Opening Document Dashboard

There are three ways to open a document’s dashboard:

1. Right-click the document name and select Dashboard.
2. Double-click the document name.
3. Click the Open Dashboard icon.
**Jacket Properties/Metadata**

Upon opening, the document dashboard displays the jacket properties, also referred to as the document metadata. See the following pages for an explanation of each area.

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**: 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.
   - **Predefined Routing**: The University of Illinois System does not use this feature.
   - **Ad Hoc Routing**: Units do not use 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)
   - **Sign off**: The University of Illinois System does not use 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.
  IMPORTANT: 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**: Primary 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 creator.
- **Audit Trail**: Captures every step in the contract’s life cycle, as well as detailed information about the date, time, and performer.
- **Property History**: Shows a quick comparison of jacket properties (metadata) and any changes made to the metadata between versions.
- **Contacts**: *The University of Illinois System does not use this feature.*