard" on page 89.
- to add to and remove Search Results documents from Favorites, see "Managing Favorites" on page 80.

All document management features also apply to Search Results documents. See Chapter 5, "Managing Document Dashboard Features".

Saving Search Parameters

Saving your search enables using the same search parameters for execution at a later time, thereby delivering up-to-the-minute Search Results, enabling report comparisons where the only difference is the date the report was run.

More detail: Your saved searches are available to all Gimmal Contract Management users, and the saved searches of all other users are available to you.

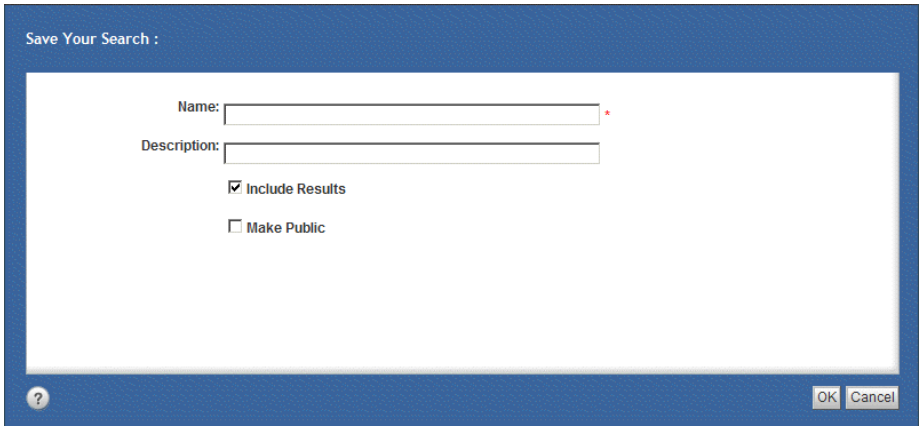
Save Your Search

1 Search for documents as described in "Advanced Searching for Documents" on page 208 or "Quick Searching for Documents" on page 206

2 On the Search Results pane, click the **Save Search** button.

The Save Your Search window displays (Figure 11-3).

Figure 11-3 Save Your Search



3 In **Name**, enter a concise search name, meaningful to you and others.

4 In **Description**, enter a detailed description of the search.

5 Select **Include Results** if you want the Search Results to also be saved along with the search.

6 Select **Make Public** if you want the search and its results available to all other users.

7 Click **OK**. Your search is saved, with its results (if checked) and is available to all other users (if checked), under the **My Saved Searches** and the **All Saved Searches** tabs. See "Managing My Saved Searches" on page 215 and see "Managing All Saved Searches" on page 217.

Managing My Saved Searches

View your saved searches at any time and run them against the current database to generate the most up-to-date searches. Then compare the older and newer versions of identical searches.

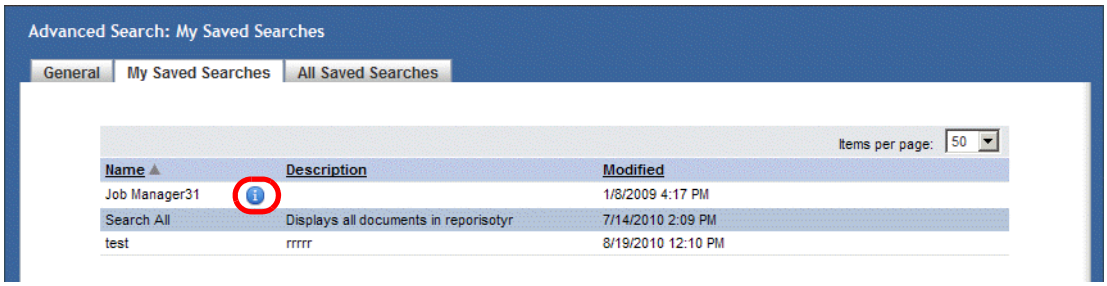
Manage My Saved Searches

Before beginning

At least one search must already be saved under the **My Saved Searches** tab.

1 In the **Search** view, click the **My Saved Searches** tab to view the named searches you have previously saved. The **My Saved Searches** tab displays (Figure 11-4).

Figure 11-4 Advanced Search – My Saved Search Tab



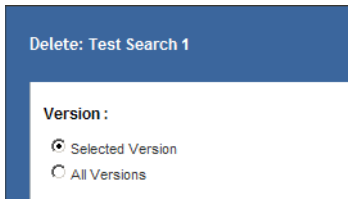
A *If needed:* to view the description of the selected saved search, click its **Properties** button. The Properties Info window for the selected search displays.

2 To *edit* the parameters of a saved search, right-click; then select **Edit**. The **General** tab displays. To modify the selected saved search parameters, see "Advanced Searching for Documents" on page 208.

More detail: Changing parameters of a previously saved search allows for quicker creation of a more targeted search. Be sure to rename the changed search!

3 To *remove* a saved search, right-click; then select **Remove**. The Delete window displays (Figure 11-5).

Figure 11-5 Delete



A Select **Selected Version** or **All Versions**. If you select **All Versions,** additional options might display.

B Click **OK**. The selected my saved Search Results is deleted.

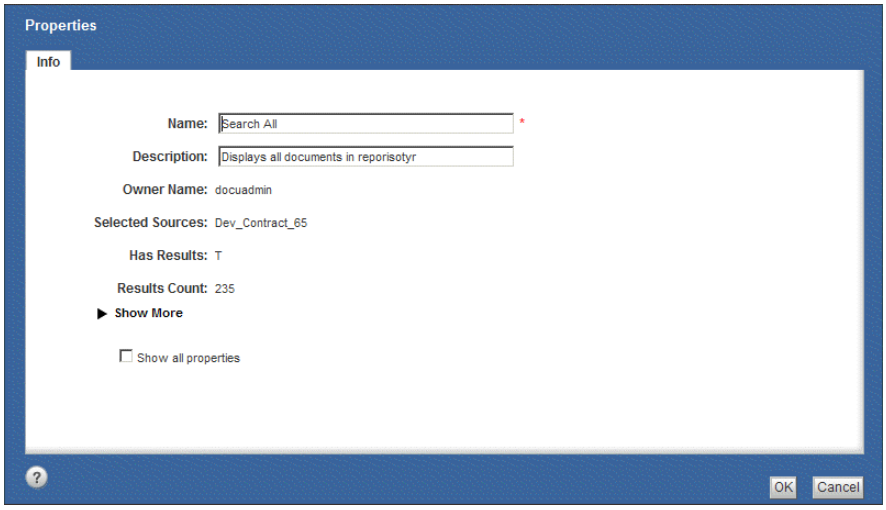
4 To run the *search* again, right-click; then select **Search**. The Search Results display again.

A To sort long lists of saved searches, click the **Name**, **Description**, **Owner** or **Modified** headings.

5 To only *view the saved Search Results*, right-click; then select **View Saved Results**. The saved Search Results display.

6 To only *view the search properties*, right-click; then select **View Search Properties**. The My Saved Search Results Properties displays (Figure 11-7).

Figure 11-6 My Saved Search Properties



Managing All Saved Searches

At any time, view all Gimmal Contract Management searches saved by all other users. Your saved searches also display in the All Saved Searches list. Run these searches against the current database to generate the most up-to-date searches. Then compare the older and newer versions of identical searches.

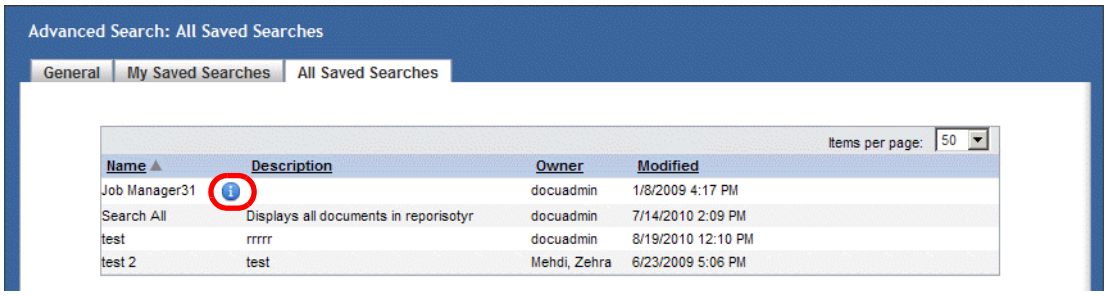
Manage All Saved Searches

Before beginning

At least one search must already be saved under the **All Saved Searches** tab.

1 In the **Search** view, click the **All Saved Searches** tab to view the named searches you have previously saved. The **All Saved Searches** tab displays (Figure 11-7).

Figure 11-7 Advanced Search – All Saved Search Tab



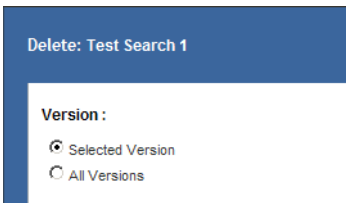
A *If needed:* to view the description of the selected saved search, click its **Properties** button. The Properties Info window for the selected search displays.

2 To *edit* the parameters of a saved search, right-click; then select **Edit**. The **General** tab displays. To modify the selected saved search parameters, see "Advanced Searching for Documents" on page 208.

More detail: Changing parameters of a previously saved search allows for quicker creation of a more targeted search. Be sure to rename the changed search!

3 To *remove* a saved search, right-click; then select **Remove**. The Delete window displays (Figure 11-8).

Figure 11-8 Delete



A Select **Selected Version** or **All Versions**. If you select **All Versions,** additional options might display.

B Click **OK**. The selected all saved Search Results is deleted.

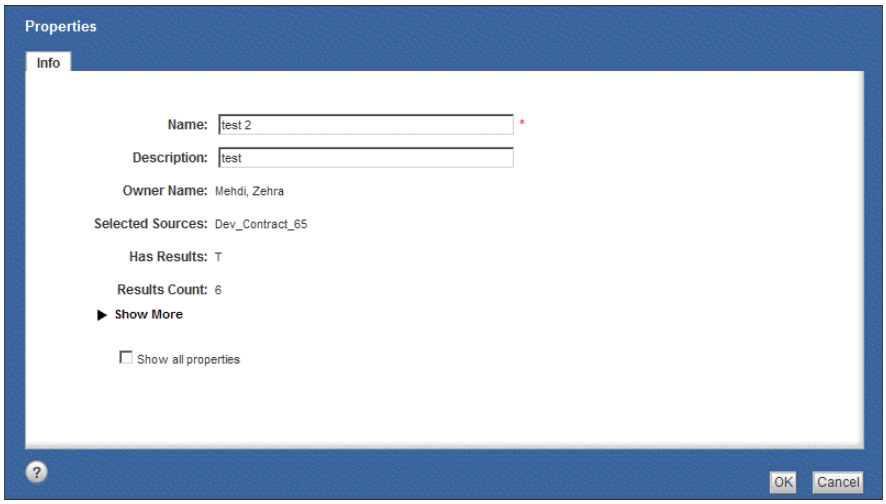
4 To run the *search* again, right-click; then select **Search**. The Search Results display again.

A To sort long lists of saved searches, click the **Name**, **Description**, **Owner** or **Modified** headings.

5 To only *view the saved Search Results*, right-click; then select **View Saved Results**. The saved Search Results display.

6 To only *view the search properties*, right-click; then select **View Search Properties**. The saved Search Results display (Figure 11-7 on page 217).

Figure 11-9 All Saved Search Properties



Saving Searches as Templates

At any time, Advanced Searches with different attributes can be saved as a Search Template. Search Templates allow changing one or more search attribute *before* running the Search. In this way, a Search Template can be the 'source' for many similar, but also different searches.

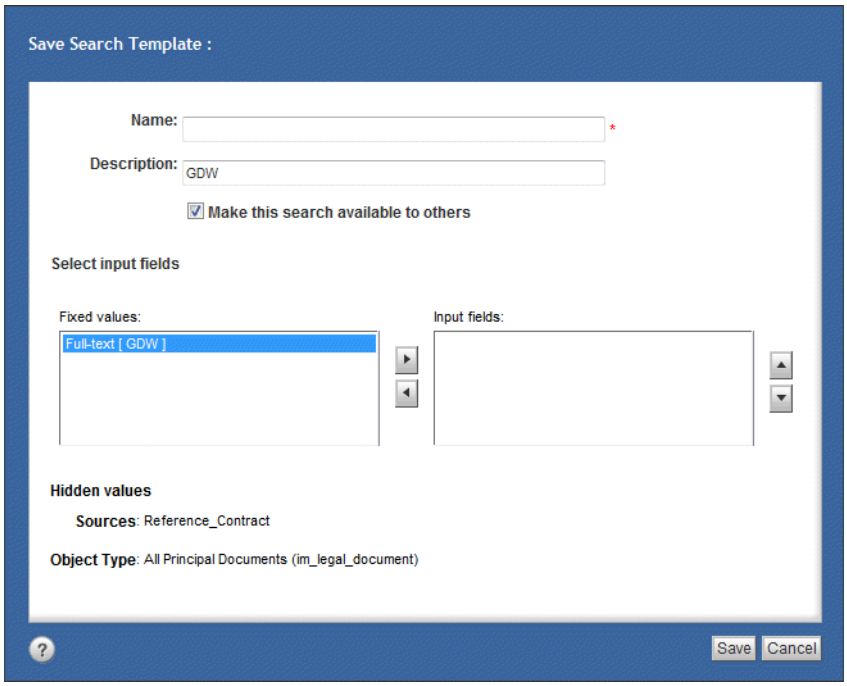
Save Searches as Templates

Before beginning

Run an Advanced Search. See "Search for Documents and Document Content" on page 208.

1 With the Search Results displayed, click the **Save Search as Template** button. The Save Search Template window displays (Figure 11-10).

Figure 11-10 Save Search as Template



2 In **Name**, enter a Search Template name.

3 In **Description**, enter a detailed description of the Search Template.

4 Move any **Fixed values** to the **Input fields** pane.

5 Click **Save**. The Template is saved. For access to this Template, contract your administrator.

Chapter 12

Generating Document Reports

This chapter includes the following topics:

About Document Reports 222
Available Standard Reports 222
Generating A Report 238
Generate a Standard or Custom Report 238
Print a Report 239
Download a Report and Export to a .csv-Formatted File 240
Creating Additional Standard Reports 241
Creating Custom Reports 241
Creating Custom Crystal Reports 241

About Document Reports

Gimmal Contract Management includes various standard reports, accessed by the **Reports** button. These standard reports are designed to give users visibility into the data repository in Gimmal Contract Management at any given point in time and to serve as examples for adding reports in the future. See "Available Standard Reports".

In addition to existing standard reports, additional standard reports may be requested, configured from your unique business requirements. See "Creating Additional Standard Reports" on page 241.

Also, custom reports (listed on the **Custom Reports** tab), can be configured for your custom business requirements. See "Creating Custom Reports" on page 241.

If so configured, a **Crystal** tab displays, providing access to customized Crystal Reports functionality. See "Creating Custom Crystal Reports" on page 241.

Available Standard Reports

Gimmal Contract Management includes the following standard reports. See Table 12-1.

Table 12-1Available Standard Reports

Checklists	"•Checklist Assigned Tasks (Open) Purpose: To report open Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Chapter 9, "Managing Checklists" and Figure 12." on page 224
	"•Checklist Assigned Tasks (Completed) Purpose: To report completed Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 13 and Chapter 9, "Managing Checklists"." on page 226
	"•Checklist Assigned Tasks (Rejected) Purpose: To report rejected Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 14 and Chapter 9, "Managing Checklists"." on page 226
	"•Checklist Assigned Tasks (Open or Completed Purpose: To report open completed Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 15 and Chapter 9, "Managing Checklists"." on page 227
	"•Checklist Tasks Workload (Assigned and Open) Purpose: To report assigned and open Checklist tasks assigned to all users and groups. See Figure 16 and Chapter 9, "Managing Checklists"." on page 227
Document	"•Deleted Documents Report Purpose: To report all deleted documents assigned to a specific user or group or to all users and groups, within or not within a specified date deleted range. See Figure 17 and "Deleting a Document" on page 57." on page 228

Table 12-1Available Standard Reports (continued)

Contracts	"•Contracts by Status Purpose: To report all Documents by their Status. See Figure 18." on page 228
	"•Contract Totals by Type Purpose: To report all the Contracts matching the selected Document Type. See Figure 19." on page 229
eSignature	"•eSignature Report for Attachment Purpose: To report all the eSignatures taken in the specified time frame for specified or all Attachments. See Figure 12-1." on page 229
	"•eSignature Report for Legal Documents Purpose: To report all the eSignatures taken in the specified time frame for specified or all Legal Documents. See Figure 12-2." on page 230
Obligations	"•Obligation Assignments Purpose: To report the status (scheduled, open or completed) of all Obligations assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 14 and "Managing Obligations" on page 153." on page 231
	"•Obligation Workload Purpose: To report how many open Obligation tasks are assigned to each user. See Figure 15 and "Managing Obligations" on page 153." on page 231
	"•Obligations by Contract Purpose: To report all Obligations for a specific contract (document) or all contracts. See Figure 16 and "Managing Obligations" on page 153." on page 232
	"•Obligations by Location, Category, Responsibility Purpose: To report Obligations in a specific location, category, subcategory or responsibility or in any combination of these parameters. See Figure 17 and "Managing Obligations" on page 153." on page 232
Principal Documents	"•Principal Documents by Status Purpose: To report the status (Approved, Draft, Effective, Active, Inactive, Suspended, Terminated) of all principal documents. See Figure 18." on page 233
	"•Principal Documents by Type Purpose: To report all principal documents by document type. See Figure 19 and "About Document Types" on page 38." on page 233
Property List	"•Property List by Document Type Purpose: To report all properties listed for a specified document type. See Figure 20 and "Managing Document Properties" on page 71." on page 234

Table 12-1Available Standard Reports (continued)

Reminders	"•Reminder Actions Purpose: To report the status (Scheduled, Open or Completed) and type of review Action of all Reminders assigned, within or not within a specified notification date range. See Figure 21 and "Managing Reminders" on page 144." on page 234
	"•Reminder Assignments Purpose: to report the status (Scheduled, Open or Completed) of all Reminders assigned to a specific user or group or to all users and groups, within or not within a specified notification date range. See Figure 22 and "Managing Reminders" on page 144." on page 235
	"•Reminder Workload Purpose: To report a total task count of the status (Scheduled, Open or Completed) of all Reminders for all users within or not within a specified notification date range. See Figure 23 and "Managing Reminders" on page 144." on page 235
Total Counts	"•Total Attachment Count Purpose: To report a total number of Attachments for each Attachment type. See Figure 24 and "About Related Documents" on page 114." on page 236
	"•Total Count by Document Type Purpose: To report a total number of documents for each document type. See Figure 25 and "About Document Types" on page 38." on page 236
Where-Used	"•Where-Used (External Clauses) Purpose: To report all documents using a specified External Clause or using all Clauses. See Figure 26 and the separate document, Creating and Applying Templates." on page 236
	"•Where-Used (Templates) Purpose: To report all documents using a specified Template or all Templates. See Figure 27 and the separate document, Creating and Applying Templates." on page 237

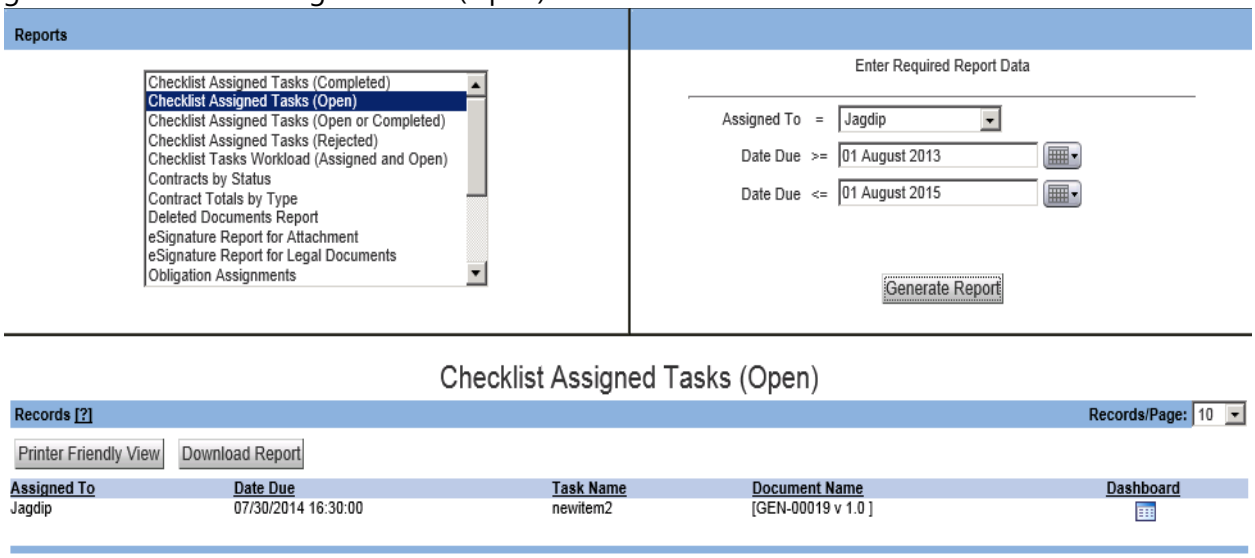
Certain users with the prodagio_admin role may view an additional seven User Administration Reports. See the separate *Gimmal Contract Management Business Administrator Guide* V6.9.

All standard and custom reports can be viewed, sorted, printed, and downloaded in .csv format for viewing and editing with Microsoft Excel and other applications. See "Generating A Report" on page 238.

A detailed description of each standard report follows.

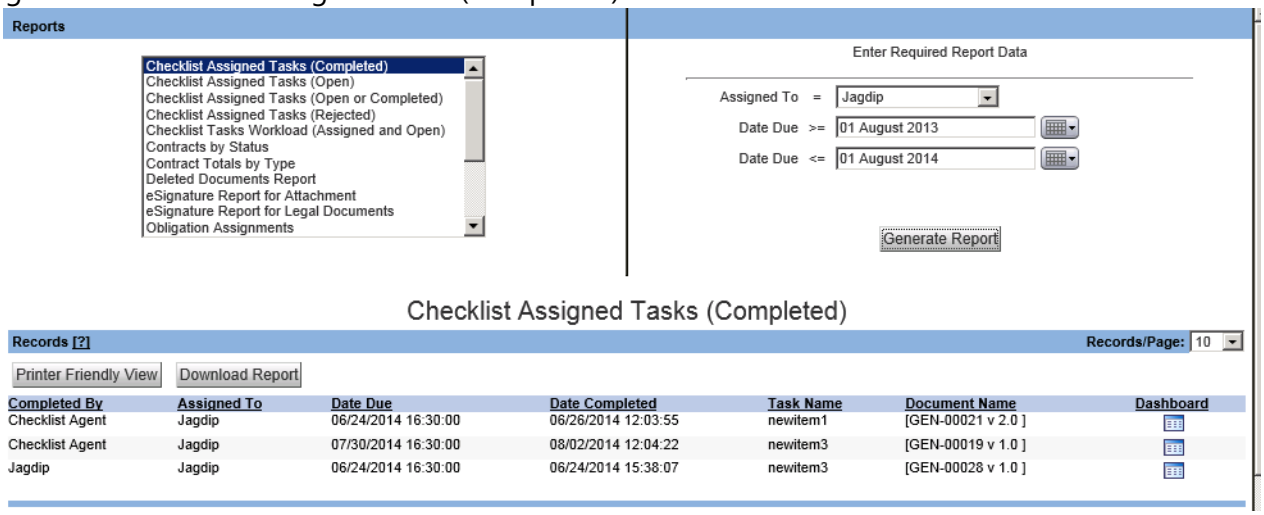
- **Checklist Assigned Tasks (Open)**
  Purpose: To report open Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Chapter 9, "Managing Checklists" and Figure 12.

Figure 12 Checklist Assigned Tasks (Open)



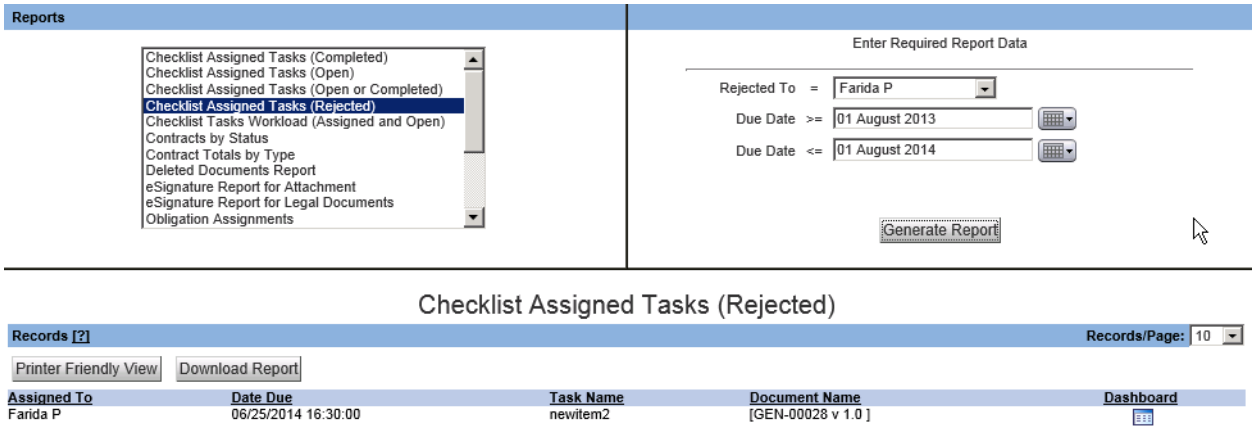
- **Checklist Assigned Tasks (Completed)**
  Purpose: To report completed Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 13 and Chapter 9, "Managing Checklists".

Figure 13 Checklist Assigned Tasks (Completed)



- **Checklist Assigned Tasks (Rejected)**
  Purpose: To report rejected Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 14 and Chapter 9, "Managing Checklists".

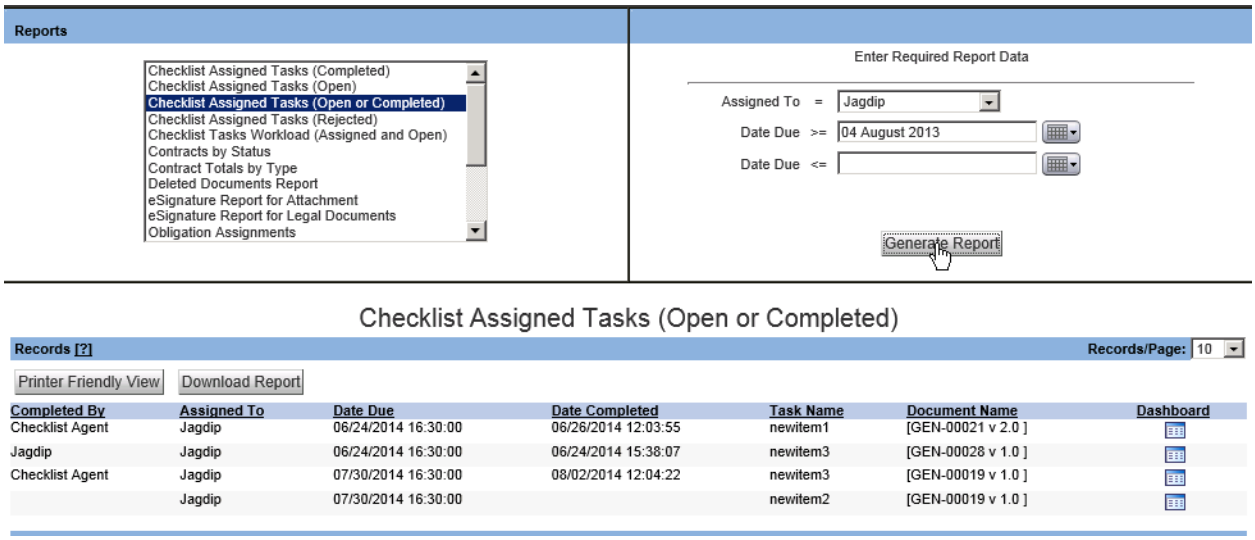
Figure 14 Checklist Assigned Tasks (Rejected)



- **Checklist Assigned Tasks (Open or Completed**
  Purpose: To report open completed Checklist tasks assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 15 and Chapter 9, "Managing Checklists".

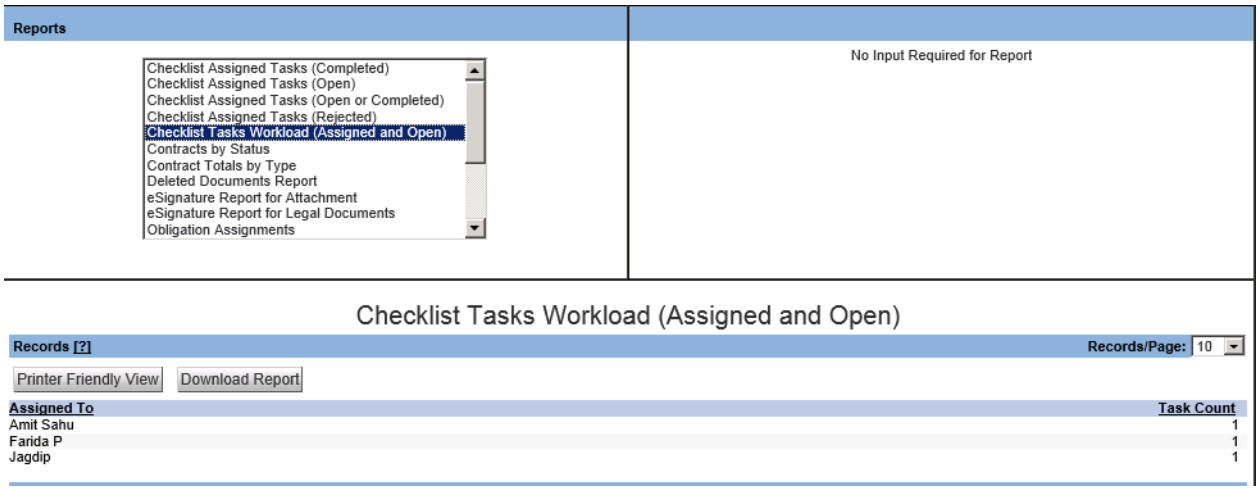
Figure 15 Checklist Assigned Tasks (Open or Completed)

s



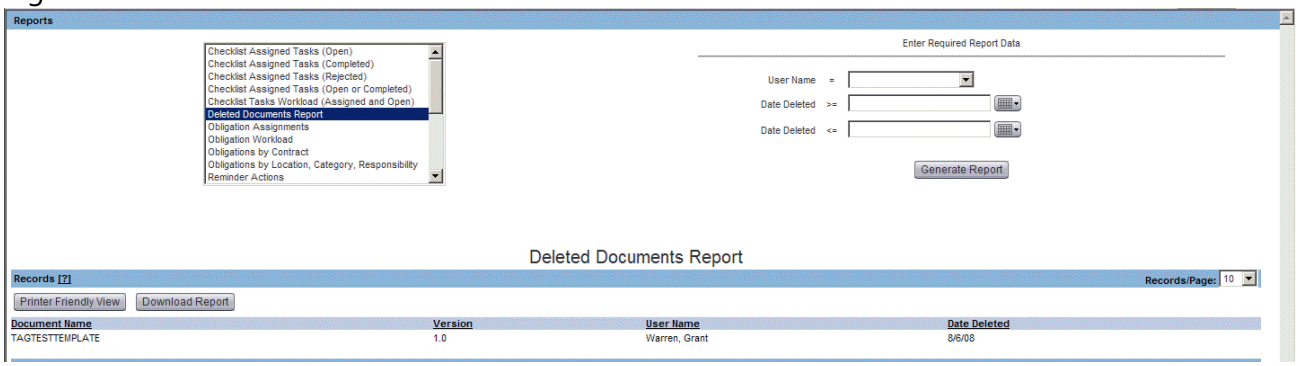
- Checklist Tasks Workload (Assigned and Open)
  Purpose: To report assigned and open Checklist tasks assigned to all users and groups. See Figure 16 and Chapter 9, "Managing Checklists".

Figure 16 Checklist Tasks Workload (Assigned and Open)



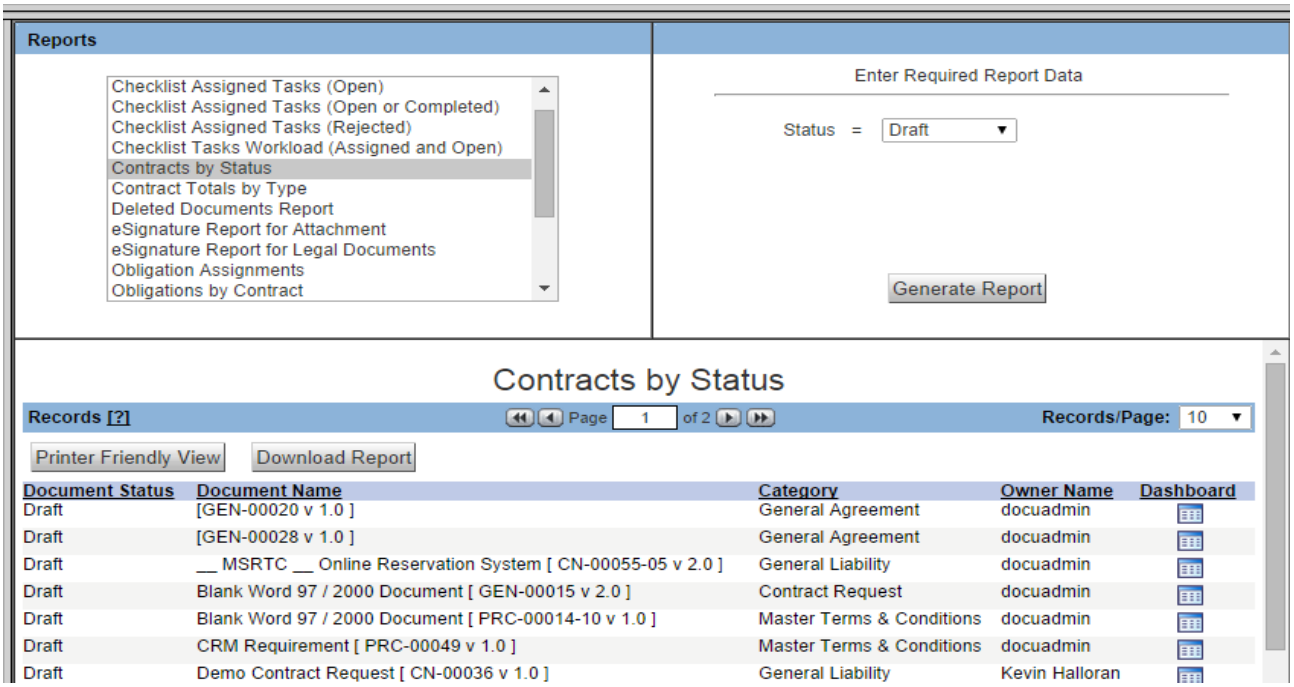
- **Deleted Documents Report**
  Purpose: To report all deleted documents assigned to a specific user or group or to all users and groups, within or not within a specified date deleted range. See Figure 17 and "Deleting a Document" on page 58.

Figure 17 Deleted Documents



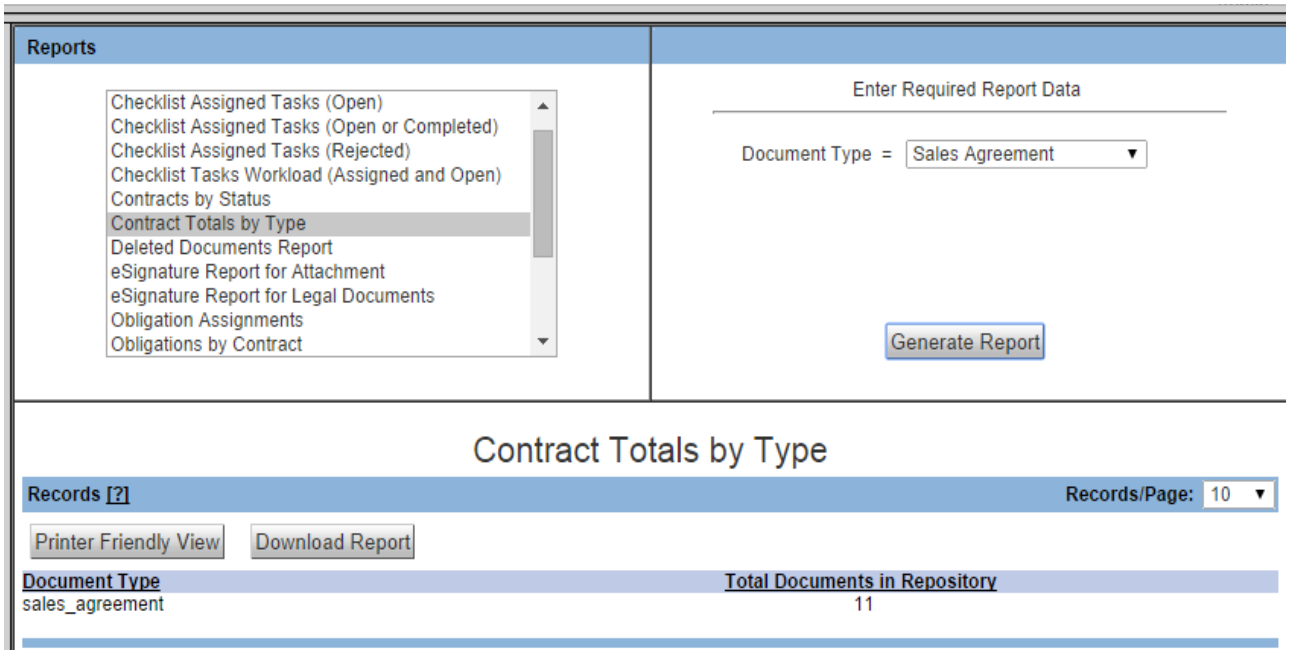
- **Contracts by Status**
  Purpose: To report all Documents by their Status. See Figure 18.

Figure 18 Contracts by Status



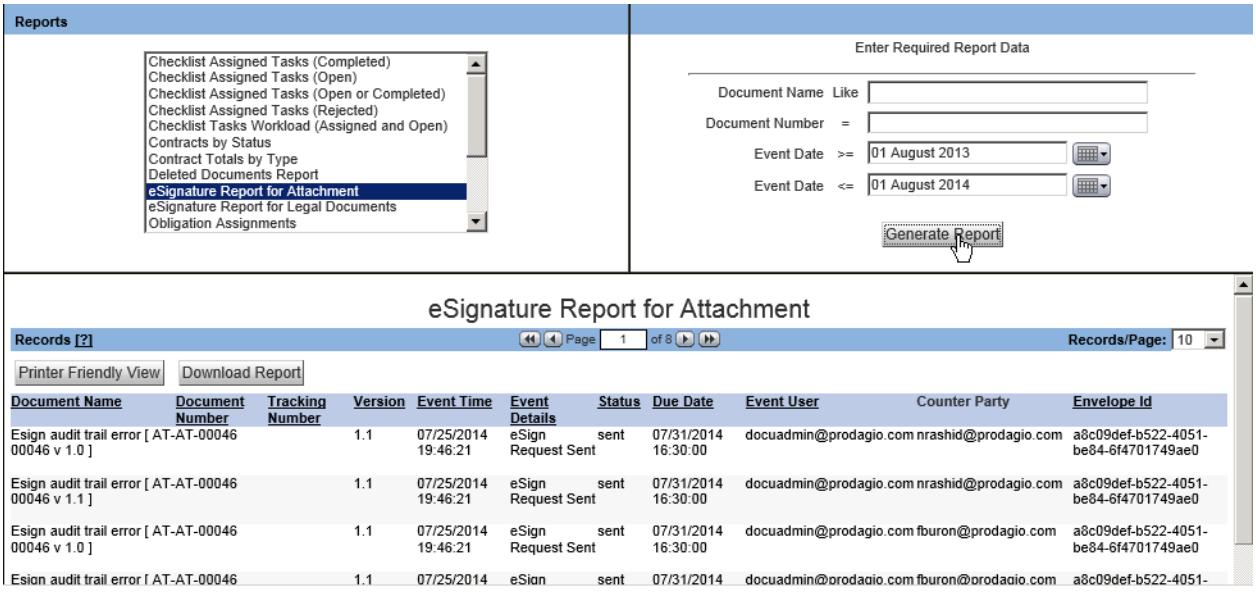
- **Contract Totals by Type**
  Purpose: To report all the Contracts matching the selected Document Type. See Figure 19.

Figure 19 Contracts Total by Type



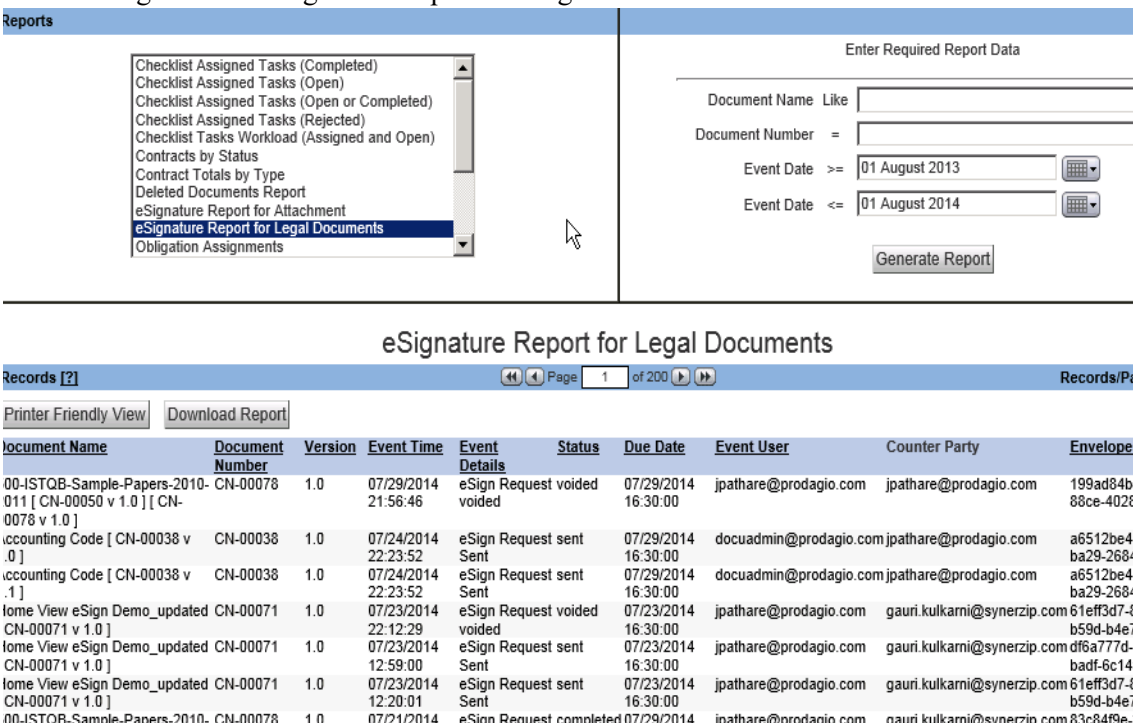
- **eSignature Report for Attachment**
  Purpose: To report all the eSignatures taken in the specified time frame for specified or all Attachments. See Figure 12-1.

Figure 12-1 eSignature Attachment Report



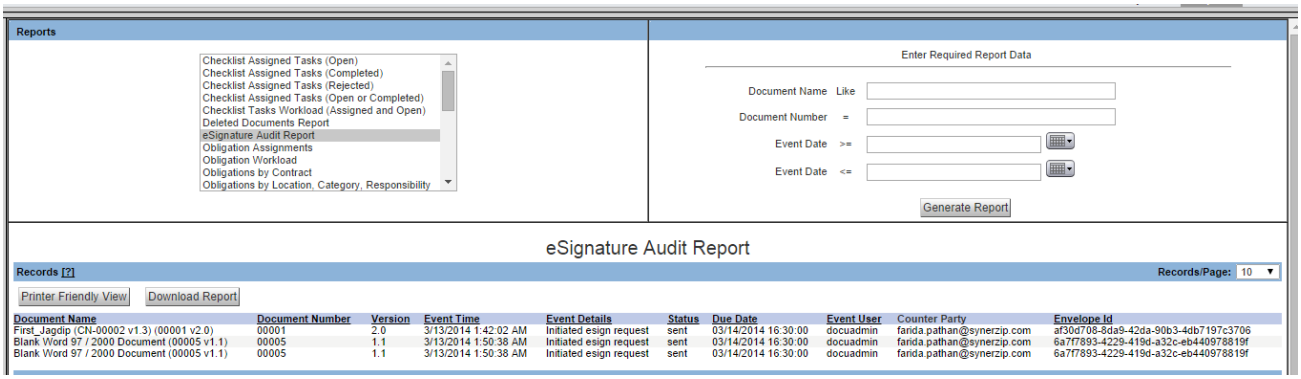
- **eSignature Report for Legal Documents**
  Purpose: To report all the eSignatures taken in the specified time frame for specified or all Legal Documents. See Figure 12-2.

Figure 12-2 eSignature Report for Legal Documents



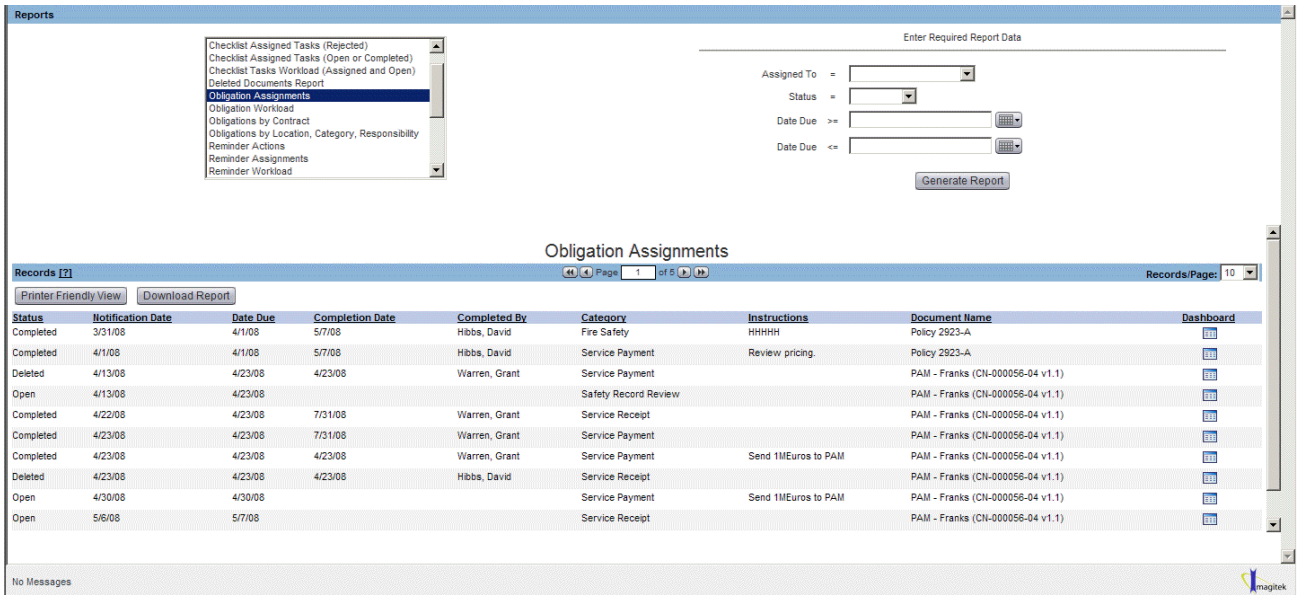
- **eSignature Audit Report**
  Purpose: To report all the events happening in a particular eSignature Report or all the existing eSignatures Reports. See Figure 13.

Figure 13 eSignature Audit Report



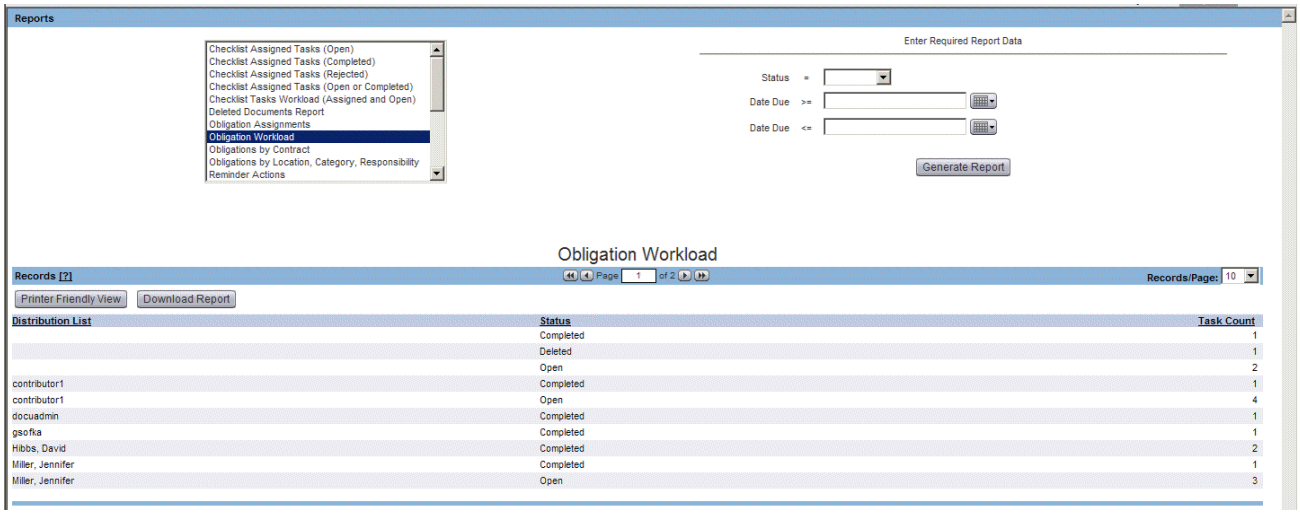
- **Obligation Assignments**
  Purpose: To report the status (scheduled, open or completed) of all Obligations assigned to a specific user or group or to all users and groups, within or not within a specified date due range. See Figure 14 and "Managing Obligations" on page 153.

Figure 14 Obligation Assignments



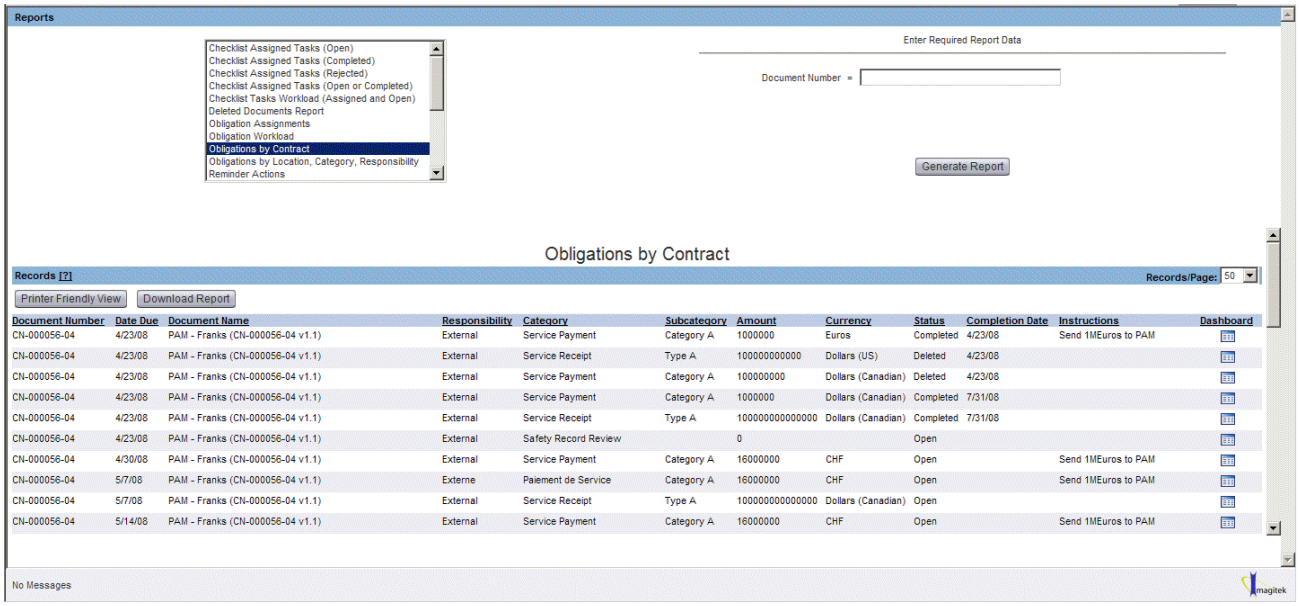
- **Obligation Workload**
  Purpose: To report how many open Obligation tasks are assigned to each user. See Figure 15 and "Managing Obligations" on page 153.

Figure 15 Obligation Workload



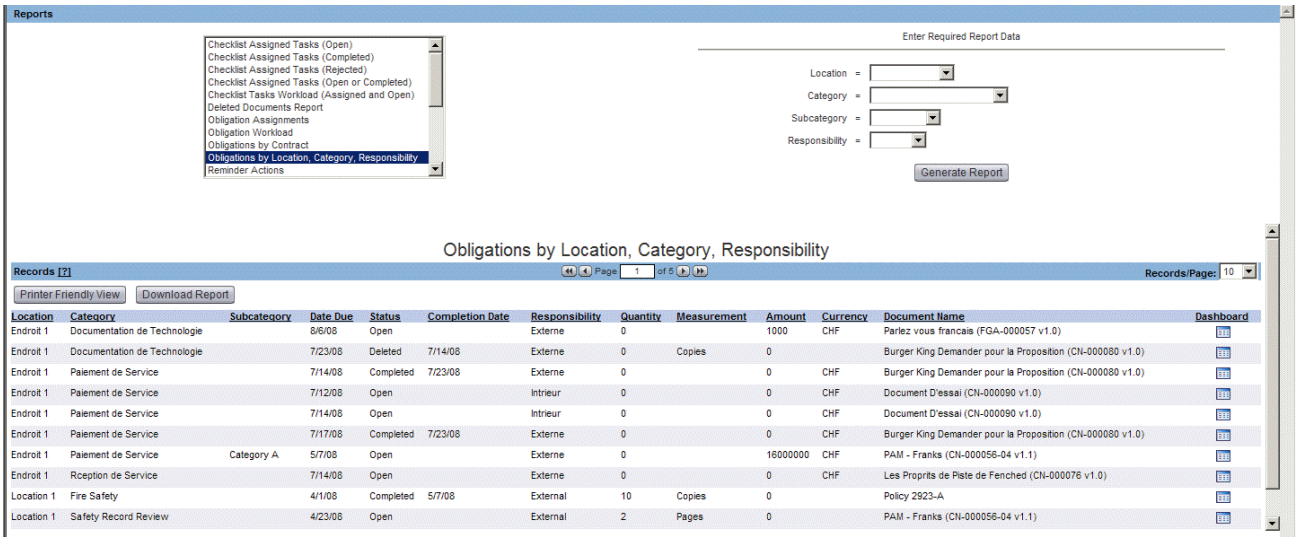
- Obligations by Contract
  Purpose: To report all Obligations for a specific contract (document) or all contracts. See Figure 16 and "Managing Obligations" on page 153.

Figure 16 Obligations by Contract



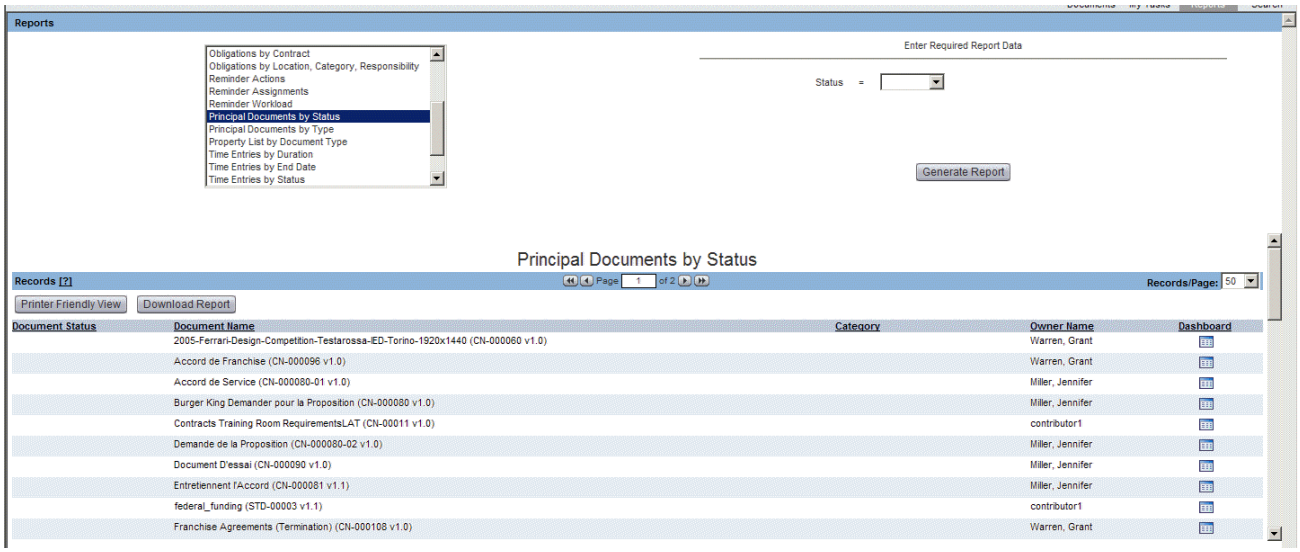
- **Obligations by Location, Category, Responsibility**
  Purpose: To report Obligations in a specific location, category, subcategory or responsibility or in any combination of these parameters. See Figure 17 and "Managing Obligations" on page 153.

Figure 17 Obligations by Location, Category, Responsibility



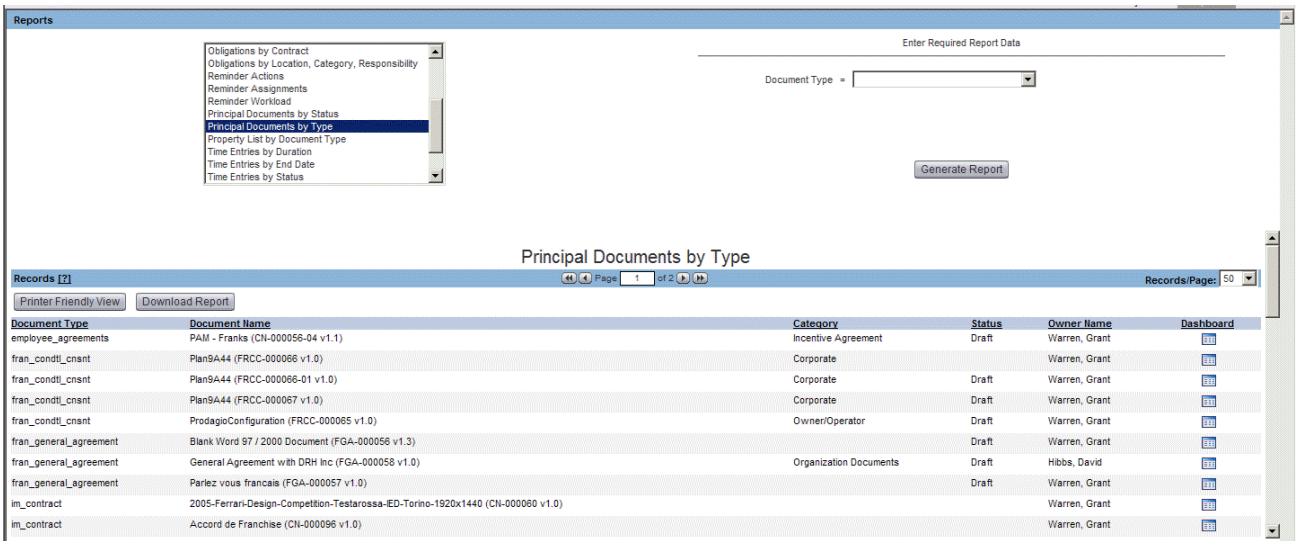
- **Principal Documents by Status**
  Purpose: To report the status (Approved, Draft, Effective, Active, Inactive, Suspended, Terminated) of all principal documents. See Figure 18.

Figure 18 Principal Documents by Status



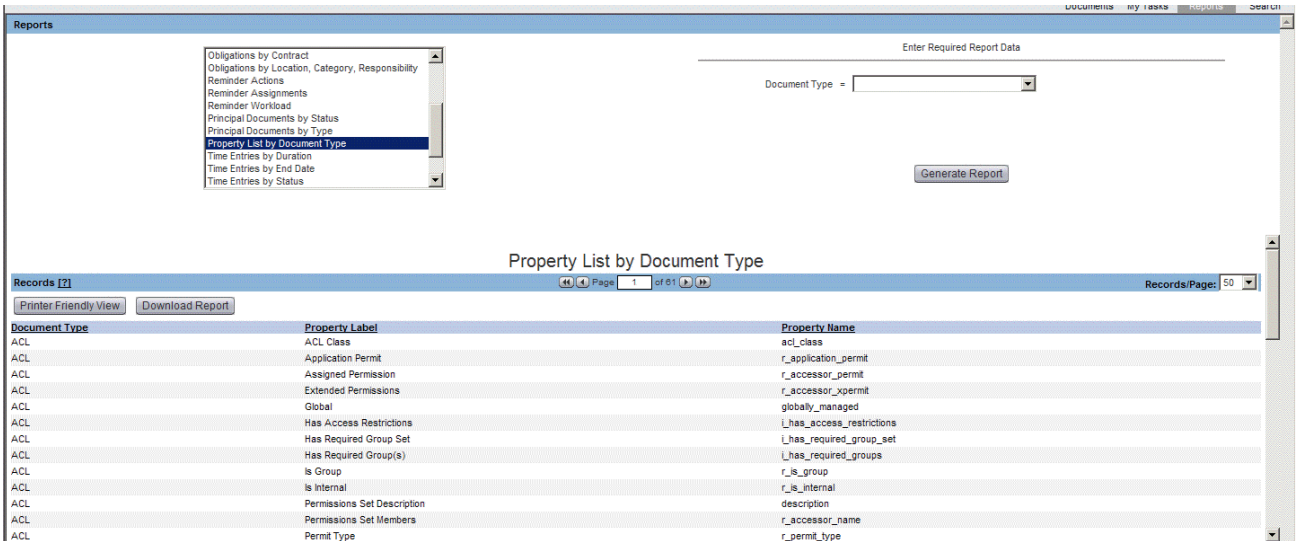
- **Principal Documents by Type**
  Purpose: To report all principal documents by document type. See Figure 19 and "About Document Types" on page 38.

Figure 19 Principal Documents by Type



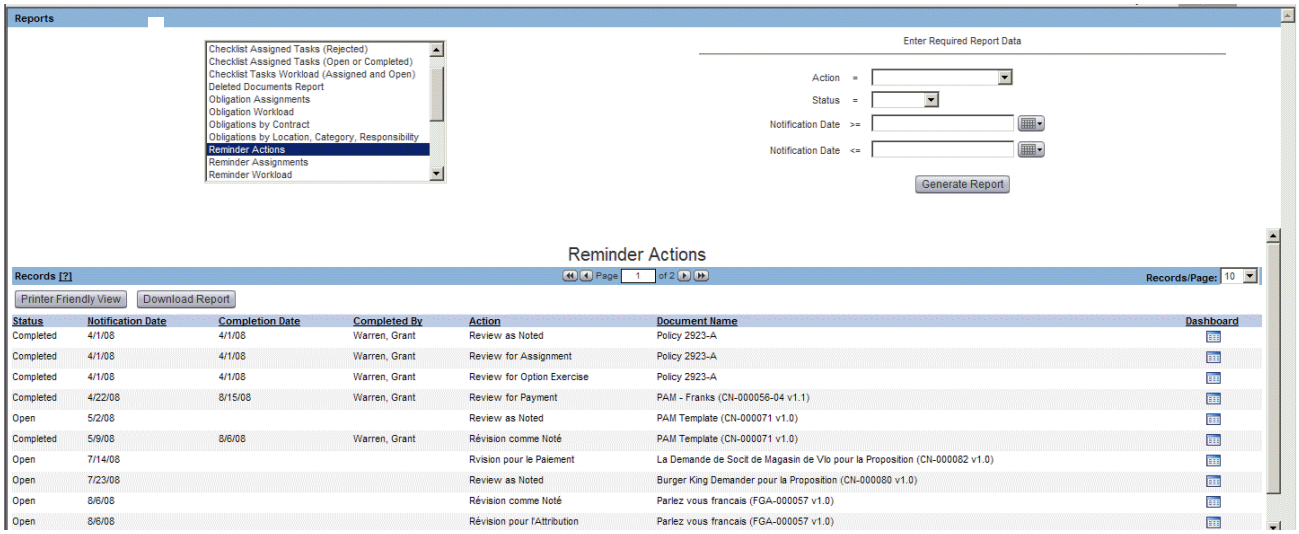
- **Property List by Document Type**
  Purpose: To report all properties listed for a specified document type. See Figure 20 and "Managing Document Properties" on page 72.

Figure 20 Property List by Document Type



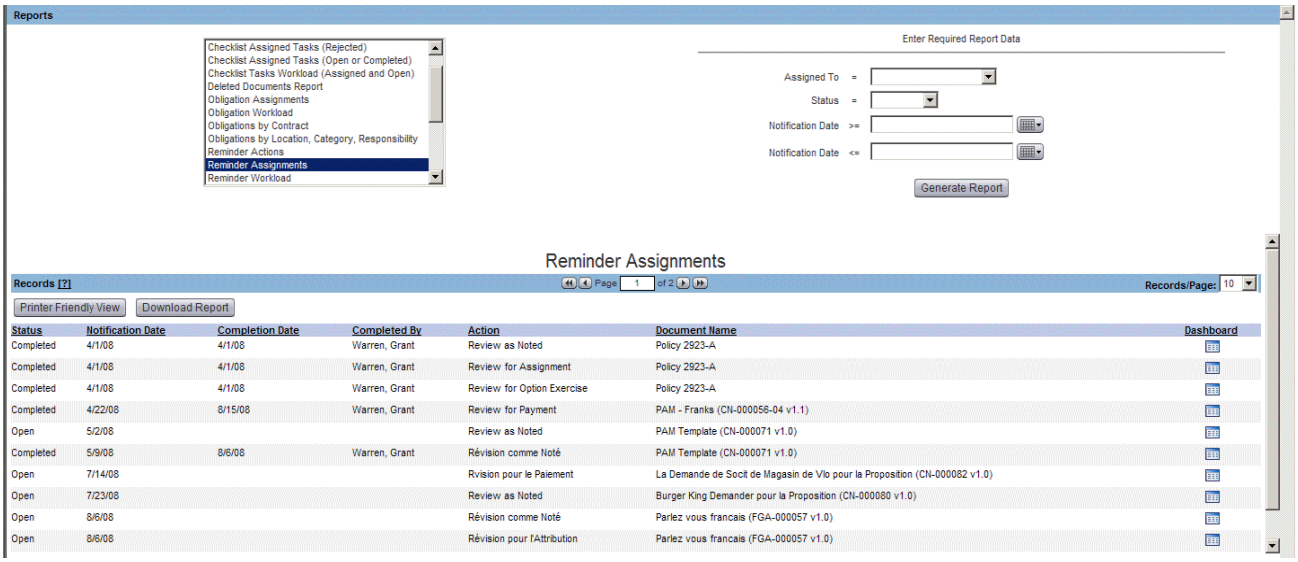
- Reminder Actions
  Purpose: To report the status (Scheduled, Open or Completed) and type of review Action of all Reminders assigned, within or not within a specified notification date range. See Figure 21 and "Managing Reminders" on page 144.

Figure 21 Reminder Actions



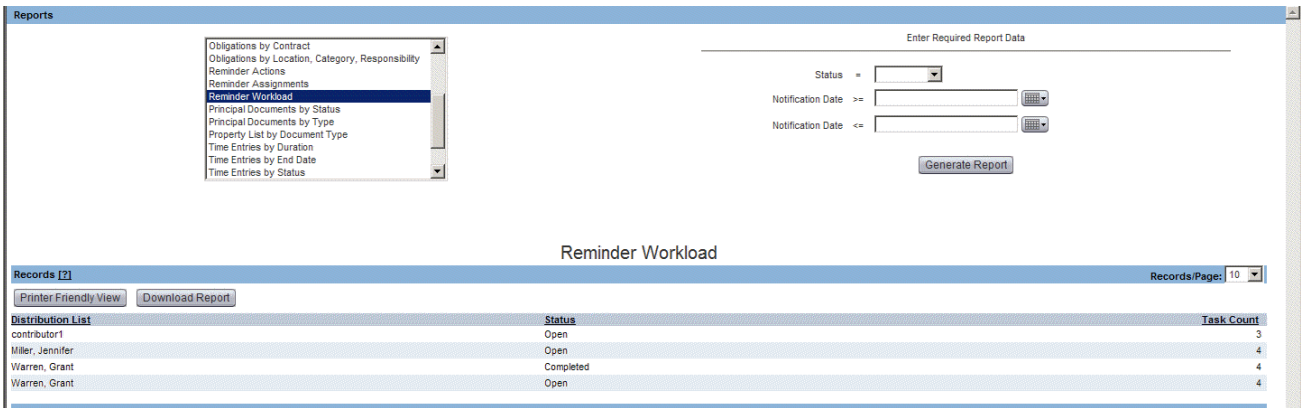
- **Reminder Assignments**
  Purpose: to report the status (Scheduled, Open or Completed) of all Reminders assigned to a specific user or group or to all users and groups, within or not within a specified notification date range. See Figure 22 and "Managing Reminders" on page 144.

Figure 22 Reminder Assignments



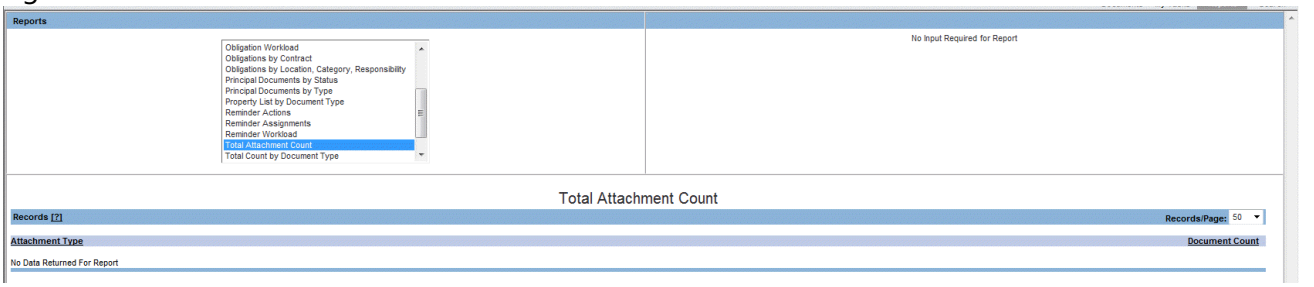
- **Reminder Workload**
  Purpose: To report a total task count of the status (Scheduled, Open or Completed) of all Reminders for all users within or not within a specified notification date range. See Figure 23 and "Managing Reminders" on page 144.

Figure 23 Reminder Workload



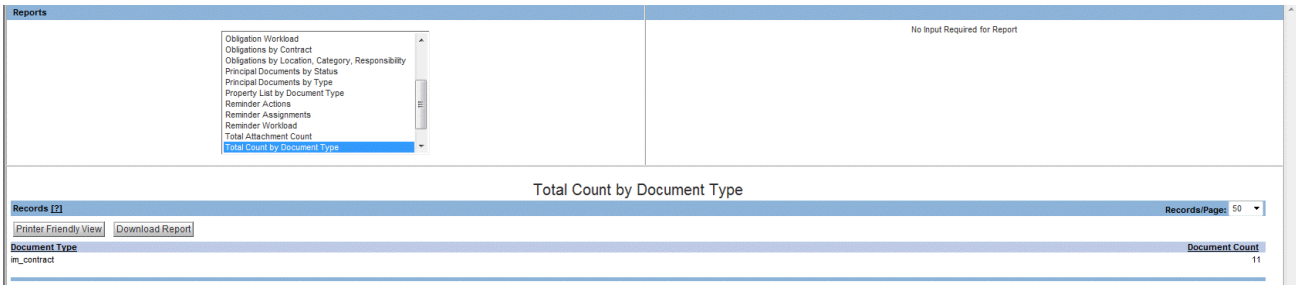
- **Total Attachment Count**
  Purpose: To report a total number of Attachments for each Attachment type. See Figure 24 and "About Related Documents" on page 114.

Figure 24 Total Attachment Count



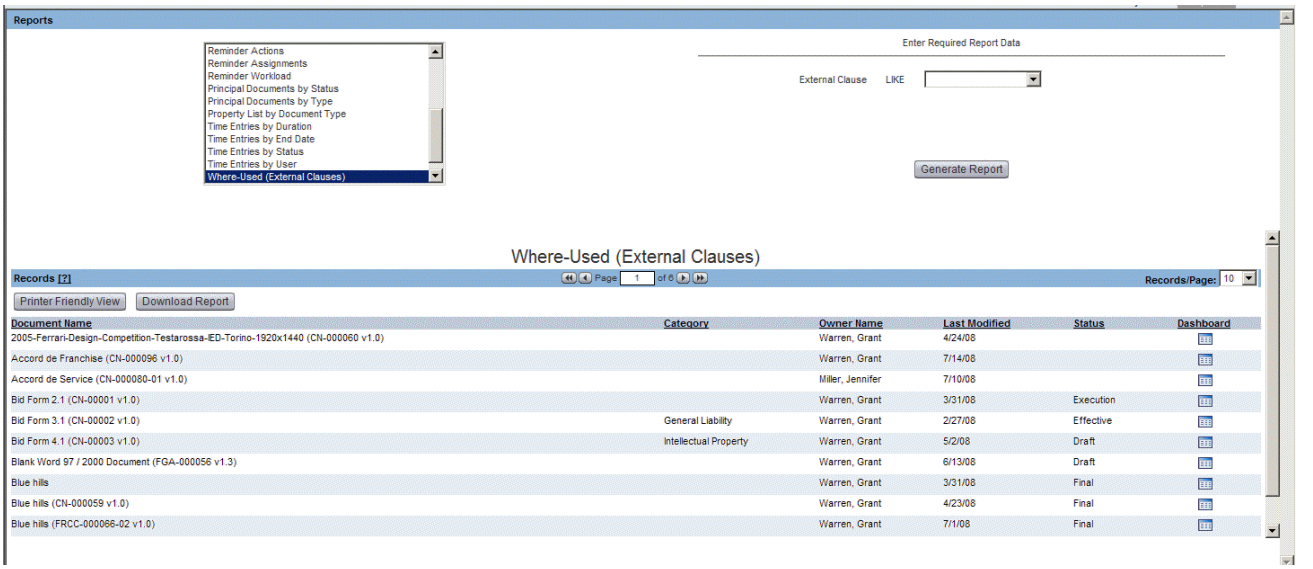
- **Total Count by Document Type**
  Purpose: To report a total number of documents for each document type. See Figure 25 and "About Document Types" on page 38.

Figure 25 Total Count by Document Type



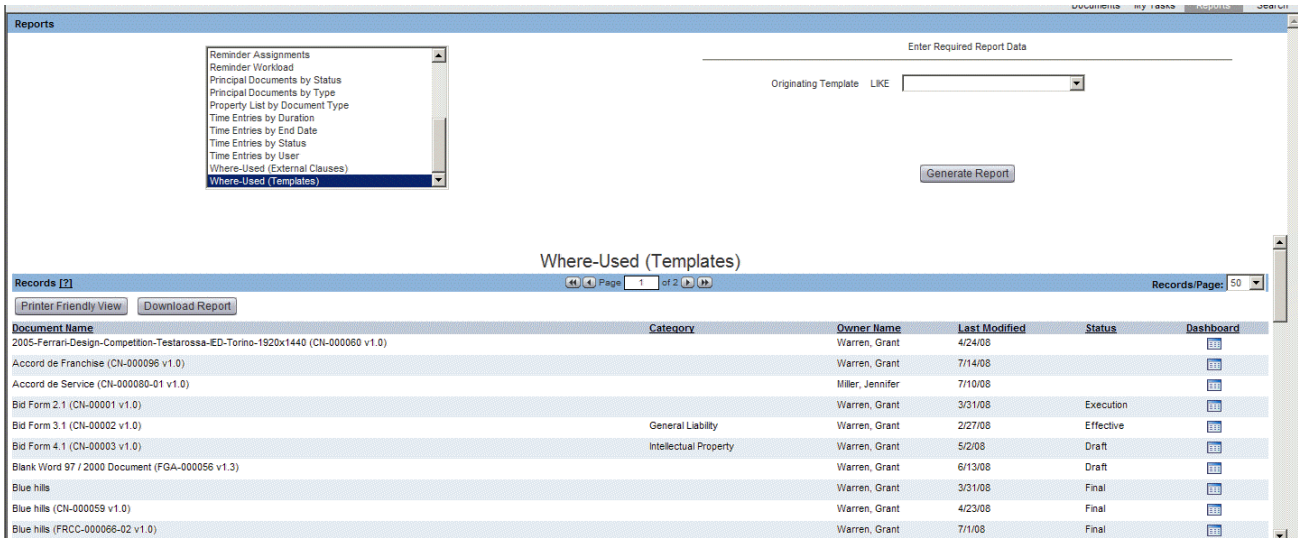
- **Where-Used (External Clauses)**
  Purpose: To report all documents using a specified External Clause or using all Clauses. See Figure 26 and the separate document, *Creating and Applying Templates*.

Figure 26 Where-Used (External Clauses)



- **Where-Used (Templates)**
  Purpose: To report all documents using a specified Template or all Templates. See Figure 27 and the separate document, *Creating and Applying Templates*.

Figure 27 Where-Used (Templates)



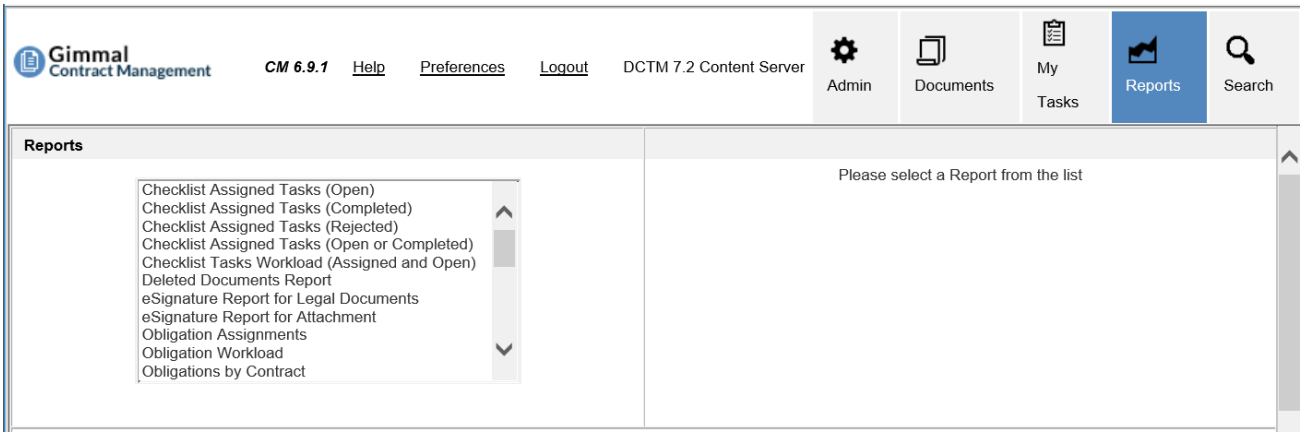
Generating A Report

All existing standard and custom reports are generated, viewed, printed, and downloaded using the same procedure. Only the report data entry fields in the selected report change.

Generate a Standard or Custom Report

1 Click **Reports** in the top menu bar to see the Reports view (Figure 28).

Figure 28 Reports View



2 Select the report that you want and enter the Required Report Data in the form.

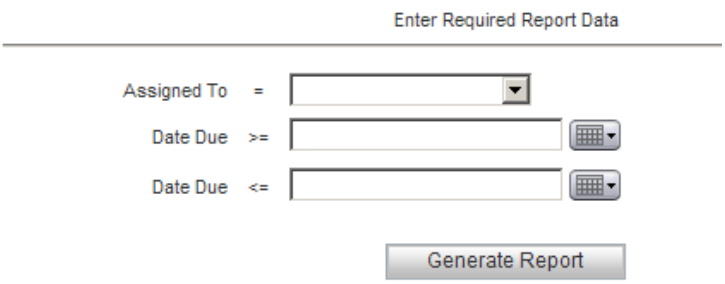
3 Click **Generate Report**.

More detail: If you have Administrator status, you do not have to enter any data into the form to get a report of all documents meeting the basic parameter.

More detail: The attributes required vary with the report selected. For example, some reports require dates to be entered and display the **Calendar** button for quick date entry. The user log in (see "Log In" on page 9) also determines the date format (MM/DD/YYYY or DD/MM/YYYY) and the Calendar language.

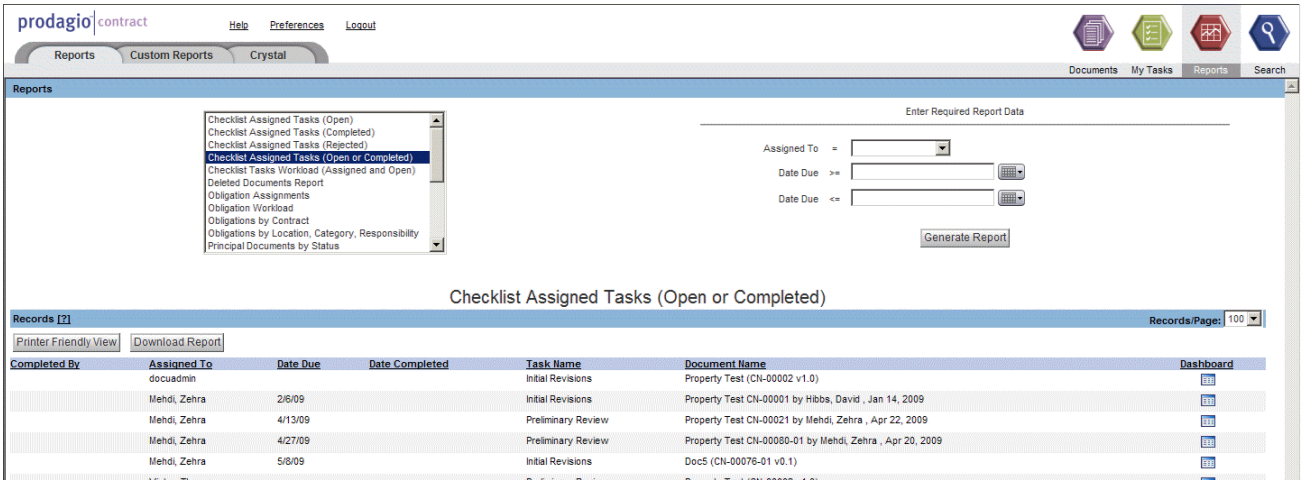
4 Enter in the fields all required report data. See Figure 12-1.

Figure 12-1 Report Selection Requiring Date Limits



5 Click **Generate Report** to display the report results in the lower pane of the window (Figure 13).

Figure 13 Example of Report Results

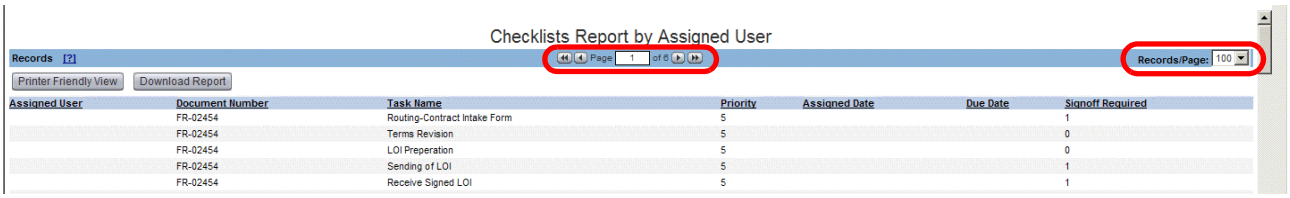


More detail: To sort report results, click a column heading. The arrow buttons indicate column data sorted in ascending ▲(a–z) or descending ▼(z–a) order. Click a column heading again to reverse the sort order.

6 To view more records in the displayed window, in the **Records/Page** field, select 100 from the menu. See Figure 14.

7 Report results usually "overflow" one window. Scroll through the report results using the page navigation buttons directly below the report's title. See Figure 14.

Figure 14 Viewing All Report Records



8 To close the report, select another report title or click any view button.

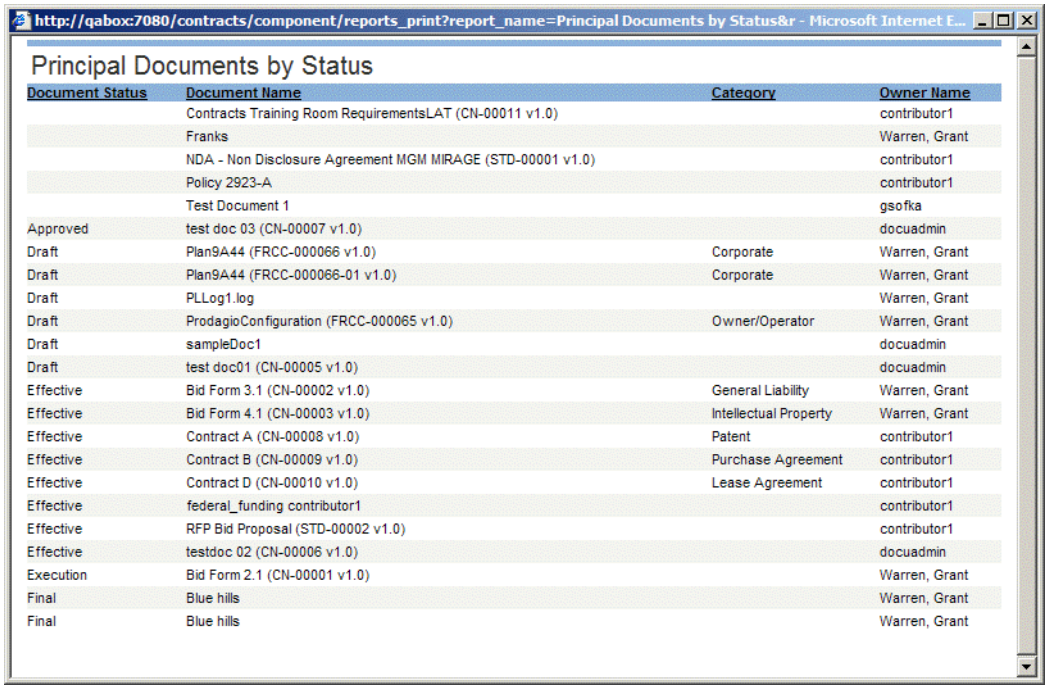
Print a Report

1 Generate a report.

More detail: If the report displays no results, printing of the report is disabled and the **Printer-Friendly View** button is not displayed.

2 From the report results view, click the **Printer-Friendly View** button. A printer-friendly view of the report and the Print window display (Figure 12-1).

Figure 12-1 Report Results in Printer-Friendly Format



Principal Documents by Status

Document Status	Document Name	Category	Owner Name
	Contracts Training Room RequirementsLAT (CN-00011 v1.0)		contributor1
	Franks		Warren, Grant
	NDA - Non Disclosure Agreement MGM MIRAGE (STD-00001 v1.0)		contributor1
	Policy 2923-A		contributor1
	Test Document 1		gsofka
Approved	test doc 03 (CN-00007 v1.0)		docuadmin
Draft	Plan9A44 (FRCC-000066 v1.0)	Corporate	Warren, Grant
Draft	Plan9A44 (FRCC-000066-01 v1.0)	Corporate	Warren, Grant
Draft	PLLog1.log		Warren, Grant
Draft	ProdagioConfiguration (FRCC-000065 v1.0)	Owner/Operator	Warren, Grant
Draft	sampleDoc1		docuadmin
Draft	test doc01 (CN-00005 v1.0)		docuadmin
Effective	Bid Form 3.1 (CN-00002 v1.0)	General Liability	Warren, Grant
Effective	Bid Form 4.1 (CN-00003 v1.0)	Intellectual Property	Warren, Grant
Effective	Contract A (CN-00008 v1.0)	Patent	contributor1
Effective	Contract B (CN-00009 v1.0)	Purchase Agreement	contributor1
Effective	Contract D (CN-00010 v1.0)	Lease Agreement	contributor1
Effective	federal_funding contributor1		contributor1
Effective	RFP Bid Proposal (STD-00002 v1.0)		contributor1
Effective	testdoc 02 (CN-00006 v1.0)		docuadmin
Execution	Bid Form 2.1 (CN-00001 v1.0)		Warren, Grant
Final	Blue hills		Warren, Grant
Final	Blue hills		Warren, Grant

3 In the Print window, select the desired printer

4 Click **Print**.

5 Close the printer-friendly report.

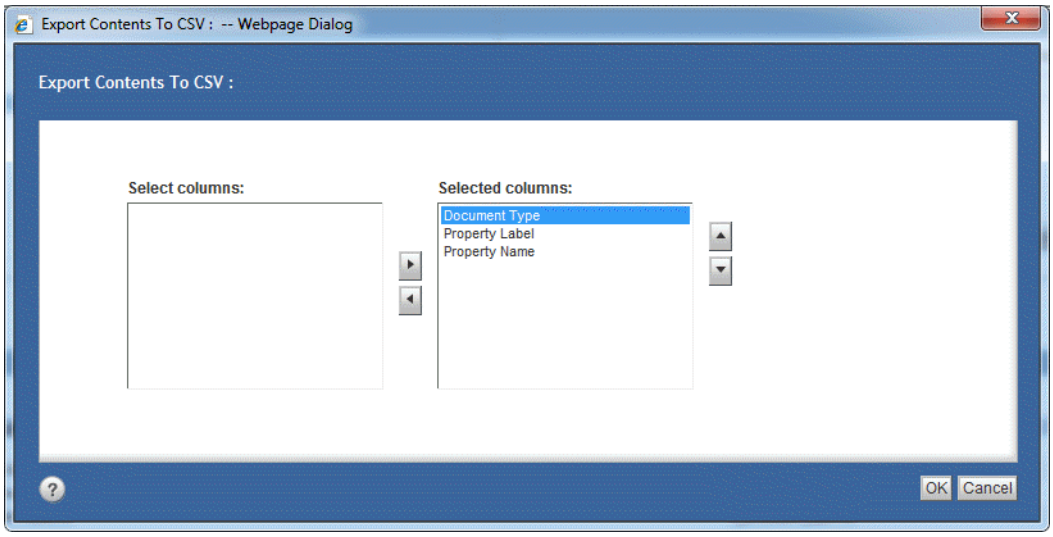
Download a Report and Export to a .csv-Formatted File

1 Complete Step 1 of the task "Generating A Report" on page 238.

More detail: If the report displays no results, downloading of the report is disabled. The **Download Report** button is not displayed).

2 From the report results pane, click the **Download Report** button. The Export Contents to CSV window displays (Figure 12-2).

Figure 12-2 Export Contents to CSV – Reports



3 Select the columns to display in the report; then click **OK**. The File Download window displays.

4 Click **Open**. The downloaded report displays in Excel.

5 Save the file in the desired location. The report name becomes the file name, with a .csv extension appended.

6 *If needed:* Open the downloaded file in an application such as Microsoft Excel.

Creating Additional Standard Reports

Additional standard Reports can be created and deployed by Imagitek using your requested report parameters. See your system administrator for details.

Creating Custom Reports

Custom Reports can be created and deployed by Gimmal Contract Management on the **Custom Reports** tab using your requested report parameters. See your system administrator for details. See Figure 28 on page 238.

Creating Custom Crystal Reports

If so configured in Gimmal Contract Management, the Reports view displays the **Crystal** tab, which allows running standard and custom reports, providing almost unlimited reporting capabilities. See your separate Crystal Reports documentation. See Figure 28 on page 238.

Chapter 13

Managing eSignatures

This chapter includes the following topics:

About eSignature....244
Requesting Document eSignatures....245
Access the eSignature Menu....245
Managing Counter Party Users....247
Select a Counter Party User....247
eSigning Process in DocuSign....251
Initiate the eSignature Process....251
Viewing Documents Post eSignature Request....253
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Reminder for Pending Document Sent to the User....253
Update for Voided Document Sent to Requester....254
Update for Completed Document Sent to the Requester....254

About eSignature

eSignatures play an important part in Gimmal Contract Management because they authenticate the contracts and/or other important documents by an authorized eSignature.

You can request an eSignature from one or many users, depending on the privileges given by the administrator. An unlimited number of eSignature requests can be sent to different users and can be attached to a contract.

You can request eSignatures in a sequential manner, and the document circulates in the order specified.

Reminders are also sent to the users if the document is nearing the due date. The Requester is kept updated about all the actions taken by the user such as updating, completed, etc., by email.

More detail: eSignature privileges are given by the business administrator as he defines users/groups who can access the eSignature functionality. Only a business administrator can change the access rights for the eSignature. See the separate *Gimmal Contract Management 6.9.1 Business Administrator Guide*.

Requesting Document eSignatures

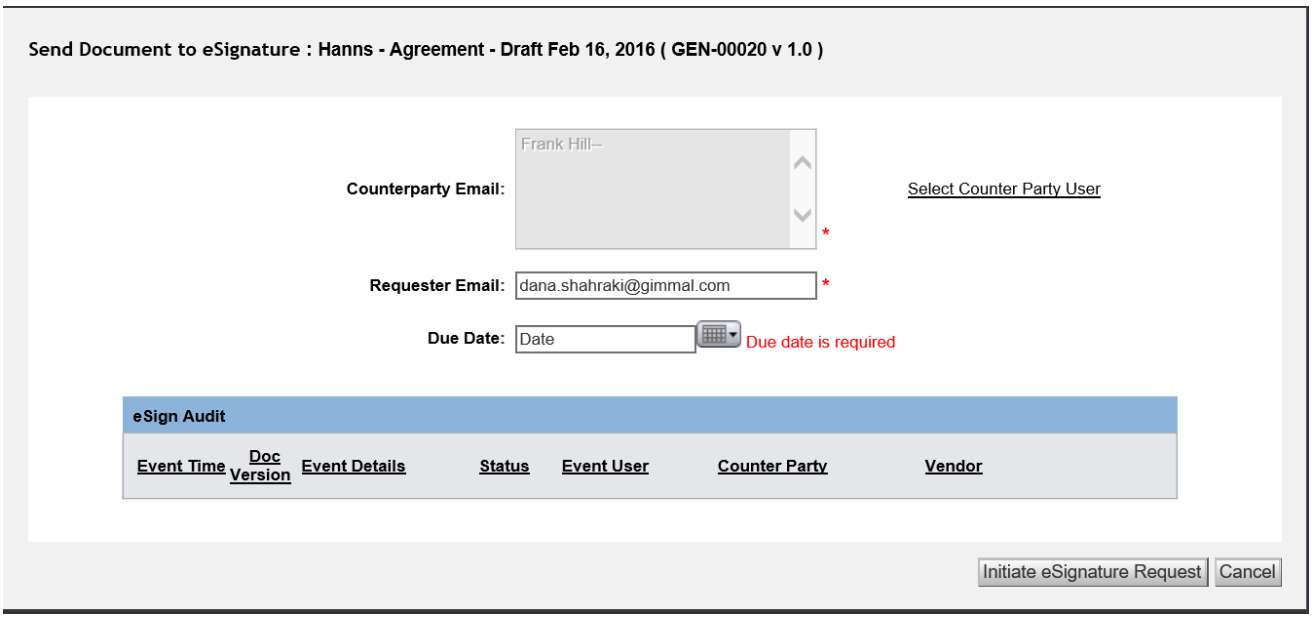
You can send a eSignature request to one or more users. If you have an account set up in DocuSign, the email

Access the eSignature Menu

1 Select the document that needs eSignature and right-click it.

2 Select **Manage eSignatures**. This opens the Send Document to eSignature Window (Figure 13-1).

Figure 13-1Send Document to eSignature



3 By the **CounterParty Email** field, click the **Select Counter Party User** link and select the name of the user to whom you want to send the document for eSignatures.

More detail: You can select one user or many users for the eSignature request. You can add the users either from the existing **Global Contact List** or **Add Other User** individually. See "Managing Counter Party Users" on page 247 for more details.

4 In the **Requester Email**, your signed-in name appears.

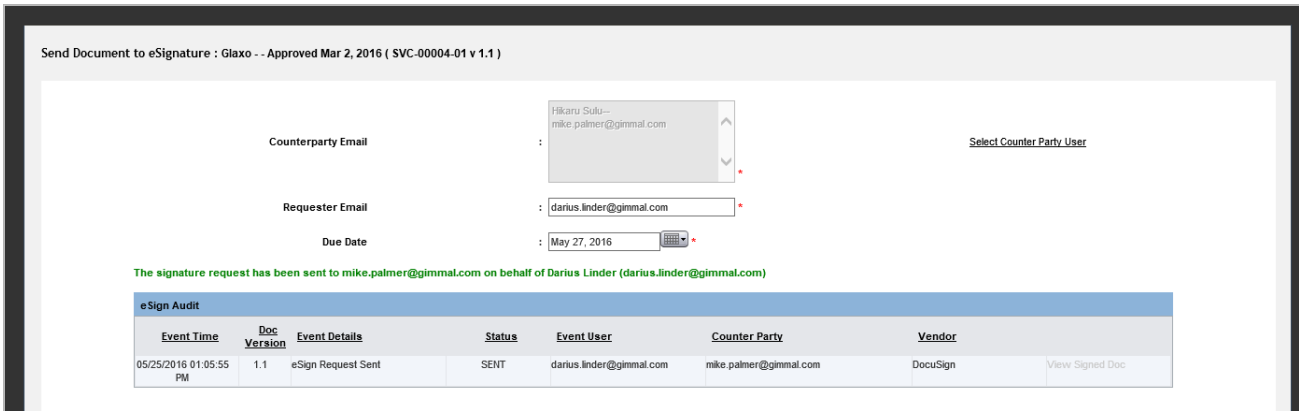
5 In **Due Date**, click the Calender to select the date by which you need the eSignatures.

6 Click **Initiate eSignature Request**.

7 An email is sent to the counter party informing him or her of the eSignature request.

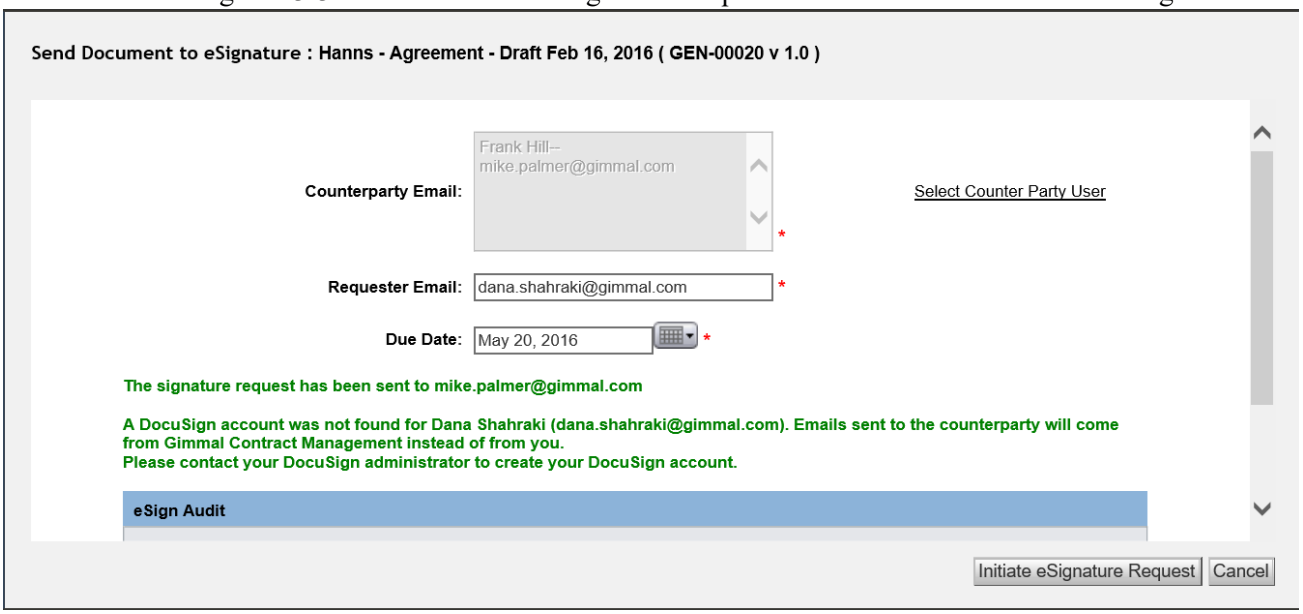
8 A message appears informing you that an email has been sent to the counter party(ies) (Figure 13-2).

Figure 13-2 Notification that eSignature Request Sent from User with DocuSign Account



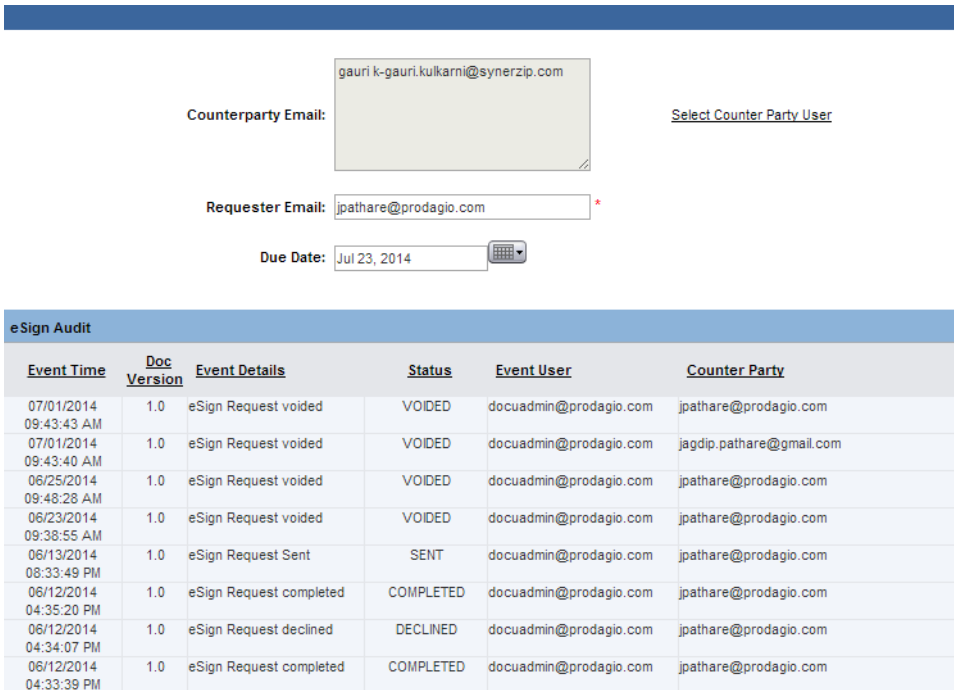
9 If you do not have a DocuSign account, the message indicates that the email will come from <*Display Name of DocuSign Integration account*> instead of from you (Figure 13-3).

Figure 13-3 Notification that eSignature Request Sent from User Without DocuSign Account



The event details of the eSignature process are captured in the **eSign Audit** table (Figure 13-4).

Figure 13-4 eSignature Request Audit Table



Event Time	Doc Version	Event Details	Status	Event User	Counter Party
07/01/2014 09:43:43 AM	1.0	eSign Request voided	VOIDED	docuadmin@prodagio.com	jpathare@prodagio.com
07/01/2014 09:43:40 AM	1.0	eSign Request voided	VOIDED	docuadmin@prodagio.com	jagdip.pathare@gmail.com
06/25/2014 09:48:28 AM	1.0	eSign Request voided	VOIDED	docuadmin@prodagio.com	jpathare@prodagio.com
06/23/2014 09:38:55 AM	1.0	eSign Request voided	VOIDED	docuadmin@prodagio.com	jpathare@prodagio.com
06/13/2014 08:33:49 PM	1.0	eSign Request Sent	SENT	docuadmin@prodagio.com	jpathare@prodagio.com
06/12/2014 04:35:20 PM	1.0	eSign Request completed	COMPLETED	docuadmin@prodagio.com	jpathare@prodagio.com
06/12/2014 04:34:07 PM	1.0	eSign Request declined	DECLINED	docuadmin@prodagio.com	jpathare@prodagio.com
06/12/2014 04:33:39 PM	1.0	eSign Request completed	COMPLETED	docuadmin@prodagio.com	jpathare@prodagio.com

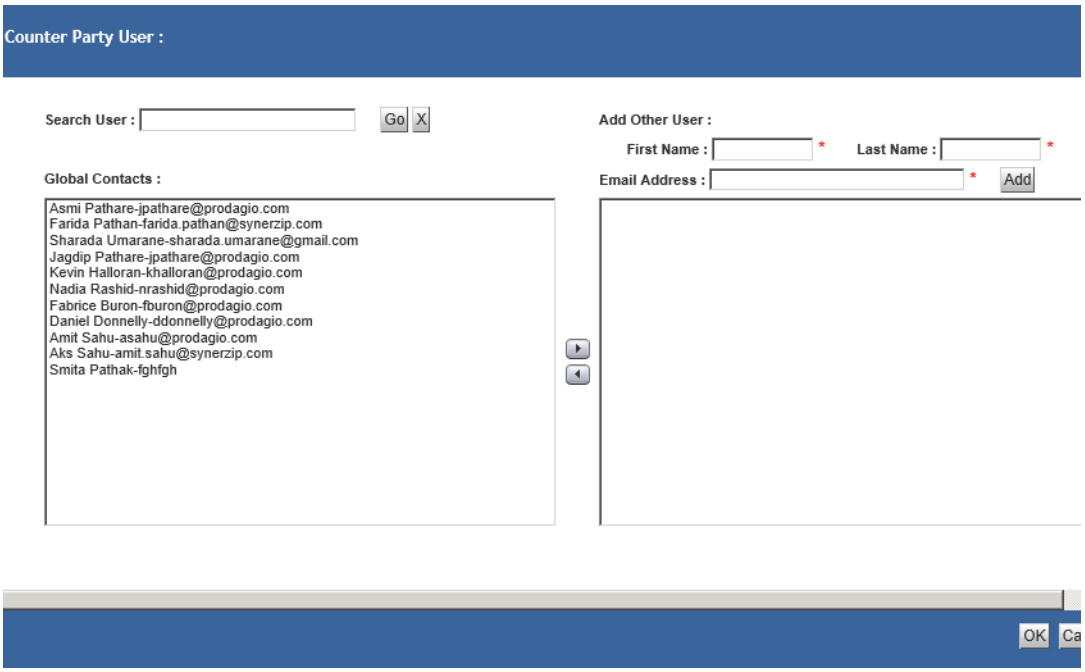
Managing Counter Party Users

Select a Counter Party User

1 In the Send Document to eSignature view, click **Select Counter Party User.**

2 Click the **Select Counter Party User** link. This selects the window to choose the users to whom the eSignatures need to be sent (Figure 13-5).

Figure 13-5 Select Counter Party Users



3 In **Search User** field, enter the name of the user to be added, if available from the Global Contacts list.

The **Global Contacts** lists the existing users.

4 Click **Go** to search the user or click **X** to cancel the search.

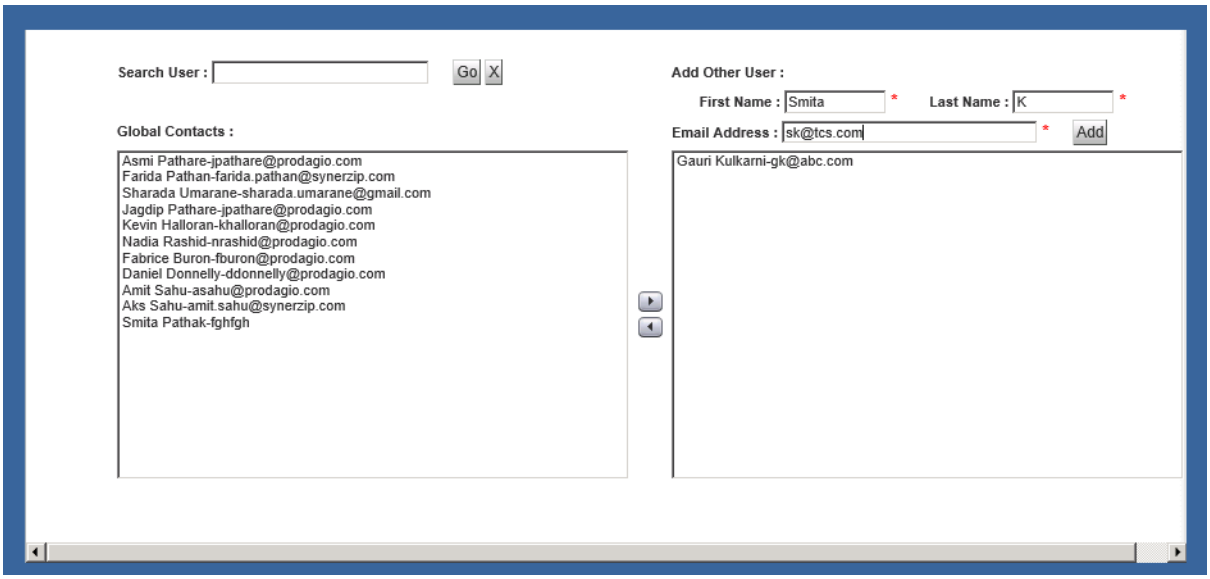
5 You can add the user from the Global Contacts list by clicking **>** and adding the user to the right column.

6 If a user is not in the Global Contacts, you can still add him or her to the list from the **Add Other User** column. The fields marked with * are mandatory.

7 Enter the **First Name, Last Name,** and **Email Address** of the user.

8 Click **Add** to add the user to the list as shown in Figure 13-6.

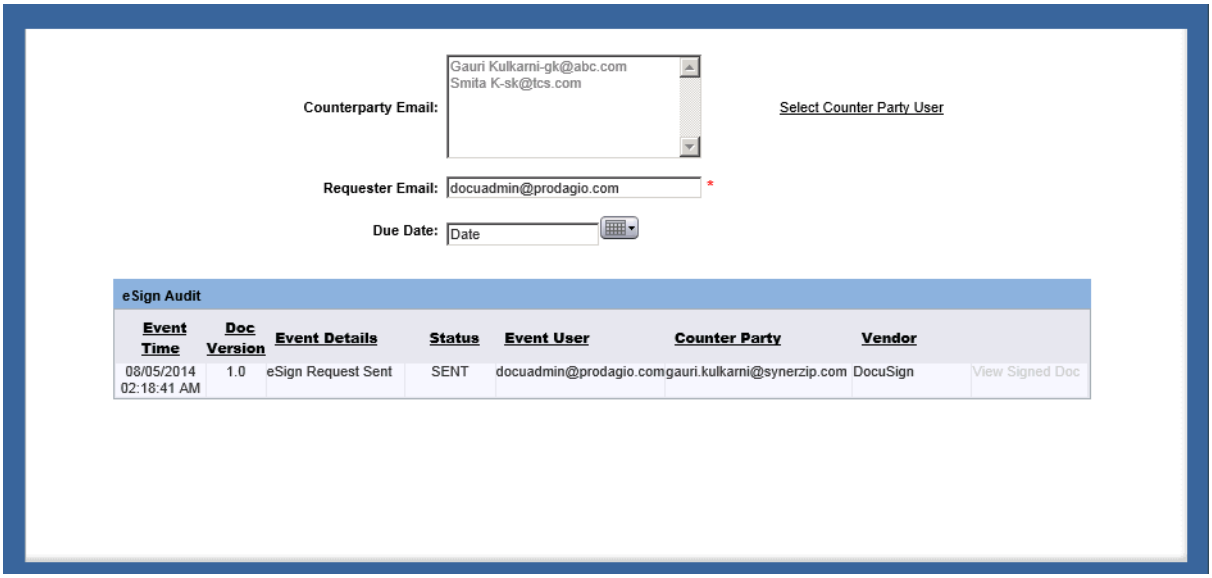
Figure 13-6 Add User



9 Click **OK** to add the user in the previous screen.

In the example in Figure 13-7, two users have been added to the **Counter Party Email** field.

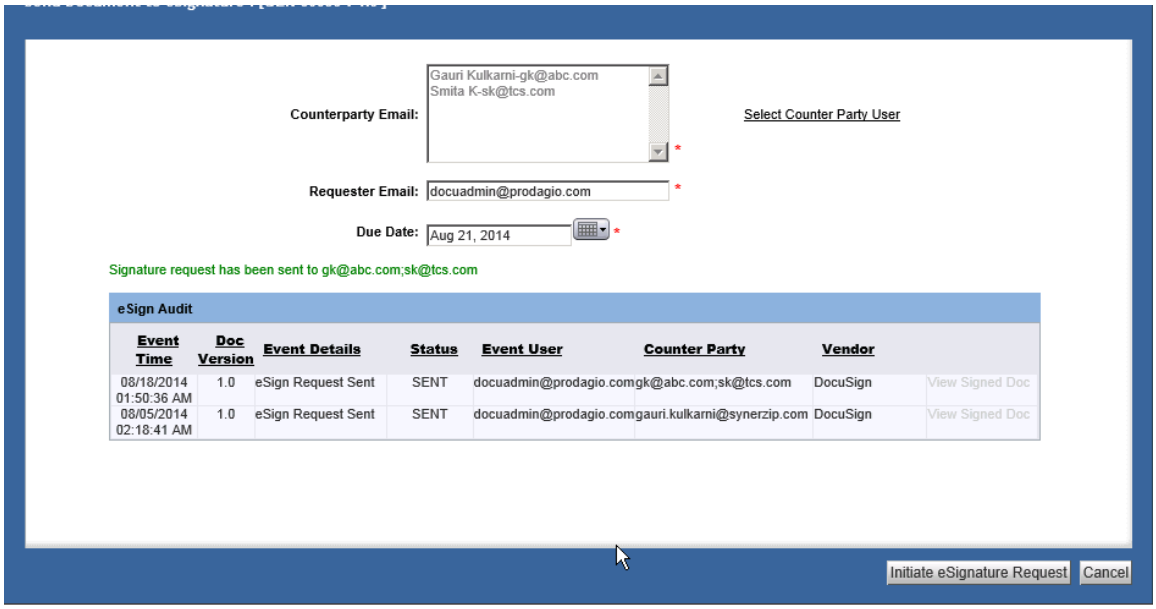
Figure 13-7 Added Counter Party Users



10 Click **Initiate eSignature** to initiate the eSignature process.

The eSignature request is generated and a confirmation message for the same appears in green (Figure 13-8).

Figure 13-8 eSignature Request Initiated



In the **eSign Audit** table, an entry appears indicating that the eSignature process is initiated.

eSigning Process in DocuSign

The eSignature process is governed by a third-party vendor, DocuSign. Gimmal Contract Management uses DocuSign user interface to enable the eSignature feature.

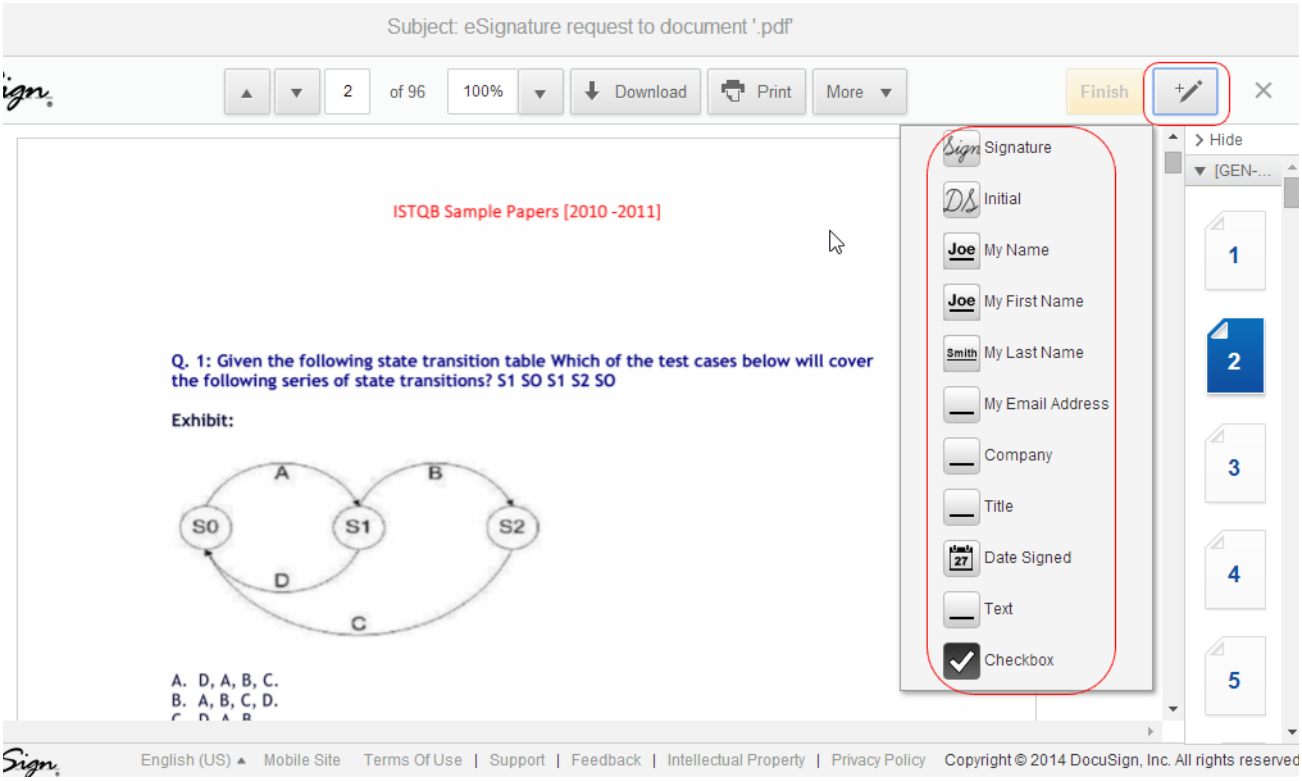
The eSignature process in any third-party vendor is similar to the one in DocuSign.

Initiate the eSignature Process

1 Click **Review Documents** to start the signing process in DocuSign.

The **Review Documents** button is enabled after you read and affirm the Disclosure by checking on the **I consent to use Electronic Records and Signatures** (Figure 13-9).

Figure 13-9 Start eSignature Process



2 Click an area within the document to insert the eSignature.

3 Select the **Pen** tool on the top bar to view the context menu.

4 Select the desired **Type of Signature** to insert that text at the selected place in the document.

You can enter your full name and initials and select the Signature Style by selecting any of the available formats by clicking on **Change Style** as shown in Figure 13-10.

Figure 13-10Adapt and Sign

5 Click **Adopt and Sign** to input the selected format of eSignature in the selected area.

6 Click **Finish** to finish the eSignature process.

More detail: For more information, you can visit the DocuSign eSignature Homepage at https://www.docusign.com/electronic-signature.

Viewing Documents Post eSignature Request

The eSignature request is sent to the Counter Party user via email. The admin user also receives frequent updates and reminders regarding the documents that are pending or are updated.

Request for eSignature Sent to the User

If you receive an email requesting your eSignature, manage it as follows.

1 Click **View Documents** in the email to open the document in DocuSign.

Figure 13-11 Viewing Documents in DocuSign

2 Select **I consent to use Electronic Records and Signatures** to enable the **Review Documents** button.

3 Click **Review Documents** to open the document for review and start the signing process.

4 Click **Decline** to decline the review process.

5 Click **Finish Later**, to review the document in part and review the remaining later.

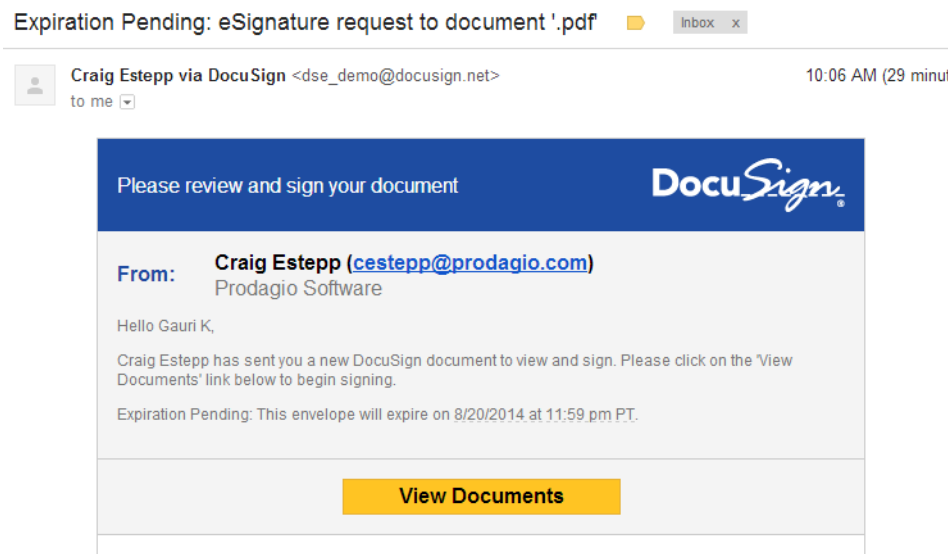
6 Click **Sign On Paper** to initiate the eSignature action.

7 Click **Change Signer** to change the signing authority if someone else should authenticate the document.

Reminder for Pending Document Sent to the User

If a document is pending for eSignature, a reminder email is sent to the user as shown in .

Expiration Pending Email

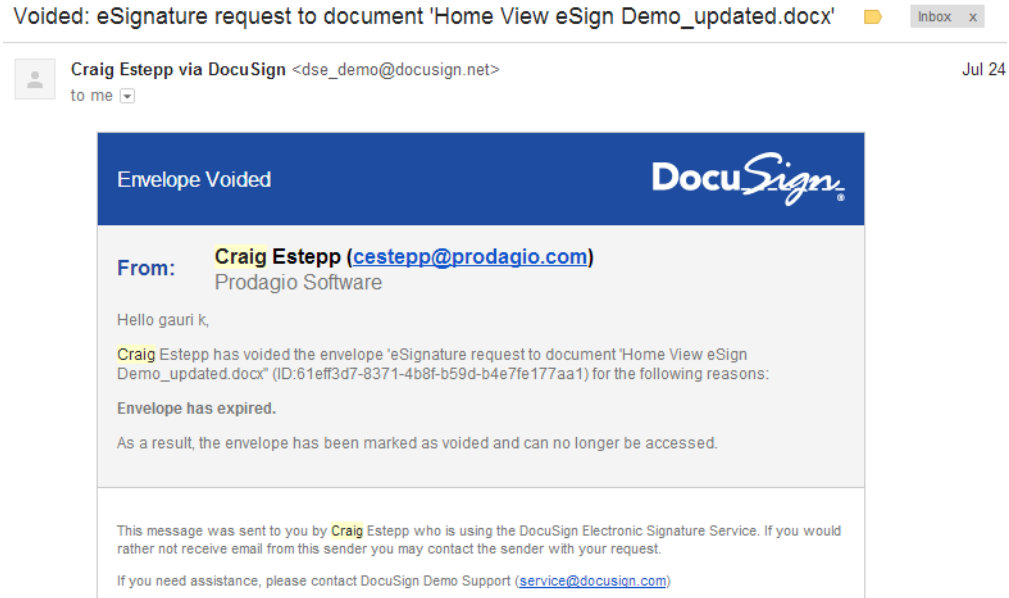


1 Click **View Documents** to see the documents.

Update for Voided Document Sent to Requester

If the eSignature request passes its due date, it is voided. The requester will receive a email notifying him or her of the void (Figure 13-12).

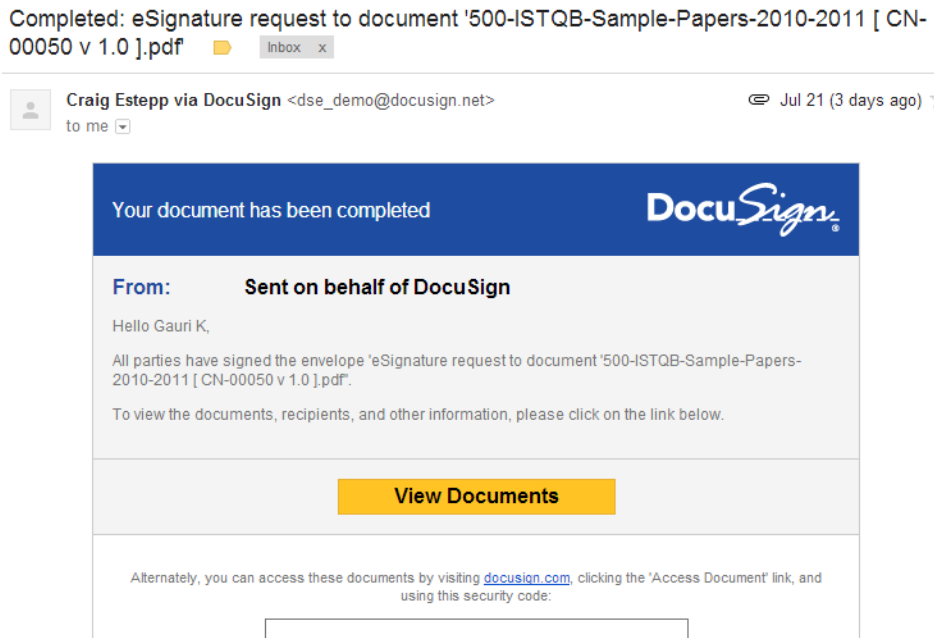
Figure 13-12eSignature Voided



Update for Completed Document Sent to the Requester

When an eSignature is completed, the requester is informed by email (Figure 13-1).

Figure 13-1Completed eSignature



1 Click View Documents to view the eSigned document(s).

Chapter 14

Managing Datagrids

This chapter includes the following topics:

About Datagrids 256
Working with Datagrids 257
- Open the Datagrid Pane 257
- View Document Properties from the Datagrid Pane 258
- Add a Row to the Datagrid 258
- Delete a Row from the Datagrid 259
- Reorder the Rows in the Datagrid 259
- Duplicate a Row in the Datagrid 259
- Import Data into a Datagrid 259

Working with Related Data 261
- View Related Data of a Datagrid 262
- Edit Related Data 262

Viewing Custom Report 263
- View Custom Report 263

Generating the Dev Report 264

About Datagrids

Gimmal Contract Management Datagrids are useful when a lot of complex data needs to be broken down into smaller components and made easier to analyze. The Datagrid enables effective and usable presentation of tabular data.

Working with Datagrids

Datagrids are *created* and *managed* by the business administrator, who defines the Datagrid properties, column layouts, etc., and links them to a specific type of document. Only a business administrator can link a Datagrid to another document or associate it with a parent Datagrid.

Example: A Datagrid named *Data Contract* is associated with the *Contract* type of document. When you open the Contract type of document in the Documents view, you see the *Data Contract* Datagrid associated with it.

An administrator can view and open all the main Datagrids.

A user can add, delete, and duplicate rows; move rows up/down, open and edit the subdatagrids, open related documents, import data into a Datagrid. You can also view and edit any related data ("Working with Related Data" on page 261).

See the separate *Gimmal Contract Management 6.9.1 Business Administrator Guide*.

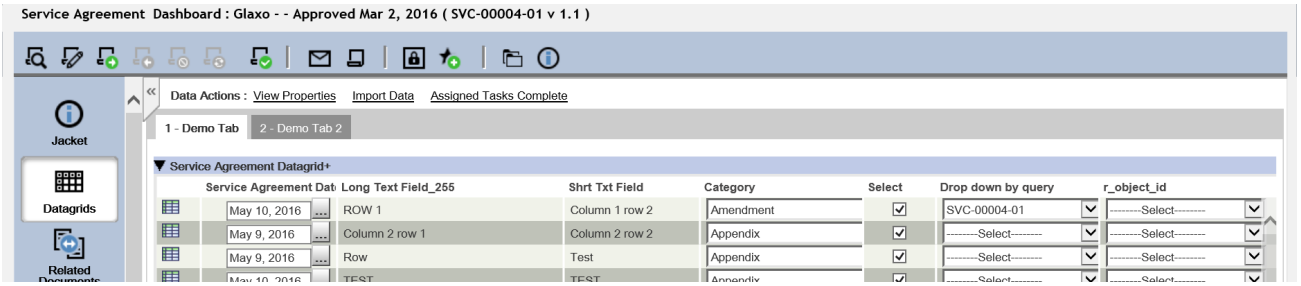
You can perform the following actions with Datagrids:

- "Open the Datagrid Pane"
- "Add a Row to the Datagrid"
- "Delete a Row from the Datagrid"
- "Duplicate a Row in the Datagrid"
- "Import Data into a Datagrid"

Open the Datagrid Pane

1. Double-click the document to open.
   OR
2. Right-click the document and click **Open Dashboard**.
3. Click the **Datagrids** button to see the available datagrid(s). Figure 14-1 shows the example Service Datagrid where three rows have been already added.

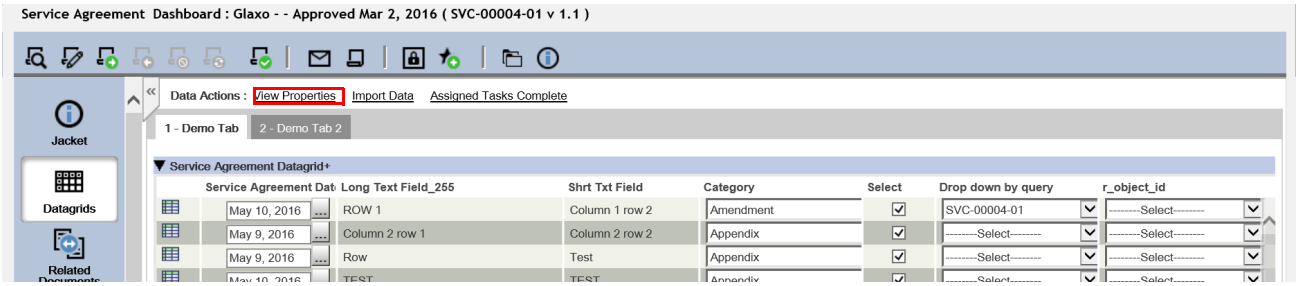
Figure 14-1 Open Datagrid



View Document Properties from the Datagrid Pane

1 To view the properties of the document that the Datagrid(s) belong to, click the View Properties link ().

Figure 14-2 View Properties Link in Datagrid Pane



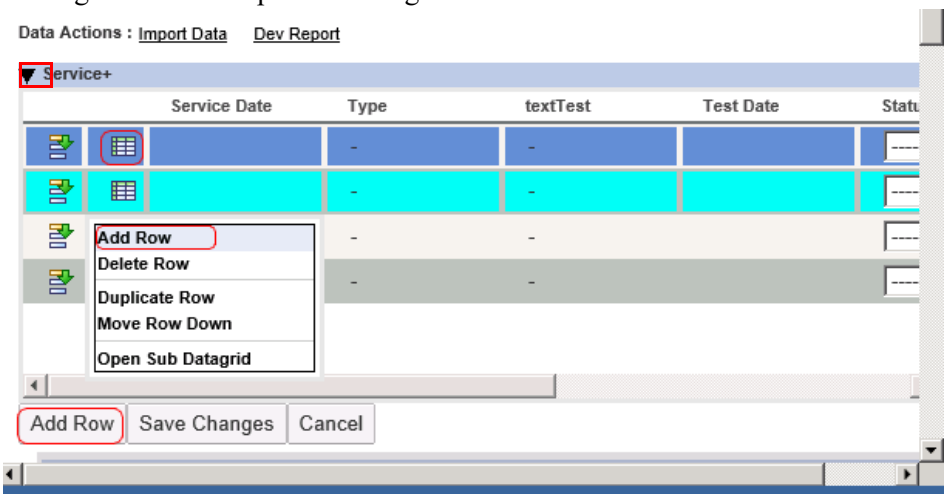
Add a Row to the Datagrid

1 Expand the Datagrid.

2 Click the **Actions** button and select **Add Row.**
OR

3 Click the **Add Row** button (Figure 14-3).

Figure 14-3 Expanded Datagrid



4 Click **Save Changes** to save all the changes to the database. Click **Cancel** to cancel the operation.

Delete a Row from the Datagrid

1 Select the row that needs to be deleted.

2 Click the **Actions** button and select **Delete Row**.

3 A confirmation message displays asking you to confirm deletion.

4 Click **Yes** to mark the row for deletion.
The row color changes to blue, indicating that it is scheduled to delete.

5 Click **Save Changes** to save all the changes to the database and delete the row from the database.

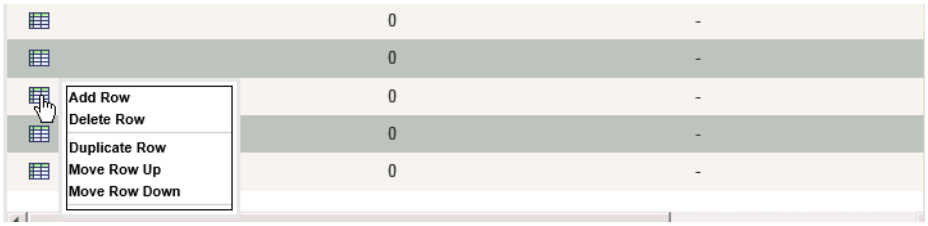
Reorder the Rows in the Datagrid

1 Select the row to be moved.

2 Click the **Actions** button to open the menu and select **Move Row Up** or **Move Row down**.

The middle rows have both selections (Figure 14-4), whereas the top and bottom row only have one selection enabled.

Figure 14-4 Move Row Up/Down



Duplicate a Row in the Datagrid

1 Select the row and click the **Actions** button to open the menu.

2 Select **Duplicate Row** to duplicate the row. All the data is duplicated in a new row below the selected row.

3 Click **Save Changes** to save all the changes to the database.

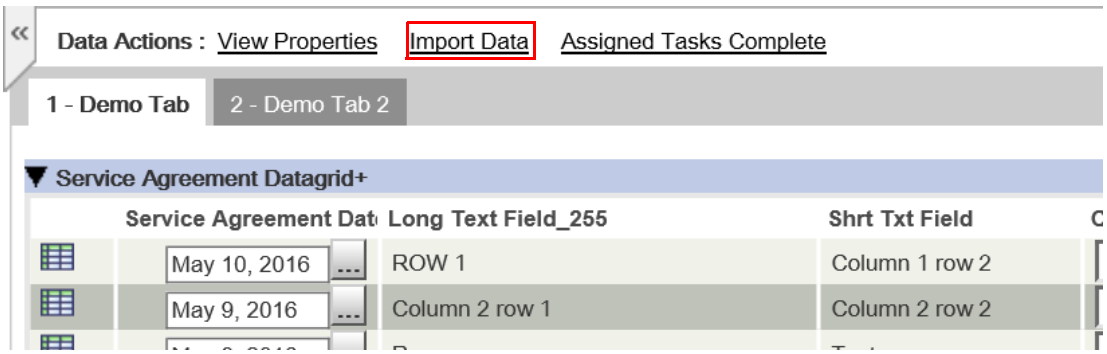
Import Data into a Datagrid

You can import data into a Datagrid.

More detail: The hierarchal structure of the Datagrids, both the one being imported from and the one being imported into, must be same or else the import cannot be performed.

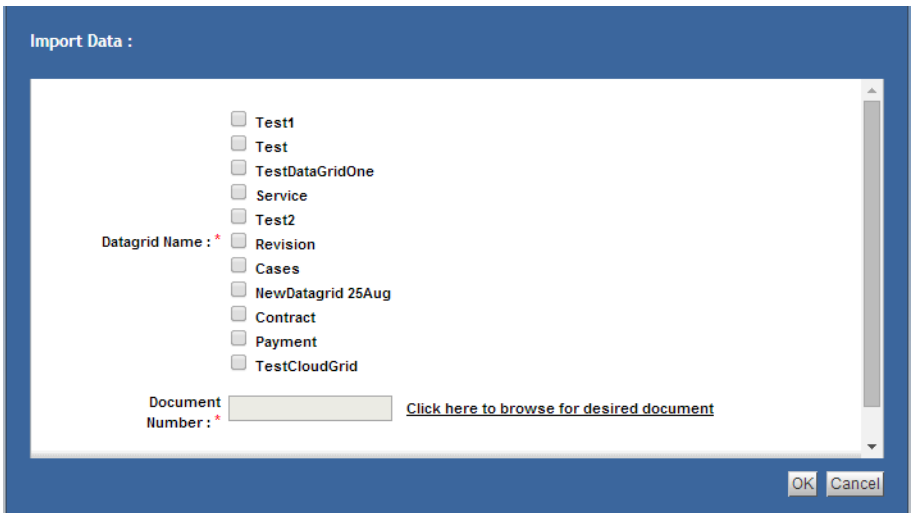
1 Open the Datagrid (Figure 14-5).

Figure 14-5 Import Data Link on Datagrid



2 Click the **Import Data** link. The Import data window appears (Figure 14-6).

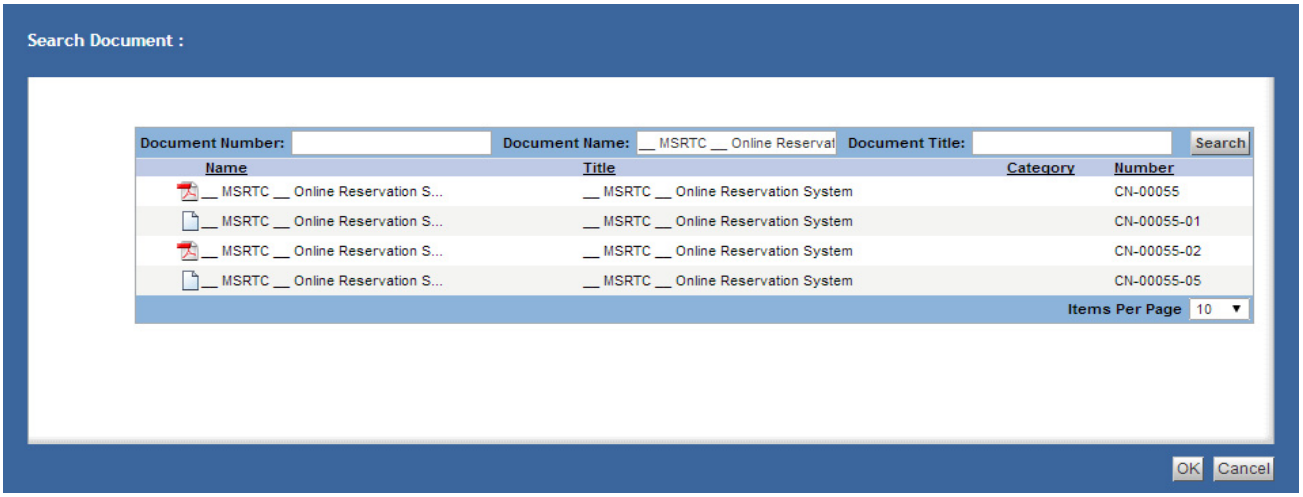
Figure 14-6 Import Data Window



3 (Mandatory) Only the parent Datagrids are choices for **Datagrid Name.** Select the parent Datagrid that you want to be imported into the current selected Datagrid.

4 (Mandatory) Type the **Document Number**, or click the **Click here to Browse for desired document** link to browse and search for the required document and its number (Figure 14-7).

Figure 14-7 Browse Desired Document



5 Enter the **Document Number**, **Document Name**, or **Document Title** and click **Search**. The search related documents display.

6 Select the number of **Items per page** from the menu.

7 Select the required document and click **OK** to return to the previous window. The selected Document Number is added in the Import Data window.

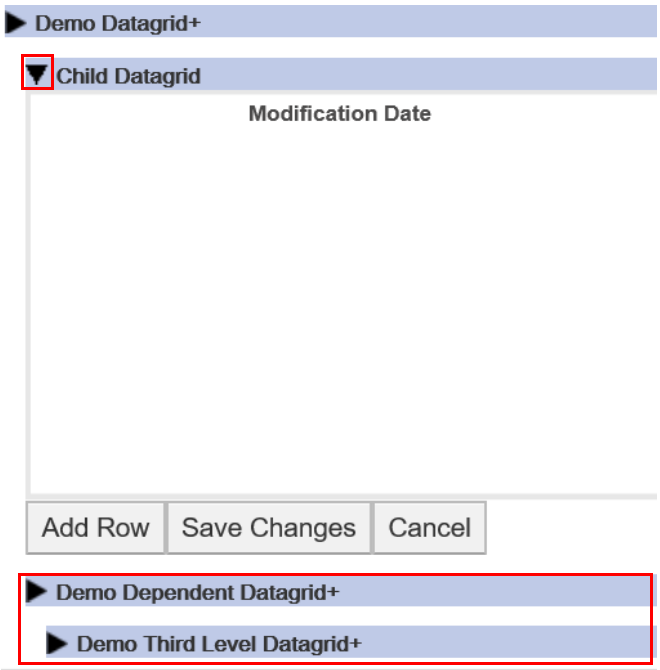
Working with Related Data

Each row of a Datagrid can have related data. This data is presented in child Datagrids. Your organization's business administrator is reponsible for creating and maintaining the child Datagrids. Please see the *Gimmal Contract Management Business Administration Guide* for more information.

View Related Data of a Datagrid

1 If a Datagrid has a child Datagrid, click the button to expand the child Datagrid that you want to view. Figure 14-8 demonstrates that a Datagrid can have more than one child Datagrid.

Figure 14-8 Subdatagrid



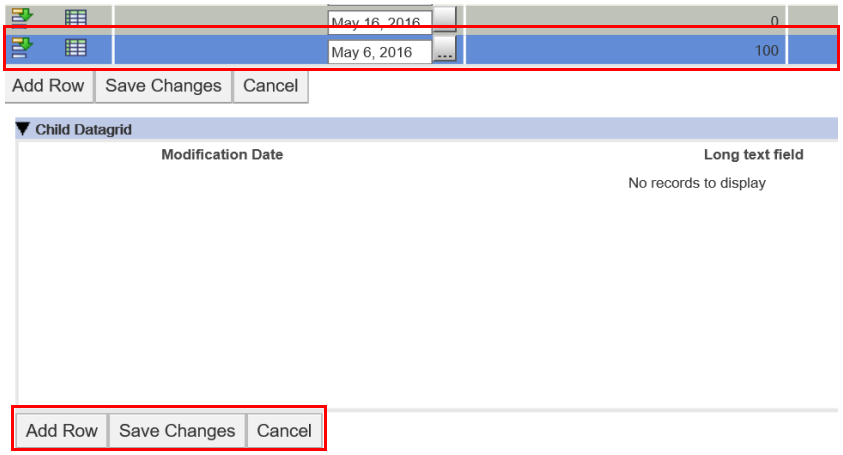
Edit Related Data

1 Expand the Datagrid that you want to edit the related data for.

2 Expand the child Datagrid that you want to edit the data in.

3 Click the **Related Data** button in the parent Datagrid for the row that you want to edit the data for. The row highlights in blue in the Datagrid and the buttons activate in the child Datagrid (Figure 14-9).

Figure 14-9 Child Datagrid Active when Row Selected



4 Edit the related data as necessary, following the procedures described in "Add a Row to the Datagrid", "Delete a Row from the Datagrid", "Reorder the Rows in the Datagrid", "Duplicate a Row in the Datagrid", and "Import Data into a Datagrid".

5 Click **Save Changes** or **Cancel**.

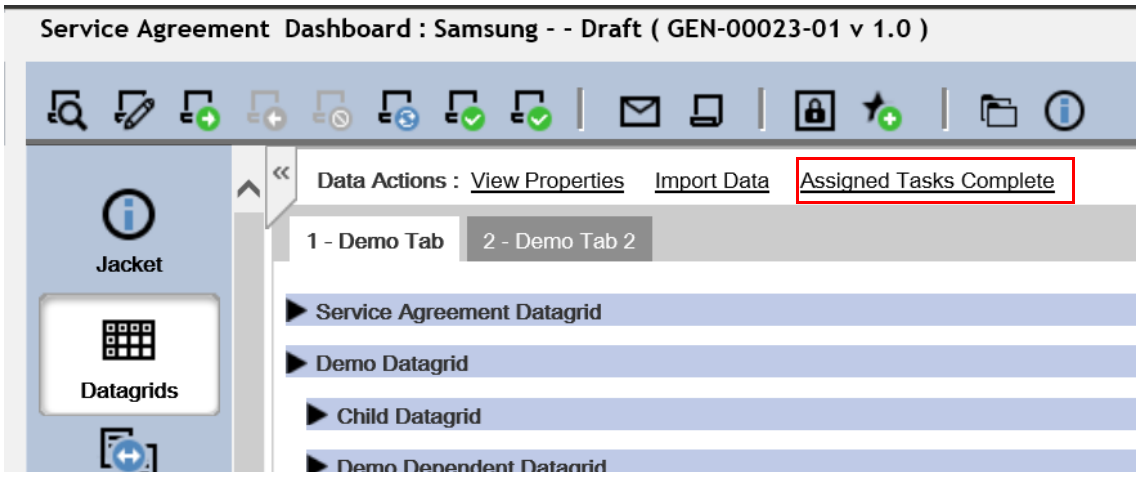
Viewing Custom Report

Your organization's business administrator can link a specific report to appear on either the Jacket and/or the Datagrid main view. Please see the *Gimmal Contract Management Business Administration Guide*.

View Custom Report

1 Navigate to the Datagrids pane for the document that you want to see the report for (Figure 14-10). In this example, the link to the custom report **Assigned Tasks Complete** appears.

Figure 14-10 Datagrids Pane with Link to Example Custom Report



2 Click the link to the custom report. The dialog box to specify the report parameters displays (Figure 14-11).

Figure 14-11 Example Custom Report Dialog Box

3 Set the parameters to get the report that you want.

4 Click **OK**. The report displays.

Glossary

A

Acquired

A task status indicating that the performer has opened the task, but has not yet completed the task. Compare with **dormant**. See "Workflow Tasks" on page 192.

Ad Hoc Routing

A one-of-a-kind document workflow routing path, set up once by the user and applied only to the current document. See "Routing Documents" on page 132. Compare with **Predefined Routing**.

Admin View

Provides access to all business administrator and system administrator tasks, and only available to users with administrator access. See the separate *Gimmal Contract Management 6.9.1 Business Administrator Guide*. See Figure 2-4 on page 12.

Advanced Search

Provides access to multi-level searches on the **Search** view, including adding search parameters using the and or operators. See "Advanced Searching for Documents" on page 208. Compare to **Quick Search**. See "Quick Searching for Documents" on page 206.

ALERT!

Indicates that taking this action cannot be undone or restored and helps the user avoid taking an incorrect action. See "Examples and Conventions" on page 2.

All Saved Searches

Uniquely titled searches which users have saved. All Saved Searches are available to all users. See "Managing All Saved Searches" on page 217.

Amendment

Any document you wish to share the same document number, but the number is appended with –01, –02, etc. An Amendment is a category of Related Document. See "Creating an Amendment" on page 123.

ascending ▲

alphabetical order, from a–z, used to sort information by column. See "Sorting Items" on page 32.

Asterisk *

Indicates a field's information is required and must be entered. See "Examples and Conventions" on page 2.

Attachment

Any document to be stored in a connected Attachments folder — use for related email, correspondence, pictures and similar documents An Attachment is a category of Related Document. See "Assigning, Creating, and Importing Related Documents" on page 118.

Attribute (properties, metadata)

A characteristic defining a document. Example attributes are document name, authors, and title. Attributes are also often referred to as **properties** or **metadata**. See "Viewing Document Properties" on page 72.

Audit Trail

A listing of all actions that have been taken on a selected document. The Audit Trail is read-only; it cannot be edited or deleted. See "Managing the Document Audit Trail" on page 99.

Auto File

Moves a document to its proper location, as determined by the document's category and type properties (metadata). Is the quickest, most accurate way to move a document from the **Personal** to the correct folder in the **Cabinets** tab. See "Auto File a Document" on page 65.

Automated Reminder (Date-Based)

Automatically sends Reminders based on Automated Reminder rules and a specific date field of a document type. Set up and managed by the business administrator. See "Managing Reminders" on page 144.

B

Buttons

Places to click to initiate actions. Usually associated with an icon.

Business Administrator

Individuals typically in an organization's legal department or another area having approval authority for the content of contracts, clauses and the model documents (Templates) used to create new contracts. The business administrator also can perform all user tasks. Compare with **system administrator**. See "Administrators and Users" on page 10 and the separate *Gimmal Contract Management 6.9 Business Administrator Guide*.

C

.csv

Comma separated variable, a standard, basic spreadsheet format in which tabular information is separated by the comma character, and is exported from and imported into Gimmal Contract Management. See "Exporting Listings to .csv-Formatted File" on page 64.

Cabinets Tab

In the Documents View, the **Cabinets** tab displays all public Cabinets. These Cabinets store all folders, sub folders and related contracts and documents available to all those with login permissions. See "Cabinets Tab" on page 13.

Cancel Checkout

Allows users to cancel any of their checked out documents instead of checking the document back in. If any changes were made on the checked out document, the changes are lost after canceling checkout. See "Canceling Document Check Out" on page 55.

Check In

Saves a file in the repository after it has been checked out for revision. After check in, a document is available to all users. See "Checking In and Changing a Document Version" on page 52.

Check Out

Padlocks a file in a repository so neither the document nor its attributes can be edited by other users. Downloads the document's content to the user's computer for editing. Checked-out files are stored by default in the C:\Documents and Settings\your name\Documentum\Checkout folder. Changes made to a file's attributes or content are not saved in the repository until the file is checked in. See "Editing a Document" on page 50.

Checklists

A uniquely named set of business process tasks assigned to a contract. Checklists consists of items, each of which must be assigned to various groups or individuals, which may be performed in a random sequence. An unlimited number of Checklists may be created and assigned to a document. Available Checklists are created by business administrators. See Chapter 9, "Managing Checklists".

Clauses Tab

On the Documents View, the **Clauses** tab displays a list of external clauses to use when building documents from Templates. Clauses are stored and updated by business administrators. See "Clauses Tab" on page 14.

Clipboard

A holding place for multiple documents, with a separate Clipboard for each user. Most common uses for the Clipboard are copying and moving, particularly from the Personal to the **Cabinets** tab. See "Moving, Copying and Linking Items Using the Clipboard" on page 89.

Completed status

A Reminder, Obligation or Checklist task that a user has completed. Users must manually mark the task as completed. See "Obligation Statuses" on page 153 and "Reminder Statuses" on page 144.

Contacts

Information related to contacts attached to any document, available to all users who can view or edit the document. Document Contacts are specific to a document, and created by users; Global Contacts are available for assigning to one or more documents and are created by business administrators. See "Managing Document Contacts" on page 103.

Crystal Reports

If so configured, a separate tab on the Reports View allowing access to Crystal Reports software and its custom reports. See "Creating Custom Crystal Reports" on page 241.

Custom Reports

If so configured, a separate tab on the Reports View allowing access to Custom Reports. Custom Reports are configured separately for each customer. See "Creating Custom Reports" on page 241.

D

Datagrid

On the Properties window of some document types, Datagrids simplify and speed entry of repetitive and related Property information. See "Edit Document Properties Using the Datagrid" on page 76.

Delegate (workflow task)
A feature of certain Predefined workflows (routing) allowing the task to be assigned to a different user. Delegate is only available if the task has been assigned to multiple users. Compare with **Repeat**. See "Workflow Tasks" on page 192.

Delegate (availability)
The user who has been delegated to perform another user's tasks during that other user's planned period of unavailability. See "Setting Your Workflow Availability" on page 203.

Deleted (Obligation)
An Obligation that a user has manually deleted. See "Managing Document Obligations" on page 160.

descending ▼
reverse alphabetical order, from z–a, used to sort information by column. See "Sorting Items" on page 32.

Docbase
See **repository**. See "Log In/Log Out of Gimmal Contract Management" on page 9.

Document action buttons
Clickable buttons providing access to all actions available for the selected document. Most of these actions are found on the document dashboard. See "Buttons and Icons" on page 25.

Document Actions
Document Actions are accessed with a right-click on the item name. See "Accessing Document Actions" on page 29.

Document (contract)
Any file with content that resides in a repository such as a contract, Attachment, spreadsheet, memo or graphic. In Gimmal Contract Management, any single file of any format is considered a document. See "Terminology" on page 1.

Document Dashboard
The main document 'window', displaying the document's key Jacket properties, actions, links and available features. See "Document Dashboard" on page 18.

Document numbers (document versions)
Automatically assigned, sequential or configured to generate specific numbers based on organizational rules. Usual document numbering schemes include a two or more letter prefix, a five-digit number, a two-digit sub-number and a version number. See "About Document Numbers" on page 39.

Documents View
The main Gimmal Contract Management view for users, which includes seven tabs and access to the three other Views. See "Documents View" on page 13.

Document Type
A grouping or categorization of documents that are similar in format, content and / or purpose. Document type is an important metadata property. See "About Document Types" on page 38.

Documentum
An enterprise-level document management software system developed and supported by the EMC and integrated with Gimmal Contract Management. See "Gimmal Contract Management Overview" on page 4.

Dormant

A task status indicating that the performer has not yet seen the task. Compared with **acquired.** See "Workflow Statuses" on page 192.

E

Email as Link

A right-click document selection which allows emailing a link of the document in the body of an email message. See "Emailing Documents as Links" on page 64.

Email as Attachment

A right-click document selection which allows emailing a document as an Attachment in an email message. See "Emailing Documents as Attachments" on page 61.

Export to CSV

A right-click document selection which allows exporting a lost of document or Search Results into a spreadsheet comma separated variable format, usually be opening Microsoft Excel. See "Exporting Listings to .csv-Formatted File" on page 64.

External Application Links

Client-configurable links to external applications displayed on most Views. Some links may include single sign-on capability. See "Help" on page 19.

F

Favorites Tab

A shortcut to the file, not the original file. On the Document View, the **Favorites** tab displays all Cabinets, folders, and files "bookmarked" by the user, to better enable quick access. See "Favorites Tab" on page 16.

Forward

A feature of Predefined workflows to permit sending the document to the next person or group. See "Routing Documents with Predefined Routing" on page 138.

Full-text search

An index of all words included within a document, and all the metadata, thereby enabling searching both document content and attributes. See Chapter 11, "Searching Documents".

H

HTTP File Transfer

The default Gimmal Contract Management method used during web-based document importing and signing in. Involves standard browsing to find the needed document. See "Importing Documents" on page 43 and "Checking In and Changing a Document Version" on page 52.

I

Import

Bring in a document from outside of Gimmal Contract Management and add it to the Repository. See "Importing Documents" on page 43.

Icons

Small graphics used to indicate a condition. See "Buttons and Icons" on page 25.

Item

A general term used to describe all documents (of all types), tasks, Obligations, Reminders, and so on, that are displayed in various windows, on which an action can be taken.

J

Jacket

The document folder listing all document properties. Allows changing these properties if user has write permissions, including adding a graphic to the Jacket. See "Document Dashboard" on page 18.

K

Keywords

Additional properties added to a document to enhance searching. Keywords can be added or changed when creating a new folder, importing documents, Amendments and Attachments, associating and filtering Attachments and during document check in. See "Importing Documents" on page 43.

L

Links

On various windows, underlined words which, when clicked, jump the user to another window. For example: Edit, Check Out, Preferences.

Locations

A document Action selection which lists all places (locations) in the Cabinet and folder structure where a document is stored. See "Finding All Locations of a Document" on page 60.

Lookups

For certain document types, a Property window feature enabling searching and automatic entry of information into one or more related fields. See "Edit Document Properties Using Lookups" on page 75.

M

Master document

One document in a *superior* relationship to the selected document — documents can only have one master A Master is a category of Related Document.

Metadata (properties, attributes)

Information about a stored document such as its author, subject, and creation date. Metadata, also called *properties* or *attributes*, can be used to locate the document during a search of the repository. See "Viewing Document Properties" on page 72.

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. See "Examples and Conventions" on page 2.

My Saved Searches

Uniquely titled searches which you have saved and are available to all other users. See "Managing My Saved Searches" on page 215.

My Tasks View

A "to-do" list of all items and tasks requiring a user's attention, including workflow or router tasks, subscribe notifications, Reminders and Obligations. For example, one of a user's employees might place a vacation request in the user's My Tasks list or a co-worker might route the user a contract to review. See Chapter 10, "Managing My Tasks".

N

Notes

Permanent notes added to a document for others to view. All users can view the notes written by all other users. See "Managing Document Notes" on page 94.

Notifications

Notifications display on your My Tasks View and are generated each time a user changes a document to which you have subscribed. See "Managing Subscription Notification Tasks and Emails" on page 200 and "Subscribing to a Document" on page 67.

O

Obligations

Tasks that must be completed in order to meet the legal requirements of a contract. Obligations are mandatory. See "Managing Obligations" on page 153. Contrast with **Reminders**.

Open status

A Reminder, Obligation or Checklist task that a user has not completed. Users must view a task to open it. See "Obligation Statuses" on page 153, "Managing Document Checklists" on page 167 and "Reminder Statuses" on page 144.

Open Dashboard

An button displayed after a item name on a View listing or after an item name in Reports results. If clicked, the item (usually a document) dashboard displays. See "Document Dashboard" on page 18 and "Available Standard Reports" on page 222. Performs the same action as the right-click **Open Dashboard** selection.

P

Performers

Individual users or groups which receive documents or document tasks sent to them, via Predefined routing. See "Routing Documents with Predefined Routing" on page 138. Compare with **Recipients**.

Permissions

Access privileges that determine what operations a user can perform on a file (such as: view, edit, and delete). For example, a user, business administrator and system administrator each have differing levels of permissions. See Table 2 on page 26 and see the separate *Gimmal Contract Management 6.9 Business Administrator Guide*.

Personal Tab

The default tab displayed on the Documents View. The **Personal** tab displays a Cabinet only available to the logged-in user, and is usually where that user creates new documents before releasing these documents to all those with login permissions to view the **Cabinets** tab. See "Personal Tab" on page 13.

Predefined Routing

A standard document workflow routing path, set up once by the system administrator and applied to many similar documents by users. An unlimited number of Predefined routing workflows can be set up. See "Routing Documents with Predefined Routing" on page 138. Compare with **Ad Hoc Routing**.

Properties

See **metadata** or **attributes.**

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. See "Displaying Document Property History" on page 100.

Q

Quick Search

Provides searching for All Principal Documents that match entered keywords. Displays on the Documents View's **Personal** tab and **Cabinets** tab, and can be used to limit the objects displayed on each tab. See "Quick Searching for Documents" on page 206.

R

Recent Tab

On the Documents View, the **Recent** tab displays files the user has most recently accessed, regardless of the file location, including files created, edited or checked out. See "Recent Tab" on page 15.

Recipients

Individual users or groups which receive documents or document tasks sent to them, via routing or checklists, by other users. See "About Checklists" on page 166 and see "Routing Documents" on page 132. Compare with **Performers**.

Reference Document

Any document you determine to be related to the current document and any other — use for related authority or source documents. A Reference is a category of Related Document.See "About Related Documents" on page 114.

Reference Tab

On the Documents View, the **Reference** tab displays the contents of the Reference Cabinet, housing a library of documents that can be viewed, copied by users, attached and associated with other documents. See "Reference Tab" on page 15 and also see "About Related Documents" on page 114.

Related Documents

Documents that are related to the open document. There are five types of Related Documents: Master, Attachment, Subordinate, Reference and Amendment. See Chapter 6, "Managing Related Documents".

Reminders

Useful "memory jogs" for yourself or for others to take some action on a particular document. Reminders are "ticklers", and are not mandatory. See "Managing Reminders" on page 144. Contrast with **Obligations**.

Repeat (workflow task)

A feature of certain Predefined workflows (routing) allowing specific users to force the task to start again and assign the task to a user. Compare with **Delegate**. See "Workflow Tasks" on page 192.

Reports - custom
Unique reports custom-configured for your organization. See "Creating Custom Reports" on page 241.

Reports - standard
Standard reports available to all users. Additional standard reports can be added. See "About Document Reports" on page 222.

Reports View
Provides access to all standard and custom reports. See Chapter 12, "Generating Document Reports".

Reset Item
Term used to reopen a completed Checklist item from the Checklist window. See "Resetting a Completed Checklist Item" on page 175.

Repository
The database of Gimmal Contract Management information. A central location that allows users to store documents of any kind—text, graphics, and scanned images, even sound and digital movies. A repository holds both document content and information about a document (metadata), such as its author, subject, and creation date, usable to locate the document. Also see **docbase**.

Role
Gimmal Contract Management includes defined user roles. Any user can be a member of one or more roles. Gimmal Contract Management includes standard roles. Additional roles may be added by the system administrator. Also see **user**.

S

Save a Local Copy
A right-click document selection which allows saving a copy of the document outside of Gimmal Contract Management. See "Saving a Local Document Copy" on page 61.

Scheduled status
A Reminder or Obligation task that is scheduled to occur in the future. No notifications have yet been sent. See "Obligation Statuses" on page 153 and "Reminder Statuses" on page 144.

Search
Under the Search view, identify the unique configuration of search parameters and run the Search. See "Advanced Searching for Documents" on page 208.

Search View
Provides access to all search capability, as well as to all previously saved individual and group searches. See Chapter 11, "Searching Documents".

Selection List
A labeled list which includes drop-down selections, usually displayed on the document's Properties window. Some Selection Lists are editable by the business administrator.

Signoff Required
A documented record initiated by entering your log in password. Signoffs may be required for certain tasks during Ad Hoc and Predefined Routing, Checklists and Obligations processing. Documents can also be signed off. See "Sign off a Document" on page 68 and "Completing a Checklist Item" on page 179.

Signoff Completed

A documented record confirming your signoff has been completed. Signoffs may be required for certain tasks during Ad Hoc and Predefined Routing, Checklists and Obligations processing. Documents can also be signed off. See "Sign off a Document" on page 68 and "Completing a Checklist Item" on page 179.

Subordinate Document

Any document you put in an *inferior* relationship, making the current document its only master — use for important related contracts. A Subordinate is a category of Related Document.See "About Related Documents" on page 114 and see **Related Documents.**

Subscriptions Tab

On the Documents View, displays all items the logged in user is currently subscribed to. See "Subscribing to a Document" on page 67.

Subscriptions

Enabling email and My Task notifications to alert the subscriber when content of a document or documents is changed by any user. See "Subscribing to a Document" on page 67. Also see **Notifications**.

System Administrator

Usually IT members, persons who typically are responsible for the installation, updating and troubleshooting of the database and Gimmal Contract Management. The system administrator also creates user IDs and adds or deletes users from permission groups. See "Administrators and Users" on page 10. Compare with **business administrator**.

T

Tasks

Actions to complete, usually found on your My Tasks view, including Reminders, Obligations and routing action and signing tasks. See "Viewing and Deleting Tasks in the My Tasks View" on page 190.

Templates Tab

On the Documents View, the **Templates** tab displays the contents of the Templates Cabinet, housing a library of Templates used to create contracts. Templates are stored and updated by business administrators. See "Templates Tab" on page 14.

Templates

A model, previously prepared and stored, used to created new contracts. Templates provide an input form or forms for variable information to be added. Templates are dynamic documents, containing many instances of variable content. See "Importing Documents" on page 43.

Type

A grouping or categorization of documents that is similar in format, content, and/or purpose. Type is a common metadata property. See "About Document Types" on page 38.

U

UCF File Transfer

An optional Gimmal Contract Management method for importing and checking in files. UCF is a Documentum standard. The default method is HTTP File Transfer. See "Checking In a Document from an External File Location (UCF Only)" on page 54 and compare with "Checking In and Changing a Document Version" on page 52

User

Authorized users with Gimmal Contract Management log in access, usually configured by the business administrator. Any user can be also be a member of one or more roles. Also see **role**.

User Preferences

Provides access to changing the default user display. Available from any View or document dashboard with the Preferences link. Once changed by a user, the changes remain in effect at each log in until changed again by the user. See "Editing User Preferences" on page 35.

V

Versions

The *version* is maintained by Documentum and is not specified by the external source that provides the file. When a document is checked out and checked back into the repository, the option to increment the version may be available depending on the document type and permission level of the user. Versions can be specified as the same version (no incrementing is performed), a minor version (increment Version by 0.1) or a major version (increment version by 1.0). When accessing files, most current version is displayed by default; however, users can access previous versions by request. See "Managing Document Versions" on page 97.

View Locations

A right-click document selection which lists all locations of the selected document. See "Finding All Locations of a Document" on page 60.

W

Workflows

A document dashboard feature listing all workflows currently involving the selected documents. See "Managing Document Notes" on page 94. Also see **Ad Hoc Routing** and **Predefined Routing**.

Workflow availability

On the My Tasks view, **My Tasks tab**, indicating up your availability (I am available) for handling workflow tasks or indicating your unavailability (I am currently set to unavailable) so that your workflow tasks can temporarily bypass you. See "Setting Your Workflow Availability" on page 203. Also see "Delegate (availability)" on page 268.

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