
Dashboard Navigation

1. Available Actions

- View displays a read-only version of the document.
- Edit checks out the document and makes it available for modification.
- Check Out assigns the document to the specific user and *locks* the document from editing by other users.
- Check In creates a new version of the document, *unlocks* the document and returns the document to the cabinet. The document is now available to be edited by other users.
- Cancel Check Out returns the document to the cabinet and discards any changes made after the document was checked out. The document is now available to be edited by other users.
- Version Using Original Template creates a new version of the document from the original template.
- Email allows the user to send the document via email to another user.
- Predefined Routing – *The University of Illinois is not using this feature.*
- Ad Hoc Routing — *Units are not using this feature.*
- Add to Favorites adds a link to that document to user’s Favorites Tab.
- Auto File moves a document to a specific cabinet location as defined by its applicable auto-file rule.

2. Jacket Actions

- View Properties allows you to view the Jacket Properties (Metadata).
- Edit Properties allows you to make changes to the Jacket Properties (Metadata).
- Print Properties allows you to print the Jacket Properties (Metadata).
- Signoff – *The University of Illinois is not using this feature.*

3. Functions

- Jacket displays the Metadata (Jacket Properties) of the document.
- Related Documents displays other documents (amendments, attachments, supporting documentation, etc.) related to the contract.
- Notes can be added to a contract, or read and printed by others. **Notes are read-only and once saved cannot be changed or deleted.**
- Reminders remind of actions that are not material obligations of the contract (e.g. review a contract for renewal two months prior to the contract end date).
- Obligations remind of legal requirements of the contract (e.g. invoice due on a certain date).
- Checklists are used as the routing mechanism for contracts in the system (similar to the Contract Approval/Routing Form).
- Workflows displays ad hoc workflows, including their current status.
- Versions displays all versions of that contract, the date and time they were saved, and the name of the modifier.
- Audit Trail captures every step in the contract’s life cycle, as well as the detailed information about date, time, and performer.
- Property History allows a quick comparison of Jacket Properties (Metadata) and any changes made to the Metadata between versions.
- Contacts – *The University of Illinois is not using this feature.*

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- 1. Available Actions
- 2. Jacket Actions

The screenshot shows a document dashboard for a contract. The title bar reads "Document Dashboard : Contract - Test - Test Party (CN-00003 v 1.1)". A toolbar at the top contains various icons for document management. A red box highlights the "Jacket Actions" menu, which includes "View Properties", "Edit Properties", "Update Number", "Print Properties", "Print All Properties", and "Signoff". A callout box labeled "1. Available Actions" points to the toolbar, and another labeled "2. Jacket Actions" points to the menu. The main content area is divided into sections: "General" (Title: Doc1, Document Number: CN-00003, Status: Contract Development, Contract Category: No Funds, Contract Sub Category 1: O&M Construction Agreements, Contract Sub Category 2: , Contract Description: sfhzhgjzdtgeJ), "Contractor" (Contracting Party Name: Test Party, Contracting Party DBA: , Contracting Party Phone: , Contracting Party Email:), and "Contract Data" (Method of Procurement: BID, Cost Savings: 0, Start Date: , End Date:). A callout box labeled "3. Functions" points to the "Contracting Party Email" field. A sidebar on the left contains navigation icons for Jacket, Related Documents, Notes, Reminders, Obligations, Checklist, Workflows, Versions, Audit Trail, Property History, and Contacts. A callout box labeled "Jacket Properties (Metadata)" points to the "General" section. A "Close" button is located in the bottom right corner.