Dashboard Navigation

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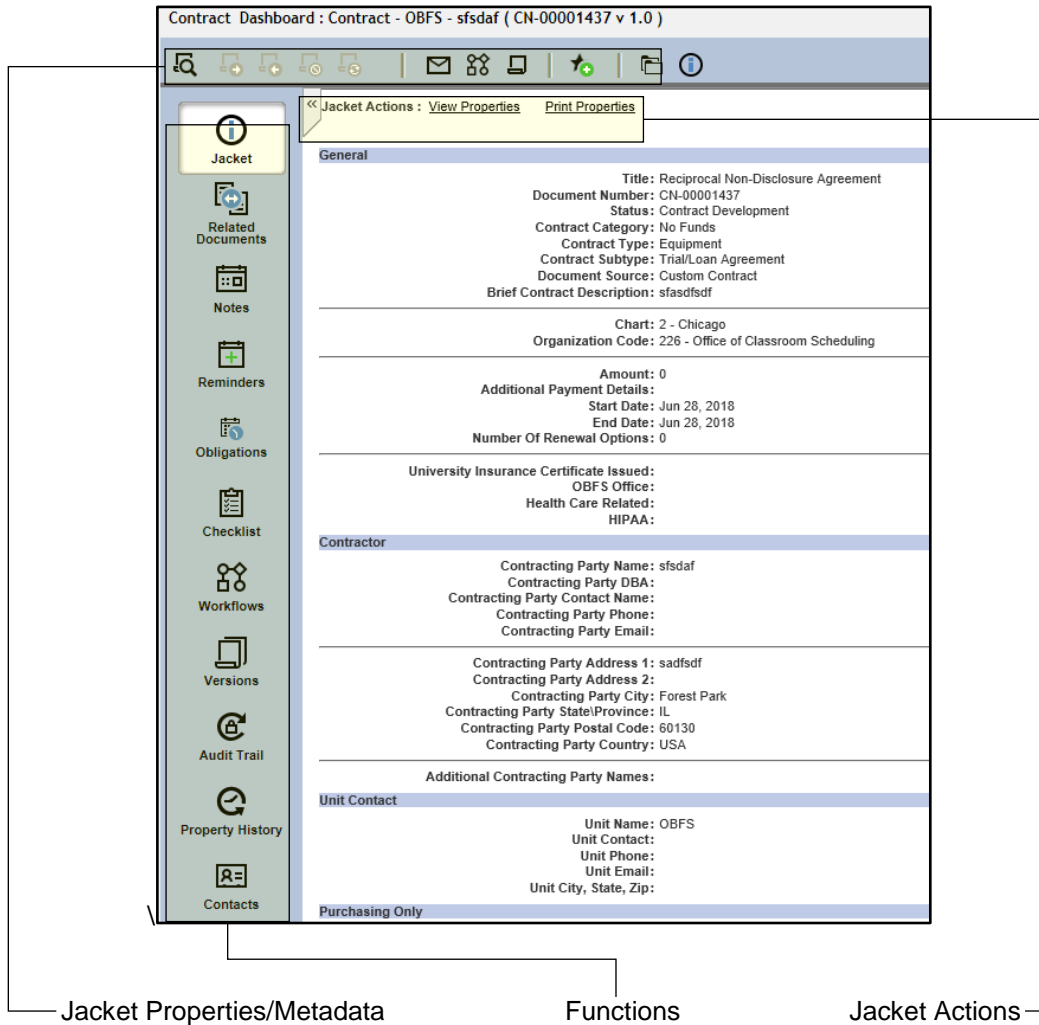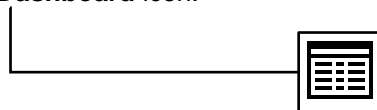
Opening Document Dashboard

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

1. Right-click the document name and select **Dashboard**.
   OR
2. Double-click the document name.
   OR
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.*