# DiliTrust Governance

User Manual – Contracts

# Contents

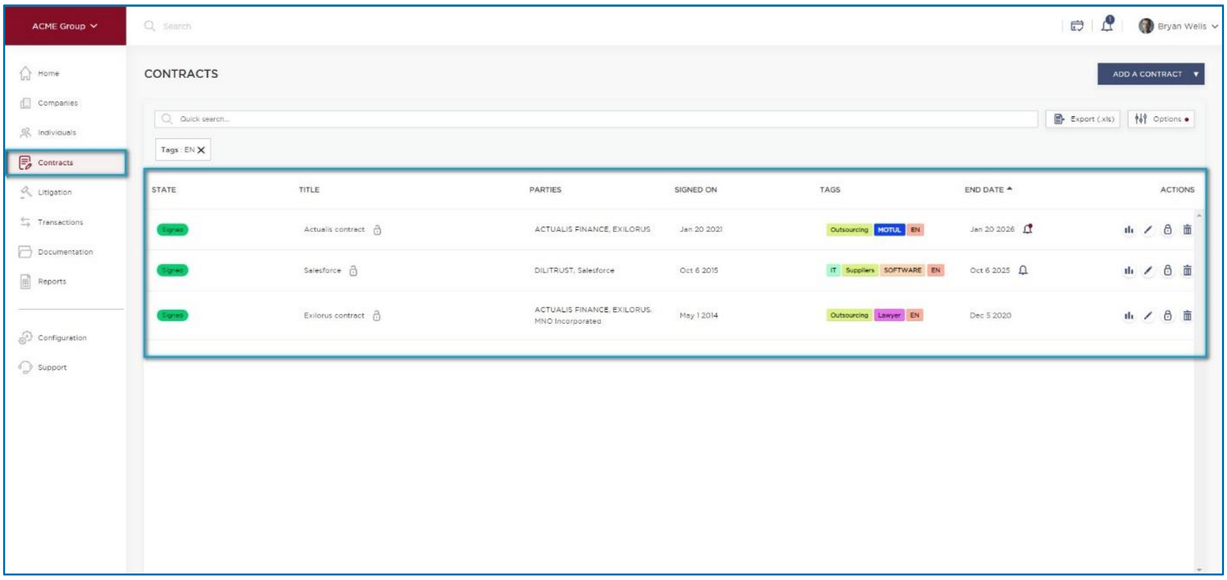


**Please note:** Depending on the permissions granted by your manager, some of the features described in this manual may not be accessible.

# 1. CONTRACT CONSULTATION

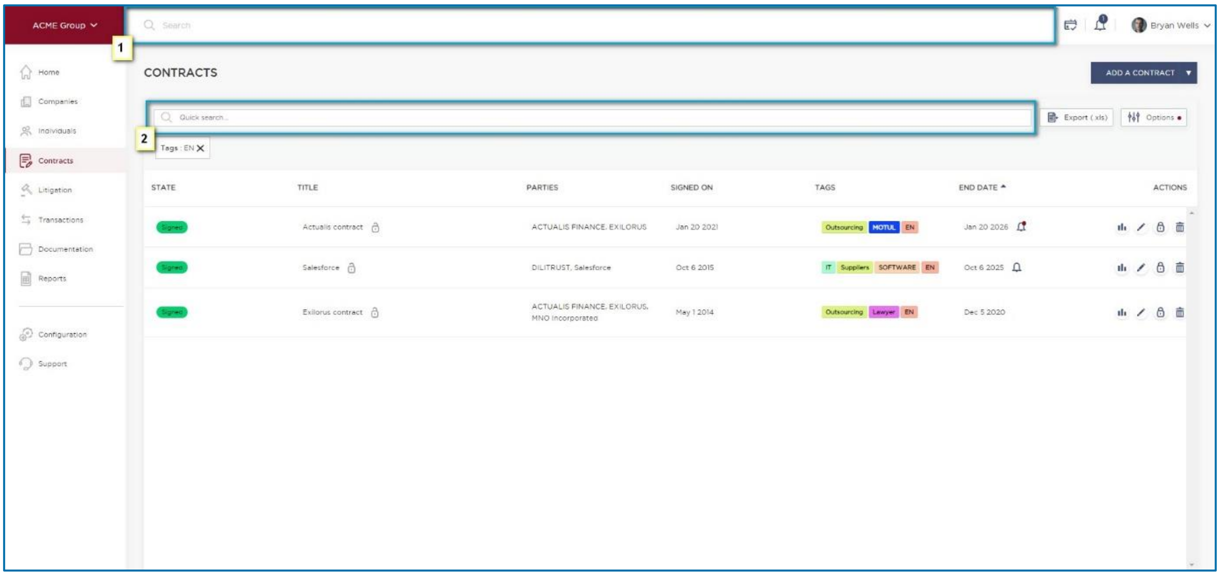
## 1.1. List of contracts

To access the list of contracts, click on the **Contracts** menu.  The following screen is displayed:




## 1.2. Searching for contracts

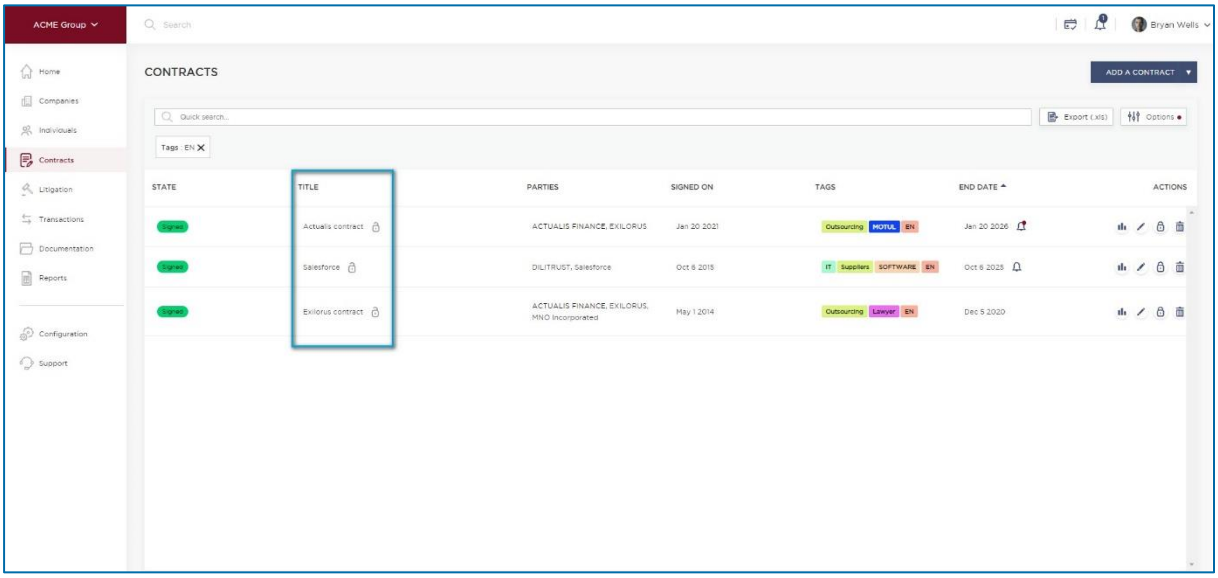
To search for a contract, use one of two methods:



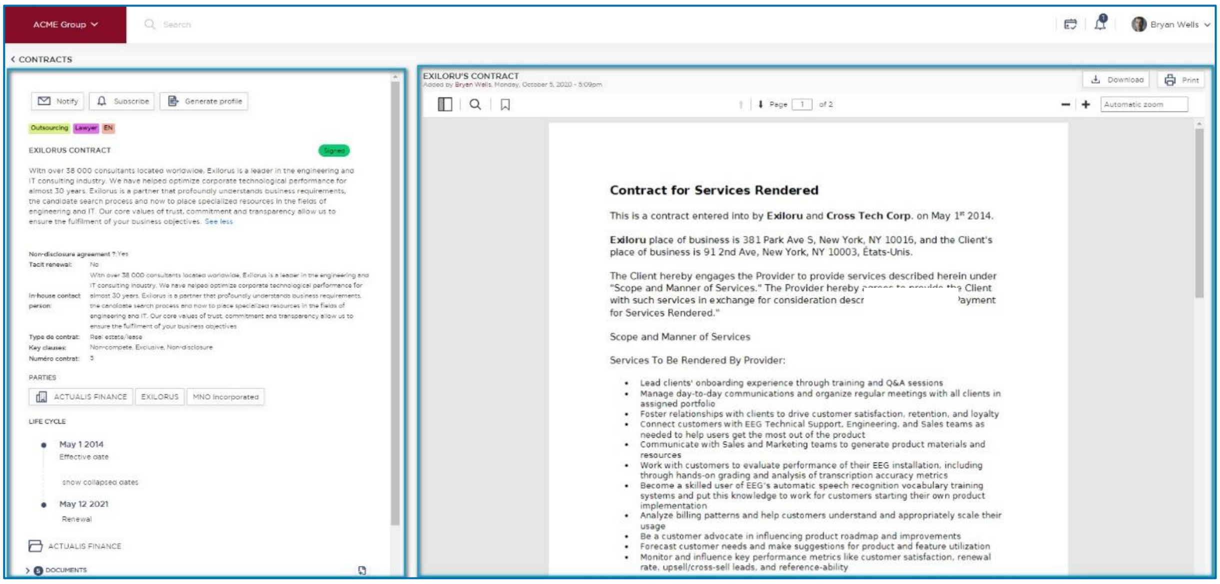

- The **main search** *(1)* method is accessible from all screens and allows you to search for any available content.
- The **quick search** *(2)* method allows you to search more precisely, only on the screen you are on.
  By default, the quick search only covers the title of items, however you can customize the columns taken into account in the search using **Options**.

## 1.3. Contract details

To view the details of a contract, click on its name in the **Title** column:




An overview of the contract is displayed.

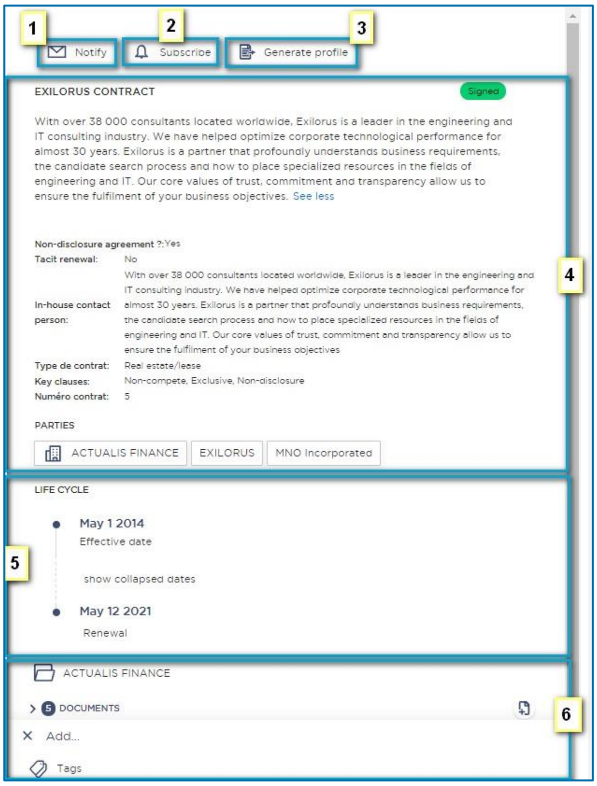



This screen is split into two parts:

- The left part presents the important contract information (title, status, parties, additional information, related documents and tasks).
- The right part displays the contractual document.

### 1.3.1. Important information

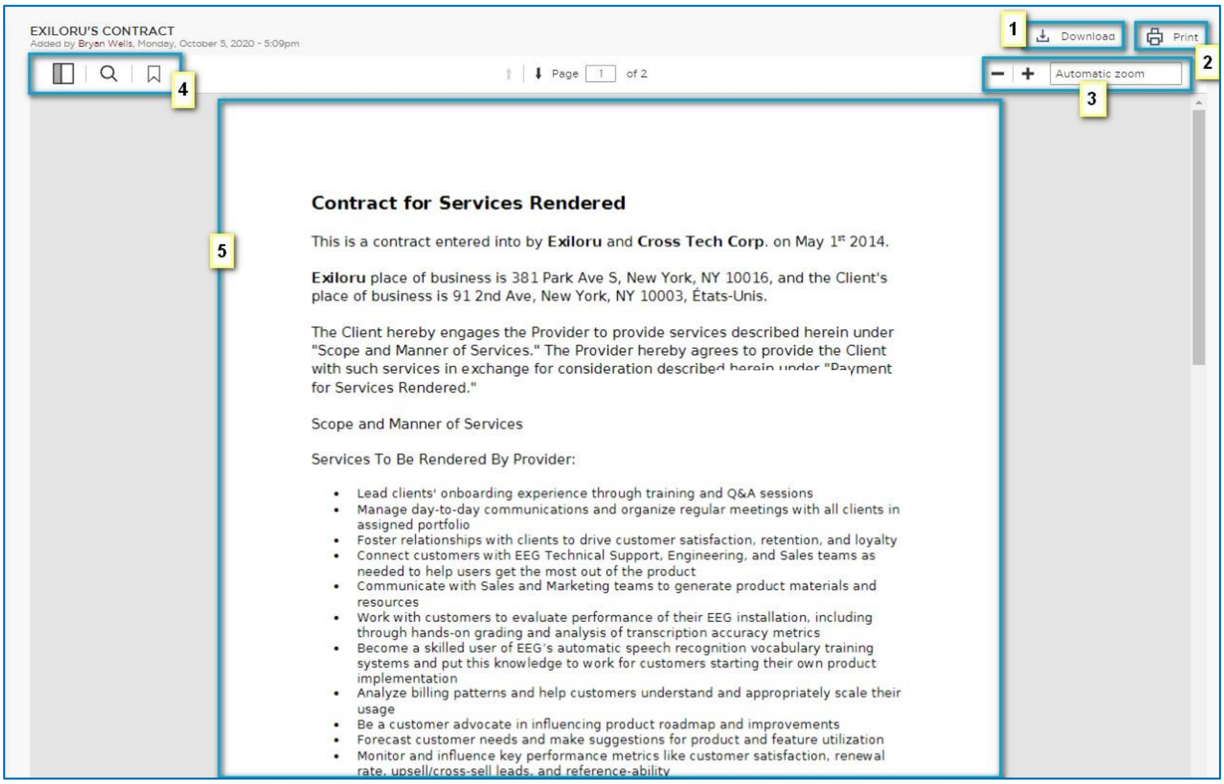
This information is displayed on the left side of the screen.




| Button/Field name | Explanation |
|---|---|
| 1 - Notify | Used to send a user a notification email containing a link to this contract. |
| 2 - Subscribe | Used to subscribe to (or unsubscribe from) this contract. Notifications are sent to you by email each time a change is made to a contract to which you are subscribed. |
| 3 - Generate profile | Used to generate a customizable summary sheet of this contract. |
| 4 – Information | The button is used to add or modify information relating to this contract. |
| 5 – Life cycle | The button is used to add or modify an event in the life cycle of this contract. |
| 6 – Add… | Used to add other elements to this contract, such as additional documents or associated tasks. |

### 1.3.2. The contractual document

This document is displayed on the right side of the screen:

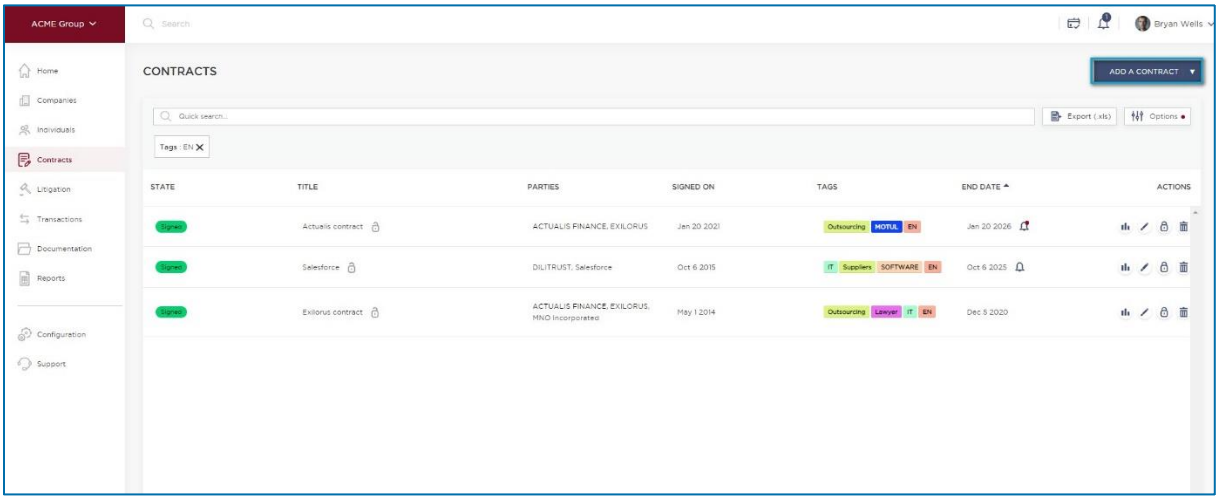


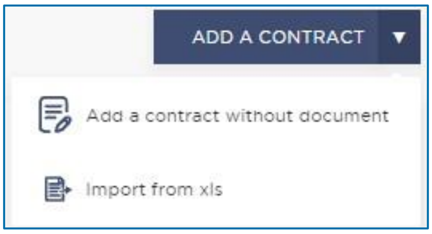

| Button/Field name | Explanation |
|---|---|
| 1 – Download | Used to download the document. |
| 2 - Print | Used to print the document. |
| 3 – Zoom | Used to zoom in on/out of the contract. |
| 4 – Search tools | Used to:<br>- display the page scrolling side panel;<br>- search for keywords in the contract;<br>- mark a page in the contract. |
| 5 – Document | You can make notes on the contract by clicking directly on the document. |

# 2. CONTRACT MANAGEMENT

## 2.1. Adding a contract

To add a new contract, click **Add a contract** or click the button's down arrow to display all available add options.



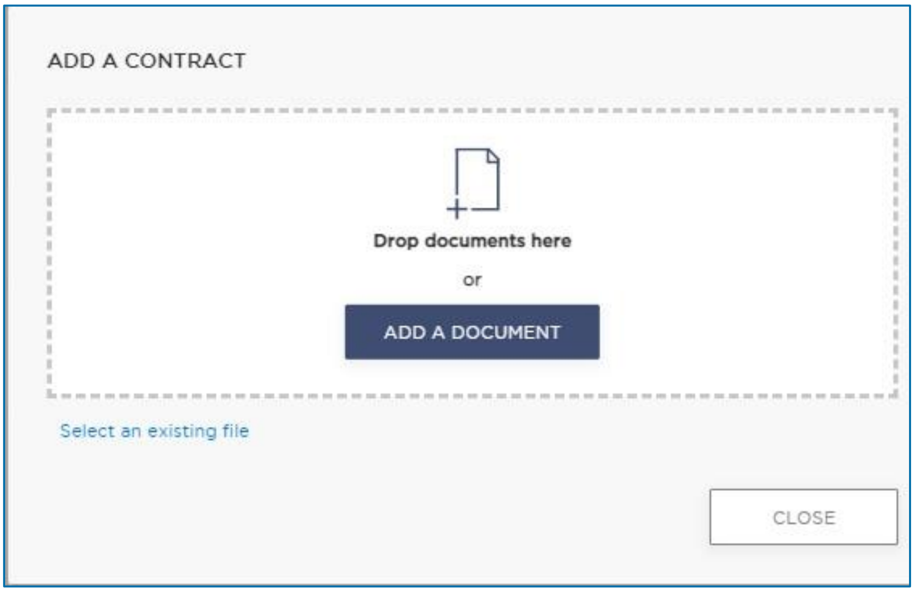




:

| Button/Field name | Explanation |
|---|---|
| Add a contract | Used to add a contract by importing a digital copy of the contract. |
| Add a contract without document | Used to add a contract without importing a digital copy of the contract. |
| Import from xls | Used to add several contracts (without the digital contracts) using an .xls import model. |

### 2.1.1. Add a contract

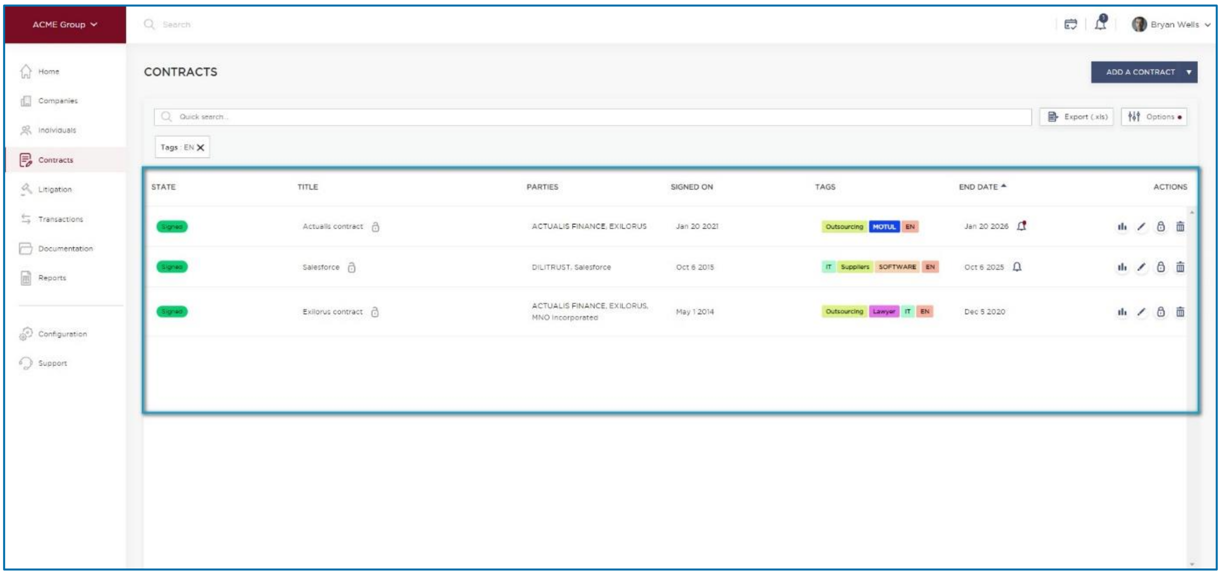
After clicking on the **Add a contract** button in the Contracts menu, the following window is displayed:




| Item | Explanations |
|---|---|
| Drop documents here | Used to import a digital copy of the contract by drag and drop. |
| Add a document | Used to import a digital copy by browsing your personal files. |

**Note:** DiliTrust Governance accepts Word, Excel, PowerPoint and PDF files. The size of each document may not exceed 30 MB.

Once the contract has been imported, it will appear in the list of contracts:



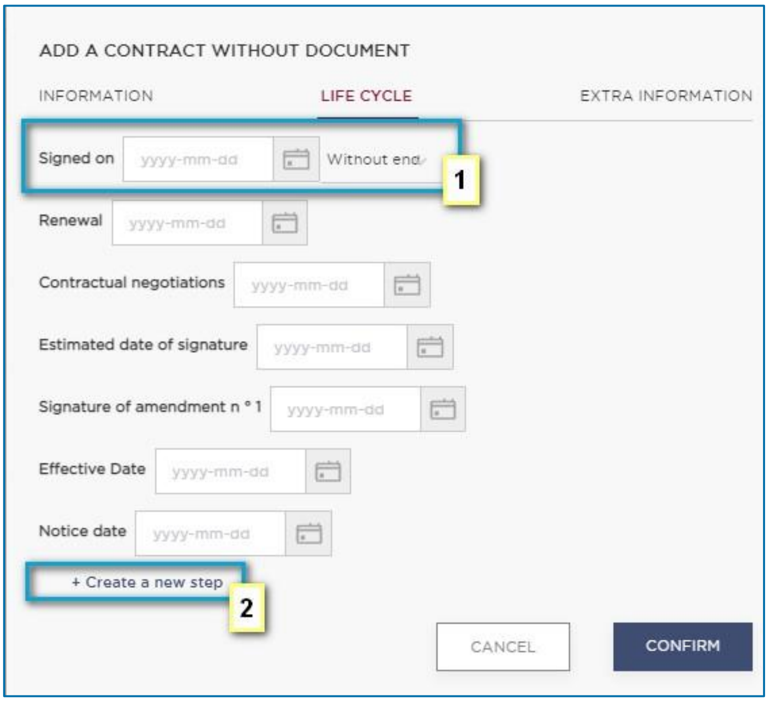

### 2.1.2. Add a contract without document

After clicking the **Add a contract without document** button, a window with the same name is displayed, comprising 3 tabs.

## 2.1.2.1.Information


| Item | Explanations |
|---|---|
| Title | Used to specify the contract title. |
| State | Used to indicate whether or not the contract is signed. |
| Description | Used to add contract details. |
| Parties | Used to specify the contract parties. |
| Tags | Used to add tags to organize your contracts. |

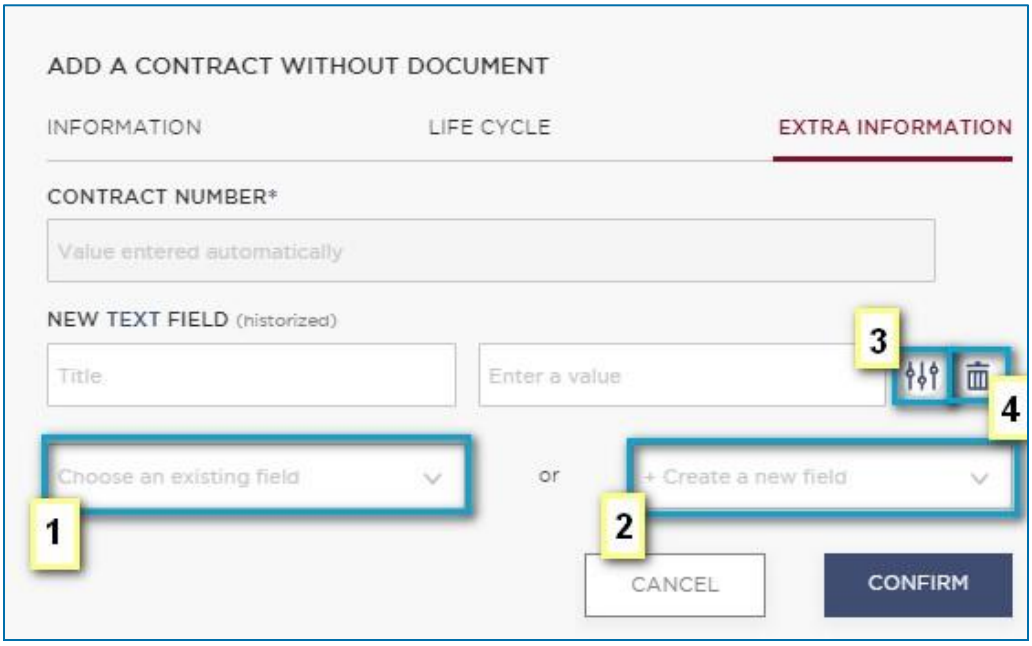
## 2.1.2.2.Life cycle



| Button/Field name | Explanation |
|---|---|
| 1 – Signed on | Used to indicate the contract signing date.<br>You can also specify an effective period. |
| 2 – Creating a new step | Used to indicate additional steps in the life cycle of this contract. |

### 2.1.2.3.Extra information

Clicking on the **Extra information** tab displays the following screen in which you can add additional fields that exist in the database or create others.

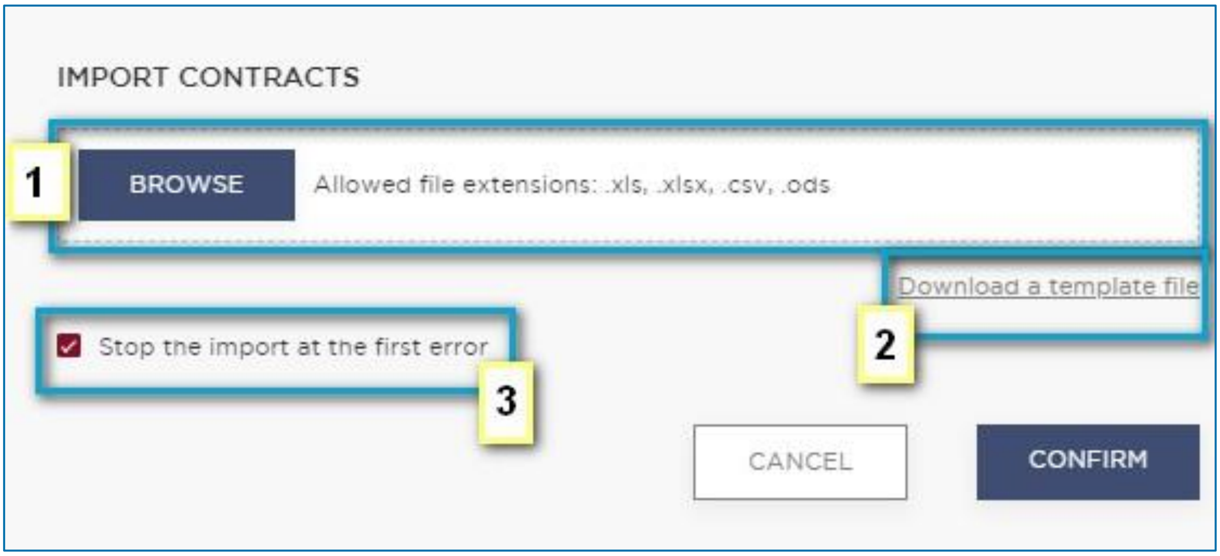



| Button/Field name | Explanation |
|---|---|
| 1 - Choose an existing field | Used to add an existing field as additional information to this contract. |
| 2 - Create a new field | Used to add a new field as additional information to this contract. First choose the appropriate field type, then give it a name and a value for this contract. |
| 3 - Field options | Depending on the type of field to be created, this button is used to set certain options, including:<br>- whether the field is required;<br>- whether to log the information in this field (in which case all changes to this field value will be logged);<br>- whether the field can accept one or more values. |
| 4 – Delete the field | Click this icon to delete this field. |

**Please note:** All fields you set as mandatory (required) in this tab will then be used for all contracts you create in the future.

## 2.1.3. Import from xls

After clicking the button **Import from xls** button in the Contracts menu, the creation wizard screen is displayed:



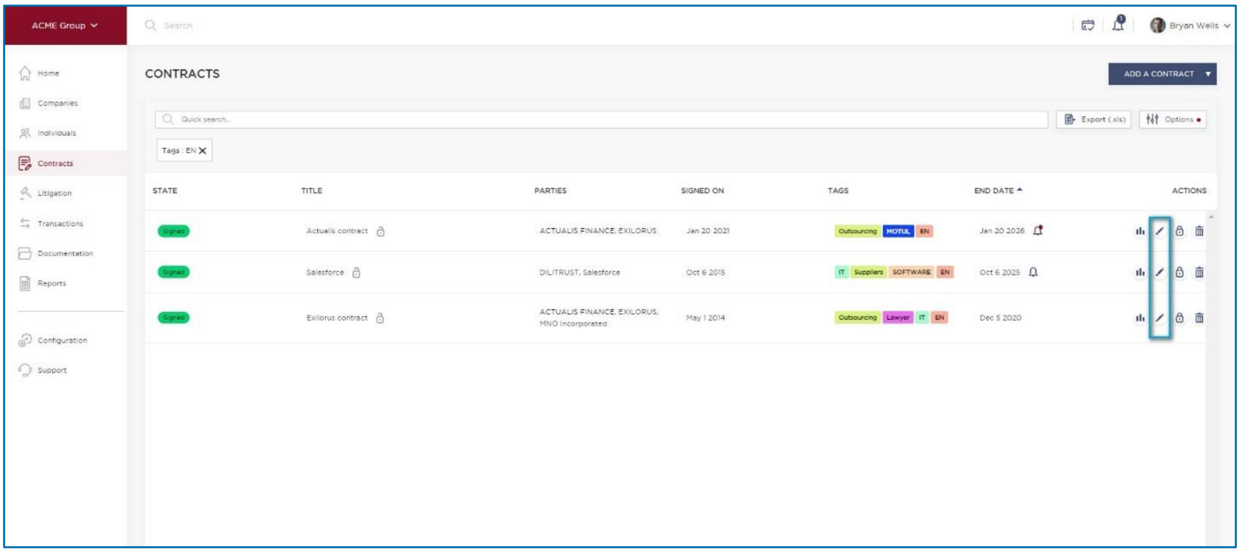

| Button/Field name | Explanation |
|---|---|
| 1 - Browse | Used to load a file containing the list of contracts and their associated fields to be imported in the application. |
| 2 - Download a template file | Used to download a template file that can be imported in the application. |
| 3 - Stop the import at the first error | Used to stop the import if an error occurs during the operation. If this box is not ticked, the contract with the error will be ignored and the import will continue. |

**Note**: the **Import from xls** function cannot be used to import digital copies of contracts. These must be subsequently added in each contract.

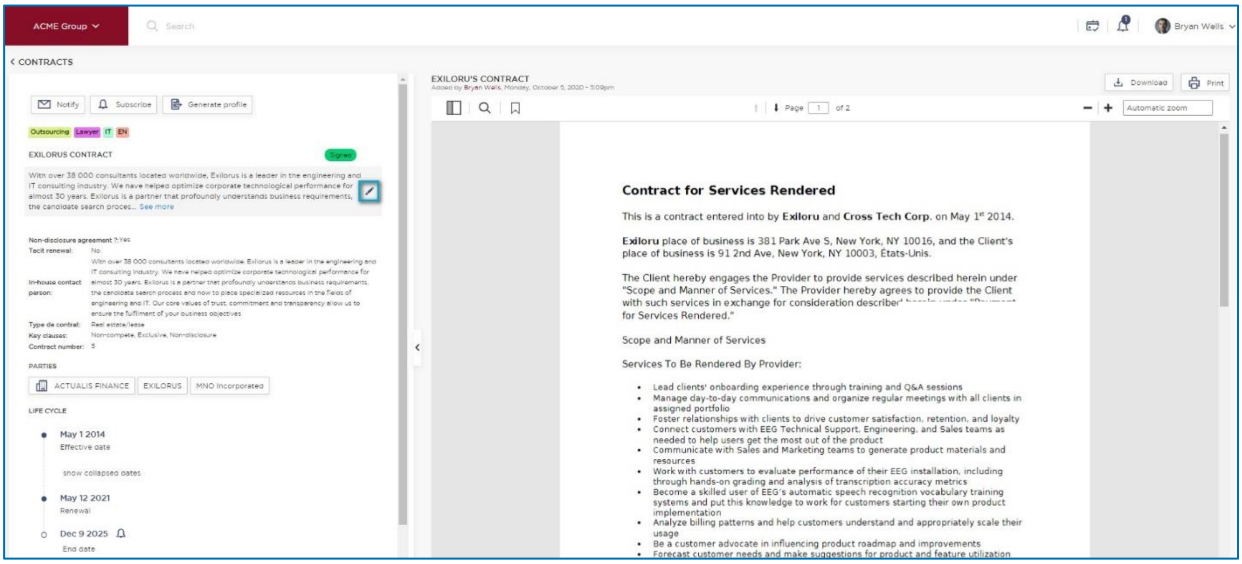
## 2.2. Updating a contract

To update the contract information, use one of two methods:

- In the list of contracts, click  in the list of actions.



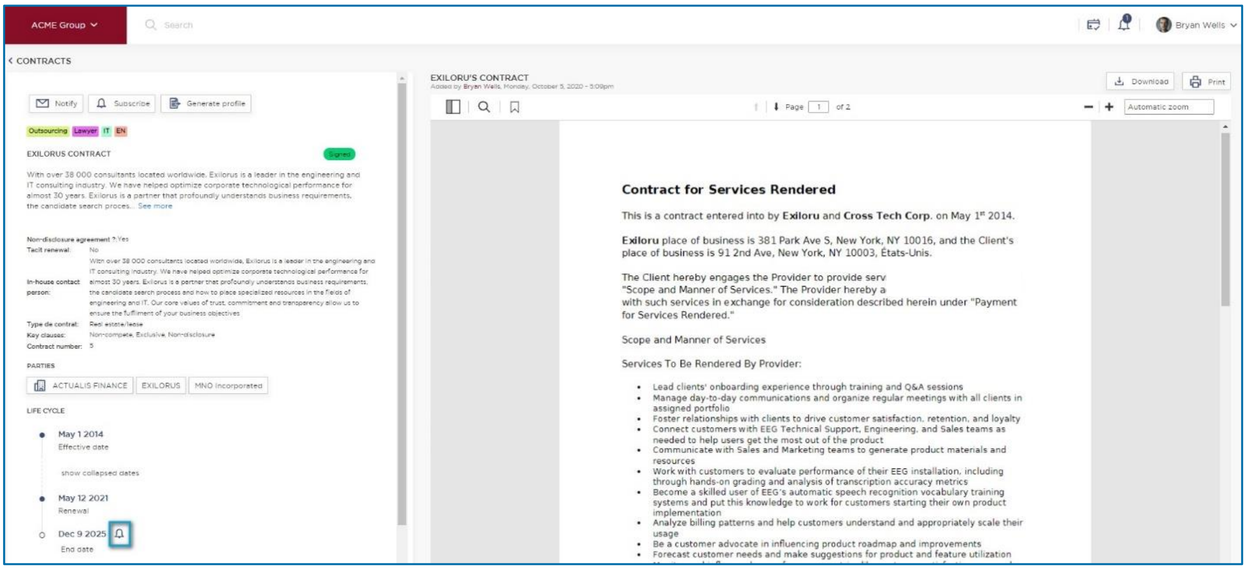

- When consulting a contract, hold your mouse over the area to be edited, then click .



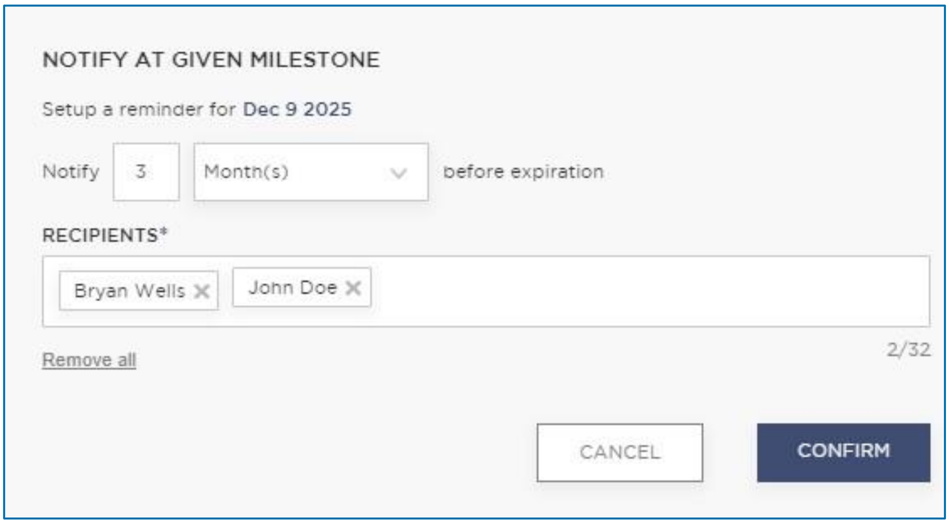

## 2.3. Adding a reminder

In order to be notified when an important contract milestone is near, you can add a reminder and receive an advance notification.

To do so, click the button next to a future date.



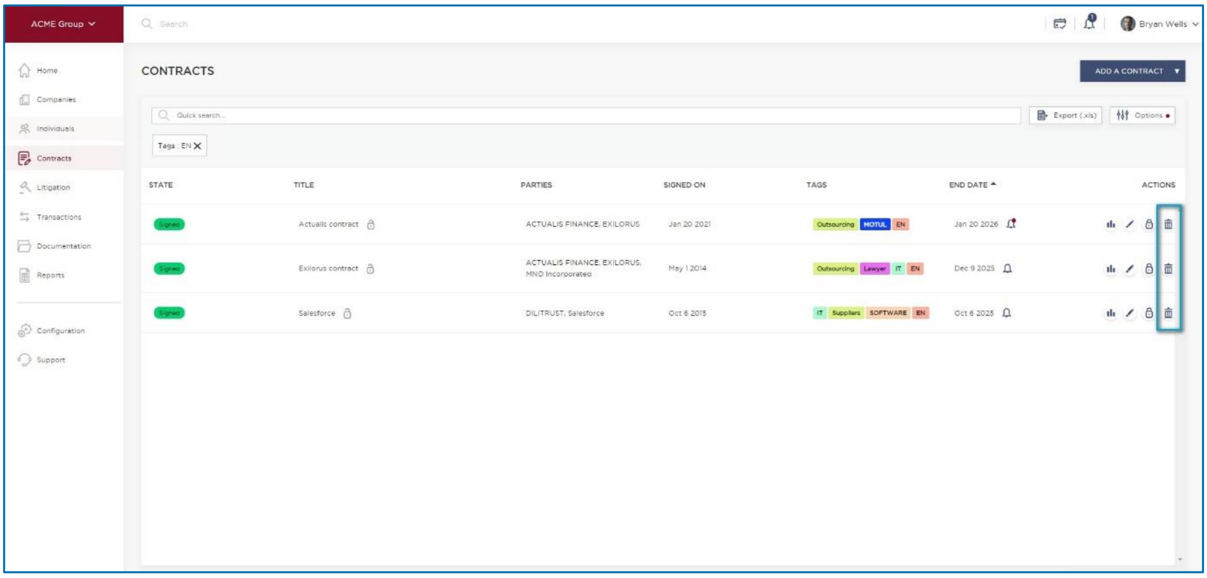

You can then customize the notification period before this milestone, as well as the recipients of this notification.




Dates on which a reminder has already been set are indicated by the icon.

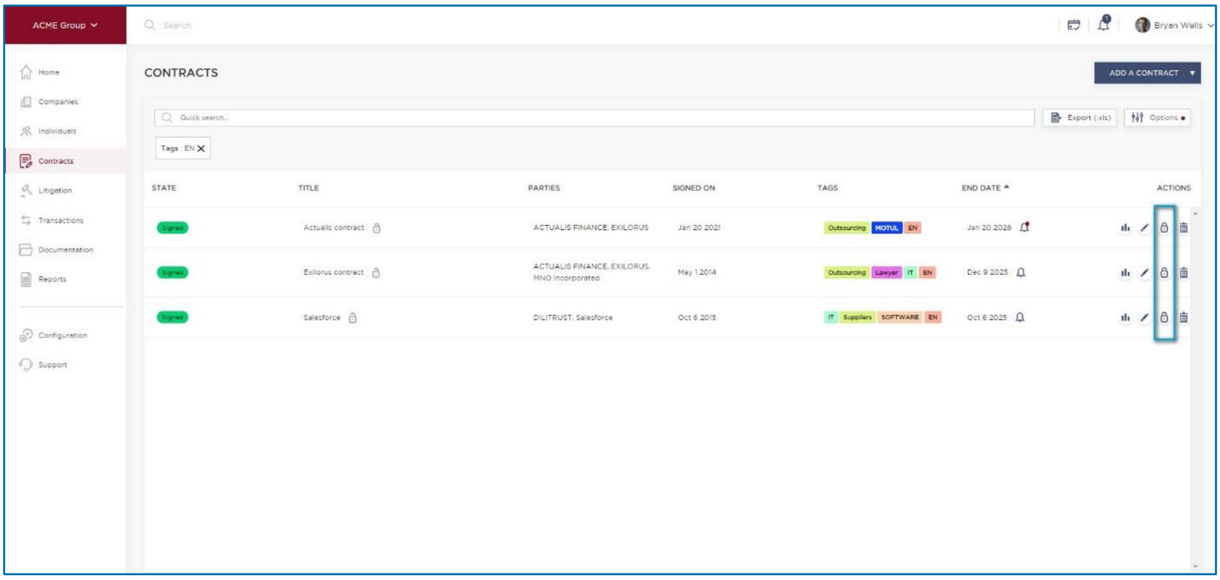
## 2.4. Deleting a contract

To delete a contract, go to the list of contracts and click in the list of actions.

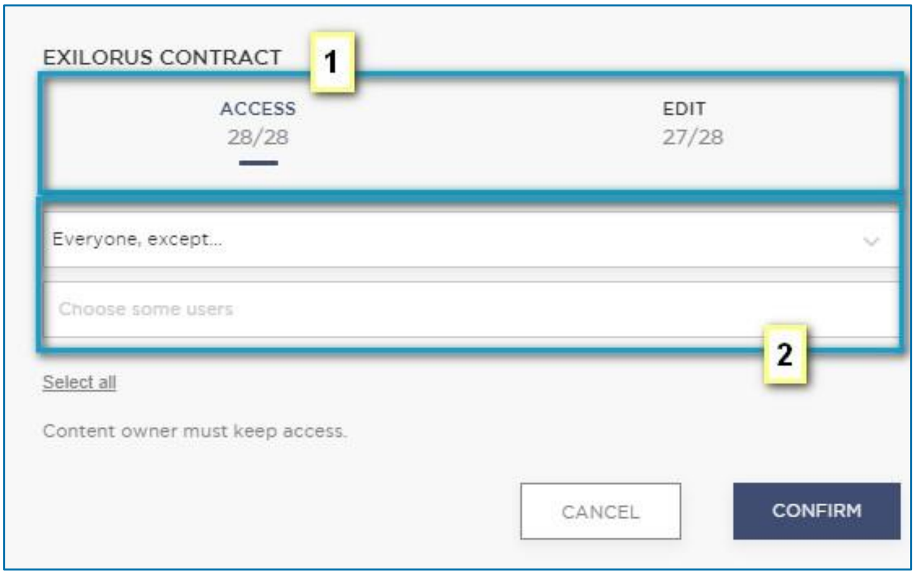



## 2.5. Permissions

Click in the list of actions to manage users' access or modification rights for a given contract.



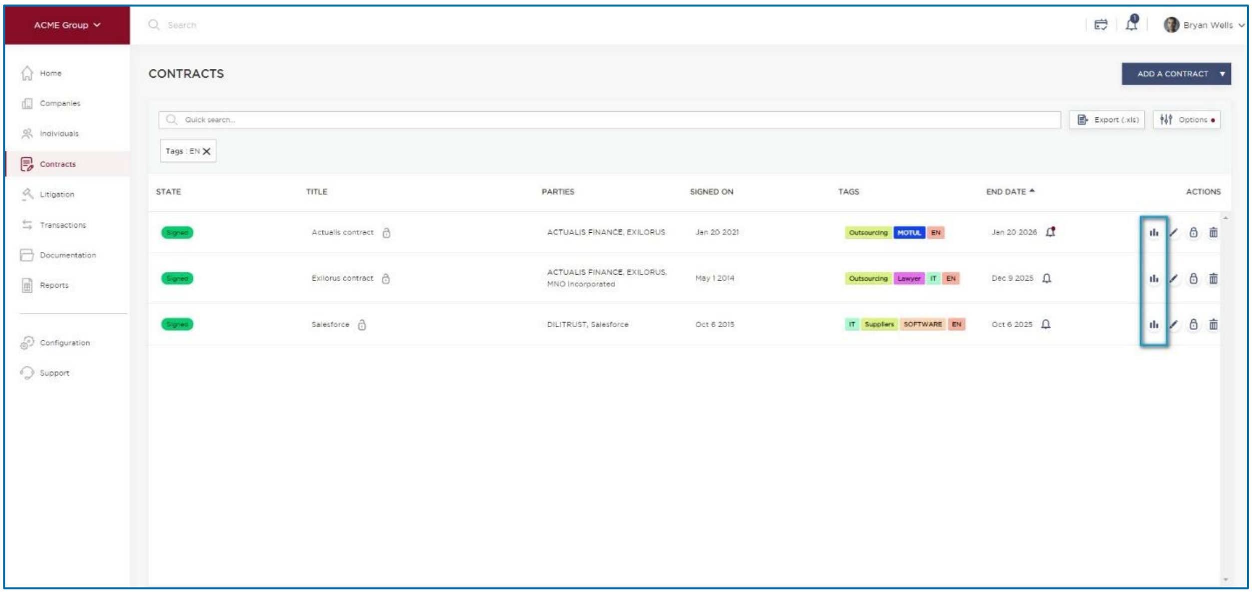

This displays the permissions management window.




| Button/Field name | Explanation |
|---|---|
| 1 – Type of permission | Select a type of permission to be granted or denied for this contract. |
| 2 – Users concerned | Select the users who are to benefit from this permission. |

## 2.6. Access monitoring

In the list of contracts, click the  button in the list of actions to view the screen for monitoring access to a contract.




The access monitoring screen shows the history of all activity on this contract: creation, update, download or simple consultation.

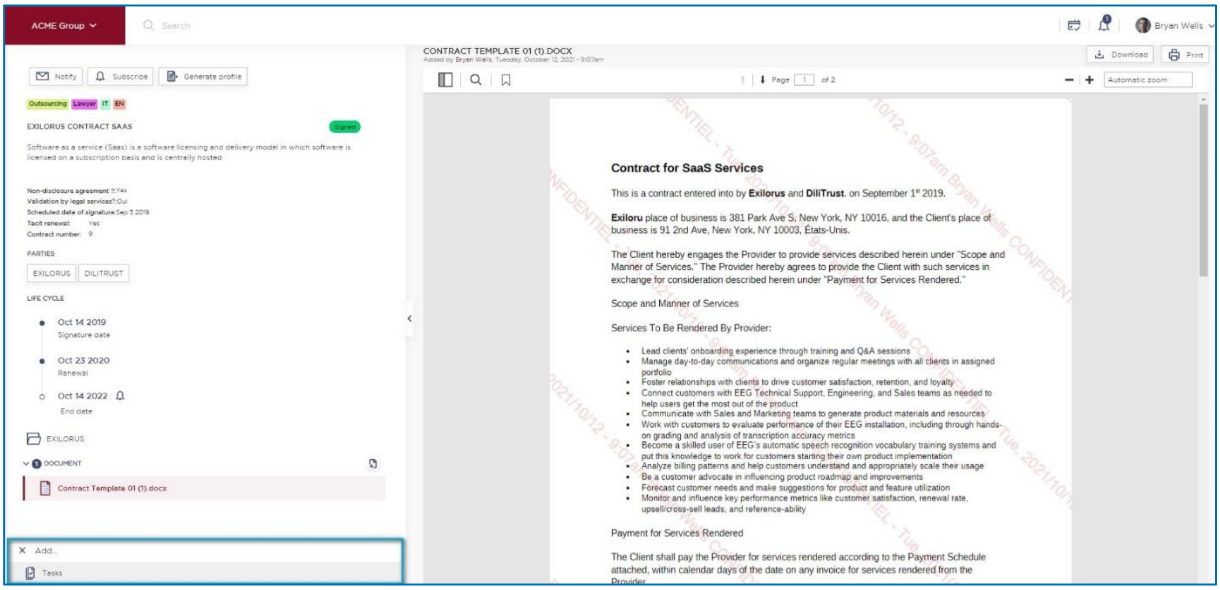
# 3. TASKS AND WORKFLOWS

## 3.1. Tasks

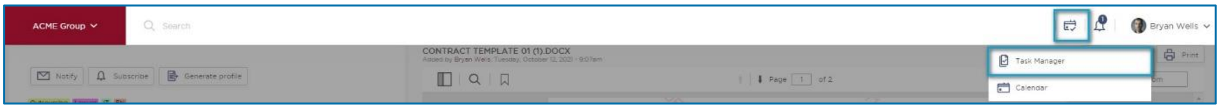
Thanks to DiliTrust Governance, you can organize your work by creating tasks that you can plan and track until completion.

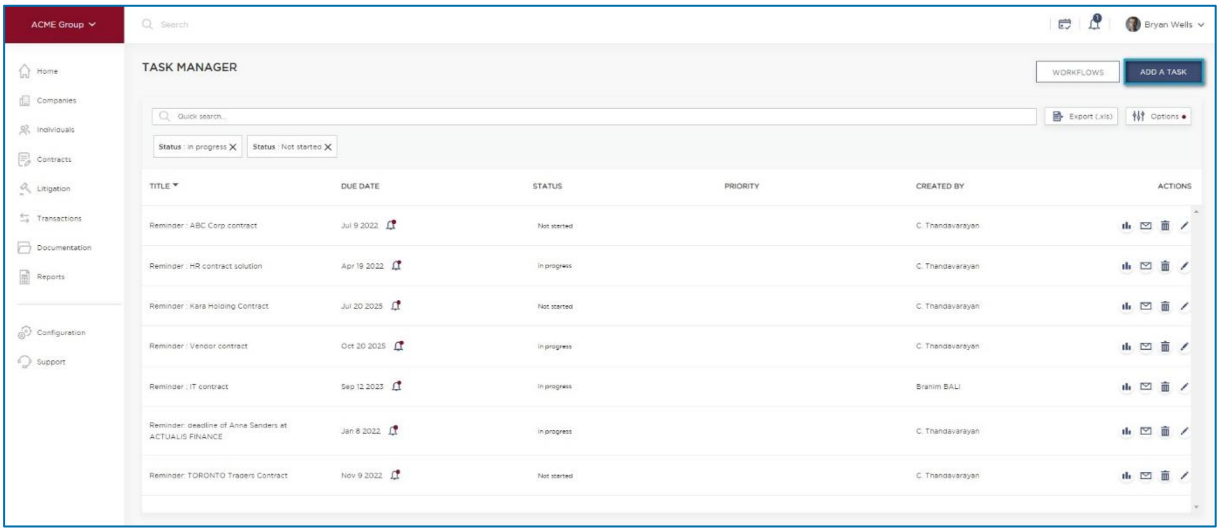
### 3.1.1. Creating a task

From a contract file, click **Add… > Tasks** to quickly create a task associated with this content.




You can also create a task by clicking **> Task Manager** in the top right corner of the screen, and then **Add a task**.




This displays a screen in which you can fill in the details of the task to be performed. You can thus:

- **Assign** the task to a user.
- Indicate a **due date** to be observed.

Once created, tasks will be displayed:
- In the **Calendar**: for tasks with a due date.
- In the **Tasks** section of a contract sheet: for tasks associated with this contract.
- On the **Home** page which you can customize using the **My assigned tasks** item.
- In the **Task Manager**.

### 3.1.2. Managing tasks

Access the Task Manager via  > **Task Manager**.

This screen can be used in particular to:
- View all the tasks created, their progress status and their due date.
- Set a reminder  on a task's due date.
- Modify or delete a task.

Lastly, you can use the **Options** button to filter the tasks displayed according to different criteria, or to customize the information displayed on the list.

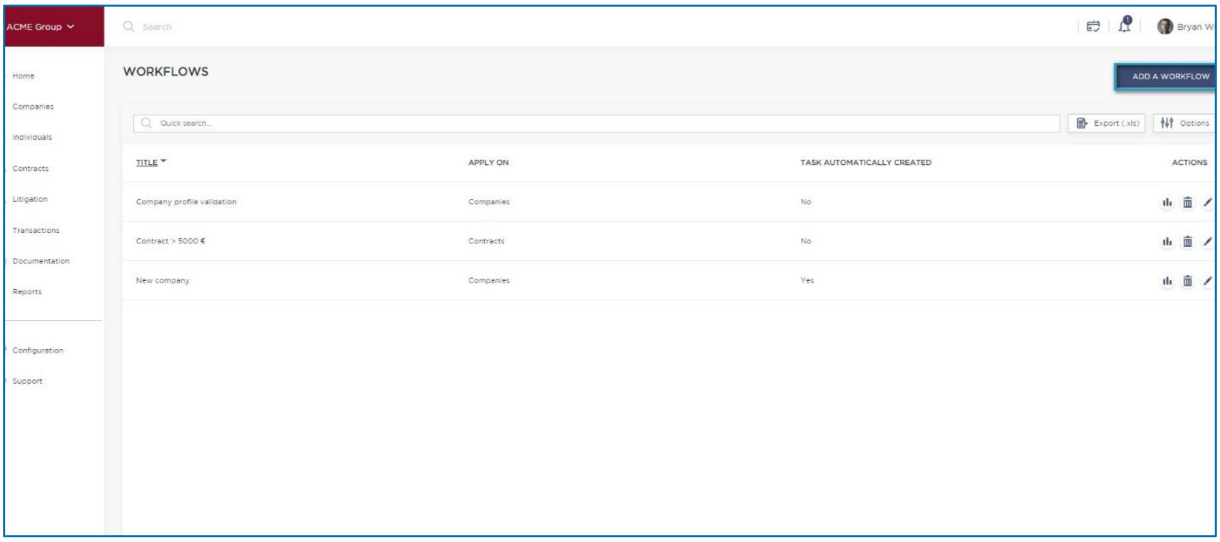
## 3.2. Workflows

Using workflows, you can quickly generate a series of tasks from a template. This feature makes it easier to implement recurring procedures within your organization.

### 3.2.1. Creating a workflow

Go to the Task Manager via  > **Task Manager** then click the **Workflows** button.


In the screen displayed, click **Add a workflow**.



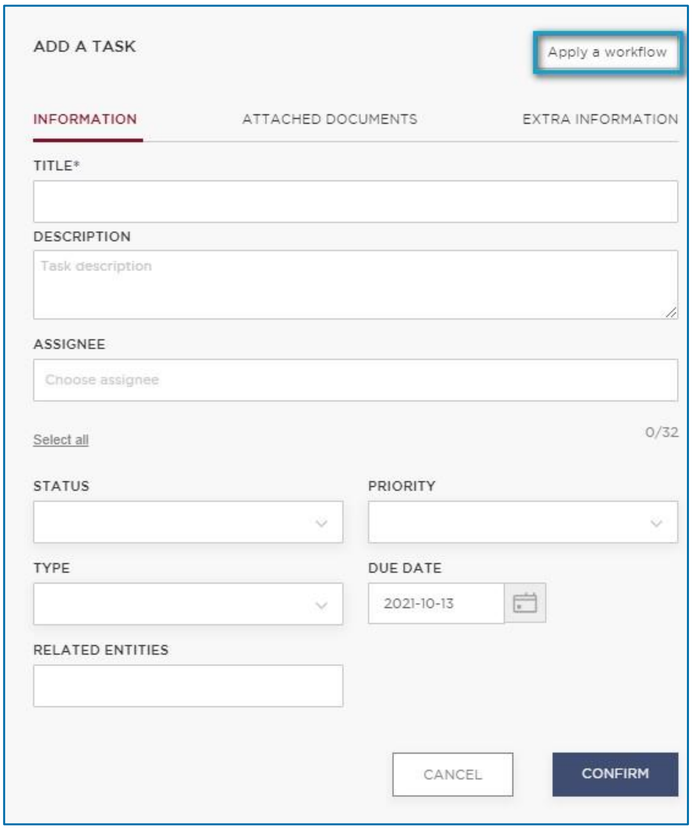

In the form displayed, you can fill in the details of the Workflow to be created, in particular:

- The **type of content** with which this workflow must be associated.
- The list of **tasks** that will be generated each time this workflow is applied. To help you organize complex workflows, you can group these tasks into **steps**.

### 3.2.2. Applying a workflow

To apply a workflow:

- In the form for adding a task, click the **Apply a workflow** button.
- Choose the workflow to apply to this content.



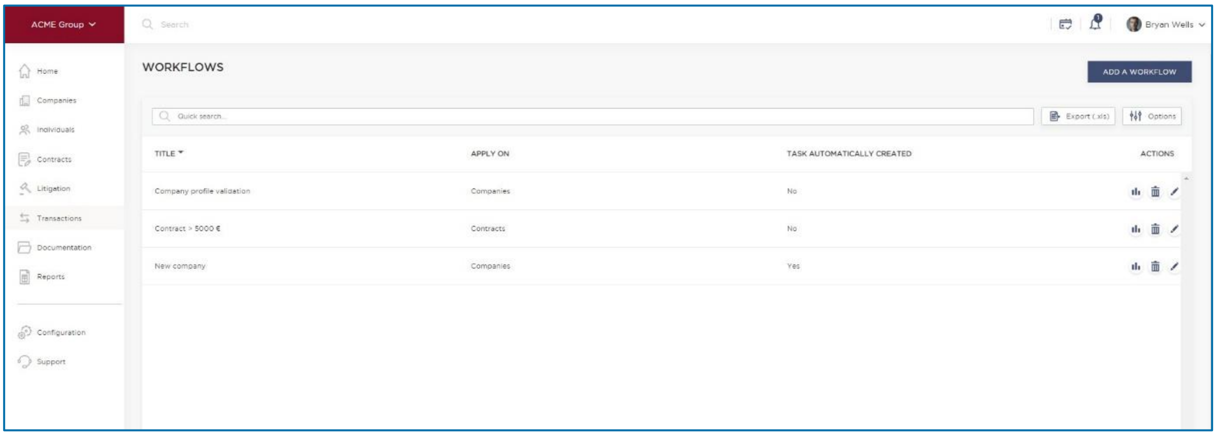

All tasks associated with this workflow will be generated and associated with this content.

### 3.2.3. Managing workflows

Go to the Workflow Manager via > **Task Manager** then click the **Workflows** button.

This screen can be used in particular to:

- View all the workflows created and the type of content with which they are associated.
- Modify or delete a workflow.


ACME Group
Search
Bryan Wells
Home
Companies
Individuals
Contracts
Litigation
Transactions
Documentation
Reports
Configuration
Support
WORKFLOWS
ADD A WORKFLOW
Quick search...
Export (.xls)
Options
TITLE
APPLY ON
TASK AUTOMATICALLY CREATED
ACTIONS
Company profile validation
Companies
No
Contract > 5000 €
Contracts
No
New company
Companies
Yes