Altova ContractManager

ALTOVA®
ContractManager

User & Reference Manual

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Published: 2022

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1 Altova ContractManager

Altova ContractManager™ (also written as Altova ContractManager or, in short as, ContractManager) provides complete contract lifecycle management with features such as templates for documenting contract details, built in reminders, change logs, and change tracking. A centralized contract repository in the cloud provides numerous benefits, from time savings to efficient management of related contracts and automatic reminders of important contract-related dates

Altova ContractManager provides the following features:

- Centralized contract management
- Unlimited, secure contract file storage
- Links between related companies and contracts
- Granular role and group-based permissions to control access to confidential information
- Automatic reminders for important review dates and deadlines
- Search tools to find contract documents and details instantly
- Printable reports
- Full audit log and change tracking
- Options to customize the app as little or as much as required
- Customize the contract database, forms, fields, reports, and more
- Select from different themes to configure your display colors and fonts

Last updated: 14 June 2022

2   General Information

This section contains basic general information about Altova ContractManager. We recommend that you read through it before you start your ContractManager work. It will help you to get a broad understanding of how the ContractManager system works.

The following topics are included:

- Getting Started [7] provides a broad practical outline of how to get started with system use.
- Roles in ContractManager [9] describes the different kinds of roles that are used in the system.
- How Data Is Stored [10] explains how a network of data relationships is built up in the system from separate individual records.
- Color Themes [12] provides an overview of how a default color theme can be set by the system administrator and a new theme selected by a user.
- Audits and Change Tracking [17] summarizes the change tracking system.

2.1   Getting Started

The Start Page of Altova ContractManager provides you with user access to your organization's ContractManager data, and enables you to edit this data [18].

Getting started with system use
For information about getting started with system use, go to the topic Quick Start: System Use [19].

System administration can be concurrent with system use

You can reconfigure the database, add new forms, change settings, and carry out other administration tasks even after users have started working with the system. Any admin changes you make will be reflected on the user side as soon as the user interacts with the system.

2.2   Roles in ContractManager

Each ContractManager user is given one or more roles. These roles define what a user is allowed and not allowed to do. For example, custom roles such as *Legal* or *Personnel* can be created that correspond to specific functions (such as access by the *Personnel* role to personnel-related contracts but not to client or IT contracts). A user can be associated with one or more roles, and would then be authorized to carry out the functions corresponding to those roles.

The roles that are available in ContractManager fall into three categories:

Admin
This role is predefined. It provides a user with all available ContractManager functionality. Users that have this role can:

- modify the ContractManager system's users and roles
- configure the ContractManager database and its components
- modify ContractManager settings
- configure reminder mails
- enter and edit data in the system's database

All Users
This role is predefined.

- Users with this role can enter and edit data in the ContractManager database. They do not have access to admin tasks *(see above).* If you need to perform an admin task, contact your ContractManager system administrator and request an *Admin* role.
- The *All Users* role is given to all users by default. As a result, any user that can access ContractManager will be given this role and can enter data (unless otherwise restricted by custom roles).

Custom roles
ContractManager administrators can define custom roles that can be assigned to users, for example, *Legal* or *Personnel* roles.

- A custom role can provide additional access or can restrict access to different containers of the database
- A custom role can provide access to different functionality within containers (for example, reading rights and writing rights)

2.3   How Data Is Stored

Data about contracts is stored in multiple containers, each of which represents one component of contract information. These containers can be organized in a hierarchy. For example, your ContractManager app might have a simple hierarchy that contains two databases named *Contract Database* and *Company Database,* as shown below:

```
Contract Database
|
|--Contract
|
Company Database
|
|--Company
|   |
|   |--Department
|   |   |
|   |   |--Person
```

Records and fields
In each container, you will enter records. Each record is defined by a number of fields (which are specific to that container). When you enter a record, what you will be doing is entering values for these fields. You can visualize a container as follows:

Container-A				
	Field-1	**Field-2**	**Field-3**	**Field-4**
Record-1	*Field-1-Value*	*Field-2-Value*	*Field-3-Value*	*Field-4-Value*
Record-2	*Field-1-Value*	*Field-2-Value*	*Field-3-Value*	*Field-4-Value*
Record-3	*Field-1-Value*	*Field-2-Value*	*Field-3-Value*	*Field-4-Value*

So when you enter data in the ContractManager app, you will be entering records for the different containers of the app. For example, you could add new company records, or department records, or person records, or contract records. In this way you build up the data in your ContractManager database.

Identity fields
In each container, one or more fields will have been configured (by your system administrator) to be *Identity Fields*. These fields will uniquely identify records. For example, employees will typically have unique ID numbers, so the ID number field can be used to identify records in the *Person* container. In the case of some containers, more than one field might be necessary to come closer to uniqueness (for example, a persons's *Name* and *Date of Birth* fields).

Linking records across containers
During database configuration, your system administrator/s will have built links across the containers. For example, a parent–child link might have been created between company and department, and another parent–

child link between department and person. In this case, when you enter a new record for a child container, one of the field values you would need to add would be for the parent of this (child) record. For example, when adding a new department record (say for a *Legal* department), you will be prompted for this department's company parent (where you could enter, say, a company named *Altova*). By selecting the parent *Altova*, you have established a link between this *Legal* department and the company *Altova*. In this record, then, you are effectively describing the legal department of Altova.

In a similar way, your system administrator/s could have built links between containers that are not directly linked in a vertical hierarchy. For example, a link could have been created between a contract and the contracted company. There is no direct hierarchical connection between the *Contract* container and the *Company* container. But if an explicit link is configured between the two, then, while entering, say, the contract data, you will be asked to enter the name of the contracted company. Doing so links the current contract not only with the selected company, but also to that company's (hierarchically descendant) departments and persons.

So, although you are entering data record-by-record for different containers, the ContractManager app is building a network of connections across records in different containers. This networked nature of the data enables you to generate reports and charts about your contracts, contract dates, and the companies and people involved.
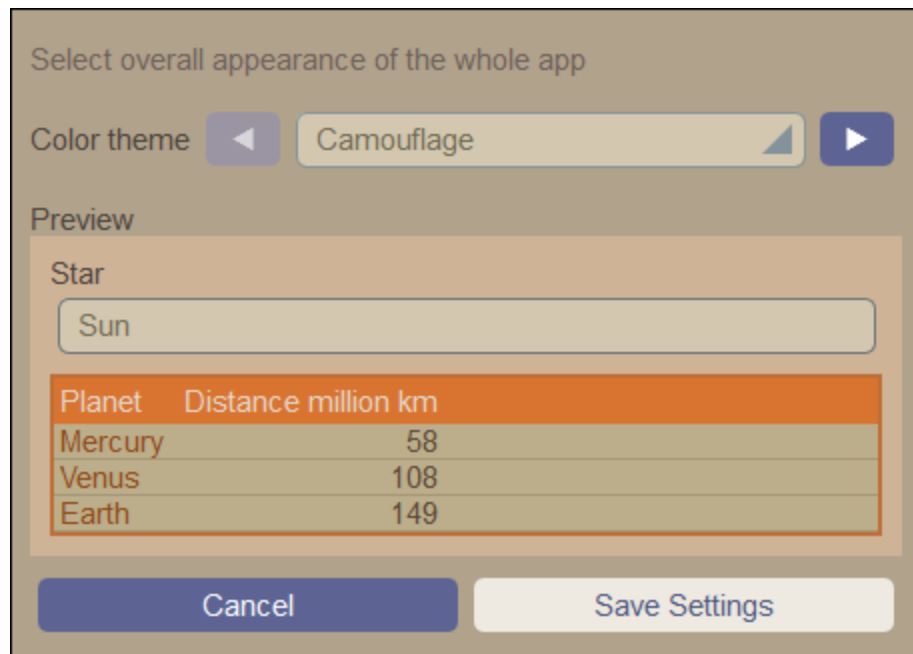
2.4   Color Themes

The ContractManager user interface can be set to one of the **themes** shown below. A default theme can be set by the system administrator (the form to set the default theme is shown in the screenshots below). A theme applies to the entire ContractManager app. When a system user opens ContractManager, the app's user interface is displayed in the default theme. The user can change the theme at any time [23] by (i) clicking the **Settings** button, and (ii) selecting a theme from the *Theme* combo box *(see screenshot below)*.
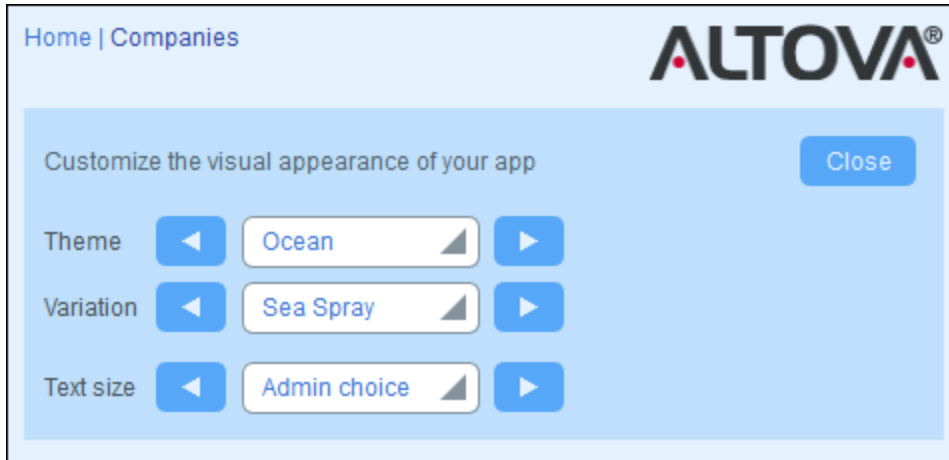
Additionally, each database of the app can be set to a different variation of the theme [23]. System users can select the theme's variation [23] on the top-level container of each database.

The screenshots below provide a sample of the available themes.
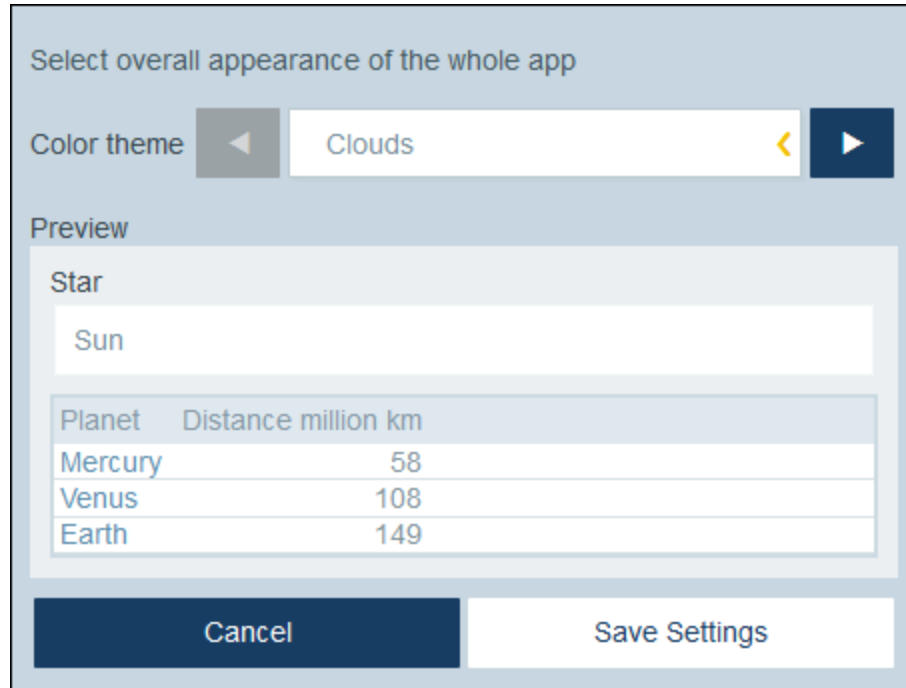
Camouflage

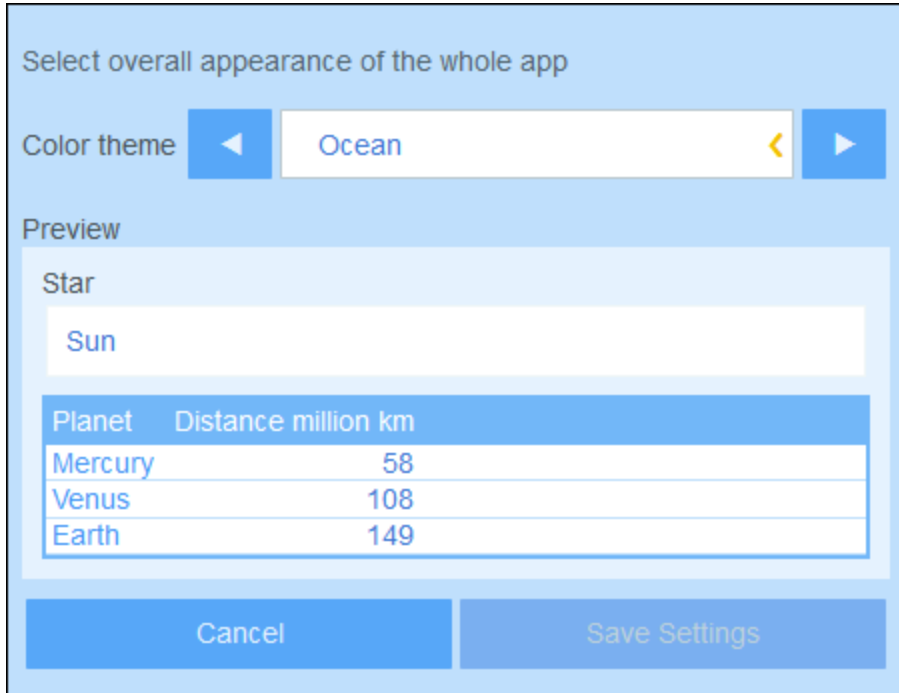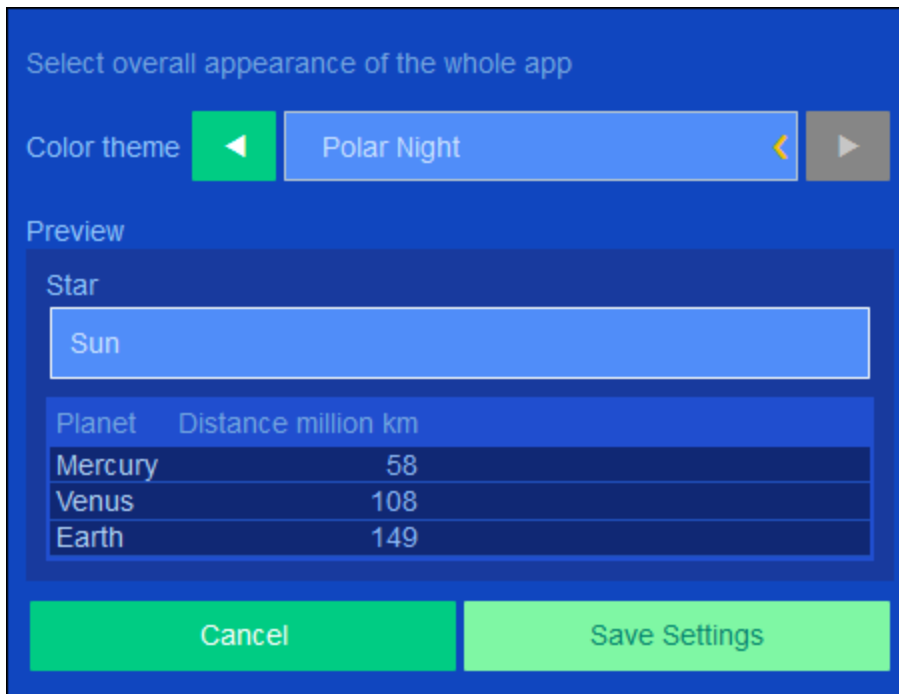
Clouds

Desert

Forest

Full Moon
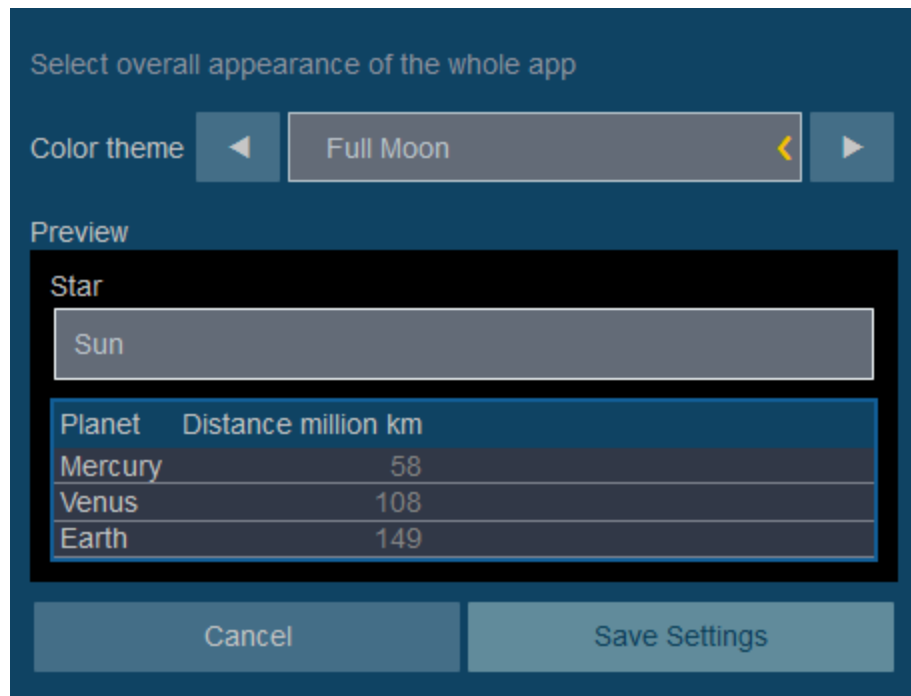
Halloween
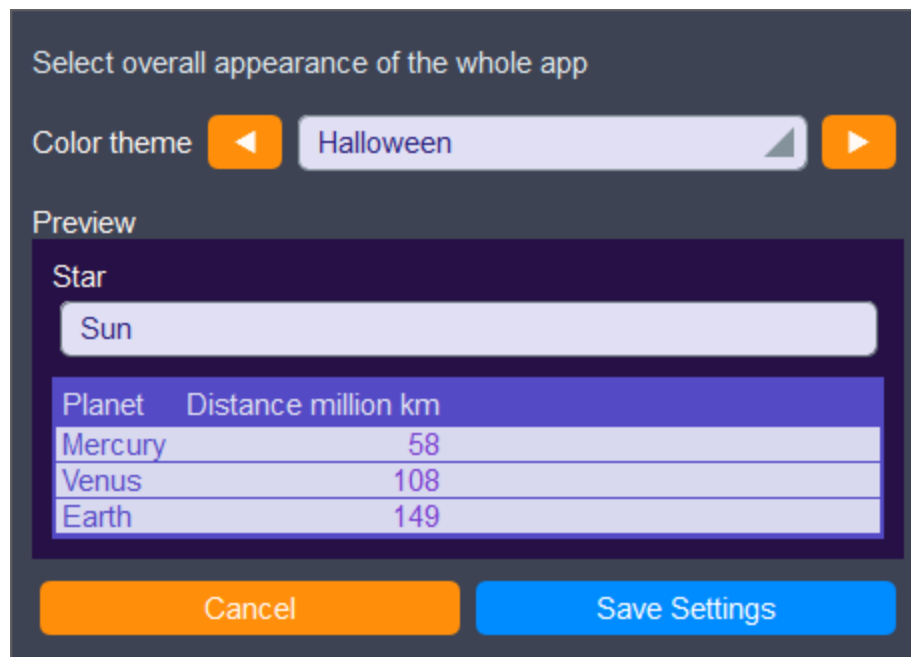
Ocean

Polar Night

2.5   Audits and Change Tracking

When users edit the data of a container, they can audit previous changes (see what changes have been made and by whom), track changes, and see a historical view of changes. How to do this is described in the section System Use | Audits and Change Tracking [38],

3   System Use

When you open Altova ContractManager, it will have been configured by a system administrator for use in your organization. Typically, the system administrator will be a person in your organization who has set up the app on your network for use among multiple users. If you have questions about how the app has been configured or how it works, contact your system administrator.

The app provides you with the following functionality:

- Enter and edit data about your organization's contracts. You might have the responsibility for maintaining records of all contracts or of only a subset of contracts. Typically, multiple users would be entering and editing data about the contracts. How to enter and edit records is described in the topics Record Listings [29] and Record Data [31].
- You can audit changes and track changes [38] made to records.
- Create and edit reminders when significant contract dates come due (for example, a contract renewal). A reminder is used to send notifications to the appropriate persons in your organization. See the topic Reminders [39].
- Export a container's contents (that is, its records) to XML and/or CSV files. This is described in the topic Export to XML, CSV [53].
- Generate charts and reports about a container's records. For example, in a Contracts container, you could generate charts and reports showing the cost of contracts by contract categories, and how these have changed over a period of time.
- Print charts, reports, and record listings.

The subsections of this section describe the ContractManager functionality that is available to you.

3.1   Quick Start: System Use

Before you read this section and get started, we recommend that you read the General Information [6] section, especially the section How Data Is Stored [10], which explains how the ContractManager database is structured into the containers in which your data records will be stored. As a user of the ContractManager app, a large part of your work will involve working with these containers. You will be adding new records and editing existing records.

The Start Page of the app serves as your navigational base. It provides access to the individual containers, within each of which you can edit the records of that container. The due reminders on the Start Page also take you to the record of a particular reminder.
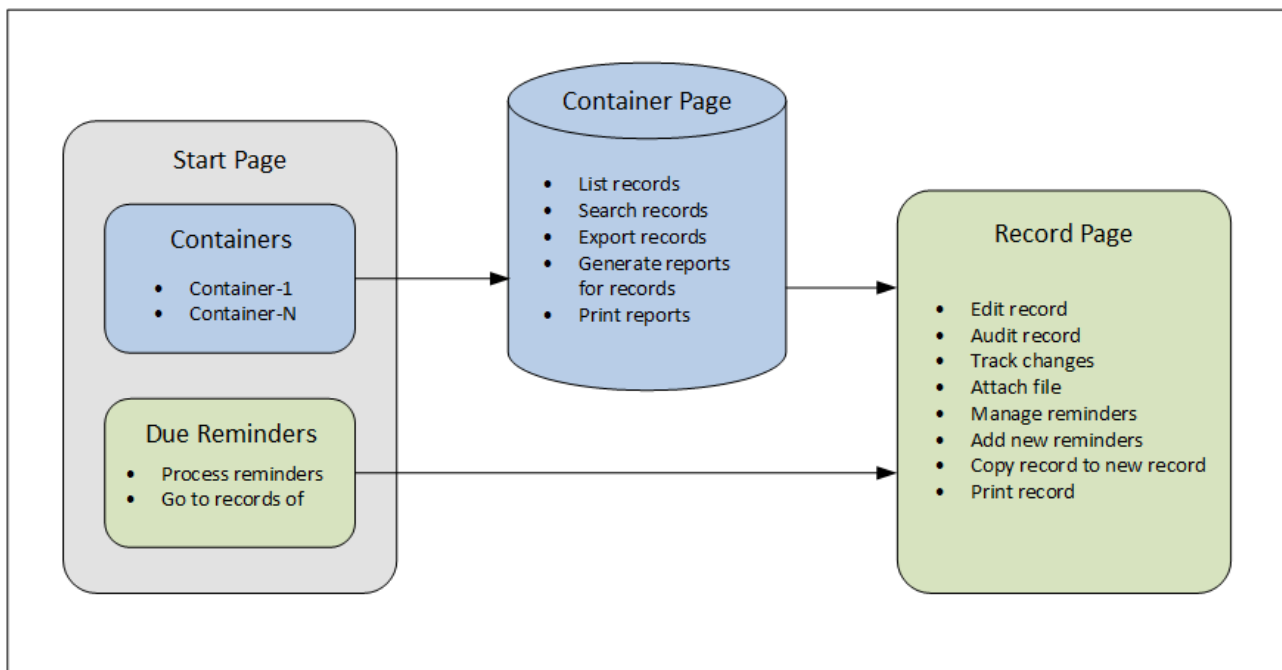
How to use the app

Data entry
- From the **Start Page** select a container to which you want to add records (or a container whose records you want to edit)
- On a **Container Page**, you can view records according to the different listing possibilities available for that container
- On a Container Page, you can search for specific records
- On the data entry form of a record (its **Record Page**), edit the record
- On a Record Page, you can track changes made to the record and audit the record (that is, see who made changes to the record)
- On a Record Page, you can copy the current record to a new record
- On a Record Page, if reminders have been enabled for that container, you can set new reminders and edit existing reminders

Data processing
- From a Container Page, you can export the records of that container to XML and CSV data formats
- From a Container Page, you can generate reports about the records of that container and print those reports
- From a Record Page, you can print the details of a record according to the format of that page

Note: You can also work offline [59]. Your changes will be synchronized automatically when you come back online.

Help

The **Help** button is available on Container Pages [29] and Record Pages [31]. Click **Help** on any of these pages to open the online user manual of Altova ContractManager in a new browser tab.

3.2   Start Page

The Start Page *(screenshot below)* has two parts:

- The upper part contains an overview of the system's databases and their respective containers. Each container displays a count of the container's records. Click a container to see its record listings and edit records
- The lower part shows due reminders. Each list item is the reminder of a specific record. Click a reminder to go to its record. Click **Snooze** or **Stop** (located at the left of each reminder) to, respectively, snooze or stop the reminder.

Home

ALTOVA®

Welcome Neo

Contract Database

Contracts

17 records available

Company Database

Company Groups	Departments
4 records available	16 records available
Companies	Persons
22 records available	8 records available

Contract reminders

Past Due (3)

Reminder Renewal "C2020/3119 Chestnut Telecom License Agreement"

Reminder Renewal "C2020/3122 Office Cleaning Contract"

Reminder Renewal "C2020/3121 Doodle Online Advertising"

There are two types of editing page:

- Container Page [29]. You get to this page by clicking a container on the Start Page *(shown in the screenshot above)*. From the Container Page [29], you can edit existing records, add new records, generate reports and charts, and print record listings. See the respective topics for information about these features.

- Record Page [31]. This page displays the data (the fields) of a record, enabling you to edit that record's data. You get to this page by clicking a record on the Container Page [29].

The pages are arranged in the following hierarchy, and you can navigate with the help of the navigation links at the top left of the page and your browser's **Back** button.

```
Home (Start Page) | Container Page [29] | Record Page [31]
```

For more information about how to edit data, see the respective topics of this section.

Help

The **Help** button is available on Container Pages [29] and Record Pages [31]. Click **Help** on any of these pages to open the online user manual of Altova ContractManager in a new browser tab.

3.3   Themes and Text Size

Themes

The user interface of the app will be displayed with the default color theme and theme variations that your system administrator has set. The theme applies to the entire app, whereas different variations of the theme can be set for different databases. To change the color theme and/or theme variation, click the **Settings** button.

- In the *Theme* combo box, select the theme that you want.
- The *Variation* combo box is displayed only in the top-level container of a database, and sets the variation for this database. For example, in the screenshot below, all containers in the *Contracts* database have been given an *Ocean* theme with the *Sea Spray* variation.
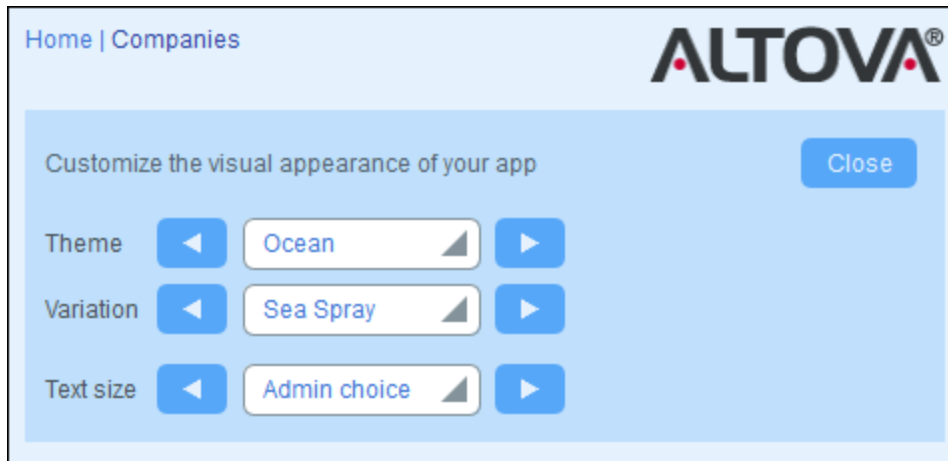
Once you change a theme and/or variations, your ContractManager will be displayed with your changed theme and/or variations till you make another change or till your administrator changes the default theme and/or variations.

Click here for samples of available themes
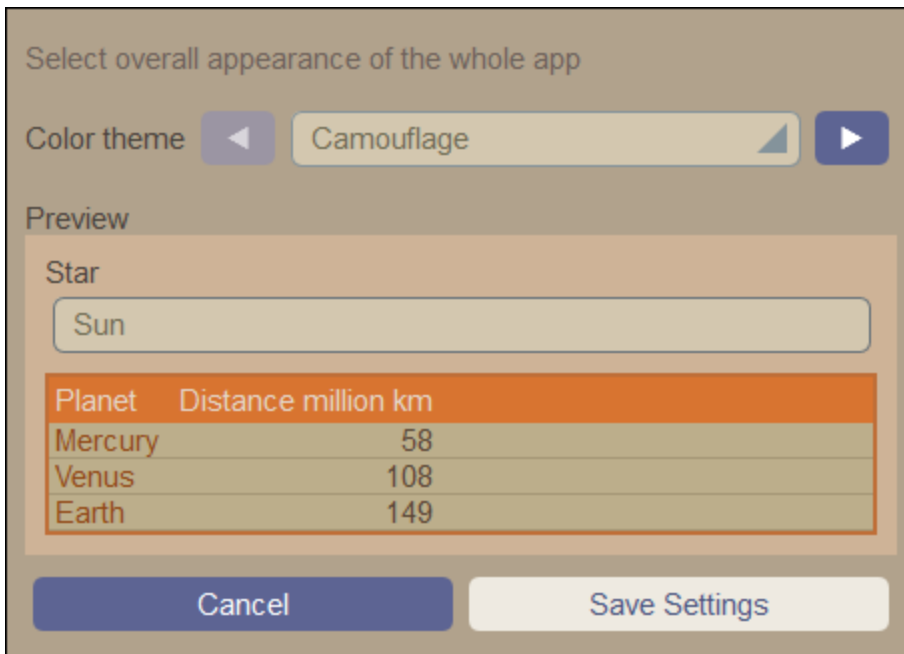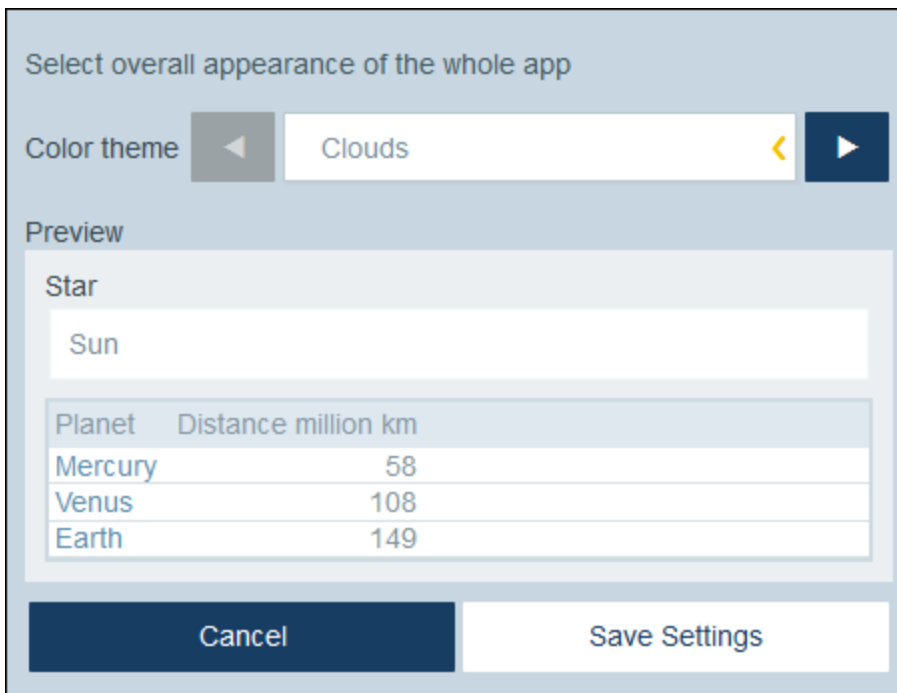
Camouflage

Clouds

Desert

Forest

Full Moon
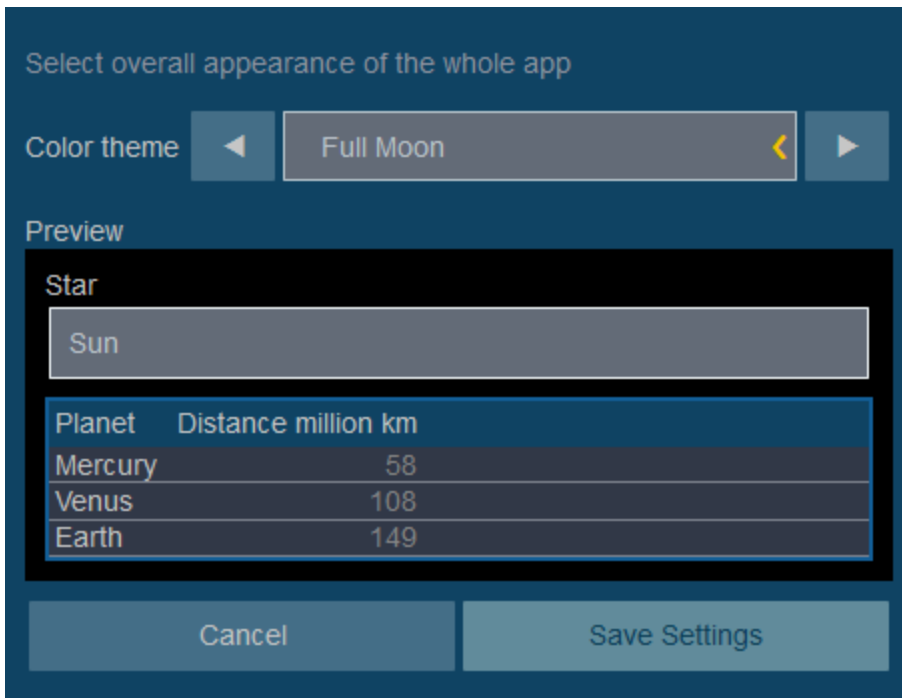
Halloween
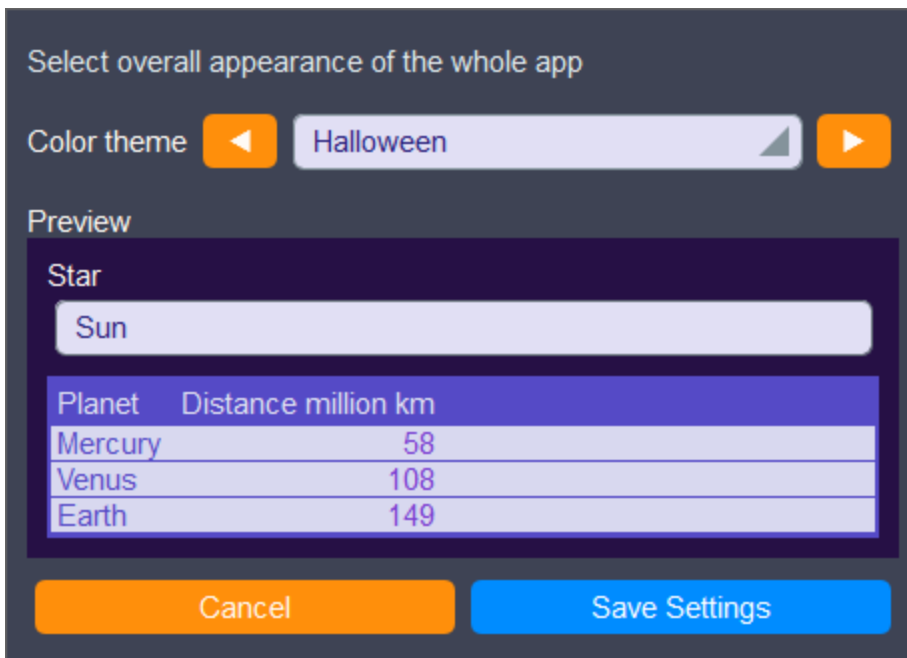
Ocean
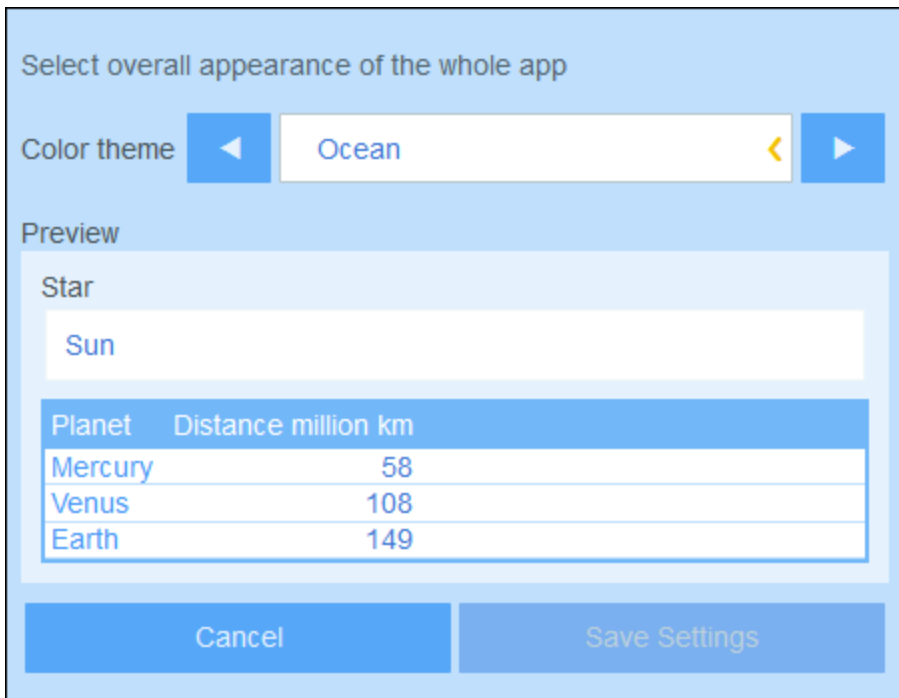
Polar Night
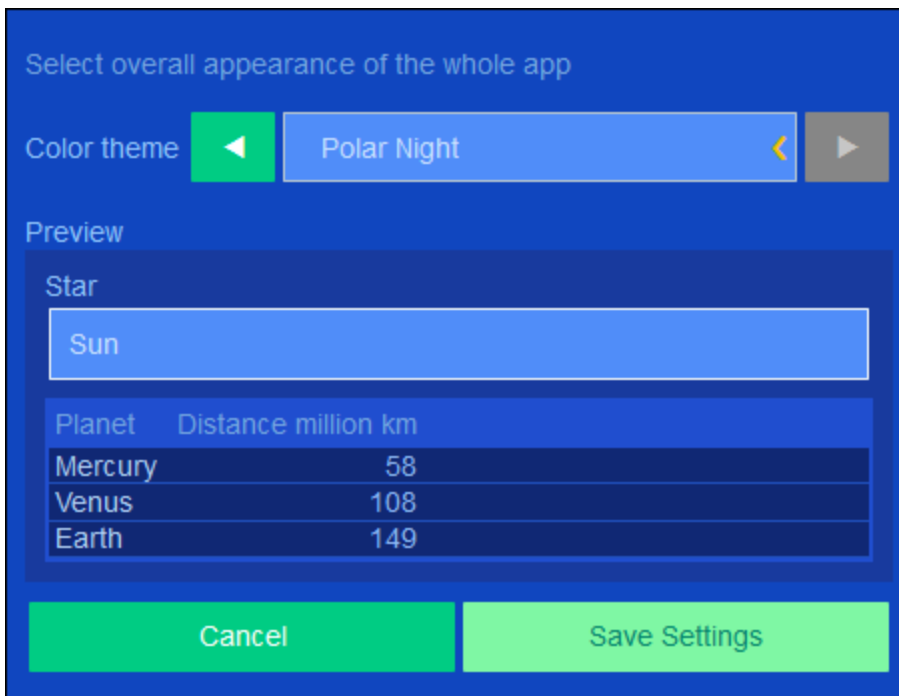
Text size

The text size of labels and values will, by default, be displayed in the sizes defined by your system administrator. You can change both sizes together in the *Text Size* combo box *(see screenshot above),* with available choices being sizes relative to the admin-defined sizes.

3.4   Container Page

The Container Page *(screenshot below)* displays an overview of a container: the container's records and the functionality available for that container. To go to a specific container's Container Page, click the container's name on the Start Page [21].


The central feature of the Container Page is its listing of the container's records. If your system administrator has created multiple listing options for this container, then you will be able to select which one to use *(see screenshot)*. The listings will have descriptive names to enable you to choose. You can switch between these listing options. Lists will be different from each other in one or more of the following ways: (i) they have different layouts; (ii) they show different record fields; (ii) they restrict the number of records shown (for example, show only US companies).

The Container Page provides the following functionality: most of which are available via the icons at top right:

- In the *View* combo box, select a list from the available viewing lists. You can switch between lists at any time.
- To add a new record, click **New <Container>**. For information about data entry, see the topic Record Data [31].
- To edit an existing record, click that container's **Edit** icon. For a description of how to edit records, see the topic Record Data [31].

- To delete a record, click its **Bin** icon.
- If alphabetic sorting on a column is possible, such columns are indicated with a vertical arrow *(circled in red above)*. The arrow direction indicates the current sorting order (up = ascending; down = descending). Click the arrow to sort in the opposite order.
- To search for specific records, select the *Search* check box. See <u>Record Searches</u> [44] for details.
- To jump to a specific record. See <u>Jump To</u> [49] for details.
- Export the records of the container in CSV and XML formats. See <u>Export to XML, CSV</u> [53] for details.
- <u>Generate reports</u> [56] about the container's records and print these reports.
- <u>Print</u> [58] the currently selected listing. See the section <u>Print</u> [58] for details.

▣ *Icons of the Container Page*

⊗	<u>Offline Mode</u> [59]
⚙	<u>Settings</u> [23]
⟳	<u>Refresh</u> [51]
⇥	<u>Export to XML/CSV</u> [53]
📊	<u>Generate Report</u> [56]
🖶	<u>Print</u> [58]
?	<u>Help</u> [20]

Help

The **Help** button is available on <u>Container Pages</u> [29] and <u>Record Pages</u> [31]. Click **Help** on any of these pages to open the online user manual of Altova ContractManager in a new browser tab.

3.5   Record Page

The Record Page *(screenshot below)* displays the data of a single record of a container. You can select different data entry forms to view and edit the record's data in different layouts. Note that different data entry forms not only have different layouts, but could also show or hide different fields.

@ | Home | Contracts | Edit

Contract Database   [↺] [↻] [▤] [🖶] [?]

Contracts

View [◀] Legal Entry Form [‹] [▶]

[«]   Cancel   Changes   Save   [»]

ID
C2020/3122

Title
Office Cleaning Contract

▼ **Contracting Party**

Contracting Party
American Hornbeam   [‹] [👁] [✎]

Contracting Department
[‹] [👁] [✎]

▼ **Type, Status, Categories, Signee**

Type
Service Contract   [‹]

Status
Active   [‹]

Process Status
[‹]

Categories
Operations   [‹]

Signee
Elizabeth Jones   [‹]

$ Amount
$2,100

▶ **Description and comments**

▼ **Key dates**

Effective Date
-1Y -1M [📅] February 08, 2019   +1M +1Y Today Clear

The following points describe the main features of record pages:

- A new record [33] can be created for a container by going to the Container Page [29] and clicking **New <ContainerName>**. This brings up the Record Page.
- If templates have been defined for the container, you will be given the option of selecting a template [33] instead of starting with a blank record.
- A Record Page essentially displays a data-entry form [34]. If multiple data-entry forms have been defined for the container, then you can switch data-entry forms at any time during editing of the record.
- Your system administrator might have divided long data-entry forms into sections for ease of navigation [35].
- Every record can be viewed in Changes Mode, where changes can be tracked and audited [38].

The sub-sections of this section describe these features in detail.

Help

The **Help** button is available on Container Pages [29] and Record Pages [31]. Click **Help** on any of these pages to open the online user manual of Altova ContractManager in a new browser tab.

3.5.1   New Records and Templates

Creating new records

To create a new record in a container, do the following:

1. Go to the Container Page [29] of the relevant container. The existing records of the container will be displayed *(screenshot below)*.
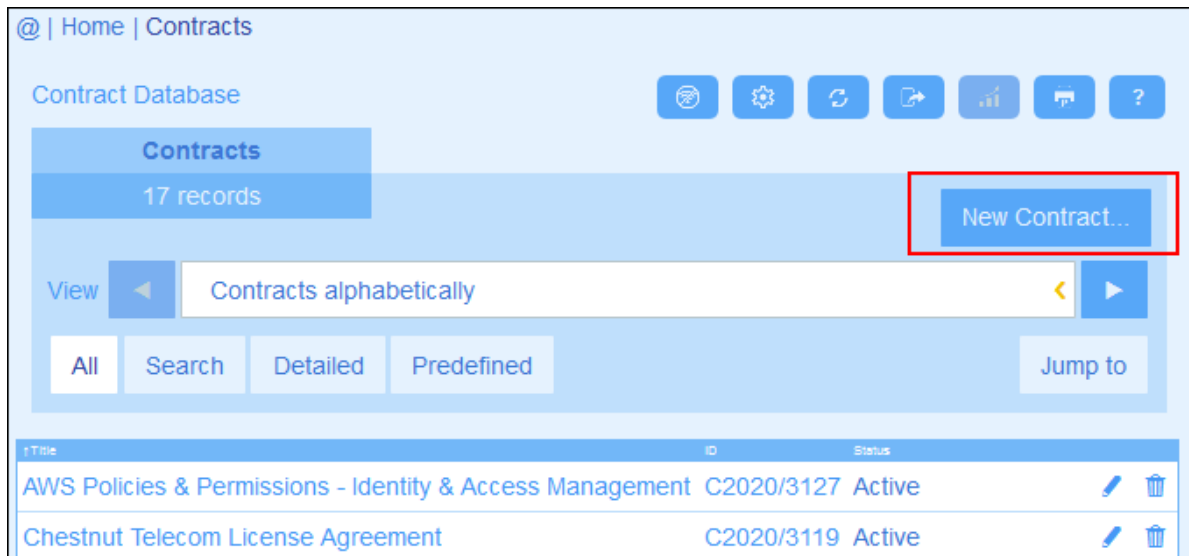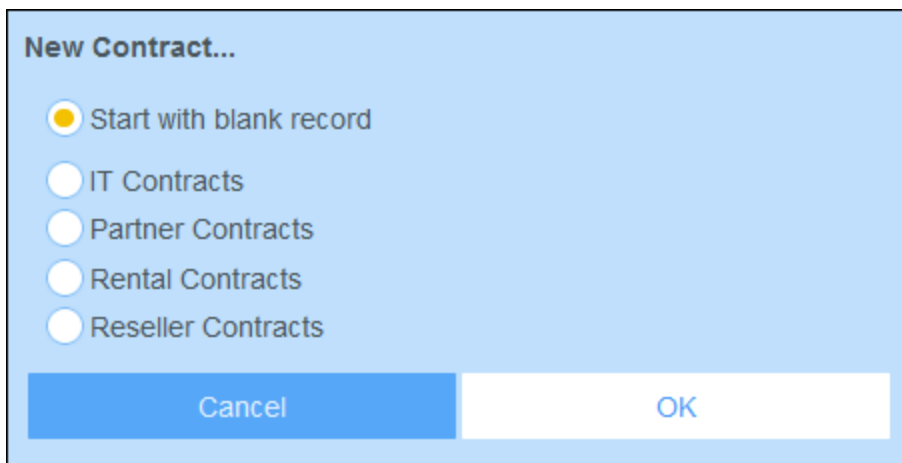

2. To create a new record, click **New <Container>**. The container's data-entry form appears, and you can enter data for the record.

Note: To edit an existing record, click the record's **Edit** icon. The record's data will be displayed in a data-entry form and can be edited.

Templates

Some containers might have templates defined for them. A template is a new record in which some fields are pre-filled to save you work. When you create a new record in a container that has one or more templates defined, you can choose to use one of these templates or to start with a blank record. If you use a template, you can edit any of the pre-filled fields at any time.

On a Container Page [29], when you click **New <ContainerName>** to create a new record in that container, you are presented, if templates have been defined for this container, with a form to select a template. For example, in the screenshot below, the user is creating a new record in the *Contracts* container, and is presented with five entry form options: four templates and a blank record. If you are given such a choice of templates, select the option you want, and click **OK**. The data-entry form appears.

Note: If no template has been defined for a container, then the choice described above is not given to you and the data-entry form appears directly after you click **New <ContainerName>**.

3.5.2   Data-Entry Forms

A container's data-entry form appears when you either create a new record or edit an existing record.

If multiple data-entry forms have been defined for a container, then these will be available in the *View* combo box (*see screenshot below*). Select the form you want to work with. Each form provides a different layout for data entry, so you can change forms at any time. But be sure to save your data before changing forms. In the screenshot below, for example, *Legal Entry Form* might provide a layout that displays basic legal information; whereas *Paralegal Entry Form* might show specific fields related to auxiliary legal matters.
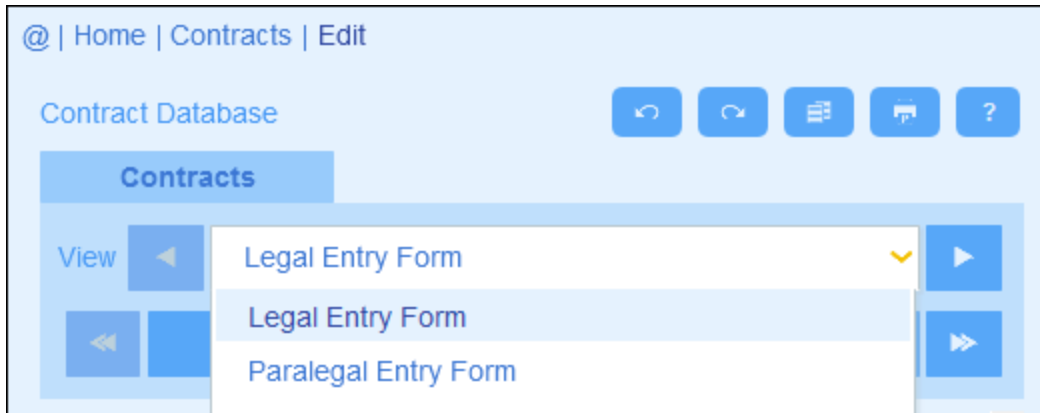
Note: If only one data-entry form has been defined for a container, then that form is displayed directly and the *Select View* combo box does not appear.

For information about editing a record, see the next topic, *Editing Data* [37].

3.5.3   Sections

Your data-entry form might be designed as a single page or might be divided into sections *(see screenshots below)*. The following possibilities exist:

- Single page
- Single page divided into sections (each of which may initially be open or closed, independent of each other)
- Sections (open or closed) that appear one after another (not on a single page)

The screenshot below shows the first three sections of a data-entry form, where all sections are on the same page. The first three section names are: (i) *Contract Header*, (ii) *Contracting Party*, (iii) *Type, Status, Categories, Signee*. When the form is initially displayed, the first and third sections are open, while the second is closed. To open/close a section, click the arrow to the left of its name.

CMDataEntry

In the screenshot below, the data-entry form has nine sections, of which the second is shown. Each section appears one after the other; they are not on the same page. The section number and the total number of sections are given next to the section's name. To navigate between sections, click the **Previous/Next** arrows on either side of the section's header. Note that when sections are shown one after another, they are always shown open and cannot be closed.

3.5.4   Editing Data

Data for each field of the record is entered via a data-entry device such as a text field, combo box, or date picker, and data entry is straightforward. Click **Save** when you finish editing a record.

Note the following points:

- If your system administrator has set validation rules for a field value, then the field name stays red till a valid value is entered.
- If your system administrator has set validation rules for the record, errors/warnings will be displayed when you click **Save**.
- When you are entering data for a new record, the **Save++** button is available (in addition to the **Save** button). Click **Save++** to save the record and create a new record.
- The arrow buttons *(see screenshot below)* enable you to navigate to the previous and next records.
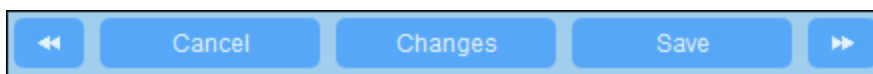
- When you edit data of an existing record, the **Changes** button *(see screenshot above)* is available. Click it to see past and current changes that have been made to the record being edited. When you are in Changes Mode, you cannot edit the record. To leave Changes Mode, click **Hide Changes**. Changes Mode is described in the next topic, *Audits and Change Tracking* [38] .

- The icons at the top of the form provide additional functionality: *Undo; Redo; Copy Current Record to New Record; Print.* (For Print setup, see the [Print](#)[58] topic); *Help* (links to the ContractManager user manual).

3.5.5   Audits and Change Tracking

Changes Mode (switched on when you click the **Changes** button; *see screenshot below*) enables you to audit changes (see who has made what changes), to track changes, and to see a historical view of changes.
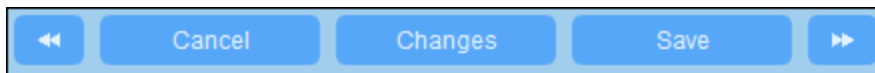
Changes Mode has three tabs:
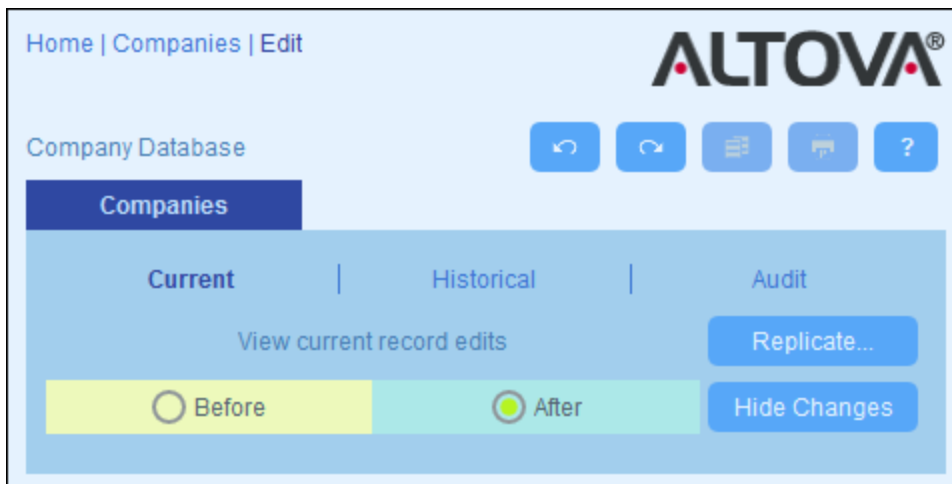
- *Current:* Shows changes made during the current editing session. Select *Before* to see field values before the changes, Select *After* to see the latest changes. Click **Replicate** if you want the changes you made to the current record to be applied to all records of the container's current record listing. In this case, you will be cycled through the records of the listing. The **Save** button will be enabled when the changes can be applied. To move to the next record, click the **Next** navigation arrow button (*see above*).
- *Historical:* Shows past changes. Cycle through the change events of the past by clicking the **Previous Event** and **Next Event** icons. For each change event, you can see the field values before and after the change. Next to each changed field, the name of the user who made the change is displayed.
- *Audit:* Shows, next to each field, who was the last user to have made the previous change.

To leave Changes Mode, click **Hide Changes**.

3.6   Reminders

Reminders on the Start Page

Due reminders are displayed at the bottom of the Start Page *(see screenshot below)*. (See *Status of Reminders* below for the meaning of due reminders.)

You can carry out the following reminder-related actions on this page:

- Snooze or stop a reminder. (See *Status of Reminders* for information.)
- Click a reminder to go to the relevant record's data entry form, where you can edit the reminder and/or add new reminders.

Opting in/out of alert groups
If you have been given the option to opt in/out of a reminder alert group by your system administrator, you will be informed that you are a member of one or more alert groups, and you can decide whether you want to be part of the alert group. If you opt in, you will receive the reminder emails of this group; otherwise you will not. You can opt in/out of the different groups of which you are a member whenever you like. To opt in/out, click **Participate**.

Reminders in data entry forms

Reminders and reminder emails are configured by system administrators. However, users have the final decision about what reminders are sent, when, and to whom. Users can manage reminders by deleting or modifying reminders and by creating new reminders. Typically, access to reminders will be made available to users in a form, such as an entry form. The screenshot below, for example, shows part of a data entry form for contracts.
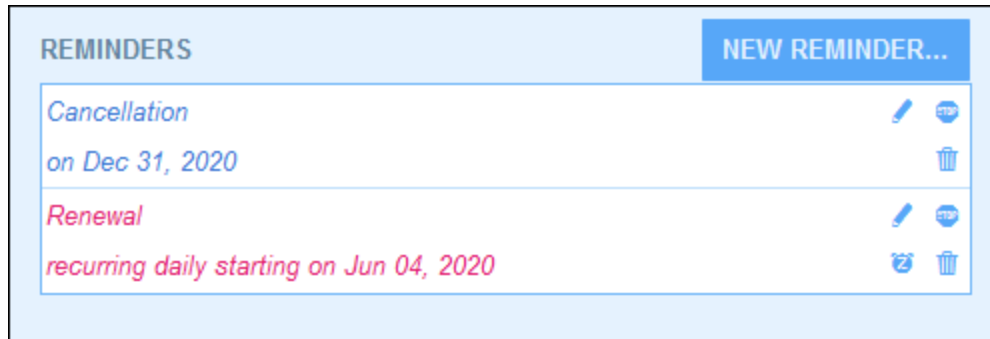
A user can do the following:

- Add a new reminder or edit an existing reminder. Clicking either of these commands takes the user to the *Reminder Settings* form, where the reminder can be configured *(see below)*.
- The user can snooze an existing due reminder. See *Status of Reminders* below.
- The user can stop a reminder (which is equivalent to marking the reminder as processed). See *Status of Reminders* below.
- The user can delete a reminder.

Icons for reminder management

	Edit Reminder
	Snooze Reminder
	Stop Reminder
	Delete Reminder

Reminder settings

The *Reminder Settings* form is shown below.

Define the reminder with the following settings:

- *Category:* Select the category of the reminder. Reminder categories were defined when the reminder field was configured.
- *Description:* Provide a description to help users to understand how this reminder will apply.
- *Recurring:* Select this option to define the reminder as a recurring reminder. A recurrence is defined in terms of a period that follows a selected date. For example, a reminder can recur monthly after the selected date. *Also see Status of Reminders below.*
- *Reminder start time:* There are two alternatives: (i) Select a specific date; or (ii) Calculate a date relative to one of the record's date fields (such as an expiry date). In the screenshot above, for example, the start time has been set to one week before the date in the *Expiry Date* field.
- *Notification frequency:* Send email notifications every day till the reminder is processed or snoozed by the user, or send email notifications once only. *Also see Status of Reminders below.*
- *Notification recipients:* Specify the alert groups to which notifications about this reminder will be sent. If no group is specified, then no recipient is selected. Note, however, that alert groups can also be chosen via filters.

Status of reminders

The status of reminders is defined in the following terms (also see screenshot below, which assumes a current date of 16 September 2020):

- *Start date*: The date from which the reminder becomes *active*. If the start date is in the past, then the reminder stays active if: (i) it is not processed, or (ii) it recurs. If the start date is in the future, then the reminder is an active reminder.
- A *processed reminder* is one for which the reminded event has been carried out and because of which the reminder has been *stopped*.
- *Action date*: (i) For one-time reminders, the same as the start date: (ii) For recurring reminders, the next recurring date after a reminder is processed. An action date can lie in the past or in the future.
- *Active reminder*: (i) A one-time reminder that has a start date in the past and which has not been processed; (ii) A recurring reminder that has a start date in the past (and may have been processed); (iii) (i) A reminder (one-time or recurring) that has a start date in the future. (Note: If the action date of an active reminder is in the past and the reminder has not been processed, then the reminder is a due reminder.)
- *Due reminder*: An active reminder with a start date in the past. Due reminders are a subset of active reminders. Once a reminder becomes due, the possibility to snooze the reminder becomes available.
- A *snoozed reminder* applies to due reminders only. Snoozing a reminder cancels the current action date and selects an action date in the future. The snooze period is specified from the current date.
- *Inactive reminder*: A non-recurring reminder which has a start date in the past and which has been processed.

The example uses a current date of 16 September 2020.

<u>*Color codes indicate reminder status*</u>
During data entry, the text color of reminders indicate their status to the user:

- *Blue*: Active reminders that are not due reminders
- *Red*: Due reminders
- *Gray*: Inactive reminders

Debugging reminder emails

If reminder emails are not being correctly sent, contact your ContractManager system administrator to verify that the system has been correctly set up.

3.7 Searches

The Search functionality is enabled at the container level. It enables you to search a container's records. You can search for: (i) a term within all fields of the container's record or a selected field, or (ii) records returned by a filter.

To run a search, do the following:

1. In the *View* combo box of a container, choose a record listing form for displaying the records of the container. For example, the screenshot below shows the records of a *Departments* container, with the records being listed in a listing form named *Standard list form*.

@ | Home | Departments

Company Database

Departments

16 records

New Department...

View ◄ Standard list form ‹ ►

All   Search   Detailed

↑COMPANY	NAME		
Arbornull, Inc.	Arbornull Legal	✎	🗑
AWS	Amazon Legal	✎	🗑
Chestnut Group	Chestnut Corporate Sales	✎	🗑
Deciduous Partners	Deciduous Legal	✎	🗑
Dropbox Corporation	Dropbox Enterprise Sales	✎	🗑
HoneyLocust	HoneyLocut Legal	✎	🗑
Microsoft Corporation	Microsoft Enterprise Licensing	✎	🗑
Pineable	Pineable Partners	✎	🗑
Red Maple and Sons	Red Maple Legal	✎	🗑
Salesforce	Saleforce Regional Sales New Englands	✎	🗑
Sycamore	Sycamore Sales	✎	🗑
Tulip, Walnut, and Willow, LLC	TWW Marketing	✎	🗑
Twitter, Inc.	Twitter Florida Regional Sales	✎	🗑
Twitter, Inc.	Twitter Regional Legal	✎	🗑
White Pine Partners	White Pine Operations	✎	🗑
Willow Properties, Inc.	Willow Sales	✎	🗑

2. To search for a term across all fields of all the container's records: (i) click **Search** *(see screenshot below)*, (ii) enter the search term (searches are case-insensitive), (iii) click the **Search** icon at right. All records will be listed that contain the search term in any of their fields.

3. To search for a term across a single field of all the container's records: (i) click **Detailed** *(see screenshot below)*, (ii) enter the search term (searches are case-insensitive), (iii) select the field you want to search (in the screenshot below this is the *Description* field), (iv) click the **Search** icon at right. All records will be listed that contain the search term in the selected field.

4. If one or more filters have been defined for a container, then the **Predefined** button will be available. To return records selected by a filter: (i) click **Predefined** *(see screenshot below)*, (ii) select one of the filters in the combo box that appears, (iii) click the **Search** icon at right. All records will be listed that match the conditions of the filter.

@ | Home | Contracts

Contract Database

Contracts

2 records

New Contract...

View ◄ Contracts alphabetically ‹ ►

| All | Search | Detailed | Predefined | | Jump to |

◄ New contracts with effective dates < 1 months ago ‹ ► 🔍

↑TITLE	ID	STATUS		
Green Power	*C2020/3133*		✏	🗑
Weekly Lunches	*C2020/3132*		✏	🗑

▬ *Icons of the Container Page*

🛞	[Offline Mode](#) [59]	
⚙	[Settings](#) [23]	
↻	[Refresh](#) [51]	
➡	[Export to XML/CSV](#) [53]	
📊	[Generate Report](#) [56]	
🖨	[Print](#) [58]	
?	[Help](#) [20]	

3.8   Jump To

The Jump To functionality enables you to jump to a record that begins with or contains the text string you enter. The look-up for the text string is carried out in either one field of the container's records or all fields. What fields are being looked up and whether the text string occurs at the beginning of the field or is contained anywhere in the field would be indicated by the name of the list form (or should be made clear to you in some other way by your administrator).

For example, in the screenshot below, when the list form named *Contracts by Status & Company* is selected, the **Jump To** button becomes available, thereby indicating that the Jump To feature is available for this list form. Since the list form is based on status and company, it is reasonable to assume that a jump-to would look up status and/or company. On typing *Amer*, the first company name that begins with *Amer* moves to the top of the list.

To use the Jump To feature: click **Jump To**, and then enter the text string you want to look up. The record that you want will move to the top of the list.

Note: If the **Jump To** button is not available, it means that your system administrator has not activated the Jump To setting for the current list form.

☐ *Icons of the Container Page*

🔵	Offline Mode [59]

⚙	[Settings](#) [23]
↻	[Refresh](#) [51]
↪	[Export to XML/CSV](#) [53]
⊪	[Generate Report](#) [56]
🖫	[Print](#) [58]
?	[Help](#) [20]

3.9   Refresh

When a container is opened and its records are listed (as in the screenshot below, which shows a list of *Department* records), you can refresh the data by clicking the **Refresh** button.


This is useful since the ContractManager app is a distributed system that can be updated by multiple users. Clicking Refresh ensures that you are viewing the latest data in the database.

☐ *Icons of the Container Page*

🌐	Offline Mode [59]
⚙	Settings [23]
⟳	Refresh [51]
↪	Export to XML/CSV [53]
📊	Generate Report [56]
🖨	Print [58]

?	Help [20]

3.10   Export to XML, CSV

When a container is opened and its records are listed (as in the screenshot below, which shows a list of *Person* records), you can export the data of these records to an XML and/or CSV file. Your system administrator will have defined one or more export forms for each container. Each export form defines a separate set of data fields (of that container) to export. An export form could include not only the fields of the container, but also the name of the parent container and higher-level ancestor containers. In the case of XML exports, child containers and a selection of their fields could also be included. The different export forms will typically have suggestive names, and the multiple options will give you a choice of datasets to export. If you need another dataset for a container, contact your system administrator.
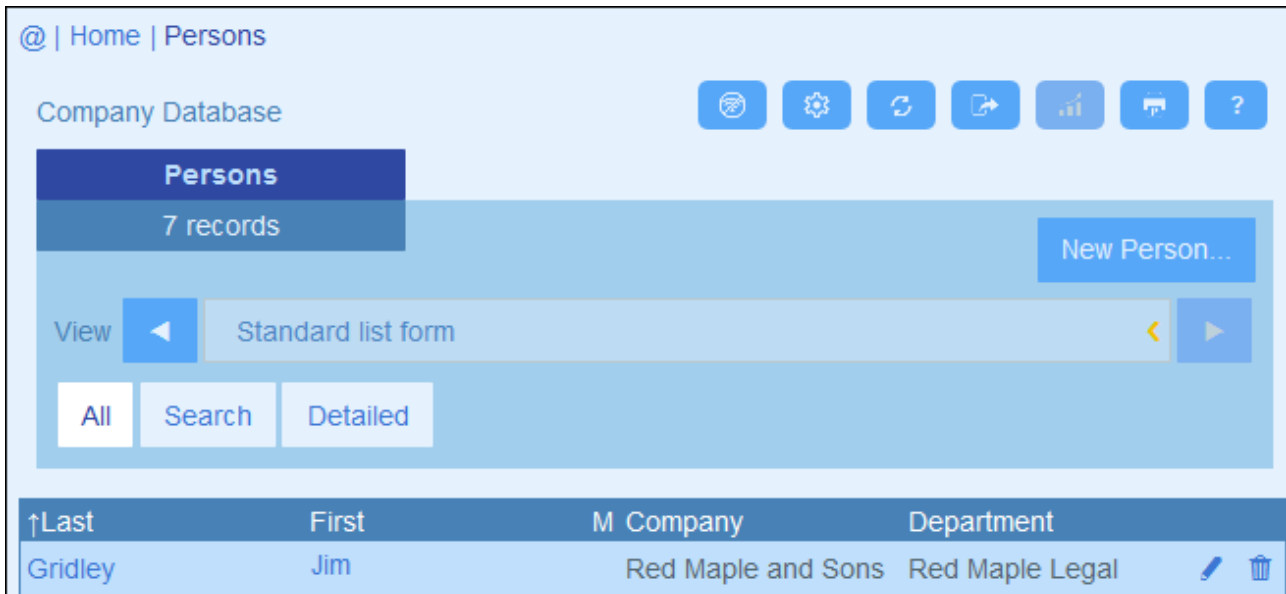
☐ *Icons of the Container Page*

⊛	[Offline Mode](#) [59]
⚙	[Settings](#) [23]
↻	[Refresh](#) [51]
⇥	[Export to XML/CSV](#) [53]
ᴧ	[Generate Report](#) [56]
🖶	[Print](#) [58]
?	[Help](#) [20]

XML and CSV formats

XML format

The exported XML file will have a root element named **<Root>**, and **<Root>** will have a child element that has the same name as the current container (in our example, this is the container named *Person*). This element will have the child elements that you selected as the fields to export. For example, the export form for a *Person* container (as shown in the screenshot above) might generate an XML file that looks like this:

```
<Root>
    <Person>
        <Department>Sales</Department>
        <First>Jim</First>
        <Last>Gridely</Last>
        <Title>Executive</Title>
        <Phone>123456789</Phone>
        <Email>legal.01@redmaple.com</Email>
    </Person>
    ...
    <Person>
        <Department>Accounts</Department>
        <First>Jane</First>
        <Last>Locke</Last>
        <Title>Manager</Title>
        <Phone>123789777</Phone>
        <Email>accounts.04@altova.com</Email>
    </Person>
</Root>
```

CSV format
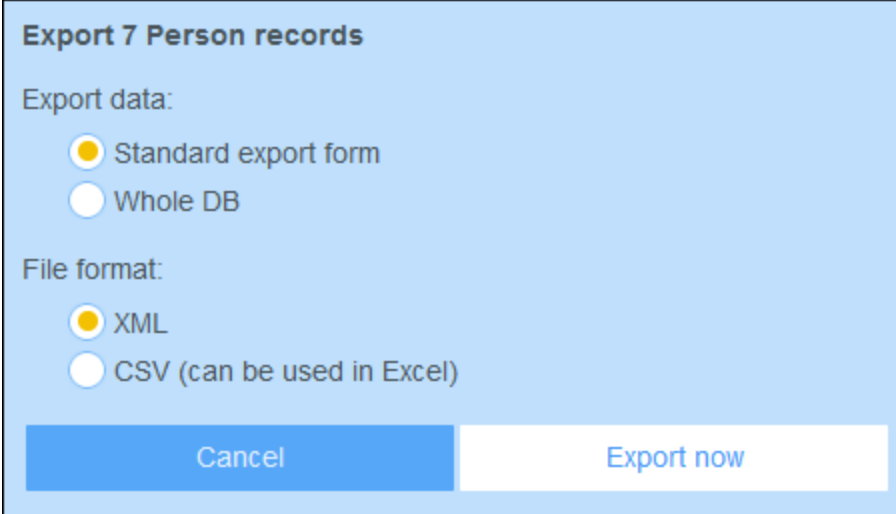
The first line of the CSV file will contain the headers of fields. Each subsequent line contains one record, with the values of fields being in the same sequence as the headers. The separator in records is a comma. Note that each record is a flat listing of the rows of the export form. Child records cannot be displayed because of the flat structure of CSV files. Compare with the XML structure above.

```
"Department","First","Last","Title","Phone","Email"
"Sales","Jim","Gridely","Executive","123456789","legal.01@redmaple.com"
...
"Accounts","Jane","Locke","Manager","123789777","accounts.04@altova.com"
```

Export data

To export to an XML file or a CSV file, do the following:

1. Click **Export to XML/CSV** *(see screenshots above)*.
2. The form that appears *(screenshot below)* has two parts: (i) the top part lists the export forms that are available for the current container; these will have been defined by your system administrator; select the form you want to use; (ii) in the bottom part, select the export format you want (XML or CSV).

3. Select **Export Now**.
4. In the Save dialog that appears, select the file location where you want to save the exported file, and click **Save**.

Points to note

- An export form exports data related to the current container (for example, a *Person* container).
- XML export: The fields of the container that are selected for export will be exported as XML elements that are children of an element that has the name of the current container (so, for example, an element named `Person`). *See the XML listing above.*
- CSV export: The fields of the container that are selected for export will be exported as the columns of a CSV row, where each CSV row corresponds to a record from the database (for example, one *Person* record). *See the CSV listing above.*
- In export forms, it is not only the container's fields that can be added; parents and higher-level ancestors can also be added. As a result, an exported record can also contain the current container's parents and higher-level ancestors. *See the listings above.*
- While data from child containers can be exported to XML files, they cannot be exported to CSV files. This is because of the flat structure of CSV files.

3.11   Reports

Reports can be generated for the records of a container, separately for each container. The content and layout of reports is defined by your system administrator in a report form. If a report form exists for a container, then the **Reports** button on the container's Record Listings page [29] is enabled *(see screenshot below)*.

@ | Home | Departments

Company Database

Departments

16 records

New Department...

View ◄ Department Names & Descriptions ‹ ►

All   Search   Detailed

↑Name	Description		
Amazon Legal	Include legal on all sales and agreement discussions	✎	🗑
Arbornull Legal		✎	🗑
Chestnut Corporate Sales		✎	🗑
Deciduous Legal		✎	🗑
Dropbox Enterprise Sales		✎	🗑
HoneyLocut Legal		✎	🗑
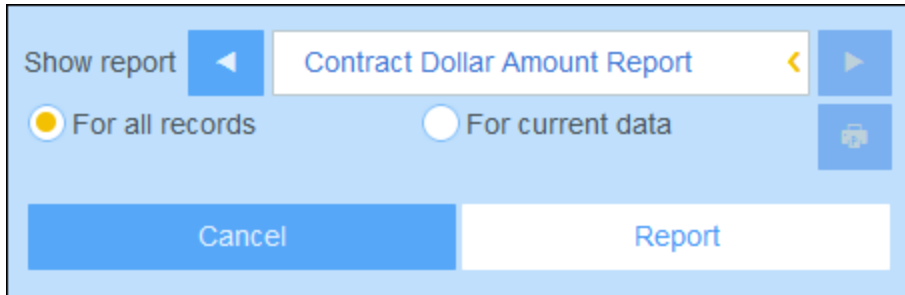
☐ *Icons of the Container Page*

🜨	Offline Mode [59]
⚙	Settings [23]
⟳	Refresh [51]
⤤	Export to XML/CSV [53]
ᵢᵢᵢ	Generate Report [56]
🖶	Print [58]
?	Help [20]

Report options

On clicking the **Reports** button, the *Report Options* form appears *(screenshot below)*.
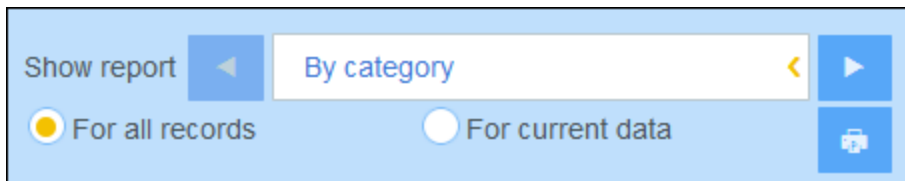
You can set the following options:

- If multiple report forms have been defined for the container, then set the *Show report* option to the report form you to want to use. If only one report form is available, then this option is not displayed.
- Select whether the report should be generated for all records in the container or only the records in the current record listing (for example, the record listing *Standard list form* that is shown in the first screenshot of this topic, has four records, which may not be the full record count of this container.

The generated report

After the report has been generated, you are once again given the report options *(see above)*, but this time within the generated report *(see screenshot below)*.

Additionally, you can print the report by clicking the **Print** icon *(see screenshot above)*. The report will be created as a PDF, which you can save to file.

3.12   Print

On a [Container Page][29], click the **Print** icon (at top right) to print the current record listing of the current container. The report will be created as a PDF, which you can save to file.

@ | Home | Departments

Company Database

Departments
16 records

New Department...

View ◄ Department Names & Descriptions ‹ ►

All   Search   Detailed

↑Name	Description		
Amazon Legal	Include legal on all sales and agreement discussions	✏	🗑
Arbornull Legal		✏	🗑
Chestnut Corporate Sales		✏	🗑
Deciduous Legal		✏	🗑
Dropbox Enterprise Sales		✏	🗑
HoneyLocut Legal		✏	🗑

⊟ *Icons of the Container Page*

⬡	[Offline Mode][59]
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⮕	[Export to XML/CSV][53]
📊	[Generate Report][56]
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3.13   Offline Mode

Offline Mode enables you to save selected records to your device, edit these records offline, and save your edits back to the server when you exit Offline Mode. The **Offline Mode** button *(circled green in the screenshot below)* is available at the *Home* level and the container level. For example, the screenshot below shows the **Offline Mode** button of the *Companies* container.

To go offline, edit records offline, and return online, do the following:

1.   Click the **Offline Mode** button (circled green in the screenshot below) at any level where it is available.
2.   In the *Enable Offline Mode* form that appears *(see screenshot below)*, select the container/s that you want to edit offline.
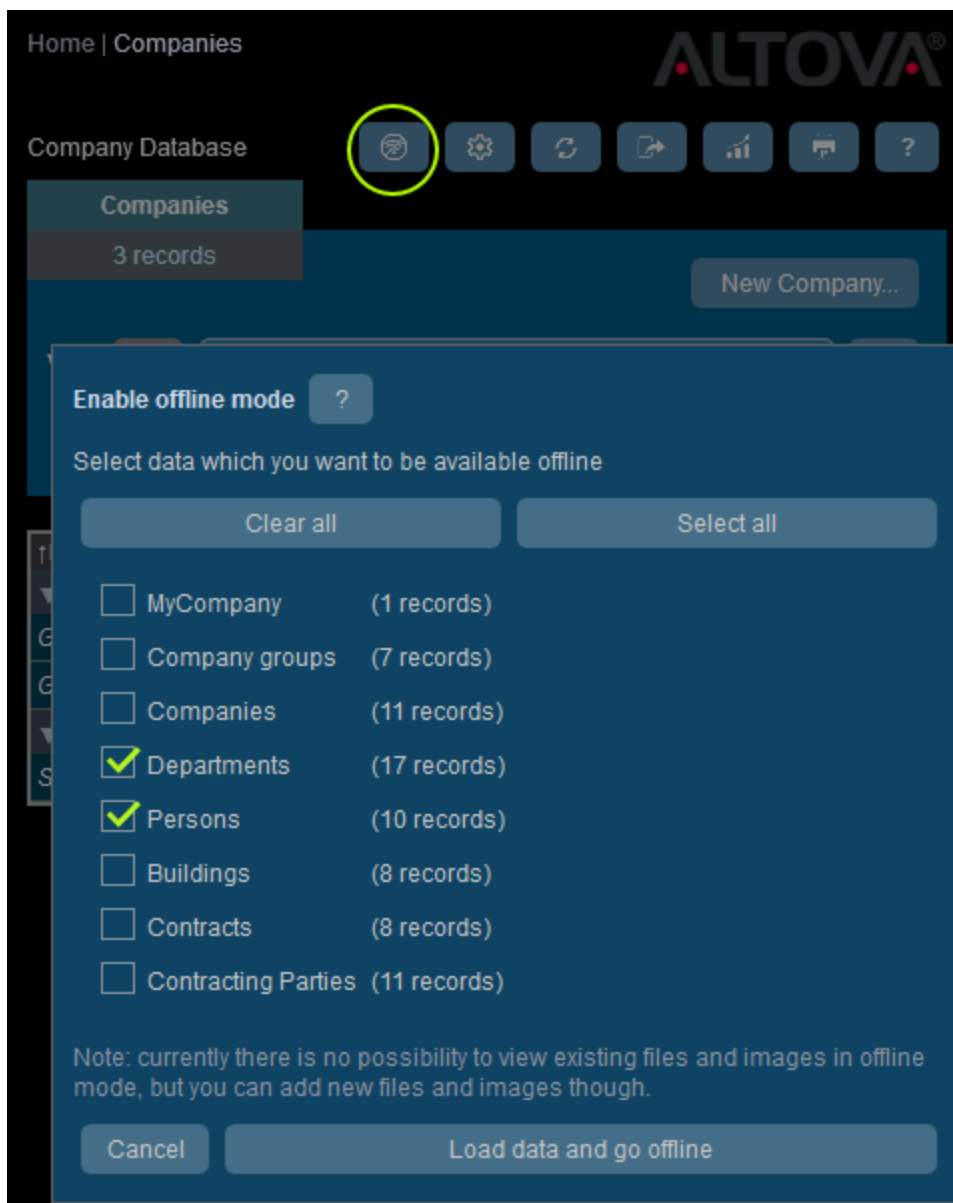
3. Click **Load data and go offline**.
4. Records of the container/s that you selected will be available for editing offline. Edit these and save your changes.
5. That you are in Offline Mode will be indicated by a button named OFFLINE at top right. To go back online and save your changes to the server database, click OFFLINE. When you are back online, your changes will be saved automatically to the ContractManager database.

■ *Icons of the Container Page*

⊗	Offline Mode [59]
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