

# Contract Insight

ENTERPRISE EDITION

**End User Training**

Goal: Start Entering Contracts Today!



# Overview

Session Time: 1.5 Hours

Main Menu Navigation	<ul style="list-style-type: none"><li>• Login</li><li>• Review key top menu items and general system navigation</li></ul>	<ul style="list-style-type: none"><li>• Be familiar with the main menu</li></ul>
Review screen layout	<ul style="list-style-type: none"><li>• Add (Entry) Screen</li><li>• Details (Display) screen</li><li>• List screen</li></ul>	<ul style="list-style-type: none"><li>• Understand the basic layout of an Add/Entry Screen that allows the addition of a new record</li><li>• Understand the layout of a Details/Display screen</li><li>• Understand the layout of an Edit Screen</li></ul>
Review how to create a new Contract Record	<ul style="list-style-type: none"><li>• Add a new Contract Record to the system</li><li>• Fill out the Contract Record Add Screen</li><li>• Important data/date fields</li><li>• Attach files &amp; documents to a Contract Record</li></ul>	<ul style="list-style-type: none"><li>• Understand how to create and add a new Contract Record to the system</li><li>• Understand how to attach contract files &amp; documents to a Contract Record</li><li>• Understand the date fields and other important fields on a Contract Record</li></ul>
Understanding Tasks & Searching	<ul style="list-style-type: none"><li>• Talk Alerts</li><li>• Find/Search Requests</li><li>• Find/Search Contracts</li></ul>	<ul style="list-style-type: none"><li>• How to read/complete a task alert</li><li>• Understand how to find and search for request and contract records</li></ul>
Reporting, Dashboards & Support	<ul style="list-style-type: none"><li>• Create, Search, Run Ad-Hoc Reports</li><li>• Creating/Managing Dashboards</li><li>• Support Options</li></ul>	<ul style="list-style-type: none"><li>• Understand how to add/edit/run Ad-Hoc Reports</li><li>• Understand how to create and manage a dashboard</li><li>• Understand the out of the box support options</li></ul>



# Login

Users can provide their username and password to login. This ensures a secure system.

The screenshot shows a login form titled "Please Sign In". It contains two input fields: "User Name" with the placeholder text "Enter User Name" and "Password" with the placeholder text "Enter Password". Below the fields is a "Login" button. At the bottom left, there is a "Forgot Password?" link with a padlock icon.

If the user has an issue with logging into Contract Insight the system will allow the user to reset their password by sending a email to them to reset.

The screenshot shows the same login form as above, but with an error message displayed in red text: "Username and Password must be provided to log in." Below the "Login" button, another error message is shown in red: "The provided credentials could not be authenticated and the account will be locked out after several failed attempts." The "Forgot Password?" link is still present at the bottom.

Note: For Clients using an SSO for login, users will not see this screen so long as there are correctly logged into your network.



# Basic Navigation



- Users have access to the main menu at the top to navigate the system
- This menu can change based on User Permissions in the system
- System Admins have access to the **Manage/Setup** Menu Item
  
- Users have access to [My Calendar](#) when they first log into the system.
  
- On their Calendar, Users will be able to see [Contract Alerts](#) & [Contract Tasks Alerts](#) that they are assigned to. System Admins will see all Contract Alerts and Task Alerts.

My Calendar

Tip: This calendar displays alerts based on the end date and notify days of a record. To add a diary note, select the number of the day in the calendar.

Today is Tuesday, October 10, 2017 Go to:  go

October 2017

24	25	26	27	28	29	30
		<b>Contract</b> New Vendor Agreement (11) : Awaiting Execution; DeVita, Nash; Dahl Systems <b>Contract Tasks</b> Tentative SOW Start Date Approaching (First MSA) : DeVita, Nash			<b>Contract</b> Hyperion Buying Agreement (13) : Pending; DeVita, Nash; Hypertion Corporation <b>Sourcing</b> B Franklin RFP (3) : Active; Barton, Clara; Legal C Barton RFI (2) : Active; Barton, Clara; Marketing Vehicle Request (6) : Pending; Hemmingway, Ernest; Contracts Administration	
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
<b>Contract</b> Vendor's Stuff (10) : In Negotiation; DeVita, Nash; Dahl Systems				<b>Contract</b> Consulting Agreement 1 (7) : Active; DeVita, Nash; Bandit Corp.		<b>Contract</b> A short title (74) : Pending; Fitzgerald, F. Scott; Vault-Tec
22	23	24	25	26	27	28
				<b>Contract</b> 04-Oct MSA (82) : Pending; DeVita, Nash; CobbleStone Systems	<b>Contract</b> DBase Software (27) : Active; DeVita, Nash; Bandit Corp. Signing an Agreement (42) : Pending; DeVita, Nash; CobbleStone Systems	
29	30	31	1	2	3	4
	<b>Contract Tasks</b> Tentative SOW Start Date Approaching (First MSA) : DeVita, Nash	<b>Sourcing</b> Template RFP (4) : Pending; DeVita, Nash; Contracts Administration				



# The 3 Screens

## Add

## Details

**Add New Contract Record**  
Add New Service Agreement Record

Add Company

**Details**

\*Contract Type: Service Agreement  
 \*Department/Division: Contracts Administration  
 Employee: Devita, Nash  
 \*Contract Title: [Empty]  
 Status: Pending  
 \*Vendor / Client Name: [Empty]  
 Description: [Empty]  
 Term/Occurrence: [Empty]  
 Location: [Empty]

**Dates**

Effective Date: [Empty]    \*Expiration Date: [Empty]    \*Contract Notify Days: 60  
 Expiration Warning Date: [Empty]

**Financial Budgetary**

\*Contract Amount: [Empty]

**Record Info**

Entered By: Devita, Nash    Date Entered: 10/10/2017 9:39 AM    Contract ID: [Empty]  
 Updated By: Devita, Nash

Save & Continue

**Contract Details**    101 days remaining; term days: 116; term months: 4

**Details**

Contract Type: Hosting Agreement    Department/Division: Accounting    Employee: Fitzgerald, F. Scott  
 Contract Title: A short title    Status: Pending    Vendor / Client Name: Vault-Tec [Everywhere Way City Province EV 0123 Everywhere]  
 Description: Text description

**Dates**

Contract Notify Days: 90    Effective Date: 9/25/2017    Expiration Date: 1/19/2018

**Financial Budgetary**

Contract Amount: 150,000.00

**Record Info**

Entered By: Devita, Nash    Date Entered: 9/25/2017 10:32:20 AM    Contract ID: 74  
 Date Updated: 9/25/2017 10:36:57 AM    Updated By: Devita, Nash

## List

	Contract ID	Company	Contract Title	Effective Date	Expiration Date	StatusName	Department	TypeName
▶ <a href="#">View</a>	74	Vault-Tec	A short title	9/25/2017	1/19/2018	Pending	Accounting	Hosting Agreement
▶ <a href="#">View</a>	4	Hyperion Corporation	Vegetable Delivery	5/14/2017	11/12/2017	Pending	Contracts Administration	Food Service
▶ <a href="#">View</a>	6	Vault-Tec	Temp Staffing	3/19/2017	3/18/2018	Active	Contracts Administration	Temporary Employment Agreement
▶ <a href="#">View</a>	7	Bandit Corp.	Consulting Agreement 1		10/19/2017	Active	Contracts Administration	Consulting Agreement
▶ <a href="#">View</a>	13	Hyperion Corporation	Hyperion Buying Agreement		9/29/2017	Pending	Contracts Administration	Vendor Buying Agreement
▶ <a href="#">View</a>	23	CobbleStone Systems	Expensive Truck	7/24/2017	8/31/2017	Active	Transportation	Lease Agreement (Truck)
▶ <a href="#">View</a>	24	CobbleStone Systems	Warehouse Lease with high maint.	9/29/2017	9/28/2018	Active	Facilities Management	Lease Agreement (Warehouse)
▶ <a href="#">View</a>	30	Jakobs Ltd.	IMA Truck Sale	8/21/2017	8/31/2017	Active	Transportation	Sales Agreement

# Add Screen



**Add New Contract Record**  
Add New Service Agreement Record

**Details**

* <b>Contract Type</b> Service Agreement	* <b>Department/Division</b> Contracts Administration	<b>Employee</b> DeVita, Nash
* <b>Contract Title</b>	<b>Status</b> Pending	* <b>Vendor / Client Name</b> -- Select One --
<b>Description</b>	<b>Term/Occurrence</b> -- Select One --	<b>Location</b> -- Select One --

**Dates**

<b>Effective Date</b>	* <b>Expiration Date</b>	* <b>Contract Notify Days</b> 60
<b>Expiration Warning Date</b>		

**Financial/Budgetary**

* <b>Contract Amount</b>
--------------------------

**Record Info**

<b>Entered By</b> DeVita, Nash	<b>Date Entered</b> 10/10/2017 9:39 AM	<b>Contract ID</b>
<b>Updated By</b> DeVita, Nash		

Data fields are available for entry. Fields are configurable by System Admins.



Fields with a \* next to them are set to required. Whether or not a field is required is fully configurable.

Any greyed out fields will be handled / controlled by the system (see Record Info).

Clicking **Save & Continue** will commit the record and bring you to the details screen.





# Details Screen

- Displays data entered into assigned fields
- Can edit a field by clicking the **Pencil**  icon
- System Admins can group fields together to display similar items together. Entire field groups can be edited at the same time by clicking the **Pencil**  icon next to the group name.


**Contract Details** 101 days remaining; term days: 116; term months: 4

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**Details** 


<b>Contract Type</b> Hosting Agreement	<b>Department/Division</b>  Accounting	<b>Employee</b> Fitzgerald, F. Scott
<b>Contract Title</b> A short title	<b>Status</b> Pending	<b>Vendor / Client Name</b> Vault-Tec [Everywhere Way City Province EV 0123 Everywhere]
<b>Description</b> Text description		

---

**Dates** 


<b>Contract Notify Days</b> 90	<b>Effective Date</b> 9/25/2017	<b>Expiration Date</b> 1/19/2018
-----------------------------------	------------------------------------	-------------------------------------

---

**Financial/Budgetary** 

<b>Contract Amount</b> 150,000.00
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**Record Info** 

<b>Entered By</b> DeVita, Nash	<b>Date Entered</b> 9/25/2017 10:32:20 AM	<b>Contract ID</b> 74
<b>Date Updated</b> 9/25/2017 10:36:57 AM	<b>Updated By</b> DeVita, Nash	



# List Screen

- Displays record(s) in the system based on permissions
- Ability to filter/search through column headers
- Users can view the record by clicking the [View](#) button

	Contract ID	Company	Contract Title	Effective Date	Expiration Date	StatusName	Department	TypeName
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
▶ <a href="#">View</a>	74	Vault-Tec	A short title	9/25/2017	1/19/2018	Pending	Accounting	Hosting Agreement
▶ <a href="#">View</a>	4	Hyperion Corporation	Vegetable Delivery	5/14/2017	11/12/2017	Pending	Contracts Administration	Food Service
▶ <a href="#">View</a>	6	Vault-Tec	Temp Staffing	3/19/2017	3/18/2018	Active	Contracts Administration	Temporary Employment Agreement
▶ <a href="#">View</a>	7	Bandit Corp.	Consulting Agreement 1		10/19/2017	Active	Contracts Administration	Consulting Agreement
▶ <a href="#">View</a>	13	Hyperion Corporation	Hyperion Buying Agreement		9/29/2017	Pending	Contracts Administration	Vendor Buying Agreement
▶ <a href="#">View</a>	23	CobbleStone Systems	Expensive Truck	7/24/2017	8/31/2017	Active	Transportation	Lease Agreement (Truck)
▶ <a href="#">View</a>	24	CobbleStone Systems	Warehouse Lease with high maint.	9/29/2017	9/28/2018	Active	Facilities Management	Lease Agreement (Warehouse)
▶ <a href="#">View</a>	30	Jakobs Ltd.	MA Truck Sale	8/21/2017	8/31/2017	Active	Facilities Management	Sales Agreement



# Requests

Requests give non-admin users the ability to request new items, such as:

1. Request a New Contract
2. Request a New Vendor/Customer
3. Request a new Purchase Order (if licensed)
4. Request a new Sourcing/Solicitation (if licensed)

Requests enable some members of your team to review the request, approve and/or reject the request, and collect important data from end-users.

Users can [add a new request](#) record by selecting the type of request they are requesting. They are then presented related fields to fill out.

The screenshot shows the 'Add New Request Record' form. At the top, it says 'Add New Request Record'. Below that is a dropdown menu labeled 'Select a Type' with the text '-select one-' and a downward arrow. At the bottom right of the form is a 'Continue' button.

The screenshot shows the 'Add New Request Record' form with the following sections and fields:

- Add New Request Record**  
Add New Contractor Agreement Record
- Details**
  - \*Company Name: -- Select One --
  - Request Details: [Text Field]
  - \*Request Title: [Text Field]
  - \*Department: Contracts Administration
  - Request Type: Contractor Agreement
  - Request Amount: 0
  - Status: Request Pending
  - \*Requestor: DeVita, Nash
  - \*Review Group: -- Select One --
- Vendor Info**
  - Contact Name: [Text Field]
  - Contact Email: [Text Field]
  - Contact Phone: [Text Field]
- Record Info**
  - Date Entered: 11/6/2017 8:30 AM
  - Date Accepted: [Text Field]
  - Date Submitted: [Text Field]
  - Date Rejected: [Text Field]
  - Request ID: [Text Field]
  - Entered By: DeVita, Nash
  - Requested By Vendor: -- Select One --
  - Updated By: DeVita, Nash
- Save & Continue** button at the bottom right.



# Requests: Review Groups

**\*Review Group**

-- Select One --

-- Select One --


Administrators

End Users

Finance

When filling out the fields assigned to the request, the **Review Group** field allows the user to assign an **Employee Role/Group** to the Request Record. They will get alerted when the record is created to review the request created.

**Request Status**

 **Current Request Status:** Request Accepted

-- Select One --

Request Pending

Request Accepted

Request Rejected

Request Cancelled

The Request Record has four Status values from which to select: Pending (the default on creation), Accepted, Rejected, and Cancelled.

Only individuals in the Review Group and System Admins can set a request's status to Accepted or Rejected.

**Create From Request**

New Request from Record

New Contract Record

New Company Record

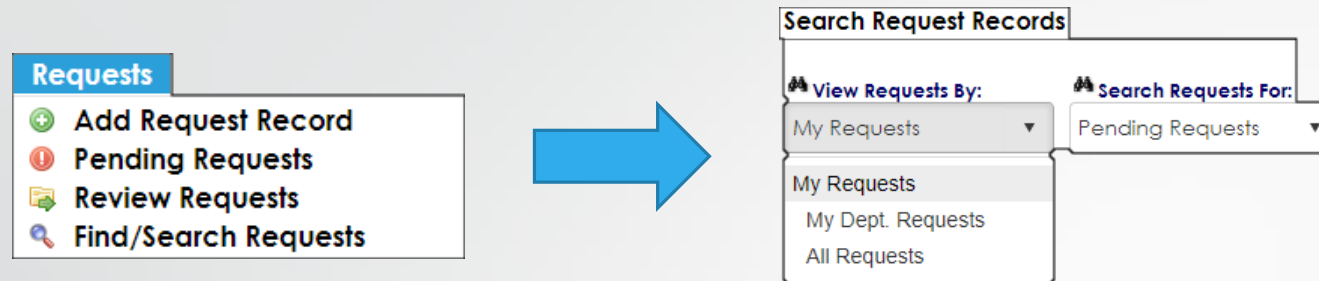
New E-Procurement Record

New Purchase Order Record

Accepting a request will allow permitted users to create a new record from the request record. (New Vendor / Contract).



# Find/Search Requests



If a user(s) would like to review a request submitted already in Contract Insight they can select Review Requests and filter “by” and “for”.  
After filtering the user(s) can select which record they would wish to view by selecting View button.

Page 1 of 1, Items 1 to 13 of 13.

	Request ID	Title	Contract Type	Vendor Name	Requestor	Review Group	Date Submitted	Days Pending	Contact Name	DepartmentName	Date Accepted
<a href="#">View</a>	1	Cats	Buyer Agreement	Vault-Tec	DeVita, Nash	Administrators	7/21/2017			Contracts Administration	7/24/2017
<a href="#">View</a>	3	Truck Request	Lease Agreement (Truck)	Dahl Systems	DeVita, Nash	Administrators			Steve	Transportation	8/10/2017



# Creating Contract Records

Three ways to [add a new contract record](#)

- Contracts
- + Add Contract Record
- + Add Contract From File
- + Add Contract by Vendor/Client
- Find/Search Contracts

After a Type is selected, the assigned fields will display for the user to fill out.

When adding a contract record, a user has to select a [contract type](#)

-select one-

- Adendum
- Banking/Finance Agreement
- Buyer Agreement
- Cleaning Agreement
- Concession Agreement
- Confidentiality Disclosure Agreement
- Construction Agreements
- Consulting Agreement
- Contractor Agreement
- Employee Agreement
- Equipment Repair
- Food Service
- General Agreement - Default
- Health Care Agreement
- Hosting Agreement
- Lease Agreement
- Lease Agreement (Truck)
- Lease Agreement (Warehouse)
- License Agreement
- Maintenance Agreement
- Master Service Agreement (MSA)
- Non-Disclosure Agreement
- Patent
- RFP Agreement

### Add New Contract Record

Add New Service Agreement Record

**Details**

*Contract Type Service Agreement	*Department/Division Contracts Administration	Employee DeVita, Nash
*Contract Title <input type="text"/>	Status Pending	*Vendor / Client Name -- Select One --
Description <input type="text"/>	Term/Occurrence -- Select One --	Location -- Select One --

**Dates**

Effective Date <input type="text"/>	*Expiration Date <input type="text"/>	*Contract Notify Days 60
Expiration Warning Date <input type="text"/>		

**Financial/Budgetary**

*Contract Amount <input type="text"/>
--

**Record Info**

Entered By DeVita, Nash	Date Entered 10/10/2017 9:39 AM	Contract ID <input type="text"/>
Updated By DeVita, Nash		



# Contract Details

After a record is created, the fields will display on the details screen.

Contract Details		
101 days remaining: term days: 116; term months: 4		
<b>Details</b>		
<b>Contract Type</b> Hosting Agreement	<b>Department/Division</b> Accounting	<b>Employee</b> Fitzgerald, F. Scott
<b>Contract Title</b> A short title	<b>Status</b> Pending	<b>Vendor / Client Name</b> Vault-Tec [Everywhere Way City Province EV 0123 Everywhere]
<b>Description</b> Text description		
<b>Dates</b>		
<b>Contract Notify Days</b> 90	<b>Effective Date</b> 9/25/2017	<b>Expiration Date</b> 1/19/2018
<b>Financial/Budgetary</b>		
<b>Contract Amount</b> 150,000.00		
<b>Record Info</b>		
<b>Entered By</b> DeVita, Nash	<b>Date Entered</b> 9/25/2017 10:32:20 AM	<b>Contract ID</b> 74
<b>Date Updated</b> 9/25/2017 10:36:57 AM	<b>Updated By</b> DeVita, Nash	

From the record, we can attach files/attachments to the record itself and assign additional employees, departments / vendors, and customers.

Upload File(s) Info.	
File Notes: <input type="text"/>	File Category: No Categories Availabl <input type="button" value="v"/>
Access Level: Internal <input type="button" value="v"/>	Single File Upload: <input type="text"/> <input type="button" value="Browse"/>
<input type="button" value="Drop Files Here"/>	

Actions
<input type="button" value="Add New Contract"/>
<input type="button" value="Create Contract &amp; Link"/>
<input type="button" value="Attachments"/>
<input type="button" value="Tasks &amp; E-mails"/>
<input type="button" value="Checklist"/>
<input type="button" value="Price/Cost Line Items"/>
<input type="button" value="Assign Employees"/>
<input type="button" value="Additional Companies"/>
<input type="button" value="Assign Departments"/>
<input type="button" value="Assign Locations"/>
<input type="button" value="Notes"/>
<input type="button" value="Refresh"/>
<input type="button" value="Link Contract"/>
<input type="button" value="Hierarchy"/>
<input type="button" value="View History"/>
<input type="button" value="Financials"/>
<input type="button" value="Company Info"/>
<input type="button" value="Copy"/>
<input type="button" value="E-mail"/>
<input type="button" value="V"/>

Click **Company Info** to view Vendor/Customer Details from the contract record.



# Important Data Fields

**Contract Type:** the legal form type [type] of the agreement

**Department/Division:** the department or business unit to which the contract record is primarily assigned

**Employee:** the internal employee assigned to/responsible for the contract record

**Contract Title:** a short name by which to search & locate a contract

**Status:** the current status of the agreement (Active, Expired, etc.)

**Customer/Vendor:** the counterparty assigned to the contract

**Contract ID:** a unique, system generated identifier for the contract

## Key Dates:

**Effective Date:** the date the contract is effective

**Expiration Date:** the date the contract expires (System Alert)

**Contract Notify Days:** the number of days prior to the Contract Expiration Date that the system will send an e-mail alert to the employee(s) assigned, if the date is in the future

**Expiration Warning Date:** system generated date field based on the Expiration Date minus Contract Notify Days (System Alert)

**Annual Review Date:** the next review date of the contract record set by the user (System Alert)

<b>Details</b>		
<b>Contract Type</b> Consulting Agreement	<b>Department/Division</b> Contracts Administration	<b>Employee</b> DeVita, Nash
<b>Contract Title</b> Agreement of Consultation	<b>Status</b> Active	<b>Vendor / Client Name</b> Benefit Corp. [36 Courtland Ave. Fresh M
<b>Description</b>		
<b>Dates</b>		
<b>Effective Date</b> 10/19/2016	<b>Expiration Date</b> 10/19/2017	<b>Contract Notify Days</b> 60
<b>Expiration Warning Date</b> 07/26/2017		
<b>Financial/Budgetary</b>		
<b>Contract Amount</b> 200,000.00		
<b>Record Info</b>		
<b>Entered By</b> DeVita, Nash	<b>Date Entered</b> 7/21/2017 2:31:37 PM	<b>Contract ID</b> 7
<b>Date Updated</b> 10/10/2017 4:38:05 PM	<b>Updated By</b> DeVita, Nash	



# Files & Attachments

Users have the ability to add single files or drag and drop multiple files onto a Contract Record.

**Upload File(s) Info.**

File Notes:

File Category:

Access Level:

Single File Upload:

**Drop Files Here**

Page 1 of 1, items 1 to 3 of 3.


Actions	View File	Notes	Category	Entry Date	Entered By	Collaboration Type	Checked Out To	Last Viewed By	Last View Date	Ver.
	<a href="#">Drop Down Changes.doc</a>	Converted To Word from pdf		11/1/2017 10:27:40 AM	DeVita, Nash	Internal	~	DeVita, Nash	11/1/2017	1
	<a href="#">Drop Down Changes.pdf</a>			11/1/2017 10:25:27 AM	DeVita, Nash	Internal	~	~		1
	<a href="#">Medical-Leave-Policy.pdf</a>	Med Policy		11/1/2017 10:21:07 AM	DeVita, Nash	Internal	~	DeVita, Nash	11/1/2017	0

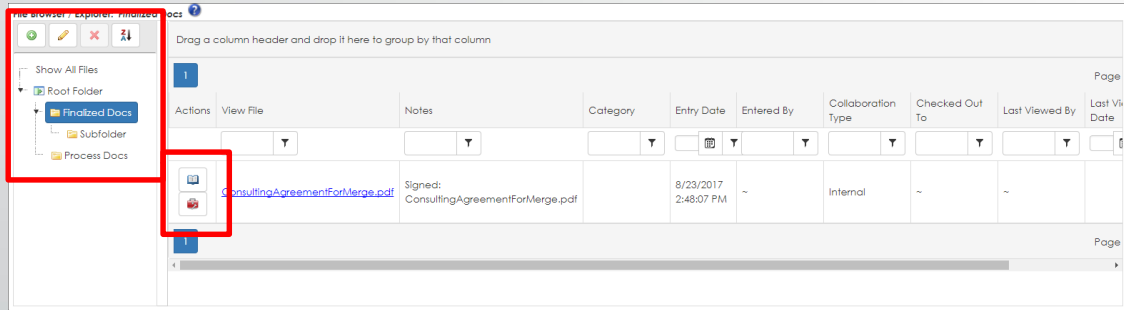
Page 1 of 1, items 1 to 3 of 3.

Just like with any list screens, the user can filter through files and see which version that file is.





# Files & Attachments: Management

When attaching files, they can be placed into folders and subfolders. Select the parent folder (including the Root folder) and click the **Plus**  **Icon**.

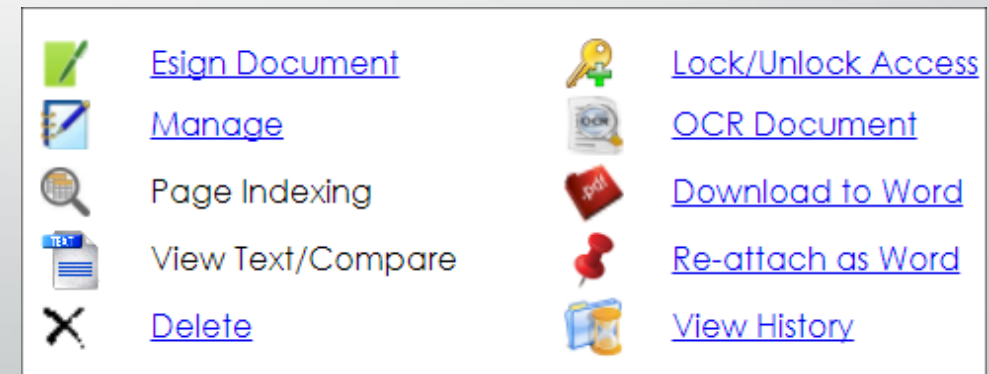


To move a file into a different folder, click in the empty area of the file's entry in the list to turn the line blue. Once the file is selected, a user can drag and drop the file into its destination.



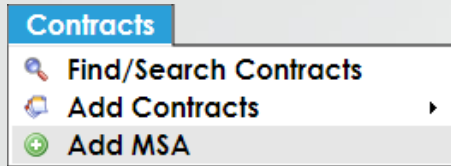
Click the **Book**  **Icon** to preview the file. Click the **Toolbox**  **Icon** to use the **Document Tools**.

From the document tools, the file can be sent for signing (if the module was purchased), be deleted, be compared to other attached documents, be processed through OCR, be downloaded, and be reattached in a different format (PDF/Word).

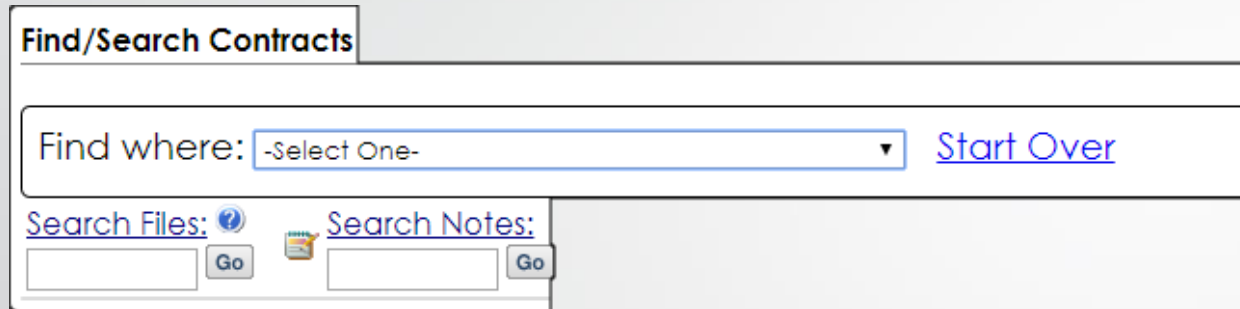




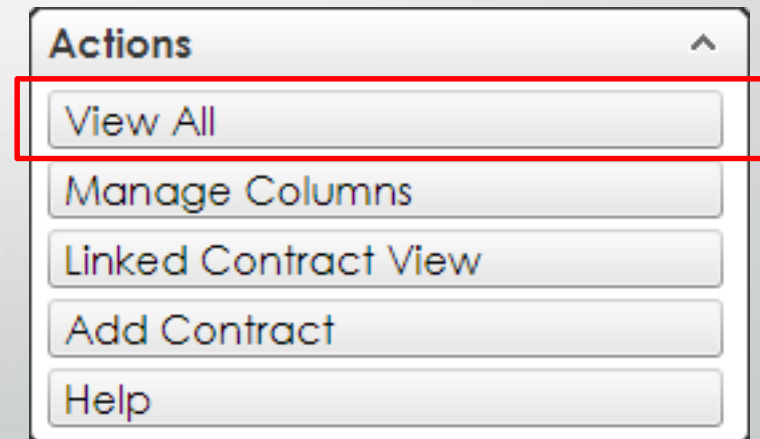
# Find/Search Contracts



Users have the ability to search through contracts to which they are assigned to or the department(s) to which they have been assigned.



- **Find Where:** Allows the user(s) to filter based on a field on a contract record
- **Search Files:** Allows the user(s) to search through all files that are text based (.doc / .docx / text based PDF / etc.)
- **Search Notes:** Allows the user(s) to search through notes found on a contract record
- **View All:** Allows the user(s) to view all contracts to which they have access





# Understanding Tasks

When a user is assigned to a task they will receive an alert, shown below. Inside the email alert will be some information about the record as well as the task at hand. The user can use the links provided to login to Contract Insight and view the task or the record the task is for.

There is a task alert below:

**Task Name:** Example Task  
**Employee Assigned To:** DeVita, Nash  
**Start Date:** Nov 01 2017  
**End/Due Date:** Nov 08 2017  
**Notify Days:** 5  
**Details:** Details about the task go here.  
**Notes:**  
**Days to Complete:**  
**Contract ID:** 74  
**Task ID:** 42  
**Days Left to Task End Date:** 5

**Record Information:**  
**Contract Title:** A short title  
**Vendor / Client Name:** Vault-Tec  
**Employee:** Fitzgerald, F. Scott  
**Department/Division:** Accounting  
**Effective Date:** Sep 25 2017  
**Status:** Pending  
**Expiration Date:** Jan 19 2018  
**Annual Review Date:**  
**Description:** Text description  
**Renewal Notes:**  
**Term/Occurrence:**  
**Contract ID:** 74  
**Updated By:** DeVita, Nash

Approve
Reject

To view this event visit: [\[Redacted\]](#)  
 To view this event's contract record visit: [\[Redacted\]](#)

The task will have some information about what is needed from the user. Once the user performs the task and it is completed the user can complete the task assigned to them.

**Process** ^

Tasks, E-mails, Workflow, Alerts

[Add Task](#)

Drag a column header and drop it here to group by that column

1	Task Name	Employee	Start Date	End/Due Date
<a href="#">View</a>	Semi-annual Maintenance Data	George Minekee		
<a href="#">View</a>	Semi-annual Maintenance Data (end year)	George Minekee	8/17/2017	8/20/2017
<a href="#">View</a>	Approve Me	Nash DeVita	8/25/2017	8/31/2017

**Task & Event Details: Contract Task**

For Record: A short title

**Details**

<b>Task Name</b> Example Task	<b>Employee Assigned To</b> DeVita, Nash	<b>Start Date</b> 11/1/2017
<b>End/Due Date</b> 11/8/2017	<b>Notify Days</b> 7	<b>Details</b> Details about the task go here.
<b>Notes</b>	<b>Amount</b> 0.00	<b>Role or Group</b>
<b>Status</b>	<b>Days to Complete</b> No	<b>Task Complete Date</b>
<b>Escalate To</b>	<b>Escalate After (Days)</b> 0	<b>Alternate Email</b>
<b>Order Number</b> 0.00	<b>Actual Non Working Days</b> 0	<b>Original Task End Date</b> 11/8/2017
<b>Number of days end date was altered</b> 0	<b>Working Days To Complete</b> 0	

**Record Info**

<b>Entered By</b> DeVita, Nash	<b>Date Entered</b> 11/1/2017 4:37:47 PM	<b>Updated By</b> DeVita, Nash
<b>Date Updated</b> 11/1/2017 4:37:47 PM	<b>Contract ID</b> 74	<b>Task ID</b> 42
<b>DaysToComplete</b> 0		



# Reporting

**Reports/Searches**

- Simple Searches
- Ad-Hoc Reports/Searches
  - Create an Ad-Hoc Report/Search
  - My Ad-Hoc Reports/Searches
- Stats
- Report Designer

Users will be able to view their list of reports. This list will display any reports created by the user as well as any reports that user was assigned to.

Contract Insight has an Ad-Hoc Reporting Tool that can be used, as long as the permission was assigned to the user.

**My Ad-Hoc Report List**

Ad-Hoc Quick Copy: 120 day finance exp Copy Report

Page 1 of 2, Items 1 to 50 of 57.

Delete	View/Run	Manage	Report Name	Emailer Active	Created On	Created By	ID
<a href="#">Delete</a>	<a href="#">View/Run</a>	<a href="#">Manage/Edit</a>	120 day finance expiration	False	8/1/2017 5:09:01 PM	Nash DeVita	102
<a href="#">Delete</a>	<a href="#">View/Run</a>	<a href="#">Manage/Edit</a>	1K Contracts	False	7/1/2011 2:24:24 PM		52
<a href="#">Delete</a>	<a href="#">View/Run</a>	<a href="#">Manage/Edit</a>	30 Day Contract Expiration Report		7/1/2011 4:25:18 PM		70

From here, a user can view/run or manage over a report on this list.

**Ad-Hoc Report Wizard**

- Overview & Tables
- Field Selection
- Filters & Conditions
- Sort Order
- Assigned To
- Email Schedule

A user has the ability to create new reports to display information that would be helpful for them. The tool has a wizard that can help the user build the report and assign additional users to it.



# Dashboards

**Home**

- My Dashboards
- My Calendar
- Configuration Wizard
- Find/Search Contracts
- Additional Documents

Users have the ability to select through multiple Dashboards

Select Your Dashboard: Primary Dashboard

- Dashboard
- Default System Dash (System)
- My Contracts
- Primary Dashboard

Users can create multiple docks onto the dashboard

[Add New Dock](#)

**Actions**

- Add New Dashboard
- My Dashboards
- My Dashboard Manager
- My Calendar

Users can also manage over dashboards they have created

Once a user has created a dashboard they can create docks on it. This is very useful to show reports that are needed for a user to view every time they login

**My Dashboards**

Select Your Dashboard: Primary Dashboard [Add New Dock](#)

Bing

Calendar

Today is Monday, November 6, 2017 Go to:  -filter by status-

November 2017									
22	<b>Contract</b> Property A (89) ; Active; Hemmingway, Ernest; Vault-Tec  <b>Contract Tasks</b> Tentative SoW Start Date Approaching (First MSA) ;; DeVita, Nash	30	<b>Contract</b> Rubbish Collection (90) ; Active; DeVita, Nash; Jakobs Ltd. Test (85) ; Pending; DeVita, Nash; CobbleStone Systems  <b>Contract Tasks</b> Tentative SoW Start Date Approaching (On Site Gym) ; ; ;  <b>Sourcing</b> Template RFP? (4) ; Pending; DeVita, Nash; Contracts Administration	31	1	2	<b>Contract Tasks</b> Example Task (A short title) ; Rejected; DeVita, Nash	3	4
5	<b>Contract Tasks</b> Tentative SoW Start Date Approaching (First MSA) ; ; ;	6	7	8	9	10	11		

Maint.

Export

Total Record Count: 1 Page Size: 25 Update

Page 1 of 1, Items 1 to 1 of 1.

Contract Title	Annual Maintenance	Type Name
Expensive Truck	26,000.00	Lease Agreement (Truck)

Page 1 of 1, Items 1 to 1 of 1.

Tasks Due

Employees by Dept



# Support Options

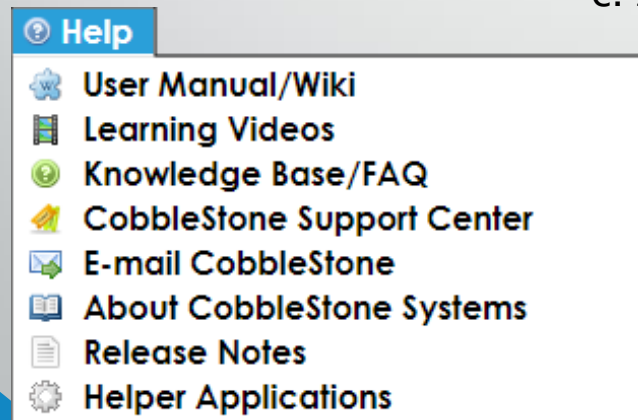
Users of the Contract Insight will have access to some tools and centers to get help regarding Contract Insight. There are two types of supports options: Self-Serve Support and CobbleStone Support. These options can be found via the Help tab on the Main Menu.

## 1. Self Serve Support

- a. [User Manual / Wiki](#)
- b. [Learning Videos](#)
- c. [Knowledge Base/FAQs](#)

## 2. CobbleStone Support

- a. [CobbleStone Support Center](#)
  1. Ticketing Center
  - b. Email: [support@cobblestonesystems.com](mailto:support@cobblestonesystems.com)
  - c. 24 /7 Phone Line: 1-866-330-0056



Note: Be sure to check your company's specific policy on Contract Insight support. You may be required to report support issues to an individual/department in your organization rather than go to CobbleStone directly.