Monitoring Processes and Documents with Visualizer, Folders and Search

1. Visualizer

1.1. The Visualizer (Above document list) creates a graphic that illustrates who received and signed the document.
1.2. Choose Visualizer first and then choose the contract. If you choose the contract first click on agreement again.

2. Managing Past Documents With Folders

2.1. After logging in you will have several navigation blades at the left (Folders, Search, Templates Manage Users).
2.2. The Folders blade lists various groups of documents organized according to various criteria.
2.3. The Unfiled group means those listed are not assigned to any specific folder (default).
2.4. Right-click folder and select Share Folder. Documents in that folder are seen by all persons sharing that folder.

3. Smart Folders

3.1. Smart Folders (See Search) make it easy to find, monitor and manage documents.
3.2. Users can save a completed search and once saved it appears as a starred folder.
3.3. At the bottom of the Search screen there is a Save as Smart Folder function.
3.4. Search criteria used can be saved with this “Save as Smart Folder” function.
3.5. The criteria are saved to a folder. Enter a folder name reflecting the criteria e.g. a subset of documents.
3.6. If a document is sent and completed later it would go to that folder.
3.7. Users can build new folders and populate them automatically.
3.8. Folders can be deleted, but documents in the folder are not deleted.
3.9. Documents can appear in multiple folders.
3.10. Administrators can automatically add documents to searchable folders based on any criteria (signatories, date ranges, dollar amounts, percentages, document content etc.).
3.11. A star or arrow beside the Folder name designates the folder as a Smart Folder.
3.12. Users can creating and delete folders and move documents to a folder.
3.13. To create a folder right-click any current folder and select create new folder. Name the folder.
3.14. Folders appear in alphabetical order except that the All Agreements and Unfiled folders remain at the top.
3.15. To delete a folder right-click the folder being deleted, select Delete Folder and confirm deletion. Documents in the folder will automatically move back to the unfiled folder.
3.16. To move a document to a folder click and drag the document to the folder you want to put it in. To move multiple documents, select all the documents, click one of them and drag the group to the folder.

4. Selecting Folder Entries and Other Folder Actions, Archiving

4.1. When a Folder list occurs various actions can be taken regarding the entire list or selected entries.
4.2. To select the entire list (not just that page, but entire list on multiple pages) click on the box at the top left in the header column i.e. above the boxes that appear for each entry.
4.3. Note: If you go to the other pages then everything will be deselected.
4.4. To select a specific entry search for that entry and click that box.
4.5. From a folder document list you can use icons at the bottom of page to take specified actions. You can: move via drag and drop; refresh; export active folder to Excel; archive to a computer; download data; print; delete; copy agreement; resend (Separate Instruction); forward copy by email, set reminder.
4.6. These actions include the ability to export/save to an Excel file where columns can be compared and analyzed or new columns added for analysis (e.g. how long parties took to sign). This only exports data that appears.
4.7. The Download Data Option downloads all fields (e.g. last time accessed) even within a contract itself.
4.8. The folders list will generally refer to All Agreements or to other created folders. The “Unfiled” folder is just the original folder i.e. documents are not otherwise assigned.
4.9. With agreements and templates you can sort the order of columns by clicking on the column header.
4.10. If a page is searchable (e.g. name in full) an old link may not work.
4.11. Delete a template or document (only possible if unsigned) by clicking the box beside it and selecting Delete.
4.12. Set Reminder function allows for documents to be automatically resent. Resend functions are separate.
4.13. With the archive and download functions you can then upload (push) to external archivist or go to the external archivist and upload (pull) into the correct archive directory.

5. Searches

5.1. The Search blade is at the left along with those for Folders, Templates and Manage Users.
5.2. The Search function is used after set up and publication and does not deal with templates.

5.3. A search allows one to see whether a contract has been signed or where emails went.
5.4. Designate the criteria i.e. Name (of file sent)– Exact Match – Period (Set Periods e.g. last 7 days)– From Date – To Date (can choose From or To Date individually) – Agreement ID – ID# (5-6 digits uniquely assigned to each document)- External ID – Recipient First Name – Recipient Last Name – Recipient Email – Publisher First Name – Publisher Last Name – Publisher Email – Subject – Company – Status (signed, in process etc.) – Notes (information in notes field of document).
5.5. Searches by User may be available.
5.6. The Agreement ID is the document ID number, usually multiple groups of characters with dashes. Open an agreement and go to details to see the Agreement ID i.e. number within Agreement Manager that has the link to open it. The Agreement ID is the longer number. The ID number is beside the contract name in the list.
5.7. First Name and Last Name – If using the fields above the publisher then the names reflect those of the people that signed. If using names below publisher then you would be searching for people that sent the contract. To find all contracts a person had sent out using a specific account use the names below the publisher.
5.8. Email is the same – If you don't know the person, but you know their email then search on that. The subject is what you see in the Agreement Manager Subject Column (generally the subject of the email sent).
5.9. It is a good idea to include searchable information in the Subject Line.
5.10. The Period (e.g. last two days) is a moving period. The From and To fields may be more suitable.
5.11. You can't search for terms in the contract. For most searches keep fields empty and add more fields if they are needed to narrow the search.
5.12. The new March 2011 interface allows users to Find and Search within a document.

6. Open Saved Documents and Templates, Changing Names

6.1. To open documents or templates click on the ID number not the name.
6.2. Click on a contract or template package name or with individual documents the second box from the left where there are three boxes to the left of the contract or template name.
6.3. To change names of existing templates and contracts click on the existing name and type the new name. You can't change the name of a completed contract.
6.4. To get the path to a template or contract click on third box beside the name and get the launch link.