



Conga Contracts



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A solution that streamlines and automates the contract lifecycle management process.

Release Notes

Discover what's new in the latest release of Conga Contracts.



About Conga Contracts

Conga Contracts is a solution that streamlines and automates the contract lifecycle management throughout the entire process—creating contracts, sending and receiving approvals, making and tracking changes, and reporting.

As an administrator, you can manage the user interface of Conga Contracts for your users through the use of portlets and global features. With Conga Contracts you can also manage user profiles by assigning permissions and role security and add additional protection to documents with document locking. Administrators can configure templates, workflows, lists, contract request types, and supplier request types for users. You can integrate with eSignature Solutions like Conga Sign. You can track additional data through the setup of scorecards, tasks, and analytics.

As a user, you can set up user preferences, and conduct searches with the ability to customize results with filters. Using wizards and templates, you can create companies, contracts, and projects. Document storage allows you to browse all uploaded documents and document packages. You can set up event alerts and tasks to keep track of important dates and tasks during the contract lifecycle management process, and create email messaging to send notification to your contacts. You can create Workflows and Flows to manage your contracts from creation to close.

The following table lists the tasks that administrators and users can perform using Conga Contracts:

Administrator	Administrator/User
<ul style="list-style-type: none"> • Manage Roles and Permissions <ul style="list-style-type: none"> • Create Users and Assign Permissions • Manage Role Security • Setup Document Locking • Configure the Home page <ul style="list-style-type: none"> • Create Portlets • Manage Global Features <ul style="list-style-type: none"> • Setup System Settings • Create Global Messages • Setup Advanced Edit • Setup Bulk Uploading • Configure Contract Lifecycle Management <ul style="list-style-type: none"> • Create Profile Rules • Setup Contract Request Types • Create Workflow Templates and Teams • Create Additional Forms and Fields • Create Email Distributions Lists • Setup Creation Templates • Setup Supplier Registration Types • Create Scorecards • Create Lists • Setup Clause Identification and Management • Setup Integrations <ul style="list-style-type: none"> • Integrate Conga Contracts with eSignature applications • Setup SalesConnect integration • Setup Analytics and Reporting <ul style="list-style-type: none"> • Create and assign Analytics roles to users • Conga Contracts API • Setup API for Conga Contracts <div data-bbox="169 1832 756 1955" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> For end-user functionality, see <i>Conga Contracts User Guide</i>.</p> </div>	<p>Conga Contracts allows a user to perform the following administrative tasks:</p> <ul style="list-style-type: none"> • Manage User Preferences <ul style="list-style-type: none"> • Manage Name, Title, and Address • Change Password • Manage System Settings and Theme • Manage Linked Applications and Notifications • Configure Contract Lifecycle Management <ul style="list-style-type: none"> • Create Companies, Contacts, and Profiles • Create Workflows • Create Flows • Add Additional Forms and Fields • Create Email Distributions Lists • Setup Supplier Registrations • Setup Scorecards • Setup Tasks • Setup Events • Setup Messaging • Use Search <ul style="list-style-type: none"> • Search and utilize filters • Setup Analytics and Reporting <ul style="list-style-type: none"> • Setup Reporting, including the Business Intelligence Toolbox <div data-bbox="788 1368 1426 1534" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> For administrator functionality, see <i>Conga Contracts Administrator Guide</i>.</p> </div>

Key Terminology

Term	Definition
Acquisition Wizard	A system-generated tool that steps a user through the process of having one company acquire another company. The wizard will assign all selected information to the acquiring company (e.g., contracts, events, people, etc.).
Active (Contract)	One of the statuses that can be assigned to the contract(s) stored in a Contract Profile. Generally, an Active status means that the contract has been executed and is enforceable, as opposed to being Inactive, Expired, or In Process.
Active (Company)	One of the statuses that can be assigned to the company represented by a Company Profile. Generally, an Active status means that the company is engaged in active business with one or more legal entities, as opposed to being Inactive, or not currently conducting business.
Additional Fields	Administrator-defined fields that can be added to the default Company, Contract, or Project profile screen.
Additional Forms	Administrator-defined forms used to capture additional information for a company, contract, or project using two or more fields or lists. An additional form is <i>captured</i> (added) and stored in a Company, Contract, or Project Profile.
People	Defines the "form" of the contract (e.g., Master, Individual, Schedule, Purchase Order, Statement of Work, Amendment). Master and Individual agreements are standalone documents since they are enforceable on their own and do not require any supporting documents. Standalone agreements usually start with the words "This Agreement . . ." and do not include any incorporated agreements, such as Schedules, Purchase Orders, or Statements of Work. Incorporated agreements are ones that cannot stand on their own and must be attached to a Master or Individual agreement. For example, an incorporated agreement might start with the words "This Schedule is incorporated into and is a part of Master Agreement."
Archive	Process by which Administrators can archive Company Profiles and Contract Profiles into a secure storage area

Term	Definition
Agreement Type	Identifies a contract as a root (parent) contract, which can stand on its own as a legal document, or an incorporated (child) contract, which must be attached to another document to be legally binding. Root agreements are displayed in bold text, such as Master or Individual , and incorporated agreements, such as Schedules and Statements of Work are displayed in regular text.
Auto Renewal, Auto Advance	An automatically-renewing contract where the Conga Contracts system advances the current contract expiration date to the next renewal date and sets up new event alerts.
Auto Renewal, Manual Advance	An automatically-renewing contract where a user must change the current contract expiration date to the next renewal date and set up new event alerts.
Audit Trail	A recorded history of changes made to the basic information in a Contract, Company, or Project Profile screen, as well as changes made to the data stored in the profile (e.g., people, addresses, and additional forms).
Automated Triggers	Changes in the system data that trigger action/notices from Conga Contracts (e.g., volume triggers send a notice when a dollar threshold has been reached).
Browse Screen	Program screen that displays a list of data records, such as a list of the companies or contracts stored in Conga Contracts. Users can control the number of records that display by filtering the records by status or some other criteria. Users can also filter the display by adding/removing columns of data so that only relevant fields are displayed in the browse screen.
Bulk Data Upload Tool	Program feature that allows you to bulk upload company, contract, and additional form data to Conga Contracts using an Excel template.
Clause Library	Repository for alternative contract language clauses, which is available to all users from their My Place menu.
Company	Typically, a company is the "other party" in your company's contractual agreements in Conga Contracts. The other party to a contract can be a vendor (buy-side contract) or a customer (sell-side contract). A company also refers to your company's legal entities for organizations that enter into inter-company contracts (i.e., legal entities sign contracts with or among internal divisions or subsidiaries).

Term	Definition
Company Locations	Linked section in a Company Profile used to add additional company locations. Location information includes not only the address, but the location type, such as a Regional Office or Storage Facility.
Company Group	Field in a Company Profile that is used to limit access to all companies in that group for security reasons. Company groups are defined first, and then users are given permissions to the data and documents in specific company groups. If a user does not have access to a company group, they will not be able to access any Company Profiles in that group or any of the company's contracts. Access to company groups is assigned to individual users via their role(s) in Conga Contracts.
Company Profile	Primary data screen used to capture key company information, which includes both default fields and Administrator-defined additional fields. The Profile also contains links to additional company information, including Contracts, People, Additional Names, Relationships, Locations, Tasks, Documents, Events, Messaging, Scorecards, Projects, Additional Forms, and History.
Contract	A document that legally binds at least two <i>legal entities</i> . A contract can include purchase orders, schedules, exhibits, attachments, and other documents.
Contract Addresses	Linked section in a Contract Profile that allows users to add additional address for a contract and specify them by type. Address types can include a notice address, billing address, and shipping address.
Contract Family	A group of incorporated and/or related contracts stored in a Company Profile.
Contract Family Tree	An expandable/collapsible hierarchy of a contract family viewable in a Contract Profile.
Contract Group	Field in a Contract Profile that is used to limit access to all contracts in that group for security reasons. Contract groups are defined first, and then users are given permissions to the data and documents in specific contract groups. If a user does not have access to a contract group, they will not be able to view any of the contracts in that group from the Company Profile. Access to contract groups is assigned to individual users via their role(s) in Conga Contracts.

Term	Definition
Contract Profile	Primary data screen used to capture key contract information, which includes both default fields and Administrator-defined additional fields. The Profile also contains links to additional information for the contract, including Contract Family, Documents, Events, Messaging, Tasks, Document Packages, Payments, People, Addresses, Products, Scorecards, Projects, Additional Forms, and History.
Contract Responsibilities	Contract feature that allows people to be assigned to duties relating to the negotiation, management, or enforcement of a contract. A contract responsibility can be associated with one or more user functions, as well as one or more user types (i.e., Program User, Company Contact, External Participant, or Legal Entity Person). The functions that people are able to perform in Conga Contracts are defined in their User Profile.
Contract Creation Templates	The MS Word documents that Administrators format and then map to Conga Contracts program fields in order to create the templates that are used to create contracts in Conga Contracts.
Contract Term Type	A category that identifies both the timeframe during which a contract is active and enforceable, and the method used to renew or inactivate the contract in Conga Contracts. See Auto Renewal - Auto Advance, Auto Renewal - Manual Advance, Fixed - Auto Inactivate, Fixed - Manual Inactivate, Perpetual, and Cotermious.
Contract Type	Field in a Contract Profile that defines the type of deal being transacted (e.g., License). Frequently, the agreement will identify the contract type in the body of the document (e.g., "This Master Software License Agreement" where "Master" is the Agreement Type and "Software License" is the Contract Type). Conga Contracts supports a five-level hierarchy, so a Software License Agreement might be divided into Level 1 - Software, and Level 2 could be Desktop, Server, Mainframe, etc.
Cotermious	A term type used exclusively for the incorporated (child) contract of a root (parent) contract. When this term type is selected in an Incorporated Contract Profile, the Conga Contracts system automatically populates all the fields in the Term & Renewal section with the data captured for the root contract, including contract status.
Home Page	Home Page of Conga Contracts, which can be used to display linked data via portlets.

Term	Definition
Direct Editing	Feature that allows a MS Word document to be edited in Conga Contracts and automatically saved as the next document revision.
Document Assembly	Program feature that allows you to run the Conga Contracts Clause Library inside MS Word so that clauses can be dragged and dropped from the Library directly into an open Word document.
Document Package	One or more documents that are shared and edited by the members of a document package team, which is formed for the express purpose of performing a specific contract-related task, such as negotiating a contract.
Documents	Electronic files that are uploaded and stored in the Documents section of a Company, Contract, or Project Profile. Documents can include files of any document type, including MS Word documents, PDF files, and Excel spreadsheets.
DocuSign	An external application that works in conjunction with Conga Contracts to facilitate the electronic signing of documents. Documents are prepared for electronic signature using the eSignature Package Wizard in Conga Contracts, electronically signed in the DocuSign cloud, and then managed in Conga Contracts.
Dynamic Forms	<i>See Additional Forms.</i>
Envelope	The email message that is sent to signatories and recipients when the eSignature Package Wizard is run. The email contains the contract document(s) that must be signed electronically in the body of the message, as well as any instructions provided by the user who initiated the eSignature process using the Wizard.
Event	A happening that occurs during the course of a business relationship, which is usually tied to an event alert (email message) notifying interested parties about the upcoming event. Events mark key dates in the life of a contract, such as its expiration date, renewal date, and notice date. Events can also be important dates for a company, such as the renewal of certifications or a merger with another company.

Term	Definition
Event Alert	<p>Email reminder that is sent to all interested parties, notifying them of an upcoming date for a contract or company event. An event alert can also be created for a contract's original expiration date. Event alerts are sent out prior to the event, and the number of days prior to the alert is defined by the user.</p> <ul style="list-style-type: none"> • Notification Date = Event Date - Number of Warn Days • Warn Days (user-defined) = number of days prior to the event date that email notification is sent. • Reminder Date = Notification Date + Number of Reminder Days • Reminder Days (user-defined) = number of days after the Notification Date that a reminder email alert is sent if the event has not been completed.
Event Alert Date	<p>Date on which Conga Contracts schedules delivery of an event alert (email message), notifying recipients of a contract or company event that was created by a program user. $\text{Event Alert Date} = \text{Notification Date} - \text{Event Creation Date}$.</p>
Event Alert Status	<p>The status of an event alert is determined by Conga Contracts; it is completely automated and controlled on the back end. The possible statuses of an event alert are:</p> <ul style="list-style-type: none"> • Scheduled - Event Alert Date has not yet reached the Notification Date (Event Date - Number of Warn Days); therefore the event alert (email message) for the event has not yet been sent out. • Due - Event Alert Date has reached the Notification Date, and therefore, the event alert (email message) for the event has been sent out. However, the Event Date has not yet been reached. • Escalated - Both the Event Alert Date and the Reminder Date (Event Date - Number of Reminder Days) have passed, but the Event Date has not been reached. • Past Due - Event Date has passed without any action having been taken on the Event Alert. • Closed - Event has been completed (individual event) or closed (event series) by the Event Owner, and it is no longer active.
Event Date	<p>Date by which action must be taken for an event, such as the expiration date of a contract or the date on which notice must be given to renew or terminate a contract. Users are notified about event dates via email messages (event alerts) sent from Conga Contracts.</p>

Term	Definition
Event Series	A happening that occurs during the course of a business relationship and is repeated on a regular basis (e.g., daily, weekly, monthly, quarterly, or yearly). Every event in the series is usually tied to an alert and a reminder for the recurring event.
External Participant	Individuals that access Conga Contracts through the Portal or a third-party application. A list of external participants can be viewed from in the Address Book.
Fixed Term Contract	A contract that is in effect for a specified length of time. A fixed-term contract is set in advance and ends when a specific task is completed or a specific event takes place.
Fixed, Auto Inactive	A fixed term contract that the Conga Contracts system automatically inactivates when the contract reaches its expiration date (i.e., the contract's status is changed from "Active" to "Inactive").
Fixed, Manual Inactivate	A fixed term contract whose status must be manually changed from "Active" to "Inactive" by a user once the contract reaches its expiration date.
Flows	Administrator-defined templates that guide users in performing the steps that must be accomplished to complete a task for a company, contract, or project. Flows include color-coded stages, as well as steps with action buttons, and are displayed at the top of a Company, Contract, or Project Profile.
Forms Library	The additional forms that appear in the <i>Additional Forms</i> screen, which is linked to a Company, Contract, or Project Profile. Administrators create additional forms and then link them to specific Company, Contract, and Project Profile types so that users can capture the information required by the form.
Functions	User designations that reflect the titles the user holds, or the jobs they can perform in Conga Contracts.
Gateway Step	A step in a workflow that requires the approval of more than one person. Those who can approve a workflow step must hold one or more user functions, as defined in a Routing Table.
Help System	Information about Conga Contracts fields, functions, and usage.

Term	Definition
Help Tips (Quick Tips)	Superscript windows that pop-up with definitions or instructions when a user hovers over a field in a program screen.
History File	A system-captured audit trail of all changes made to data fields in a Company, Contract, or Project Profile.
Inactive Status	<ul style="list-style-type: none"> • One of the values in the Status field in a Contract Profile. This generally means that the contract is no longer in force, as opposed to "Active" or "In Process." The contract has either expired or been canceled. • One of the values in the Status field in a Company Profile. This generally means that the company is no longer "Active" or "On Hold," either having gone out of business or been acquired. Acquired companies are automatically given this status when the Acquisition Wizard is run.
Incorporated Contract	Contract that is integrated with other documents into a single legal document. Incorporated contracts have a parent/child relationship, which Conga Contracts displays as a tree structure.
In Process Status	<ul style="list-style-type: none"> • One of the values in the Status field in a Contract Profile. This generally means that the contract is in draft form and has not yet been executed. • One of the values in the Status field in a Company Profile. This generally means that the company is in the process of being accepted as a supplier or customer.
Legal Entity	Any entity that will be separately named during the contracting process. In Conga Contracts, companies that are separately named in a contract are marked as legal entities from their Company Profile. Individual contracts stored in Company Profiles are then associated with legal entities so reports can be run to locate contracts for a legal entity.
Location Name	Administrator-defined name for a specific type of company location, such as Regional Office.
Manual Advance	For an auto-renewing contract, one of the options for moving the contract forward to the next expiration date. Manual advance is used to move the contract to an "expired" status, which requires a user to manually process the renewal info and review the event alerts.
Messaging	Email feature that stores all communications sent and received from both Contract and Company Profiles.

Term	Definition
Mobile Notifications	Automated notices that are sent from Conga Contracts to users who have hand-held devices, enabling them to take action.
Mobile Slim Interface	A language and message format offered by Conga Contracts that allows users to access the application via a mobile device.
Multi-Party	Contracts that have more than two (2) parties bound to the terms, and all parties have signed the contract.
My Calendar	Calendar for individual users, which is launched from the My Place menu, displays on the user's Dashboard, and shows event and/or notice dates.
Notice Date	For Fixed - Auto Inactivate and Fixed - Manual Inactivate contract term types, it is the date by which action must be taken so that a contract does not expire. For Auto Renewal - Auto Advance and Auto Renewal - Manual Advance term types, it is the new expiration (i.e., old expiration date has been extended). <i>A Notice Date can exist even if an event alert is not created.</i>
Notice Period	Number of days prior to the end of a contract's current term that your company is required to provide notice of intent to renew or terminate the contract.
Notification Date	Date on which Conga Contracts send an event alert (email notification) to selected recipients, notifying them about an upcoming contract or company event. In the Event Profile, the Notification Date = Event Date - Number of Warn Days.
Notifications/ Notice	A notice, reminder, or communication that is sent out from Conga Contracts via email and is tied to an event or standalone action.
One Click Report	A Comprehensive Contract or Company Summary Report that includes key data for a company or contract.
One Step Search	Search across Conga Contracts for user-defined company, contract, and project data. Users can search for a single keyword or a phrase.

Term	Definition
Parent Contract	A contract that is integrated with other contracts into a single legal document. A parent (or root) contract has a parent/child relationship with incorporated contracts, and this relationship is displayed as a tree structure in the Contract Profile.
Payment Stream	Incoming or outgoing payments recorded in the Payments section of a Contract Profile to reflect the amounts received/paid in accordance with the terms of a contract. Forecasts can also be run to calculate future amounts paid/received for a payment stream.
People Profile	Data input screen used to capture personal/contact information for program users, company contacts, and external participants who use Conga Contracts.
Perpetual Contract Term	A contract with an effective date, but no expiration date. Perpetual contracts are often Master agreements that contain legal terms, as well as schedules with term and renewal information.
Portlet	Window that can be added to the Dashboard to provide a user with quick access to the companies, contracts, and projects they recently visited. Portlets can also be added to quickly access a user's saved search queries, their recent messages, assigned events, tasks, workflow and flow steps, document package tasks, contract requests, contract approvals, and supplier registrations. A charting portlet can be added to display a graphic representation of data using a pie chart, bar chart, or time line.
Person Function	A designation that a person holds in relation to a company or contract (e.g., Contract Manager, Attorney, Sales Rep, etc.).
Profile	The "main page" that houses basic information for a company, contract, or project. A profile page also exists for most of the linked company, contact, and project data, including a Person, Document, Task, Event, Product, Document Package, Location, and Additional Form Profile.
Project	A feature that allows new data, documents, tasks, additional forms, and workflows to be captured and stored to accomplish a goal or provide reference data. A project can also include legacy data by incorporating existing Company and Contract Profiles.

Term	Definition
Reminder Date	Date on which another event alert (email message) is sent by Conga Contracts, reminding recipients that an open event is still not completed/closed. The Reminder Event Alert Date = Event Date - Number of Reminder Days (number of days entered into the <i>Reminder Days</i> field for the event).
Renewal Wizard	A system-generated tool that steps a user through the process of renewing a contract by requiring a new expiration date, renewal interval, notice date, and notice interval. In the wizard, users can also update the warn date, which is the number of days prior to the new expiration date that an email notification (event alert) is sent out.
Reports	Data extracts configured using the Report Wizard or the Advanced Reporting feature. Reports can be viewed in the Conga Contracts Report Viewer, downloaded as a PDF file, or exported as an Excel spreadsheet.
Roles	A security measure that controls individual user access to program features and stored data.
Routing Table	An Administrator-defined list that identifies the user function(s) that can approve a Gateway (approval) step in a company, contract, or project workflow.
Salesforce	An external application that works in conjunction with Conga Contracts to facilitate the creation of contracts. Contract requests are sent from Salesforce, reviewed and processed in Conga Contracts, and information is shared throughout the contract creation process.
Scorecards	Feature that allows users to rate companies, contracts, and projects based on criteria established by Administrators.
Security Group	A field in a Company or Contract Profile that is used to control access to the profiles in this group. Each user role grants access to one or more company and contract groups, and individual users are then granted access to one or more user roles, which can allow access to several different security groups.
Self-Service Contract	A contract request that does not have to be approved.

Term	Definition
Simple Gateway Step	A step in a workflow that requires the approval of a single person who holds one or more user functions, as defined in a Routing Table.
Single Use Form	An Additional Form that can only be captured once. When the form is added to a Company, Contract, or Project Profile, it cannot be captured again and it cannot be copied.
Sub-Contract	An incorporated contract.
System Fields	Standard Conga Contracts fields that cannot be modified or re-named.
Templates	Administrator-defined forms that can be used to create contracts and events alerts, run flows and workflows, and capture additional information for Company, Contract, and Project Profiles.
Wizard	A system-generated tool that walks a user through the steps needed to perform a company-related or a contract-related task.
Workflows	Administrator-defined set of steps for a process or procedure (<i>workflow template</i>) that is accomplished by a specific group of users (<i>workflow team</i>), and linked to individual Company, Contract, or Project Profile <i>types</i> and <i>groups</i> . If approval is needed for a workflow step, Administrators also create a <i>routing table</i> to identify the user functions that can approve the step.

What's New in Conga Contracts

Documentation

The following section lists changes in the documentation to support each release.

Spring '21

Document	Topic	Description
Spring 2021 (Rev A)	Conga Contracts Features and Editions	Updated available features.
Spring 2021	New Contract Profile User Interface Updates	Updated Flow Stages component section. Added additional screenshots.
	Conga Contracts for REST API Developers	The REST API Guide content was added to the documentation portal for 'Spring 21.
	SOAP API Guide	The SOAP API Guide legacy content was added to the documentation portal for Spring '21.

Winter '20

Document	Topic	Description
Winter20.12.17 Patch	New Contract Profile User Interface Updates	Added a section for the Flow Stages component.

Document	Topic	Description
Winter 2020	New Contract Profile User Interface Updates	New Topic
	Clause Library Group Security	New Topic
	Enabling Clause Library Group Security	New Topic
	Setting Clause Library Group Security Permissions by Role	New Topic
	Creating or Deleting Clause Groups in the Clause Library	New Topic
	Editing Clause Groups in the Clause Library	New Topic
	Adding a Clause to Clause Groups	New Topic
	Adding a Clause Group List Item	New Topic
	Editing, Disabling, and Deleting Items in a Clause Group List	New Topic

Conga Contracts for Administrators

Select one of the following topics for more information:

- [Program Basics](#)
- [Program Security](#)
- [Program Configuration](#)
- [Global Features](#)
- [eSignature Integration](#)
- [Salesforce Integrations](#)
- [SalesConnect](#)

Program Basics

Contracts Program Basics, including Technical Requirements, Security Measures, Program Components, Setup Tasks, Contracts Portal, Simultaneous Editing, Mobile Devices, and a Glossary of terms used in Contracts.

Program Basics Overview

Overview of Contracts System Basics, including Technical Requirements, Security Measures, Program Components, Setup Tasks, and Simultaneous Editing. Security Measures include Standard Permission Types and User Role Security. Program Components include Navigation Toolbar & Admin Menu, Dashboard Portlets & Global Messages, Address Book & User Types, Contract & Company Wizards, Mouse-Overs & Quick Tips, and the Contracts Portal.

The Contracts Program Administrator should review the following system basics before configuring the program:

- [Technical Requirements](#)
- [Log in to Conga Contracts](#)
- [Administrator Navigation Toolbar](#)
- [User Roles and Permission Types](#)
- [User Role Security](#)
- [Setup Tasks](#)
- [Home Page Portlets and Global Messages](#)
- [Address Book and User Types](#)
- [Contract and Company Wizards](#)

- [Hover-Overs and Quick Tips](#)
- [Help System](#)
- [Conga Contracts Portal](#)
- [Simultaneous Editing](#)
- [Mobile Devices](#)
- [Glossary](#)

For information on performing non-administrative tasks or other information not contained in this guide, refer to the Contracts User Guide.

For assistance with the application, Contact Support.

Contracts holds several [Apache licenses](#), which work in conjunction with the program, as well as other [miscellaneous licenses](#).

Log in to Conga Contracts

You can log in to Contracts with a username and password, from an email link, or from a mobile device.

Log in with a User Name and Password

1. Navigate to <https://appl.novatuscontracts.com/Contracts/> using any of the following browsers:
 - Internet Explorer 9.0, or higher
 - Firefox
 - Chrome
 - Safari
2. At the login screen, type your Login Name and Password, and click Login.

 **Reminder:**

If you don't remember your password, click the Forgot Password link and follow the onscreen prompts. An email message with a temporary password is sent.

Log in From an Email Message

If your Administrator has added you as a Conga Contracts user and allowed the system to generate your password, you will receive an email message from Conga Contracts Login Information.

1. In the email message, write down your login name and temporary password.
2. Click the Login to Conga Contracts link.
3. At the <https://appl.novatuscontracts.com/Contracts/> screen, type your Login Name and Password, and click Login.

Log in Using a Mobile Device

If you have a login ID and password, you can access Conga Contracts at <https://appl.novatuscontracts.com/Contracts/> from any of the following mobile devices:

- iOS 4 or higher
- Blackberry OS 6.0 or higher
- Android 2.3 or higher

Conga Contracts Technical Requirements

Using a current browser and most operating systems, you can access the Conga Contracts Management system and database 24/7 from any computer or from your Apple iOS 4+, BlackBerry OS 6.0+, or Android 2.3+ mobile device. You have the option of using Conga Contracts as your Application Service Provider (ASP).

The technical requirements for Conga Contracts Contract Management Solution are shown in the table below. Using a current browser and most operating systems, you can access the Contracts Contract Management system and database 24/7 from any computer or from your Apple iOS 4+, BlackBerry OS 6.0+, or Android 2.3+ mobile device. You have the option of using Conga Contracts as your Application Service Provider (ASP).

Desktop Software	Web Server Software
Software (Supported Browsers) <ul style="list-style-type: none"> • IE9 for Windows Vista SP2 • IE11 for Windows 7 SP1 and Windows 8.1 Update 	ASP Secured Hosting by Contracts <ul style="list-style-type: none"> • No client hardware or software requirements

Desktop Software	Web Server Software
<p>Contracts supports the browsers that are still supported by the vendor for:</p> <ul style="list-style-type: none"> • Mozilla FireFox • Apple Safari • Google Chrome* <p>*Chrome's support for the following platforms will end in April 2016: (1) Windows XP and Windows Vista (2) Mac OS X 10.6, 10-7, and 10.8, and (3) any 32-bit Linux, as well as Ubuntu 12.04 (Precise) and Debian 7 (Wheezy).</p>	

Accessing System Information

To access Conga Contracts System Information, take the following steps:

1. From the Administrator Navigation Toolbar, click on the ? icon.
2. A System Information popup appears with the following information: Audit UUID, Base System URL, Database Name, eSignature Provider, Login Name, OCR Provider, SSO Enabled, System Company Name, Company UUID and Version.

Administrator Navigation Toolbar

The Administrator Navigation Toolbar displays along the top of every screen and includes the following options: Search, Home, Companies, Documents, and Tools. More options display when you click the gear icon, question mark icon, or person icon. Each menu option in the toolbar includes links that allow you to program data and/or perform tasks.

Menu Option	Action
Home	This link returns you to the home page.

Menu Option	Action
Companies	<p>The Companies menu option now takes you to the All Companies page, and the dropdown has the following options:</p> <ul style="list-style-type: none"> • Add Company • Projects
Contracts	<p>The Contracts menu option takes you to the All Contracts page, and displays the following:</p> <ul style="list-style-type: none"> • Add Contact • My Contracts • Clause Library • Projects • Requests
Documents	<p>The Documents option takes you to the Global Documents page.</p> <ul style="list-style-type: none"> • If you've purchased the Documents Packages add-on, it is available here as a dropdown option.
Tools	<p>The new Tools option displays the following:</p> <ul style="list-style-type: none"> • Calendar • Events • People • Reports • Scheduled Reports • Search Query • BI Toolbox and Supplier Registrations are listed here if you've purchased these add-ons.

Menu Option	Action
Gear Icon	<p>The Admin options are available here, which include the following:</p> <ul style="list-style-type: none"> • Additional Forms • Advanced Edit • Bulk Upload • Company Flow Templates • Contract Request Types • Creation Templates • Email Distribution Lists • Event Alert Templates • Global Messaging • Lists • Roles • Profile Rules • Project Flow Templates • Routing Tables • Scorecards • System Settings • Task Lists • Users
Question Mark Icon	<p>The question mark icon displays the following:</p> <ul style="list-style-type: none"> • Create Ticket • View Knowledge Base • Conga Contracts Version Number
Person Icon	<p>The person icon displays the following:</p> <ul style="list-style-type: none"> • Your user name. Click on your user name to access User Preferences. • Log Out

Role Permission Descriptions

Conga Contracts provides 40 default permission types, which are used to control user access to program data, tasks, and features such as Reporting, Direct Editing, and approving or making contract requests.

Conga Contracts provides 40 permission types, which are used to control user access to program data, tasks, and features such as Reporting, and approving or making contract requests. System Administrators create individual user [roles](#) and assign one or more

permission types to each role. Administrators then add program [users](#) to Conga Contracts and assign one or more roles to each user. A Full User may be assigned a role with up to all permission types selected.

There are five (5) permissions reserved for Request/View User Types (but may be assigned to Full User Types). Request/View User Types have restricted permissions and are typically assigned one and up to all of the following permissions: eSignature Admin, Reporting, Requester, and Scorecard Viewing.

Request/View User Types (but may be assigned to Full User Types)

ROLE PERMISSIONS	PERMISSION DESCRIPTION
eSignature Admin	Create and void Conga Sign, DocuSign or Adobe EchoSign envelopes.
Reporting	Create, modify, generate, delete, and copy global reports.
Requestor	Allows a user to create contract requests.
Restrict To My Contracts	Limited to viewing the contracts for which the user has a responsibility. This permission overrides all other user roles.
Scorecard Viewing	View Company, Contract, and Project scorecards.

The remaining 35 permissions are used to grant permissions to power users and administrators. Power users and Administrators can be assigned one or more of the following permissions to perform tasks or manage program features, such as Companies, Contracts, Projects, Users, Roles, Contract Requests, Contract Approvals, Contract Creation Templates, Clauses, Additional Forms, Flows, Reports, Document Packages, Scorecards, Supplier Registrations, and Systems Settings.

Power Users and Administrators

ROLE PERMISSIONS	PERMISSION DESCRIPTION
Additional Forms Admin	Create and modify additional company, contract, and project forms and manage additional fields in the Company, Contract, and Project Profiles.
Advanced Reporting	Create, format, edit, and generate advanced reports.
Open in Word (Direct Editing)	Edit Microsoft Word Documents within Conga Contracts.
Approver	Approve contract requests.
BI Tool	Create, modify, and delete BI Toolbox analyses, reports, and dashboards.
Bulk Data Upload Tool	Simultaneously upload multiple records into the following tables: Companies, Contracts, and Additional Forms. Each table must be loaded one at a time.
Bulk Sync Admin	Allows the owner of this permission to sync records in bulk to Salesforce.
Clause Admin	Create, modify, and delete clauses, regardless of the clause's security level.
Company Admin	Perform administrative functions for companies, including using the wizards: Merger/ Acquisition, Change Name, Archive, and Mark as Legal Entity.
Contract Admin	Perform administrative functions for contracts, such as archiving contracts, and using the wizards: Creation, Renew Contract, Document Package, Assign Contract.
Creation Template Admin	Create, modify, and delete creation templates.
Document Package Admin	Administer document packages.
Email Distribution Lists	Create, modify, and delete email distribution lists.

ROLE PERMISSIONS	PERMISSION DESCRIPTION
eSignature Admin	Create and void DocuSign or Adobe Sign envelopes.
Flow Admin	Run a flow via the Start Flow button on an existing Contract, Company, or Project Profile, override a flow step, and invalidate a flow.
Flow Template Admin (Contract, Company, and Project)	Review the components of a template and review flow actions and steps; view flow templates; add a flow template; add a workflow to a flow template; filter; publish; edit; delete; inactivate/reactivate a flow template; and reorder flow templates.
Global Documents Admin	Update and delete global documents.
Global Messaging Admin	View, create, modify, and delete global Dashboard messages.
Global Translation Admin	Translate and edit the translation of items in the List Admin screen; and download a translation file.
List Admin	<ul style="list-style-type: none"> • Administer list values in List Administration screen for companies, contracts, projects, addresses, additional fields, additional forms, documents, global translations, people, and company relationships. • View, create, copy, modify, and delete event alert templates. • View, create, modify, and delete task lists.
Profile Rules Admin	<ul style="list-style-type: none"> • View, create, modify, and delete profile rules for both system (default) fields and any additional fields in Company, Contract, and Project Profiles. • View, create, modify, and delete profile rules for Company, Contract, and Project Additional Forms.
Project Admin	Create projects using teams, and modify projects.
Report Admin	Perform administrative functions for reports.

ROLE PERMISSIONS	PERMISSION DESCRIPTION
Request Admin	View, add, modify, and delete contract request types.
Request Unlock Admin	Visibility into self-service requests that have become locked and unlock those requests.
Role Admin	View, add, copy, modify, and delete users roles; generate a Role and Permissions Report; and view the history of changes to a role.
SSO Admin	Configure SSO integration settings.
Scorecard Admin	View, create, modify, and delete scorecard Answer Profiles; view, create, modify, and delete Scorecard Components; and view, create, modify, and delete Scorecards.
Scorecard Viewing	View Company, Contract, and Project scorecards.
Supplier Registration Admin	View and approve Supplier registrations.
Supplier Registration Type Admin	View, create, modify, and delete supplier registration types; add, edit, and delete documents from a supplier registration type.
System Settings Admin	Configure Global Messages and System Settings: General, API, Dashboard, Email, Export, Import, and Integration, including: Salesconnect, eSignature (for Conga Sign, DocuSign, or Adobe Sign) and Conga Suite.
True-Up Access	Access the True-Up feature.
User Admin	View a list of users, add users, copy user information, edit user information, disable/re-enable users, generate user reports, generate user Login Reports.
Microsoft Word Add-In Access	Install the Microsoft Word Add-In plugin and update a document in Word using Conga Contracts clauses.

ROLE PERMISSIONS	PERMISSION DESCRIPTION
Workflow Admin	<p>View, create, copy, modify, and delete the available Workflow Templates; view, create, copy, modify, and delete the various Workflow Teams; and view, create, copy, edit, and delete the various Routing Tables.</p> <p>Tip: This role allows Administrators to perform both the administrative tasks shown above and the user tasks for any workflow. User tasks include (1) completing, reassigning, and approving any step in the workflow (2) managing workflow documents, and (3) editing, closing, and deleting the workflow.</p>

User roles work in conjunction with default permissions by allowing Administrators to create individual roles in Conga Contracts and then assign one or more permissions to each user role. In addition, security can be applied to a user role so that the groups (Company, Contract, and Project) that can be accessed by the users assigned to that role can be limited, as well as the level of access to [additional forms](#) and [document types](#). Once all the user roles have been defined, Administrators can then [add users](#) to Contracts.

User Role Security

Administrators can control user access to the data in Conga Contracts by creating different [Company](#), [Contract](#), and [Project](#) groups, and then assigning the appropriate Company, Contract, and Project Profiles to one of these special groups.

Security permissions can then be applied to a user role by allowing/restricting access to these Company, Contract, and Project groups, thereby allowing/denying the users holding this role access to the individual Contract, Company, and Project Profiles assigned to these special groups. In addition, access to the [additional forms](#) created by Administrators can also be controlled using this Role Security feature.

In the example below, the Power User role has full access to all the Company Profiles, except those in the Restricted company group.

The possible permissions are:

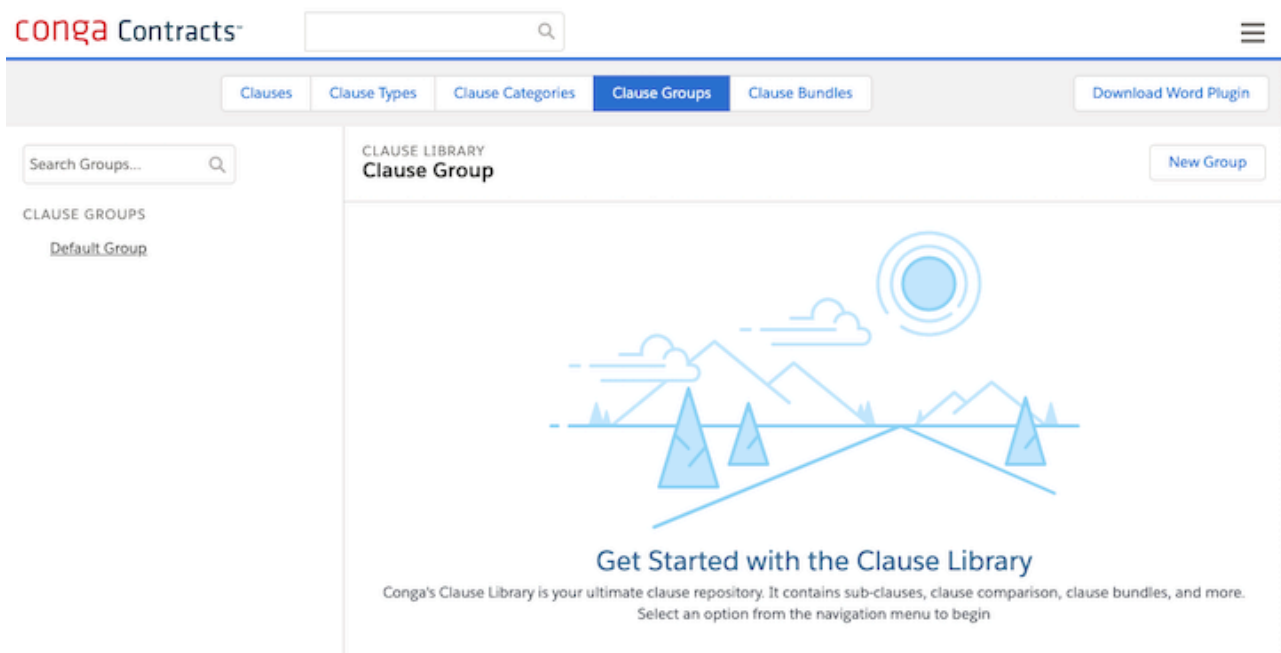
- Full - user can view and edit the Company Profiles for companies in this group.
- Viewable - user can only view the information in the Company Profiles for companies in this group.

- Create - user can create (add) information to the Company Profiles for companies in this group, such as creating events, adding people, tasks, company relationships, as well as additional forms, locations, and company names.
- Modify - user can edit the basic information in the Company Profiles for companies in this group, including the stored information for Events, Messages, Locations, People, Relationships, Tasks, Scorecards, Additional Forms, Additional Names, and Locations
- Documents - user can view and download documents stored in the Company Profiles for companies in this group
Document Upload - user can upload documents to the Company Profile.

These same permissions can be set for Contract Groups, Project Groups, and Additional Forms. Contract Groups, however, also has a Run eSignature Wizard permission.

Clause Library Group Security

Conga Contracts allows you to create Clause Groups so that you can separate your clauses into groups accessible by users only with permissions to view that group. This allows you to have higher security and control over who is able to view specific clauses.



For more information, see the following topics:

- [Enabling Clause Library Group Security](#)
- [Setting Clause Library Group Security Permissions by Role](#)
- [Creating or Deleting Clause Groups in the Clause Library](#)

- [Editing Clause Groups in the Clause Library](#)
- [Adding a Clause to Clause Groups](#)

Enabling Clause Library Group Security

To enable the Clause Library Group Security feature, take the following steps:

1. From the Administrator Navigation Toolbar, go to to the Gear Icon and click System Settings.
2. Click Clause Group Security in the menu to the left.
3. Check the Enable Clause Group checkbox.
4. Enter a name for your Default Clause Group. By default, all existing clauses in the system are assigned to this clause group.
5. (Optional) Check the Assign Default Clause Group to all user roles if you want all your existing users to have access to clause groups and clauses.

Setting Clause Library Group Security Permissions by Role

To set Clause Library Group Security permissions by role, take the following steps:

1. From the Administrator Navigation Toolbar, go to the Gear Icon and click Roles.
2. Select a role by clicking the role name.
3. Click Edit.
4. Click the Clause Groups tab.
5. Manage permissions by clicking the checkbox beside the name of each Clause Group Name. The permission options are the following:
 - Full: Permission to view clauses, create clauses, and modify clauses in this group.
 - Viewable: Permission to view clauses in this group.
 - Create: Permission to create clauses in this group.
 - Modify: Permission to modify clauses in this group.
6. Click Save.

Creating or Deleting Clause Groups in the Clause Library

Creating Clause Groups in the Clause Library

1. From the Administrator Navigation Toolbar, go to Contracts and click Clause Library.
2. Click the Clause Groups tab.
3. Click the New Group button.
4. Under the Details tab, the following options are available:
 - Clause Group Name: Enter the name of the Clause Group. This is a required field.
 - Disabled Checkbox: Check to disable this Clause Group. Leave it unchecked to enable this Clause Group.
 - Description: Enter an optional description of the Clause Group.
 - Created By: Displays the user name who created the Clause Group, and creation date.
 - Last Modified By: Displays the user name who made the last modification, and modification date.
5. Under the Related tab is a list of clauses associated with this group.
6. Click Save to save your changes.

Deleting Clause Groups in the Clause Library

1. From the Administrator Navigation Toolbar, go to Contracts and click Clause Library.
2. Click the Clause Groups tab.
3. Under Clauses on the left, click on the name of a clause group.
4. Click Delete to delete this clause.

Editing Clause Groups in the Clause Library

To edit Clause Groups within the Clause Library, take the following steps:

1. From the Administrator Navigation Toolbar, go to Contracts and click Clause Library.
2. Click the Clause Groups tab.
3. Under Clauses on the left, click on the name of a clause group.
4. Under the Details tab, the following options are available:
 - Clause Group Name: Edit the name of the Clause Group.

- Disabled Checkbox: Check to disable this Clause Group. Leave it unchecked to enable this Clause Group.
 - Description: Enter or edit an optional description of the Clause Group.
 - Created By: Displays the user name who created the Clause Group, and creation date.
 - Last Modified By: Displays the user name who made the last modification, and modification date.
5. Under the Related tab is a list of clauses associated with this group.
 6. Click Save to save your changes.

Adding a Clause to a Clause Group

To add a Clause to a Clause Group, take the following steps:

1. From the Navigation Toolbar, go to Contracts and then select Clause Library.
2. Click on the Clauses tab.
3. Click on the name of a Clause from Clauses list the left panel.
4. Click on the Details tab.
5. In the Clause Group field, select a Clause Group from the dropdown menu.
6. Click Save.

Setup Tasks

Configuring Conga Contracts prior to use involves Repository Tasks, Templates, and Rules. Repository tasks include identifying user roles & adding users, configuring global settings, and defining selections in program screen lists. Templates are designed to capture information for contract creation, events, flows/workflows, scorecards, and contract requests/approvals. Profile rules are written to control the display & capture of information in profiles, as well as perform cal

Administrators are responsible for performing the following tasks, designing the following templates, and defining the following rules prior to using Conga Contracts.

Repository Tasks

- An overview of the information that Administrators need to add to default program fields, which will affect the data stored in the Conga Contracts system, are shown below.

Security Features

- [Users](#) are allowed access to Conga Contracts when Administrators create User Profiles with logins and passwords
- [Roles](#) to grant a user permissions to the roles they can play in Conga Contracts

List Configurations

The following field lists appear in the default program screens, and Administrators must add items selections to the lists from the [List Administration](#) screen:

- Company Categories, Groups, Types, and Stauses for the [Company Profile](#)
- Contract Groups, Types, Agreement Types, Responsibilities, and Statuses for the [Contract Profile](#)
- [Additional Forms](#) and [Additional Fields](#) for Company, Contact, and Project Profiles to capture information not captured in the profiles
- Document Type Groups and Document Types to classify [documents](#) uploaded to Company, Contact, and Project Profiles
- Clause Categories, Types, and Security Levels to categorize and control access to the clauses that users can add to their [Clause](#) Libraries
- Location Types for the [addresses](#) of companies in the Company Profiles and contracts added to Contract Profiles
- Company Relationships to define the types of [relationships](#) that exist between the companies with which you do business
- [People Functions](#) to grant a user one or more functions in the tasks that are performed in Conga Contracts
- [Routing Table Categories](#) to define the types of approval chains that are used in a workflow
- Project Groups, Types, and Statuses for the [Project Profile](#)
- Required fields in the [Company](#), [Contract](#), [Location](#), and [Person](#) program screens
- Quick Tips to assist users in populating fields in the [Company](#), [Contract](#), and [Location](#) program screens

Global Configurations

The following global settings are controlled by Administrators, and System Settings are controlled by your Conga Contracts System Administrator.

- [Advanced Edits](#) to globally replace data in a field for all companies, contracts, events, company events, contract events, company tasks, and contract tasks

- [Global Messaging](#) to send a system-wide message to selected user roles.
- [System Settings](#) to establish global [system settings](#), [email settings](#), integration settings for [DocuSign \(or EchoSign\)](#) and [Salesforce](#), [API settings](#), and [data import/export](#) for migrating other instances of Conga Contracts.

Templates and Rules

An overview of the templates and rules that Administrators need to define to assist users in performing Conga Contracts tasks are shown below, and are added from the various links in the [Admin Menu](#).

- [Event Alert Templates](#) to standardize the text in the email notifications and follow-up reminders received to alert individuals to an upcoming contract event
- [Contract Request Types](#) to add all the types of contract requests that can be made, typically by salespeople, in Conga Contracts
- [Creation Templates](#) to standardize the contract document that must be used when users create a contract of this type using the Contract Creation Wizard
- [Task Lists](#) to create a standardized list of steps that must be completed, and the persons responsible for completing the steps, in order to accomplish the task
- [Additional Forms and Additional Fields](#) to design forms and add fields to capture information that is not captured in the default Company, Contact, and Project Profiles
- [Profile Rules](#) to control a field in a Company, Contact, or Project Profile by establishing a condition and an action for a related field
- [Profile Rule Formulas](#) to add formulas to profile rules applied to fields in Company, Contact, and Project Profiles
- [Workflow Templates](#) to define the steps and assign individuals to the steps in a procedure used in a Company, Contact, or Project Profile
- [Workflow Teams](#) to build a team of the individuals who will routinely perform one or more steps in completing a Company, Contact, or Project Profile workflow.
- [Routing Tables](#) to build a list of user functions that can approve a workflow step that requires approval (i.e., Gateway step) in a Company, Contact, or Project workflow.
- [Supplier Registration Types](#) to capture information that will be provided to the companies who want to do business with your company and provide a link that will allow the "supplier" to register at the Conga Contracts Portal and provide pertinent data on their company
- [Scorecards](#) to rate the performance of a company, contract, or project using Administrator-defined categories, questions, and response profiles.

- [Flows](#) to guide users in the completion of tasks and the capture of information for a [Contract](#), [Company](#), or [Project Profile](#).

Home Page Portlets and Global Messages

The Dashboard is the default screen that displays when you log in to Contracts and is used to house portlets and global messages.

Portlets are miniature browse screens, which contain links to information and tasks relevant to the individual user, as well as links to the Contract, Company, and Project Profiles that the user recently visited. Portlets can be added, removed, resized, and repositioned one the home page.

[Global messages](#) are created by Administrators and display on the home page of users who need, or are affected by, the information provided in the message. Global messages typically display for a prescribed amount of time, which is determined by the Administrator who authored the message.

Portlets

Currently, there are 15 available portlets, included three navigation portlets: Recently Viewed Companies, Recently Viewed Contracts, and Recently Viewed Projects. The other portlets provide quick access to the Tasks and Workflow steps users need to complete, the Events users are monitoring, the Contracts for which users have some measure of responsibility, Recent Messages that are awaiting a user’s reply, the Document Packages that include a user as a member of the team, the eSignature Packages that include a user in the electronic signing process, and the contract requests (My Requests) users have made and are monitoring. For users with approval authority, they can also add portlets to monitor the contract requests (My Approvals) made by other users, and the Supplier Registrations that are awaiting approval. If a user frequently performs searches on the data stored in Contracts, they can add a Search portlet to quickly retrieve saved searches, which can be displayed graphically using the Charting portlet.

Add Portlet button	Click Add Portlet on the top right hand side of the home page to display the Add Portlet window.
Add Portlet window	Locate the portlet you want to add by scrolling through the list.

Add button	Click to add the portlet to the home page. Tip: The default display of portlets is two side-by-side portlets, but a single portlet can occupy the entire width of the home page by dragging-and-dropping it to a different location on the home page.
Close button	Click the red X icon to close the window.

Global Messages

Administrators create the global messages that display in selected, or all, user home pages. There are three types of global messages: (1) Warnings, which display with a yellow background (2) Alerts, which display with a pink background, and (2) Information, which displays with a blue background.

A [global message](#) displays for a prescribed amount of time, as determined by the Administrator who sent the message, but the display can be collapsed to free up the viewing area in the home page for portlets.

Alert message	Display for a message that has been designated as an alert.
Warning message	Display for a message that has been designated as a warning. Tip: A global message may contain an active link to a URL (e.g., https://qa-dev.novatuscontracts.com/Contracts).
Important message	Display for a message that has been designated as important.
Collapse icon	Click the ^ icon to collapse the global message display.

Person Browse and User Types

The Address Book stores the names and email addresses for the four Conga Contracts user types: program users, company contacts, legal entity people, and external participants. Distribution lists are also stored in the Address Book, which is used in several program features, including Messaging & Distribution Lists, Events, Scheduled Reports, Workflows, Scorecards, and Project Teams.

Person browse is accessed by going to Tools > People in the navigation menu, and is a compilation of the names and contact information for all Conga Contracts user types:

- Add Company Person: Individuals without Conga Contracts credentials who are Points of Contact (POCs) for a company, and are added to the Company Profile.
- Add External Person: Individuals without Conga Contracts credentials whose email addresses have been added to the Conga Contracts system so that they can take part in specialized program features, such as Document Packages, the eSignature process, and [Supplier Registrations](#).

Person Browse contains key information for each individual, such as their email address, work number, and the roles they play in Conga Contracts. The Address Book also stores any [email distribution lists](#) that have been created by users with the [Email Distribution List permission](#), and is automatically available for use in many of the Conga Contracts program features, including Messaging, Events, Scheduled Reports, Workflows, Scorecards, and Project Teams. However, distribution lists are not available for use with the Document Package and eSignature Package wizards. A distribution list allow users to quickly and easily communicate with several people without having to select each person individually.

Option	Description
Category Dropdown List	Change the default view from All People to Users, Company People, or External People to filter the list. Tip: The default view includes email distribution lists.
Search option	To quickly locate a person or distribution list, enter the first few letters of the person's name, or the name of the distribution list, in the Search field and click the search icon . Click C to clear the search results.
Search filter	Click v to the right of the Search field to display a pop-up window with a list of available fields that can be searched. De-select the check boxes for the fields you do not want to search to filter the results that are returned when you perform a search.
Navigation icons and Page field	<ul style="list-style-type: none"> • Click < and > to move back or forward one page in the Address Book. • Click << to jump to the first page, and >> to jump to the last page. • Enter a number in the Page field, and press ENTER on your keyboard to advance to a specific page.
Show Items list	Change the default from 25 to 5, 10, 50, or 100 to change the number of data records that display on each page.

Option	Description
Refresh screen	Click the refresh icon to return the screen to the default view after a running a search or making changes to the display.
Sort option	Click on any column heading to change the sort order of the data in the column.
Column Display option	Hover over a column heading until the v icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Person or Distribution List record	Click on a person's name, or the name of a distribution list, to add the individual or list to the Person Browse list box.
Addresses list box	Verify the names of the individuals / distribution lists selected. Click X to remove an individual or distribution list.
Submit button	Click to add all the selected people and/or distribution lists to the event, task, message, workflow, report, project team, or scorecard.

Contract and Company Wizards

Conga Contracts employs wizards to assist users in completing both company and contract-related tasks.

Conga Contracts uses wizards to assist users in completing both company and contract-related tasks. Administrators should become familiar with the wizards since some of the templates and program configurations are used by the wizards.

Contract Wizards

There are seven wizards, and one feature that behaves as a wizard, which can be launched from the Contract Profile:

- **Creation Wizard:** Creates a new contract using a [creation template](#) designed by an Administrator.
 - **Contract Renewal Wizard:** Renews a contract by requiring the user to enter a new expiration date and update the event alert for the new expiration date.
 - **Contract Reassignment Wizard:** Transfers the contracts from one company to another. When a contract is reassigned, all of its data, including incorporated contracts, events, tasks, messages, and the people, payments, and products associated with the contract are also transferred to the new company. Conga Contracts also stores a record of the assignment so that the contract's history can be tracked.
 - **Document Package Wizard:** Creates the document package that is used in creating or negotiating a contract. The wizard not only identifies the documents that will be used in the package, but also allows the user to select the people who will participate in performing the tasks associated with the documents in the package.
 - **eSignature Package Wizard:** Creates a document package and then send the final document for electronic signature (eSignature). The wizard gives users the option of using a pre-defined template or running the wizard without a template. In conjunction with the DocuSign or Adobe Sign application, the wizard prompts you to tag the document(s) to indicate the signature lines and any other areas of the document that require the signer's input.
 - **Workflow Wizard:** Creates a contract [workflow](#) using a template created by an Administrator.
 - **Move Document Wizard:** Moves documents from one contract profile to another contract (or company) profile if a user inadvertently uploaded a document to the wrong profile.
 - **Copy Contract Wizard:** Creates a new Contract Profile by making a copy of an existing Contract Profile, and also allows the user to select the additional forms they want copied to the new Contract Profile.
- Archive feature: Removes the Contract Profile so that it no longer displays in browse screens, or is returned as a search result.

Company Wizards

There are four wizards, and two features that behave as wizards, which can be launched from the Company Profile:

- Merger/Acquisition Wizard: Transfers select data from an acquired company to the acquiring company.
- Change Name Wizard: Automatically updates a company name in all applicable locations in Conga Contracts.
- Workflow Wizard: Creates a company [workflow](#) using a template created by an Administrator.
- Move Document Wizard, which allows users to move a document from one company profile to another company (or contract) profile if they inadvertently uploaded the document to the wrong profile.

Archive feature: Removes the Company Profile so that it no longer displays in browse screens, or is returned as a search result.

Mark as Entity feature: Designates a company as a legal party to a contract.

Hover-Overs and Quick Tips

Hover-overs and quick tips assist users in populating fields in program screens.

Administrators can help users in populating a system field, or an [additional field](#), in a Company or Contract Profile screen, as well as any of their linked Profile screens. The [Quick Tip](#) option in the [List Administration](#) screen is used to provide help for a system or additional field.

When an Administrator provides a quick tip for a system or additional field, the ? icon displays to the left of the field. When the user "hovers over" the field, a superscript window displays with information or instruction for populating the field.

The Contract (Bundle) Description field in a [request type template](#) is used to provide a quick tip during the contract request process. When a user initiates a contract request and hovers over the Description field in the Request screen, the quick tip assists the user in correctly populating the field. The information the user enters into the Description field is transferred to the Contract Description field in the Contract Profile once the contract request is approved and the profile is created.

Help System

Conga Contracts provides an online help system, which directly links you to the Contracts support site where you can access the topics in both the User Guide and Administrator Guide.

The User Guide contains basic program information and step-by-step instructions for the several tasks that can be accomplished in Contracts. The Administrator Guide contains security-related tasks and program configurations that must be performed before Contracts is ready for use.

Context-sensitive help is also provided for the Company Profile and Contract Profile, and the screens linked to each Profile.

1. Click on the ? icon in the Navigation Toolbar to display a drop-down menu. From here, you can select Create Ticket or View Knowledge Base.
2. Click Help in the toolbar of a Company or Contract Profile to display a menu with options that directly link you to the help topics for the option selected. Context-sensitive help is available for:
 - Company Profile: Click on a menu option to access the help topics for the screens linked to the Profile: Documents, Tasks, Events, Messaging, People, Locations, History, and Additional Forms
 - Contract Profile: Click on a menu option to access the help topics for the screens linked to the Profile: Contract Family, Documents, Tasks, Events, Payments, Messaging, People, Addresses, History, and Additional Forms.

Conga Contracts Portal

Contracts provides a secure module known as the Portal, which is an online forum that your customers and clients can access to share information, exchange documents, negotiate contracts, and sign documents using electronic signatures. The Portal is also used to register suppliers (or vendors) who want to do business with your company.

Contracts includes a secure module known as the Portal, which is an online forum that your customers and clients can access to share information, exchange documents, negotiate contracts, and sign documents using electronic signatures. The Portal is also used to register suppliers (or vendors) who want to do business with your company.

Customers and clients receive the URL for the Portal from a link in an email message that is generated by the Document Package Wizard or the eSignature Package Wizard (from [DocuSign](#)).

Administrators are responsible for providing a link to the Portal to potential suppliers or vendors during the [Supplier Registration](#) process. During this process, Administrators can provide the link to suppliers via email, or the Administrator can post the link on their company's website.

The individuals who participate in document packages, the electronic signing process, and supplier registrations via the Portal are known as external participants.

Logging in to the Portal

1. Ensure the I have an account radio button is selected.
2. In the Email Address field, enter the email address that was used to invite you to the document package, participate in the eSignature process, or register as a supplier.

✔ **Tip:**

If you have not already set up your Portal account, you must [create an account](#).

3. In the Password field, enter your password.

✔ **Tip:**

If you don't remember your password, click the Forgot Password button to answer a security question. Once you correctly answer the question, you receive an email message containing a link to a screen that allows you to reset your password.

4. Click Login.

Creating a Portal Account

If you do not have a login to Contracts, but you are an external participant in a Contracts process, you are required to login to the Portal. If you do not have a Contracts Portal account, you will be required to create one.

1. Select the I need to register radio button.
2. When the screen refreshes:
 - Provide the required User Information.
 - Click the Portal Settings link to display the options:
 - Clear the appropriate check box if you do not want to receive an email when a document is checked out of or back into the document package, or when a document in the document package was completed.
3. Click Register.

Simultaneous Editing

Simultaneous edits to the same Company, Contract, or Project Profile results in only the edits of the user who saves the profile last to be saved. To avoid this issue, the ability to perform simultaneous editing can be disabled in the System Settings screen.

Contracts is a complex and dynamic contract management solution that offers a myriad of features to support the needs of its users and Administrators.

While Contracts accommodates several users and Administrators performing different functions simultaneously, there are instances where two or more Administrators performing edits to the same data at the same time results in lost edits, and may cause their browser to lock up or crash. When the uncommon situation arises wherein Administrators perform simultaneous edits to the same data, Contracts only recognizes the edits that were saved last, and disregards the prior edits.

An example is provided in the following scenario:

1. Administrator #1 and Administrator #2 open the same Contract Additional Form at the same time to make edits.
2. Administrator #1 adds a new field list (e.g., Delivery Method) to the form, and then saves the Additional Form.
3. Meanwhile, Administrator #2 is deleting a field list (e.g., Accuracy of Delivery) from the same Additional Form. Administrator #2 saves their edits to the form after Administrator #1 has saved their edits.
4. Contracts would recognize only the edits made by Administrator #2 (deletion of Accuracy of Delivery field list), and the edits entered by Administrator #1 (addition of new Delivery Method field list) would not be saved.

A System Administrator can disable simultaneous editing by selecting the Enable profile edit locks check box in the [System Settings](#) screen.

Mobile Devices

The Slim Mobile Interface provides access to Contracts using an Apple iOS 4+, BlackBerry OS 6.0+, or Android 2.3+ mobile device.

The Contracts Slim Mobile Interface allows program users to access the system using their Apple iOS 4+, BlackBerry OS 6.0+, or Android 2.3+ mobile device. This quick and easy access to the Contractssystem enhances communication and allows contract deals and negotiations to constantly move forward.

Once a user logs into the Contracts system from their mobile device, they can view company, and contract information, as well as perform tasks associated with the Contract and Company Profiles, such as downloading documents, closing events, completing tasks, and approving (or declining) Gateway steps in a workflow.

Supported Mobile Devices

The below are supported mobile devices for the Slim Mobile Interface:

Platform	Phones	Tablets
Android	<ul style="list-style-type: none"> • Google Pixel 3 • Google Pixel 2 / Pixel 2 XL • Google Nexus 6P • Samsung Galaxy S10 • Samsung Galaxy S9 / S9+ • Samsung Galaxy S8 • Samsung Galaxy S7 • Samsung Galaxy Note 9 • Samsung Galaxy Note 5 • Samsung Galaxy Note 4 	<ul style="list-style-type: none"> • Samsung Tab A 9.7 • Samsung Tab A 8.0
iOS	<ul style="list-style-type: none"> • iPhone XS Max • iPhone XR • iPhone X • iPhone 8 / 8 Plus • iPhone 7 / 7 Plus • iPhone 6S / 6S Plus • iPhone 6 / 6 Plus • iPhone 5S • iPhone SE 	<ul style="list-style-type: none"> • iPad Pro 12.9" (2nd Generation) • iPad Pro 10.5" • iPad Pro 9.7" • iPad 2017 (5th Generation) • iPad Air 2 • iPad Mini 4

Glossary

A glossary of key Conga Contracts terms and definitions:

Term	Definition
Acquisition Wizard	A system-generated tool that steps a user through the process of having one company acquire another company. The wizard will assign all selected information to the acquiring company (e.g., contracts, events, people, etc.).
Active (Contract)	One of the statuses that can be assigned to the contract(s) stored in a Contract Profile. Generally, an Active status means that the contract has been executed and is enforceable, as opposed to being Inactive, Expired, or In Process.
Active (Company)	One of the statuses that can be assigned to the company represented by a Company Profile. Generally, an Active status means that the company is engaged in active business with one or more legal entities, as opposed to being Inactive, or not currently conducting business.
Additional Fields	Administrator-defined fields that can be added to the default Company, Contract, or Project profile screen.
Additional Forms	Administrator-defined forms used to capture additional information for a company, contract, or project using two or more fields or lists. An additional form is <i>captured</i> (added) and stored in a Company, Contract, or Project Profile.
People	Defines the "form" of the contract (e.g., Master, Individual, Schedule, Purchase Order, Statement of Work, Amendment). Master and Individual agreements are standalone documents since they are enforceable on their own and do not require any supporting documents. Standalone agreements usually start with the words "This Agreement . . ." and do not include any incorporated agreements, such as Schedules, Purchase Orders, or Statements of Work. Incorporated agreements are ones that cannot stand on their own and must be attached to a Master or Individual agreement. For example, an incorporated agreement might start with the words "This Schedule is incorporated into and is a part of Master Agreement."
Archive	Process by which Administrators can archive Company Profiles and Contract Profiles into a secure storage area.

Term	Definition
Agreement Type	Identifies a contract as a root (parent) contract, which can stand on its own as a legal document, or an incorporated (child) contract, which must be attached to another document to be legally binding. Root agreements are displayed in bold text, such as Master or Individual , and incorporated agreements, such as Schedules and Statements of Work are displayed in regular text.
Auto Renewal, Auto Advance	An automatically-renewing contract where the Conga Contracts system advances the current contract expiration date to the next renewal date and sets up new event alerts.
Auto Renewal, Manual Advance	An automatically-renewing contract where a user must change the current contract expiration date to the next renewal date and set up new event alerts.
Audit Trail	A recorded history of changes made to the basic information in a Contract, Company, or Project Profile screen, as well as changes made to the data stored in the profile (e.g., people, addresses, and additional forms).
Automated Triggers	Changes in the system data that trigger action/notices from Conga Contracts (e.g., volume triggers send a notice when a dollar threshold has been reached).
Browse Screen	Program screen that displays a list of data records, such as a list of the companies or contracts stored in Conga Contracts. Users can control the number of records that display by filtering the records by status or some other criteria. Users can also filter the display by adding/removing columns of data so that only relevant fields are displayed in the browse screen.
Bulk Data Upload Tool	Program feature that allows you to bulk upload company, contract, and additional form data to Conga Contracts using an Excel template.
Clause Library	Repository for alternative contract language clauses, which is available to all users from their My Place menu.

Term	Definition
Company	Typically, a company is the "other party" in your company's contractual agreements in Conga Contracts. The other party to a contract can be a vendor (buy-side contract) or a customer (sell-side contract). A company also refers to your company's legal entities for organizations that enter into inter-company contracts (i.e., legal entities sign contracts with or among internal divisions or subsidiaries).
Company Locations	Linked section in a Company Profile used to add additional company locations. Location information includes not only the address, but the location type, such as a Regional Office or Storage Facility.
Company Group	Field in a Company Profile that is used to limit access to all companies in that group for security reasons. Company groups are defined first, and then users are given permissions to the data and documents in specific company groups. If a user does not have access to a company group, they will not be able to access any Company Profiles in that group or any of the company's contracts. Access to company groups is assigned to individual users via their role(s) in Conga Contracts.
Company Profile	Primary data screen used to capture key company information, which includes both default fields and Administrator-defined additional fields. The Profile also contains links to additional company information, including Contracts, People, Additional Names, Relationships, Locations, Tasks, Documents, Events, Messaging, Scorecards, Projects, Additional Forms, and History.
Contract	A document that legally binds at least two <i>legal entities</i> . A contract can include purchase orders, schedules, exhibits, attachments, and other documents.
Contract Addresses	Linked section in a Contract Profile that allows users to add additional address for a contract and specify them by type. Address types can include a notice address, billing address, and shipping address.
Contract Family	A group of incorporated and/or related contracts stored in a Company Profile.

Term	Definition
Contract Family Tree	An expandable/collapsible hierarchy of a contract family viewable in a Contract Profile.
Contract Group	Field in a Contract Profile that is used to limit access to all contracts in that group for security reasons. Contract groups are defined first, and then users are given permissions to the data and documents in specific contract groups. If a user does not have access to a contract group, they will not be able to view any of the contracts in that group from the Company Profile. Access to contract groups is assigned to individual users via their role(s) in Conga Contracts.
Contract Profile	Primary data screen used to capture key contract information, which includes both default fields and Administrator-defined additional fields. The Profile also contains links to additional information for the contract, including Contract Family, Documents, Events, Messaging, Tasks, Document Packages, Payments, People, Addresses, Products, Scorecards, Projects, Additional Forms, and History.
Contract Responsibilities	Contract feature that allows people to be assigned to duties relating to the negotiation, management, or enforcement of a contract. A contract responsibility can be associated with one or more user functions, as well as one or more user types (i.e., Program User, Company Contact, External Participant, or Legal Entity Person). The functions that people are able to perform in Conga Contracts are defined in their User Profile.
Contract Creation Templates	The MS Word documents that Administrators format and then map to Conga Contracts program fields in order to create the templates that are used to create contracts in Conga Contracts.
Contract Term Type	A category that identifies both the timeframe during which a contract is active and enforceable, and the method used to renew or inactivate the contract in Conga Contracts. See Auto Renewal - Auto Advance, Auto Renewal - Manual Advance, Fixed - Auto Inactivate, Fixed - Manual Inactivate, Perpetual, and Coterminous.

Term	Definition
Contract Type	Field in a Contract Profile that defines the type of deal being transacted (e.g., License). Frequently, the agreement will identify the contract type in the body of the document (e.g., "This Master Software License Agreement" where "Master" is the Agreement Type and "Software License" is the Contract Type). Conga Contracts supports a five-level hierarchy, so a Software License Agreement might be divided into Level 1 - Software, and Level 2 could be Desktop, Server, Mainframe, etc.
Coterminous	A term type used exclusively for the incorporated (child) contract of a root (parent) contract. When this term type is selected in an Incorporated Contract Profile, the Conga Contracts system automatically populates all the fields in the Term & Renewal section with the data captured for the root contract, including contract status.
Home Page	Home Page of Conga Contracts, which can be used to display linked data via portlets.
Direct Editing	Feature that allows a MS Word document to be edited in Conga Contracts and automatically saved as the next document revision.
Document Assembly	Program feature that allows you to run the Conga Contracts Clause Library inside MS Word so that clauses can be dragged and dropped from the Library directly into an open Word document.
Document Package	One or more documents that are shared and edited by the members of a document package team, which is formed for the express purpose of performing a specific contract-related task, such as negotiating a contract.
Documents	Electronic files that are uploaded and stored in the Documents section of a Company, Contract, or Project Profile. Documents can include files of any document type, including MS Word documents, PDF files, and Excel spreadsheets.

Term	Definition
DocuSign	An external application that works in conjunction with Conga Contracts to facilitate the electronic signing of documents. Documents are prepared for electronic signature using the eSignature Package Wizard in Conga Contracts, electronically signed in the DocuSign cloud, and then managed in Conga Contracts.
Dynamic Forms	<i>See Additional Forms.</i>
Envelope	The email message that is sent to signatories and recipients when the eSignature Package Wizard is run. The email contains the contract document(s) that must be signed electronically in the body of the message, as well as any instructions provided by the user who initiated the eSignature process using the Wizard.
Event	A happening that occurs during the course of a business relationship, which is usually tied to an event alert (email message) notifying interested parties about the upcoming event. Events mark key dates in the life of a contract, such as its expiration date, renewal date, and notice date. Events can also be important dates for a company, such as the renewal of certifications or a merger with another company.
Event Alert	<p>Email reminder that is sent to all interested parties, notifying them of an upcoming date for a contract or company event. An event alert can also be created for a contract's original expiration date. Event alerts are sent out prior to the event, and the number of days prior to the alert is defined by the user.</p> <ul style="list-style-type: none"> • Notification Date = Event Date - Number of Warn Days • Warn Days (user-defined) = number of days prior to the event date that email notification is sent. • Reminder Date = Notification Date + Number of Reminder Days • Reminder Days (user-defined) = number of days after the Notification Date that a reminder email alert is sent if the event has not been completed.
Event Alert Date	Date on which Conga Contracts schedules delivery of an event alert (email message), notifying recipients of a contract or company event that was created by a program user. Event Alert Date = Notification Date - Event Creation Date.

Term	Definition
Event Alert Status	<p>The status of an event alert is determined by Conga Contracts; it is completely automated and controlled on the back end. The possible statuses of an event alert are:</p> <ul style="list-style-type: none"> • Scheduled - Event Alert Date has not yet reached the Notification Date (Event Date - Number of Warn Days); therefore the event alert (email message) for the event has not yet been sent out. • Due - Event Alert Date has reached the Notification Date, and therefore, the event alert (email message) for the event has been sent out. However, the Event Date has not yet been reached. • Escalated - Both the Event Alert Date and the Reminder Date (Event Date - Number of Reminder Days) have passed, but the Event Date has not been reached. • Past Due - Event Date has passed without any action having been taken on the Event Alert. • Closed - Event has been completed (individual event) or closed (event series) by the Event Owner, and it is no longer active.
Event Date	<p>Date by which action must be taken for an event, such as the expiration date of a contract or the date on which notice must be given to renew or terminate a contract. Users are notified about event dates via email messages (event alerts) sent from Conga Contracts.</p>
Event Series	<p>A happening that occurs during the course of a business relationship and is repeated on a regular basis (e.g., daily, weekly, monthly, quarterly, or yearly). Every event in the series is usually tied to an alert and a reminder for the recurring event.</p>
External Participant	<p>Individuals that access Conga Contracts through the Portal or a third-party application. A list of external participants can be viewed from in the Address Book.</p>
Fixed Term Contract	<p>A contract that is in effect for a specified length of time. A fixed-term contract is set in advance and ends when a specific task is completed or a specific event takes place.</p>

Term	Definition
Fixed, Auto Inactive	A fixed term contract that the Conga Contracts system automatically inactivates when the contract reaches its expiration date (i.e., the contract's status is changed from "Active" to "Inactive").
Fixed, Manual Inactivate	A fixed term contract whose status must be manually changed from "Active" to "Inactive" by a user once the contract reaches its expiration date.
Flows	Administrator-defined templates that guide users in performing the steps that must be accomplished to complete a task for a company, contract, or project. Flows include color-coded stages, as well as steps with action buttons, and are displayed at the top of a Company, Contract, or Project Profile.
Forms Library	The additional forms that appear in the <i>Additional Forms</i> screen, which is linked to a Company, Contract, or Project Profile. Administrators create additional forms and then link them to specific Company, Contract, and Project Profile types so that users can capture the information required by the form.
Functions	User designations that reflect the titles the user holds, or the jobs they can perform in Conga Contracts.
Gateway Step	A step in a workflow that requires the approval of more than one person. Those who can approve a workflow step must hold one or more user functions, as defined in a Routing Table.
Help System	Information about Conga Contracts fields, functions, and usage.
Help Tips (Quick Tips)	Superscript windows that pop-up with definitions or instructions when a user hovers over a field in a program screen.
History File	A system-captured audit trail of all changes made to data fields in a Company, Contract, or Project Profile.

Term	Definition
Inactive Status	<ul style="list-style-type: none"> • One of the values in the Status field in a Contract Profile. This generally means that the contract is no longer in force, as opposed to "Active" or "In Process." The contract has either expired or been canceled. • One of the values in the Status field in a Company Profile. This generally means that the company is no longer "Active" or "On Hold," either having gone out of business or been acquired. Acquired companies are automatically given this status when the Acquisition Wizard is run.
Incorporated Contract	Contract that is integrated with other documents into a single legal document. Incorporated contracts have a parent/child relationship, which Conga Contracts displays as a tree structure.
In Process Status	<ul style="list-style-type: none"> • One of the values in the Status field in a Contract Profile. This generally means that the contract is in draft form and has not yet been executed. • One of the values in the Status field in a Company Profile. This generally means that the company is in the process of being accepted as a supplier or customer.
Legal Entity	Any entity that will be separately named during the contracting process. In Conga Contracts, companies that are separately named in a contract are marked as legal entities from their Company Profile. Individual contracts stored in Company Profiles are then associated with legal entities so reports can be run to locate contracts for a legal entity.
Location Name	Administrator-defined name for a specific type of company location, such as Regional Office.
Manual Advance	For an auto-renewing contract, one of the options for moving the contract forward to the next expiration date. Manual advance is used to move the contract to an "expired" status, which requires a user to manually process the renewal info and review the event alerts.
Messaging	Email feature that stores all communications sent and received from both Contract and Company Profiles.

Term	Definition
Mobile Notifications	Automated notices that are sent from Conga Contracts to users who have hand-held devices, enabling them to take action.
Mobile Slim Interface	A language and message format offered by Conga Contracts that allows users to access the application via a mobile device.
Multi-Party	Contracts that have more than two (2) parties bound to the terms, and all parties have signed the contract.
My Calendar	Calendar for individual users, which is launched from the My Place menu, displays on the user's Dashboard, and shows event and/or notice dates.
Notice Date	For Fixed - Auto Inactivate and Fixed - Manual Inactivate contract term types, it is the date by which action must be taken so that a contract does not expire. For Auto Renewal - Auto Advance and Auto Renewal - Manual Advance term types, it is the new expiration (i.e., old expiration date has been extended). <i>A Notice Date can exist even if an event alert is not created.</i>
Notice Period	Number of days prior to the end of a contract's current term that your company is required to provide notice of intent to renew or terminate the contract.
Notification Date	Date on which Conga Contracts send an event alert (email notification) to selected recipients, notifying them about an upcoming contract or company event. In the Event Profile, the Notification Date = Event Date - Number of Warn Days.
Notifications/Notice	A notice, reminder, or communication that is sent out from Conga Contracts via email and is tied to an event or standalone action.
One Click Report	A Comprehensive Contract or Company Summary Report that includes key data for a company or contract.
One Step Search	Search across Conga Contracts for user-defined company, contract, and project data. Users can search for a single keyword or a phrase.

Term	Definition
Parent Contract	A contract that is integrated with other contracts into a single legal document. A parent (or root) contract has a parent/child relationship with incorporated contracts, and this relationship is displayed as a tree structure in the Contract Profile.
Payment Stream	Incoming or outgoing payments recorded in the Payments section of a Contract Profile to reflect the amounts received/paid in accordance with the terms of a contract. Forecasts can also be run to calculate future amounts paid/received for a payment stream.
People Profile	Data input screen used to capture personal/contact information for program users, company contacts, and external participants who use Conga Contracts.
Perpetual Contract Term	A contract with an effective date, but no expiration date. Perpetual contracts are often Master agreements that contain legal terms, as well as schedules with term and renewal information.
Portlet	Window that can be added to the Dashboard to provide a user with quick access to the companies, contracts, and projects they recently visited. Portlets can also be added to quickly access a user's saved search queries, their recent messages, assigned events, tasks, workflow and flow steps, document package tasks, contract requests, contract approvals, and supplier registrations. A charting portlet can be added to display a graphic representation of data using a pie chart, bar chart, or time line.
Person Function	A designation that a person holds in relation to a company or contract (e.g., Contract Manager, Attorney, Sales Rep, etc.).
Profile	The "main page" that houses basic information for a company, contract, or project. A profile page also exists for most of the linked company, contact, and project data, including a Person, Document, Task, Event, Product, Document Package, Location, and Additional Form Profile.
Project	A feature that allows new data, documents, tasks, additional forms, and workflows to be captured and stored to accomplish a goal or provide reference data. A project can also include legacy data by incorporating existing Company and Contract Profiles.

Term	Definition
Reminder Date	Date on which another event alert (email message) is sent by Conga Contracts, reminding recipients that an open event is still not completed/closed. The Reminder Event Alert Date = Event Date - Number of Reminder Days (number of days entered into the <i>Reminder Days</i> field for the event).
Renewal Wizard	A system-generated tool that steps a user through the process of renewing a contract by requiring a new expiration date, renewal interval, notice date, and notice interval. In the wizard, users can also update the warn date, which is the number of days prior to the new expiration date that an email notification (event alert) is sent out.
Reports	Data extracts configured using the Report Wizard or the Advanced Reporting feature. Reports can be viewed in the Conga Contracts Report Viewer, downloaded as a PDF file, or exported as an Excel spreadsheet.
Roles	A security measure that controls individual user access to program features and stored data.
Routing Table	An Administrator-defined list that identifies the user function(s) that can approve a Gateway (approval) step in a company, contract, or project workflow.
Salesforce	An external application that works in conjunction with Conga Contracts to facilitate the creation of contracts. Contract requests are sent from Salesforce, reviewed and processed in Conga Contracts, and information is shared throughout the contract creation process.
Scorecards	Feature that allows users to rate companies, contracts, and projects based on criteria established by Administrators.
Security Group	A field in a Company or Contract Profile that is used to control access to the profiles in this group. Each user role grants access to one or more company and contract groups, and individual users are then granted access to one or more user roles, which can allow access to several different security groups.

Term	Definition
Self-Service Contract	A contract request that does not have to be approved.
Simple Gateway Step	A step in a workflow that requires the approval of a single person who holds one or more user functions, as defined in a Routing Table.
Single Use Form	An Additional Form that can only be captured once. When the form is added to a Company, Contract, or Project Profile, it cannot be captured again and it cannot be copied.
Sub-Contract	An incorporated contract.
System Fields	Standard Conga Contracts fields that cannot be modified or re-named.
Templates	Administrator-defined forms that can be used to create contracts and events alerts, run flows and workflows, and capture additional information for Company, Contract, and Project Profiles.
Wizard	A system-generated tool that walks a user through the steps needed to perform a company-related or a contract-related task.
Workflows	Administrator-defined set of steps for a process or procedure (<i>workflow template</i>) that is accomplished by a specific group of users (<i>workflow team</i>), and linked to individual Company, Contract, or Project Profile <i>types</i> and <i>groups</i> . If approval is needed for a workflow step, Administrators also create a <i>routing table</i> to identify the user functions that can approve the step.

Conga Contracts Licenses - Apache

Apache licenses used in Contracts Contract Management software solution.

Contracts makes use of a variety of Apache standard open source packages, as follows:

Apache ActiveMQ

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JAX-WS API

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JExcelApi

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Conga Contracts and AWS FAQs

Overview of Conga Contracts System Basics, including Technical Requirements, Security Measures, Program Components, Setup Tasks, and Simultaneous Editing. Security Measures include Standard Permission Types and User Role Security. Program Components include Navigation Toolbar & Admin Menu, Dashboard Portlets & Global Messages, Address Book & User Types, Contract & Company Wizards, Mouse-Overs & Quick Tips, and the Conga Contracts Portal.

Why are we moving to Amazon Web Services (AWS)?

By moving Conga Contracts to Amazon Web Services, Conga can focus on improving our core applications and increase our pace of innovation. AWS offers a rich selection of components that Conga can leverage to accelerate product development.

Other benefits include:

- **Consistent User Experience:** This change will create a consistent and reliable user experience to meet the performance demands of our customer base.
- **Enhanced Security:** AWS provides next generation security tools and threat intelligence that will enhance our security stance.
- **Improved Integration:** Migrating Conga Contracts to AWS will create a common hosting environment with our other products that will improve integration across the Digital Document Transformation Suite.
- **Increased Global Support:** The AWS Cloud provides access to a global network of region locations that will improve access to support worldwide.

Will this affect me?

- North America Conga Contracts customers who signed with Conga prior to August 27, 2018 are affected and should have already received legal notice.
- Customers who implemented after this date ARE NOT affected as they were provisioned with AWS.

How will this affect my Conga Contracts instance and experience?

The Conga Contracts application will not be affected by this change. You will see a more consistent and reliable user experience after the migration.

When will the AWS migration take place?

This communication is the first step in our plan for migration. We have planned a phased migration which will begin in November 2018.

Will I have to do anything?

The URL to login to Conga Contracts is still the same but some of the IP addresses we recently communicated to you will need to be updated.

Action items:

If you are unable to see the login page, it is important that you ask your IT Team to add the following IPs to your egress whitelist for uninterrupted access to Conga Contracts.

- 75.2.100.76
- 99.83.181.93

If your organization has strict firewalls and you were already whitelisting Conga Contracts, please ask your IT team to update their whitelist to the following ingress IPs.

- 44.226.4.87
- 34.218.25.184
- 44.226.251.241

Our Conga Contracts customers who are currently whitelisting email sources will need to preferably remove email whitelisting or, if that is not possible, update their current whitelisting process to allow emails from Amazon SES.

See <https://aws.amazon.com/blogs/messaging-and-targeting/amazon-ses-ip-addresses/> for up-to-date instructions to discover those ip addresses.

If you have any questions, please reach out to support@conga.com.

What happens to my data that is held in the current data centers?

We will move all data to Amazon Web Services. After migration is completed, the data in the current data centers will be deleted.

Where will my data be after the migration?

Both production and disaster recovery data will be held in AWS data centers in either the U.S. or Europe, depending on the location of your data today.

Will there be any downtime during the migration?

The migration will have a minor impact on customers based on the complexity of each individual customers' system. We will work with each customer to minimize any downtime.

How will Conga Contracts data be backed up?

We will work with AWS for backup and destruction of data while meeting the needs of our customer's data retention and compliance requirements. The shift to AWS will provide additional benefits for data backup, retention, and recovery operations including reliability, availability, scalability, flexibility, compliance, and security. [To learn about how Conga is backing up to the AWS Cloud, click here.](#)

Do you have security documentation available about the AWS hosting?

- An updated [security datasheet is available here.](#)
- Conga Contracts SOC 2 Type II audit period is from February 1, 2018, through January 31, 2019. The next report is scheduled to be available in February 2019. The 2019 report will include the AWS specific components of the service. It is important to note that Conga has maintained other services within AWS for a number of years. The core functionality, policies, and processes will be nearly identical to these existing services. If you would like to review an audit report for one of these services to understand specific AWS controls, we can provide a report upon request. Additionally, we can coordinate the delivery of the AWS SOC 2 Type II and/or ISO 27001 certification, which is also available immediately to any AWS customer via "Compliance Reports" within the AWS console.

How will the migration to AWS impact security?

The transition to AWS will not reduce any existing security controls, policies, or core processes covered by historical audits or previously completed customer assessments. The following are high level enhancements to Conga's security provisions that support our commitment to providing secure services to meet and adapt to the demands of evolving threats.

- Enhanced Encryption - Moving from disk-level encryption to separate file and database level encryption utilizing AES-256.
- Improved Recovery Time Objective (RTO) & Recovery Point Objective (RPO) -RTO improved from 24 hours to 2 hours and RPO from 2 hours to 1 hour.
- Agile Security - An environment which provides the ability to protect against more threats faster and adopt emerging security technology standards at a quicker pace. With the recent release of TLS 1.3, for example, implementation and support for customers will take place more quickly and easily. Agile security provides for

seamless scaling of security protections as the services expand for load or new regional services.

- Enhanced Monitoring & Protection - This is a next generation suite of tools which allows for further centralized visibility, incident mitigation, and reporting on the entire environment. It includes improved intrusion detection and prevention, anti-malware, file integrity monitoring, configuration auditing, and log monitoring.
- Enhanced Threat Defence Intelligence - This is an integration with leading providers of over 1,000+ global security experts who monitor global threat activity 24/7 and provide updated signatures and alerting to systems in near real time.
- Improved Physical Security - We leverage Amazon's best in class data center controls and processes to enhance the security and redundancy of environmental controls of the processing environments. Amazon data centers undergo continuous audits against a multitude of stringent compliance frameworks.

Does migration to AWS affect on-premises customers?

It does not affect on-premises customers.

Will this affect my API/integration with other applications?

- Yes, this migration will impact all API integrations, including custom integrations.
- We will work with individual customers on a case-by-case basis to help assist in the process of updating your API calls with the new endpoint connections.
- There is no action required at this point in time. However, once your new URL is ready, we will provide you with instructions on how to update your API calls.

Does this mean I need to use Salesforce?

No customer will be asked to move to Salesforce. You will still be able to access the Conga Contracts solution as you do today.

How can I learn more?

- We will host a live, in-person webinar on August 30, 2018 at 2:00 p.m. ET to walk through these details and answer your questions. [Please register for the webinar here.](#)

- We also recommend reviewing the [Amazon Web Services security whitepaper](#) to learn more about AWS's physical and operational security processes.
- If you have any additional questions, please feel free to reach out to your account manager or contact us at ContractsNotifications@getconga.com.

Did my customer receive legal notification?

- All customers who signed with Conga prior to August 27, 2018 received notification about this change.
- Customers who signed after August 27, 2018 were provisioned on AWS.

What is the timeline for AWS migration?

Below are some key dates that you should be aware of:

Date	Item	Details
August 27, 2018	Legal Notice	A formal letter was sent to customers to provide a legal notice in pursuant to the terms of their MSA.
August 27, 2018	Customer Communication	An email from Conga's Chief Product Officer, Doug Rybacki, provided advance notice to customers. The communication ensured all customers knew about the live webinar, FAQ, and migration timeline.
August 30, 2018	Customer Webinar	Customers were able to learn about key upcoming changes and have an opportunity to get questions answered by Conga Contracts product managers. Webinar Recording
April 12, 2018	EMEA Migration	Conga completes migration of Conga Contracts EU customers to Amazon Web Services.
November 7, 2019	In-App Notification	Customers will receive a notification upon logging into Conga Contracts giving them a heads up about this change and how it will impact them.

Date	Item	Details
November 7, 2019	Customer Communication	An email from Conga’s Chief Product Officer, Doug Rybacki, will provide advance notice to customers. The communication will ensure all customers know about this migration and how it will impact them.
December 14, 2019	AWS Migration Begins	Conga completes migration of Conga Contracts customers to Amazon Web Services during scheduled maintenance window.
December 16, 2019	In-App Notification	Customers will receive a notification upon logging into Conga Contracts letting them know the migration was complete.

Conga Contracts Features and Editions

An overview of Contracts features and editions.

Contracts offers editions tailored to your every need. The Repository Edition allows you to store and search contracts in a secure, central location. The Business Edition adds the ability to manage approvals, workflows, and signatures. The Enterprise Edition, our most inclusive edition, allows you to manage complex workflows and negotiations where risk is your top priority.

FEATURE SET	BENEFITS	REPOSITORY	BUSINESS	ENTERPRISE
Repository	Store, locate, and search all contracts. Understand the relationships between contracts in the same family.	✓	✓	✓
OCR (Optical Character Recognition)	Automatically perform OCR on your PDF files to take advantage of full-text searches.	✓	✓	✓

FEATURE SET	BENEFITS	REPOSITORY	BUSINESS	ENTERPRISE
3rd Party Contracts	Bring 3rd party paper into the system. Track and compare 3rd party contracts, map their data to fields for reconciliation, and identify which clauses should be saved in the clause library.	✓	✓	✓
Alert Notifications	Create and deliver alert notifications for every aspect of the contract management process that needs to be managed, so nothing gets forgotten.	✓	✓	✓
Single Sign On Integration	A Single Sign-On service (SSO) for our clients to provide ease of user administration and greater security controls. Ideal for clients with a large user base due to ease of implementation and affordable cost.	✓	✓	✓
Contract Creation	Leverage existing company data in the system when a new contract is created from a Company Profile by generating a root (parent) or incorporated (child) Contract Profile where information is stored and managed.	✓	✓	✓
Open in Word	Make it easy to review and redline in the format that you – or the other party – prefers.	✓	✓	✓
Redlining & True-Up™	Automatically track changes, and record accepted changes in your system of record.	✓	✓	✓

FEATURE SET	BENEFITS	REPOSITORY	BUSINESS	ENTERPRISE
Reporting	Enable standard and ad hoc reports on contract status and timelines, and access live overviews of contract activities.	✓	✓	✓
Word Plugin	The plug-in allows the Contracts Clause Library to run inside the Word application, so that clauses stored in the Library can be dragged-and-dropped into a Word document.		✓	✓
Clause Library	Store commonly used clauses and alternates that are pre-approved by legal to speed up contract authoring and negotiations, while maintaining control.		✓	✓
Workflows & Approvals	Automatically route tasks to appropriate parties and track their interaction and cycle times.		✓	✓
eSignature Integration	Create a seamless, end-to-end contract process, from negotiation to signature, and keep an audit trail.		✓	✓
Salesforce Integration	Integrates with CRM software to associate contracts with customer records, and with CPQ software to feed calculated quote details into the contract.		✓*	✓*

FEATURE SET	BENEFITS	REPOSITORY	BUSINESS	ENTERPRISE
API	Contracts Public API provides a set of web services for users to create and modify data in the system. The public API supports both SOAP and REST clients.		✓*	✓*
Clause Management	Allows a user to select a match between a clause in an uploaded document and an existing clause type stored in Contracts.			✓
Scorecard	Take business administration to the next level of decision-making with custom, quantifiable scorecards for your companies, contracts, and projects.			✓
Negotiation Portal	The Negotiation Portal is a collaborative workspace that provides secure access for buyers and sellers to invite participants to a contract negotiation to share information, exchange documents, negotiate contracts, and sign documents using electronic signatures.			✓

✓*Additional cost or professional services time may be required for some use cases.

What to expect with a Conga Contracts Sandbox

What to expect with a Conga Contracts Sandbox

You can expect the following with a Conga Contracts sandbox:

- Your users will still exist, but they won't be able to log in. You will still have the Admin User available, but any new users created after the creation of the sandbox and the refresh will be erased.
- Event and scheduled reports emails notifications will be disabled to avoid duplicate emails being sent from the production system.
- Contacts and users still retain their current email address. You can request a bulk change to a valid email address provided.
- Documents and creation templates are not copied over from your Production account. You will receive an error if you try to view any.
- If you have any integrations, or anything related to Single Sign-On, it will not be copied over. This includes eSignature integrations, which we can add upon request.

Note: Conga can create a blank sandbox for you upon request.

Warning: Your sandbox username must be different than your production username. For example, if your production username is [firstname@conga.com](#), your sandbox username is [firstname@congasandbox.com](#).

Program Security

Contracts offers multi-level security using the ROLES and USERS features, which work together so that very specific permissions can be granted to individual users.

Conga Contracts Security Overview

Multi-level security is available using the Roles and Users features, and the Groups option for Company, Contract, and Project Profiles.

- [Program Security Overview](#)
Contracts offers multi-level security using the Roles, Users, and Lists features, which work together so that very specific permissions can be granted to individual users.

Program Security Overview

Contracts offers multi-level security using the Roles, Users, and Lists features, which work together so that very specific permissions can be granted to individual users. A user with the Role Admin permission must first create a role and then assign one, none, or a combination of the [38 default permission types](#) to the role. A permission type grants administrative access to a program module or grants user access to a restricted module. Once roles are

created, a user with the User Admin permission adds program users to Conga Contracts and assigns one or more roles to each user.

In creating a role, security can be applied by granting/denying access to Contract, Company, and Project Profiles based on the group to which the Profile belongs. A user with the List Admin permission creates the individual company, contract, and project groups that are used to limit user access. For example, a List Admin can create a Restricted group for [companies](#), [contracts](#), and [projects](#). A Role Admin then limits access to the restricted company, contract, and project groups to specific [user roles](#). A Role Admin also controls access to secure [additional forms](#) and [document types](#) by limiting their access to specific user roles.

The following features are used to secure the information stored in Conga Contracts and limit access to program data and tasks:

- [Roles](#)
- [Users](#)
- [Company Group Lists](#)
- [Contract Group Lists](#)
- [Project Group Lists](#)
- [Additional Forms](#)
- [Document Types](#)

Roles

The Roles feature is a security measure that controls individual user access to Conga Contracts program features, as well as the data stored in the program.

- [Roles Overview](#)

A role is assigned to individual users as a security measure to control a user's ability to administer program features, as well as grant access to restricted features and data stored in the program.
- [User Roles and Permission Types](#)

Permission types grant users holding a role administrative permissions to program modules and access to modules that can be restricted. A role also identifies access to program data, the level of access, and the ability to upload documents to Company, Contract, and Project Profiles.
- [Locating a Role](#)

Existing user roles are viewed and managed from the Roles screen.
- [Adding Role-Based Security](#)

You need the List Admin, Additional Forms Admin, and Role Admin permissions to add security to a user role.

- [Adding a User Role](#)

You need the Role Admin permission to add a user role to Conga Contracts. Since there are 38 default permissions types, and five security groups with varying levels of access to program data and tasks, a role can be created using any combination of the permissions and access to security groups.
- [Copying a User Role](#)

You need the Role Admin permission to create a new user role by making a copy of an existing role, and then modifying the permissions. This option is useful if most of the same information for a new role is the same as an existing role.
- [Editing a User Role](#)

You need the Role Admin permission to update the permissions assigned to a user role, as well as the level of access to additional forms, document types, and individual company, contract, and project groups.
- [Deleting a User Role](#)

You need the Role Admin permission to delete a user role. However, a role can only be deleted if it has not been assigned to a user.
- [Viewing a Role's History](#)

You need the Role Admin permission to view a history of the changes made to any of the user roles that have been added to Conga Contracts.
- [Generating a Role and Permissions Report](#)

You need the Role Admin permission to generate a report showing all the roles that have been created for users and the permissions associated with each user role.

Roles Overview

A role is assigned to individual users as a security measure to control a user's ability to administer program features, as well as grant access to restricted features and data stored in the program.

The ability to administer a program feature, such as those in the Security, Configuration, and Global categories, includes the ability to add, modify, and delete information for the feature. Restricted features include Reporting, Bulk Data Upload Tool, Direct Editing in MS Word, and the ability to make and approve contract requests. Access to data can be restricted on the basis of the group to which a Company, Contract, and Project Profile is assigned. Within each group, a second level of security can be applied by limiting data access to Read Only (viewing) for certain groups, while allowing full access (ability to add and edit data, and access/upload documents) to other groups.

Important: Roles are used in creating individual User Profiles, and therefore, at least one user role must be created before users are added to Conga Contracts. However, a user's level of access to the groups, additional forms, and document types defined by their role

can be overridden by setting the User Type field in their User Profile screen to Contract Request Only or Casual User.

A user with the Role Admin permission creates the roles that are assigned to both program users and Administrators. A Role Admin can create a multitude of roles with varying administrator permissions and different levels of data access, all of which typically fall into one of three major categories:

- Role has a singular default permission and the name of the role reflects that permission.
- For example, a Workflow Administrator role is created and is assigned the Workflow Admin default permission. Security for the role can be applied on four levels: (1) controlling user access to the company, contract, and project groups to which individual Company, Contract, and Project Profiles are assigned, as well as access to the individual additional forms and document types that have been identified as requiring security (2) granting or denying access to a contract, company, or project group, an additional form, or a document type (3) controlling the level of access by granting/denying users the ability to view, create, and modify data in each Company, Contract, and Project group, additional form, and document type, and (4) controlling the ability to upload documents or only view the documents for a company, contract, and project group.
- Role has more than one default permission and the name of the role encompasses the permissions.
- For example, a Full Administrator role is created and is assigned all the default permissions, except Restrict to My Contracts. Security is applied on three levels, as described above.
- Role has no default permissions and the name of the role reflects access to company, contract, and project data.
- For example, a Power User role is created and assigned Full permissions to all the Company, Contract, and Project groups, as well as full access to any restricted additional forms and document types. Although this user role has full access to data and uploaded documents, it does not carry any administrative capabilities or access to the program features that can be restricted: Reporting, Advanced Reporting, Scheduled Reporting, BI Toolbox, Email Distribution Lists, Scorecard Viewing, Open in Word (Direct Editing), Bulk Data Upload Tool, Requestor for contract requests, and being an Approver for contract requests.

A Role Admin can perform the following tasks:

- [Locate an existing role](#)
- [Identify Role Permission Types](#)
- [Add Role-Based Security](#)
- [Add a User Role](#)

- [Copy a User Role](#)
- [Edit a User Role](#)
- [Delete a User Role](#)
- [Generate a Role and Permissions Report](#)
- [View a Role's History](#)

User Roles and Permission Types

Permission types grant users holding a role administrative permissions to program modules and access to modules that can be restricted. A role also identifies access to program data, the level of access, and the ability to upload documents to Company, Contract, and Project Profiles.

Permission types are one component of a role and grant users holding this role (1) administrative permissions in the Security, Configuration, or Global categories, which allow the administrator to add, modify, and delete information for a program module, and (2) access to program modules that can be restricted: Reporting, Advanced Reporting, Scheduled Reporting, BI Toolbox, Email Distribution Lists, Scorecard Viewing, Open in Word (Direct Editing), Bulk Data Upload Tool, Requestor for contract requests, and being an Approver for contract requests.

The second component of a role includes a security measure that controls access to program data, the level of access, and the ability to upload documents for the following groups:

Company Groups, Contract Groups, and Project Groups - Full, Viewable, Create, Modify, Documents, and Upload Documents check boxes are used to identify the level of access to each group, which determines the Company, Contract, or Project Profiles that are available to those assigned to this role.

- Contract Groups also contain a Run eSignature Wizard check box to control user access to the eSignature Package Wizard for each contract group. Selecting no check boxes denies the users holding this role access to the Profiles in this group.
- Additional Company, Contract, and Project Forms - Full, Viewable, Create, and Modify check boxes are used to identify the level of access to each additional form designated as restricted.
- Document Types - Full, Viewable, Create, and Modify check boxes are used to identify the level of access to each document type, such as executed contracts.

Important: A program user is assigned one or more user roles to control the type and amount of data they can access, as well as the program tasks they can perform. Another level of security is applied using the User Type field in the User Profile.

As shown below, a Power User role for government contracts is given full access to only the Cost Reimbursement and Firm Fixed Price contracts, which includes the ability to view and edit existing Contract Profiles belonging to these contract groups, view documents stored in existing Profiles, as well as create new Contract Profiles and upload documents to the Profiles. The Power User is also granted the basic Reporting permission. To complete the role, the Power User must be granted access to Company Groups that compliment the selected Contract Groups, as well as any applicable Project Groups and Additional Forms. Security is applied to the role by selecting the Document Types that the Power User can view, create, and edit.

Default User and Administrator Permissions

Administrator permissions and user permissions to restricted modules can be granted to users by adding a separate role dedicated to a single permission or adding a new permission or restricted module to an existing role.

 **Tip:**

A System Admin role should be created to grant a power user all of the Admin permissions, including System Settings Admin, along with the user permissions of Approver, Requestor, Email Distribution Lists, Reporting, Advanced Reporting, Scheduled Reporting, Analytics (BI Toolbox), Scorecard Viewing, Direct Editing (Open in Word), and the Bulk Data Upload Tool.

PERMISSION TYPE	ADMINISTRATOR ACTIONS	USER ACTIONS
Additional Forms Admin	<ul style="list-style-type: none"> View, create, and modify additional company, contract, and project forms. View, create, and modify the additional fields in the Company, Contract, and Project Profiles. 	
Advanced Reporting		Create, format, edit, and generate advanced reports.

Analytics	Create, modify, and delete Analytics Reports.	Create, modify, and delete Analytics Reports.
Approver		Approve contract requests.
BI Tool (replaces Analytics)	Create, modify, and delete Analytics visualizations and reports.	Create, modify, and delete Analytics visualizations and reports.
Bulk Data Upload Tool	Simultaneously upload data for multiple companies, contracts, and additional forms using a spreadsheet.	
Clause Admin	Create, modify, and delete clauses, regardless of the clause's security level.	
Company Admin	Perform administrative functions for companies, including using the wizards: Merger/ Acquisition, Change Name, Archive, and Mark as Legal Entity.	
Contract Admin	Perform administrative functions for contracts, such as archiving contracts, and using the wizards: Creation, Renew Contract, Document Package, Assign Contract, and eSignature Package.	
Creation Template Admin	View, create, modify, and delete creation templates used by the Creation Wizard.	
Document Package Admin	Administer document packages in the program and in the Portal.	
Email Distribution Lists	View, create, modify, and delete email distribution lists.	

eSignature Admin	Create and void DocuSign or Adobe Sign envelopes.	
Flow Admin	Run a flow on an existing Contract, Company, or Project Profile, view flows, override a flow step, and invalidate a flow.	Users with this permission can perform all the Admin tasks, and participate in the following flow-related tasks: view flows and complete a flow step.
Flow Template Admin (Contract, Company, and Project)	Review the components of a template and review flow steps and their properties; view flow templates; add a flow template; add a workflow to a flow template; filter, unnamed link, publish, copy, edit, delete, and inactivate/ reactivate a flow template; load a previous version of a flow template; and reorder flow templates.	
Global Document Admin	Update and delete global documents.	
Global Messaging Admin	View, create, modify, and delete global Dashboard messages.	
Global Translation Admin	Translate and edit the translation of items in the List Administration screen; and download a translation file.	

List Admin	<p>Manage list values in List Administration screen for</p> <p>companies,</p> <p>contracts,</p> <p>projects,</p> <p>addresses, clauses, additional fields, additional forms, documents, global translations, people, company relationships, and workflow routing tables.</p> <ul style="list-style-type: none"> • View, create, copy, edit, and delete event alert templates. • View, create, edit, and delete task lists. 	
Open In Word (Direct Editing)		Edit MS Word Documents inside Conga Contracts
Profile Rules Admin	<p>View, create, modify, and delete profile rules for both system (default) fields and additional fields in Company, Contract, and Project Profiles.</p> <ul style="list-style-type: none"> • View, create, modify, and delete profile rules for Company, Contract, and Project Additional Forms. 	
Project Admin	Create projects using teams, and modify projects.	
Report Admin	Perform administrative functions for reports.	

Reporting		Create, modify, generate, delete, copy, and share basic reports.
Request Admin	View, create, copy, modify, and delete contract request types.	
Request Unlock Admin	View and unlock locked self-service contract requests.	
Requestor		Create contract requests (enhanced or legacy mode).
Restrict To My Contracts	Note: This role overrides all other user roles.	Limited to viewing the contracts for which the user has a responsibility; however, permissions to run the eSignature Package Wizard and download documents may also be granted.
Role Admin	View, create, copy, modify, and delete users roles; generate a Role and Permissions Report; and view the history of changes to a role.	
Scheduled Reporting	View, create, modify, and delete scheduled reports. This permission allows selection of the user whose role(s) determine the amount and type of data in the report generated and scheduled for distribution. Based on the combined roles' access to document types, company/contract/project groups, and secure dynamic forms, the scheduled report can range from a filtered report to a comprehensive report.	View, create, modify, and delete scheduled reports.

Scorecard Admin	View, create, modify, and delete scorecard Answer Profiles; view, create, modify, and delete Scorecard Components; and view, create, modify, and delete Scorecards.	
Scorecard Viewing		View Company, Contract, and Project scorecards.
Supplier Registration Admin	View and approve supplier registrations.	
Supplier Registration Type Admin	View, create, modify, and delete supplier registration types; add, edit, and delete documents from a supplier registration type.	
System Settings Admin	Send Global Messages; Configure System settings, Email settings, Integration settings for DocuSign (or Adobe Sign) and Salesforce, API settings, and Migration settings.	
True-Up Access	Grant permission to display a True-Up button in the toolbar of a contract Document Profile.	Use True-Up button to identify and select changes to be made to fields in Contract Profile screen based on document selected.

<p>User Admin</p>	<p>View a list of users, add users, copy user information, edit user information, disable/re-enable users, archive users, replace users, generate User Reports, and generate User Login Reports.</p>	
<p>Word Add-In Access</p>	<p>Install the Word Add-In plugin and update a Word document using the Clause Library.</p>	<p>Install the Word Add-In plugin and update a Word document using the Clause Library.</p>
<p>Workflow Admin</p>	<p>View, create, copy, modify, and delete the available Workflow Templates; view, create, copy, modify, and delete the various Workflow Teams; and view, create, copy, edit, and delete the various Routing Tables.</p> <p>This role allows Administrators to perform both the administrative tasks shown above and the user tasks for any workflow. User tasks include (1) completing, reassigning, and approving any step in the workflow (2) managing workflow documents, and (3) editing, closing, and deleting the workflow.</p>	

Locating a Role

1. Existing user roles are viewed and managed from the Roles screen. A role is assigned to individual users as a security measure to control the user's ability to administer program features, as well as access data stored in the program.
2. Click Gear Icon in the Navigation Toolbar, and click the Roles link in the menu.

3. In the Roles screen, locate the role by its name or description.
4. Click a column heading to change the sort order of the data.
5. To resize a column, hover over the right or left border of the column heading until the resize icon appears. Click the icon and drag the border to the desired width.
6. From the Roles screen, you can add a user role and run the Role and Permissions Report.
7. Click a role record to display its Role Profile screen, where you can:
8. Review the permission types granted to the role, as well as the groups, additional forms, and document types that the role can access.
9. Edit the information for a user role.
10. Make a copy of the user role.
11. Delete the user role.
12. View a history of the changes made to the role.
13. Save your changes.

Adding Role-Based Security

You need the List Admin, Additional Forms Admin, and Role Admin permissions to add security to a role held by users. A role can grant or deny access to a contract group, company group, project group, additional form, or a document type, as well as control the level of access if permission is granted.

Since roles are assigned to users and Contract, Company, and Project Profiles are assigned to a group when a user adds any of these Profiles to Conga Contracts, access to a Profile can be granted or denied by creating a Restricted group so that sensitive Profiles can be assigned to this secure group. Since the Contract Group, Company Group, and Project Group field in each Profile screen is a list, you must use the Lists feature to add Restricted as a list item in the Group field for each Profile type so that access to secure information can be controlled when a Role Admin adds a user role.

Adding a Restricted Contract Group

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter contract group in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, click the Contract Group list to display the existing groups in the right side of the screen.
4. Click Add in the toolbar to display a blank New Item record:
5. Click in the Name field and enter Restricted.

6. (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
7. Click Save.

 **Tip:**

You can also enter Confidential, Proprietary, or another term that indicates access to the Profile should be limited.

Adding a Restricted Company Group

1. Click Admin in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter company group in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, click the Company Group list to display the existing groups in the right side of the screen.
4. Follow Steps 4-5 in the Adding a Restricted Contract Group section.

Adding a Restricted Project Group

1. Click Admin in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter project group in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, click the Project Group list to display the existing groups in the right side of the screen.
4. Follow Steps 4-5 in the Adding a Restricted Contract Group section.

Applying Security to a Document Type

A role can apply security to certain types of documents, such as Executed Contracts. Although document security is also applied using the Lists feature, a Restricted group does not need to be created since each document type contains a Role Security check box that can be selected or cleared to apply or remove security. When the check box is selected, the document type is listed under the Document Types tab in the Role Profile screen when a Role Admin adds a user role. The Role Admin can either grant or deny access to the document type for users who hold the role.

1. Click Admin in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter document types in the Search field and press the ENTER key on your keyboard.

3. When the results display in the Fields List section, click the Document Types list to display the existing document types in the right side of the screen.
4. Click the Role Security check box to apply security to a document type.
5. Click Save.

Apply Security to an Additional Form

A role can apply security to an additional form so that it is hidden or shown in the Additional Forms screen in the Contract, Company, or Project Profile linked to the form. An Additional Forms Admin can apply security to an additional form by selecting the Use role-based security check box when setting restrictions for the form. When the check box is selected, the additional form is listed under the Additional Forms tab in the Role Profile screen when a Role Admin adds a user role. The Role Admin can either grant or deny access to the additional form for users who hold the role.

1. Click Admin in the Navigation Toolbar, and click the Additional Forms link in the menu.
2. In the Additional Form Admin Browse screen, locate the Form Type: Company, Form Type: Contract, or Form Type: Project category, depending on the additional form you want to locate.
3. In the Company, Contract, or Project category, locate the additional form, and click its form record to select it.
4. In the Profile Edit screen, click the Restrictions tab.
5. In the Restrictions view of the screen, select the Use role-based security check box to apply security to the additional form.
6. Click the Dynamic Profile tab to return to the default view.
7. Click Save.

Adding a User Role

You need the Role Admin permission to add a user role to Conga Contracts. Since there are [38 default permissions types](#), and five security groups with varying levels of access to program data and tasks, a role can be created using any combination of the permissions and access to security groups.

The security groups are Company, Contract, Project, Additional Forms, and Document Types. Within the Company, Contract, and Project Groups, the level of access ranges from View only to Full access to data in the Profile, as well as access to the documents stored in the Profile. The permission to perform tasks is restricted to uploading documents in Company and Project Profiles, while the tasks that can be performed from a Contract

Profile include uploading documents for CIM processing and running the eSignature Package Wizard. A role's access to additional forms and document types is granted or denied for only those additional forms and document types that have security.

When a user is assigned to a role, they can perform the tasks associated with each permission type granted in the role. Permission types include the administrative functions for a Security, Configuration, and Global module and the program modules that can be restricted (Reporting, Advanced Reporting, Scheduled Reporting, BI Toolbox, Bulk Data Upload Tool, Requestor, Approver, Open in Word (Direct Editing), Scorecard Viewing, and Email Distribution Lists).

 **Important:**


A user's level of access to company and contract groups defined by their role can be overridden by setting the User Type field in their User Profile screen to Contract Request Only or Casual User.

1. Click the Gear Icon in the Navigation Toolbar, and click the Roles link from the dropdown menu.
2. In the Roles screen, click New Role in the toolbar.
3. In the Role Profile screen, populate the Role Name and Role Description fields.
4. (Optional) Select a security level in the Clause Security list to identify the highest clause security level this user role can access.
5. (Optional) Select the Limit Editing User Preferences check box to prevent any user holding this role from populating or editing the fields in the Name, Address, and Contact tabs in their User Preferences window.

 **Tip:**

Users will still be able to access the Email Signature field in their Contact tab.

1. (Optional) In the Permission Types section of the screen, select the check boxes for all the permission types you want to assign to the role.
2. Assign the role's access level to each company, contract, and project group, additional form, and document type that uses security:

 **Tip:**

A role can be created by selecting one permission type and then selecting an access level to a single Company, Contract, or Project group, additional form, or document type. Conversely, a role can contain several permission types, and an access level for several company, contract, and project groups, additional forms, and document types.

1. In the Company Groups tab, select the check box(es) for a company group to define the role's level of access to the data for a company group, or leave all check boxes unselected to prevent access to the group:
2. Viewable - views information in Company Profiles.
3. Create - adds Company Profiles.
4. Modify - edits information in Company Profile screens, as well as linked information (except documents).
5. Documents - views and downloads documents stored in Company Profiles.
6. Document Upload - uploads documents to Company Profiles.
When this check box is selected, the Viewable and Documents check boxes are automatically selected since this permission works in conjunction with the Documents feature, which allows any user, even the Restrict to My Contracts role, to view and download documents.
7. Full - user is granted all the above permissions.
8. Click the Contract Groups tab, and select the check box(es) for a contract group to define the role's level of access to the data for the group (Viewable, Create, Modify, Documents, Document Upload, and/or Full), or leave all check boxes unselected to prevent access to the group.
9. Run eSignature Wizard - user can run the eSignature Package Wizard. This permission works in conjunction with the Contract Request feature and allows users who have made a contract request, which has been approved, to run the wizard so that the contract is sent for electronic signatures.

 **Tip:**

For a contract group, you must first select the Run eSignature Wizard check box or you will not be able to select the Full check box

1. Click the Projects tab, and select the check box(es) for a project group to define the role's level of access to the data for the group (Viewable, Create, Modify, Documents, Document Upload, and/or Full), or leave all check boxes unselected to prevent access to the group.
2. Click the Additional Forms tab, and select the check box(es) for an additional form to define the role's level of access to the secure additional form (Full, Viewable, Create, and/or Modify), or leave all check boxes unselected to prevent access to the additional form.
3. Click the Document Types tab, and select the check box(es) for a document type to define the role's level of access to the secure document type (Full, Viewable, Create, and/or Modify), or leave all check boxes unselected to prevent access to the document type.
4. The document types that appear in this list are determined by the selections made in the Role Security check boxes in the Document Types list in the List Administration screen, which are used in Clause Identification & Management.
5. Click Save.

Copying a User Role

You need the Role Admin permission to create a new user role by making a copy of an existing role, and then modifying the permissions. This option is useful if most of the same information for a new role is the same as an existing role.

1. Click the Gear Icon in the Navigation Toolbar, and click the Roles link in the dropdown menu.
2. In the Roles screen, locate the user role you want to copy, and click it to select it.
3. In the Role Profile screen, click Copy in the toolbar.
4. When the screen refreshes, enter a name for the new role in the Role Name field.
5. (Optional) Update the description of the role in the Role Description field.
6. (Optional) Change the selection in the Clause Security list to identify the security level for the clauses that this user role is permitted to use.
7. (Optional) Click or clear the Limit Editing User Preferences check box.
Tip: Selecting this check box prevents any user holding this role from populating or editing the fields in the Name, Address, and Contact tabs in their User Preferences window. However, users will still be able to access the Email Signature field in their Contact tab.
8. Edit the permission types and/or the company, contract, project groups, additional forms, and document types that the user role can access. For additional information, refer to Steps 6-7 in Adding a User Role.
9. Click Save.

Editing a User Role

You need the Role Admin permission to update the permissions assigned to a user role, as well as the level of access to additional forms, document types, and individual company, contract, and project groups.

1. Click the Gear Icon in the Navigation Toolbar, and click the Roles link in the menu.
2. In the Roles screen, locate the user role you want to edit, and click it to select it.
3. In the Role Profile screen, click Edit in the toolbar to display the screen in edit mode.
4. When the screen refreshes, make any of the following updates:
 - Role Name field - click in the field and update the name of the user role.
 - Role Description field - click in the field and edit the role's description.
 - Clause Security list - click > in the field to display a list of security levels, and click another level to identify the clauses that this user role is permitted to use.
 - Click or clear the Limit Editing User Preferences check box.

 **Tip:**

Selecting this check box prevents any user holding this role from populating or editing the fields in the Name, Address, and Contact tabs in their User Preferences window. However, users will still be able to access the Email Signature field in their Contact tab.

5. Edit the permission types and/or the company, contract, and project groups, additional forms, and document types that the user role can access. For additional information, refer to Steps 6-7 in Adding a User Role.
6. Click Save.

Deleting a User Role

You need the Role Admin permission to delete a user role. However, a role can only be deleted if it has not been assigned to a user.

1. Click the Gear Icon in the Navigation Toolbar, and click the Roles link in the menu.
2. In the Roles screen, locate the user role you want to delete, and click it to select it.
3. In the Role Profile screen, click Delete in the toolbar.
4. In the Delete Role prompt, click Yes.

Viewing a Role's History

You need the Role Admin permission to view a history of the changes made to any of the user roles that have been added to Conga Contracts. The history of a role not only lists the change(s) that have been made, but also the date of the change and the user who made the change.

1. Click the Gear Icon in the Navigation Toolbar, and click the Roles link in the menu.
2. In the Roles screen, locate the user role whose history you want to view, and click it to select it.
3. In the Role Profile screen, click View History in the toolbar.
4. In the History view of the Role Profile screen, review the creation date and the user who created the role, along with any changes made to the role.
 - To sort the information in a column in ascending or descending order, click (toggle) the column heading.
 - To resize a column, hover over the right or left border of the column heading until the resize icon appears. Click the icon and drag the border to the desired width.
5. Click Back in the toolbar to return to the Role Profile screen.

Generating a Role and Permissions Report

You need the Role Admin permission to generate a report showing all the roles that have been created for users and the permissions associated with each user role. This tool is helpful in obtaining an overview of the roles that users can play in Conga Contracts and avoid any overlap that might cause security issues.

1. Click the Gear Icon in the Navigation Toolbar, and click the Roles link in the menu.
2. In the Roles screen, click Role and Permissions Report in the toolbar.
3. In the Role and Permissions Report Options prompt, select pdf, xls, or html in the Report Format list.

 **Tip:**

If you want to sort, edit, and/or reformat the report, select the XLS (Excel spreadsheet) option.

4. Click OK to display the report, which includes the name of each user role, a description, all the permissions granted to each role.
 - HTML displays the report in the Report Preview window.
 - PDF and XLS formats require you to download the report.

5. In the PDF report shown below, the Power User role can run Basic, Advanced, and Analytics Reports, create and manage Email Distribution Lists, and can start a Flow from a legacy Contract, Company, or Project Profile. The Company, Contract, and Project groups that the user can access display as true or false, depending on the level of access (Create, Modify, Documents). The user also has access to the Milestones additional form, and the Executed Contract document type. The Clause Security field is used to track a history of the changes made between clause security levels and user roles.

Users

The Users feature adds and manages the individual profiles of those who have been allowed to perform tasks, and view and/or manage the information stored in Conga Contracts.

Users are those individuals who have been granted permission to perform tasks, and view and/or manage the information in Conga Contracts.

Users can perform the following tasks:

- [Users Overview](#)
- [User Type Permissions](#)
- [Conga Contracts User Type Permissions](#)
- [Locating a User](#)
- [Adding a User with the Copy Feature](#)
- [Granting a User an Additional Role \(Permission\)](#)
- [Disabling and Re-enabling Users](#)
- [Replacing a User](#)
- [Archiving a User](#)
- [Editing User Information](#)
- [Resetting User Passwords](#)
- [Disabling and Enabling SSO](#)
- [Reviewing a User's History](#)
- [Generating a User Report](#)
- [Generating a User Login History Report](#)

Users Overview

A Conga Contracts program user has a login name and password and is able to view, capture, and/or manage program information. The Users feature allows those with the User Admin permission to create User Profiles, which store basic information for each user, as well as the functions they can perform and the roles they play in Conga Contracts.

User functions are needed for several tasks, such as assigning a responsibility for a contract and identifying those who can approve a flow step, a workflow step, and a contract request. User roles determine the program modules that a user can access and/or administer, the data they can access, and their level of access to a secure data group. Therefore, prior to adding users, a Role Admin must add all the appropriate user functions and roles.

User Type Permissions

Individual users are assigned a user type of Full, or Request/View User in their User Profile, which determines their access to program data and features.

A User Admin assigns each user one of the following user types in their [User Profile](#) screen:

- Full user (default) - User can be granted any permission (Viewable, Create, or Modify) for the contract, company, and project groups they can access, as defined by their [user role\(s\)](#). The user's role(s) can also define their [permission types](#) and the level of access they have to [additional forms](#) and [document types](#).
- Request/View User - User can make contract requests and view information for their submitted requests whether or not if they are assigned the Requestor permission in their user role. User can view and add tasks and messages to any the Contract Profile to which they are granted view access per their user role.

The User Type field in the User Profile screen reflects the user's level of access to the Contract Request feature, as well as their access to program data and the tasks they can perform, which are controlled by their user [role\(s\)](#). The table below summarizes a user's permissions based on their user type.

Admin

Feature / Task	Full User	Request/View User
Administer Creation Templates	Yes	No

Tools

Feature/Task	Full User	Request/View User
Dashboard & Portlets	Yes	Yes
Calendar	Yes	Yes
My Events - browse screen	Yes	Yes
My Contracts - browse screen	Yes	Yes
My Requests - View / Manage (Run Request Wizard)	Yes, requires role with Requestor permission	Yes, requires role with Requestor permission
My Requests - Upload Documents and Document Revisions	Yes	Yes
My Approvals (Contract request approvals) - View / Manage	Yes, requires role with Approver permission	No
Person browse (Address Book)	Yes	Yes
Global Documents - View	Yes	Yes
Global Documents - Manage	Yes	No
Clauses - View / View History	Yes	Yes
Clauses - Manage	Yes, requires role with Clause Admin Permission	No
eSignature Packages - View / Manage	Yes	Yes
Manage Supplier Registrations	Yes	No

Feature/Task	Full User	Request/View User
Projects - View	Yes	Yes
Projects - Manage	Yes	No

Search

Feature/Task	Full User	Request/View User
Basic Search	Yes, only visible when the Permission Type Restrict to my Contracts is disabled	Yes, only visible when the Permission Type Restrict to my Contracts is disabled
Search Query	Yes	Yes
Document Search	Yes, only visible when the Permission Type Restrict to my Contracts is disabled	Yes, only visible when the Permission Type Restrict to my Contracts is disabled

Companies

Feature/Task	Full User	Request/View User
All Companies browse screen	Yes	Yes
Filter by Company Status	Yes	Yes
Search for Company	Yes	Yes
Export Company List to Excel	Yes	Yes
Company Profile screen	Yes	Yes
Manage Companies	Yes	No
Edit Company Profile	Yes	No

Feature/Task	Full User	Request/View User
Add Contract to Profile	Yes	No
Manage Company Workflows	Yes	No
Generate One-Click Report	Yes	Yes
View and Run Company Reports	Yes, requires role with Reporting permission	Yes
Print One-Click Report	Yes	Yes
Complete Company Flow Step	Yes	Yes
Run Company Flow on Profile	Yes, requires role with Flow Admin permission	No

Contracts

Feature/Task	Full User	Request/View User
All Contracts Browse Screen	Yes	Yes
Filter by Contract Status	Yes	Yes
Search for Contract	Yes	Yes
Export Contract List to Excel	Yes	Yes
Contract Profile screen	Yes	Yes
Manage Contracts	Yes	No
Edit Contract Profile	Yes	No

Feature/Task	Full User	Request/View User
Add Incorporated	Yes	No
Manage Contract Workflows	Yes	No
Generate One-Click Report	Yes	Yes
View and Run Contract Reports	Yes, requires role with Reporting permission	Yes
Print One-Click Report	Yes	Yes
Complete Contract Flow Step	Yes	Yes
Run Contract Flow on a Profile	Yes, requires role with Flow Admin permission	No. Request/View users can complete flow steps and interact with flow but they cannot run or approve flow steps.
Contract Flow Approvals	Yes.	No. Request/View users can complete flow steps and interact with flow but they cannot approve flow steps.

Company Wizards

Feature/Task	Full User	Request/View User
Merge / Acquisition	Requires role with Company Admin permission	No
Change Name	Requires role with Company Admin permission	No
Archive	Requires role with Company Admin permission	No

Feature/Task	Full User	Request/View User
Mark / Unmark as Legal Entity	Requires role with Company Admin permission	No

Contract Wizards

Feature/Task	Full User	Request/View User
Renew Contract	Yes. Requires role with Company Admin permission	No
Document Package Wizard	Yes. Requires role with Document Package Admin permission	No
eSignature Package Wizard	Yes. Requires role with eSignature Admin permission	No
Assign Contract	Yes. Requires role with Contract Admin permission	No
Run Creation Wizard Manually	Yes.	No

Company Profile Links

Feature/Task	Full User	Request/View User
Contracts	Yes	View Only
People	Yes	View Only
Additional Names	Yes	View Only
Relationships	Yes	View Only

Feature/Task	Full User	Request/View User
Locations	Yes	View Only
Tasks	Yes	View Only
Documents	Yes	View Only
Events	Yes	View Only
Messaging	Yes	Yes
Scorecards	Yes	View Only
Projects	Yes	View Only
Additional Forms	Yes	View Only
History	Yes	View Only

Contract Profile Links

Feature/Task	Full User	Request/View User
Contract Family	Yes	View Only
Documents	Yes	View Only
Clauses	Yes	View Only
Events	Yes	View Only
Messaging	Yes	Yes
Tasks	Yes	View Only
Document Packages	Yes	View Only
Payments	Yes	View Only

Feature/Task	Full User	Request/View User
People	Yes	View Only
Addresses	Yes	View Only
Products	Yes	View Only
Scorecards	Yes	View Only
Projects	Yes	View Only
Additional Forms	Yes	View Only
History	Yes	View Only

Reports

Feature/Task	Full User	Request/View User
Run One-Click Reports	Yes	Yes
Run, Create, Edit, and Copy Report Wizard	Requires role with Reporting permission	Requires role with Reporting permission
Create Global Reports	Requires role with Reporting permission	No
Manage/Format Advanced Reports	Requires role with Advanced Reporting permission	No
Schedule Reports	Requires role with Scheduled Reporting permission	No
Manage BI Toolbox Analytics Report	Requires role with BI Toolbox permission	No

Conga Contracts User Type Permissions

A User Admin assigns each user one of the following user types in their User Profile screen:

User Type	Permissions
Full user (default) User	Can be granted any permission (Viewable, Create, or Modify) for the contract, company, and project groups they can access, as defined by their user role(s). The user's role(s) can also define their permission types and the level of access they have to additional forms and document types.
Request/View Only User	In the role(s) assigned to the user, the Create and Modify permissions granted for a Company, Contract, or Project group are overridden so that the user has only Viewable permissions for the selected groups. As with the Full user, the role(s) assigned to the Request/View Only User can also define their permission types and their level of access to additional forms and document types.

The User Type field in the User Profile screen reflects the user's level of access to program data and the tasks they can perform, which are controlled by their user role(s). The table below summarizes a user's permissions based on their user type.

- Tools
- Search
- Companies
- Company Wizards (Admin Tools)
- Company Profile Links
- Contracts
- Contract Wizards (Admin Tools)
- Contract Profile Links
- Reports

Feature / Task	Full user	Request/View Only User
Run One-Click Reports	Yes	Yes
Run Report Wizard (Add/Edit Report)	Yes, requires role with Reporting permission	Yes, requires role with Reporting permission

Feature / Task	Full user	Request/View Only User
Manage, Copy, Share Reports	Yes, requires role with Reporting permission	Yes, requires role with Reporting permission
Manage / Format Advanced Reports	Yes, requires role with Advanced Reporting permission	Yes, requires role with Advanced Reporting permission
Schedule Reports	Yes, requires role with Scheduled Reporting permission	Yes, requires role with Scheduled Reporting permission
Manage Analytics Reports	Yes, requires role with Analytics permission	Yes, requires role with Analytics permission

Locating a User

Existing users are viewed and managed from the Users screen. A user has a login and password to Contracts and is able to view, capture, and/or manage program information based on their roles and functions.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, locate the user by:
 - Typing their first or last name into the Search field and pressing the ENTER key on your keyboard.
 - Changing the default view from Active Users in the Status list to Disabled Users to locate a disabled user, or All Users to display both active and disabled users.
3. (Optional) Manage the display of information in the screen:
4. Update the columns that display using the Sort/Column menu:
 - Reorder and resize the columns to manage the display of information in the screen.
 - Sort the data in a column by clicking (toggling) a column heading.
5. Click a user record to display their User Profile screen, where you can:
 - Edit a user's information
 - View a history of changes made for the user
 - Copy a User Profile
 - Disable/re-enable a user
 - Replace a user
 - Archive a user

Adding a User with the Copy Feature

You need the User Admin permission to add a new user by making a copy of an existing User Profile, and then modifying the information. This option is useful if a new user will have the same roles and functions as an existing user.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, locate the user whose profile you want to copy, and click their user record to select it.
3. In the User Profile screen, click Copy in the toolbar.
4. In the Copy Screen State prompt:
 - Select Yes to copy the original user's home page portlets.
 - Select No if you want the user to set up their own home page.
5. Populate the required fields for the new user.
6. (Optional) Populate the optional fields, and update the copied information, including the roles and functions assigned to the user.
7. Click Save.

Granting a User an Additional Role (Permission)

The tasks that a user can perform may change over time due to increased responsibilities and/or the addition of new modules to Contracts. To accommodate these changes, an existing role can be expanded by adding a new (or existing) module. Alternatively, a new role can be created for a new module and then assigned to the users who have permissions to perform the tasks associated with the module.

Expanding a User Role

You need the Role Admin permission to expand a user role by adding a new permission to the role. This option guarantees that all users who hold this role will have the new permission.

1. Click the Gear Icon in the Navigation Toolbar, and click the Roles link in the menu.
2. In the Roles screen, locate the role that needs the additional permission, and click on it to select it.
3. In the Role Profile screen, click Edit in the toolbar.
4. When the screen refreshes, scroll down to the Permission Types section.

5. In the Permission Type Name field, locate the new permission type in the alphabetized list, and select its check box.
6. Click Save.

Adding a Role and Granting the Role to Users

You need the Role Admin and User Admin permissions to add a role for the new permission, and then assign the role to individual users.

In the example shown below, a Document Assembly role is created for the Word Add-In Access permission, which allows users to edit a Word document using clauses from the Clause Library without launching Conga Contracts.

1. Add a new user role called Document Assembly and assign only the Word Add-In Access permission:
2. Click the Gear Icon in the Navigation Toolbar, and click the Roles link in the menu.
3. In the Roles screen, click New Role in the toolbar.
4. In the Role Profile screen, enter Document Assembly in the Role Name field
5. Enter a description of the role in the Role Description field.
6. In the Permission Types section of the screen, select the check box for the Word Add-In Access permission.(Optional) Assign the role's access level to each company, contract, and project group, additional form, and document type that uses security.
7. Click Save.
8. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
9. In the Users screen, locate the user who needs the new Document Assembly role, and click their user record to select it.
10. In the User Profile screen, scroll to the bottom of the screen.
11. In the Role Name field, locate the Document Assembly role in the alphabetized list, and select its check box.
12. Click Save.

Disabling and Re-enabling Users

You need the User Admin permission to disable a user so they can no longer log in to Conga Contracts. However, Conga Contracts has an Auto-Disable User system setting, which automatically disables a user who has not logged in to the system for "x" number of days. If a user has been disabled by Conga Contracts, you can still re-enable the user from their User Profile.

Disabling a User

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, locate the user you want disable, and click their user record to select it.
3. In the User Profile screen, click Disable User in the toolbar.

The Disable User button changes to a Re-enable User button to quickly and easily reverse the action so that the user can once again be granted access to Conga Contracts without a User Admin having to create a new User Profile.

Re-enabling a User

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, select Disabled Users in the user status list.
3. Locate the user you want enable, and click their user record to select it.
4. In the User Profile screen, click Re-enable User in the toolbar.

Replacing a User

You need the User Admin permission to reassign the responsibilities from one program user to another. This option is useful if an employee gets promoted or leaves the company and all of their responsibilities must be transferred to another employee. The responsibilities that are transferred from one user to another include completing a workflow step, flow step, event, task, and scorecard, as well as holding a responsibility for a contract and serving as a member of a Project Team.

Important: The replacement user must have the same roles and functions as the user being replaced. This feature does not function on inactive Contract Profiles.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, locate the user you want to replace, and click their user record to select it.
3. In the User Profile screen, click Replace User in the toolbar.
4. In the Replace User prompt:
5. Select a replacement user in the Replace user list.

 **Tip:**

Only the users whose roles and functions match the user being replaced will display in the list.

6. Click Submit.

7. In the Success prompt, click OK.

Archiving a User

You need the User Admin permission to archive, rather than disable a user if there is no chance the user will be accessing the program in the future. However, a user cannot be archived if they are named in a contract, company, or project-related task or responsibility. The login name for an archived user can be reused, if needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, locate the user you want to archive, and click their user record to select it.
3. In the User Profile screen, click Archive User in the toolbar.

 **Tip:**

If the user cannot be archived because they are tied to program tasks and/or responsibilities, remove them from the items listed in the Cannot Archive User prompt, or use the Advanced Edit feature to assign their tasks and responsibilities to another user.

4. In the Success prompt, click OK.

Editing User Information

You need the User Admin permission to edit a user's information in their User Profile. You can edit a User Profile by changing the user's login name, password, and user type, updating their contact information, and revising the roles and functions they have been granted in Contracts.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, locate the user whose information you want to edit, and click their user record to select it.
3. In the User Profile screen, click Edit in the toolbar.
4. When the screen refreshes, make any of the following updates:
 - User Profile section - click in any field and edit the user's program information.
 - Person Profile section - click in any field and edit the user's contact information.
 - Person Generic Fields section - click in any field and edit the selection in an Administrator-defined list.
5. Change the roles assigned to the user by selecting or clearing a check box in the Selected column for a Role Name.

6. Click Save.

Resetting User Passwords

One program user can be designated as the person responsible for resetting user passwords. The responsible person receives an email message from system@conga.com with a Reset Password subject line each time a person clicks the Forgot Password link in the Login screen. The person responsible for resetting user passwords is identified by making a selection in the Forgot Password Email Address list in the System Settings screen.

1. In the system email message, identify the user that needs their password reset.
2. In Conga Contracts, open their User Profile, and populate the Password and Confirm Password fields with a temporary password that meets your company's password restrictions.
3. Select the Force Password Change check box.
4. Click Save.
5. In the second system email message, click the user's login link to open a message window.
6. In the message window, provide the user with their temporary password.
7. Click Send.

Disabling and Enabling SSO

You can enable and disable Single Sign-On for individual users by taking the following steps:

1. Click on the Gear Icon in the Administrator Navigation Toolbar.
2. Click on Users in the dropdown menu.
3. Click on the name of the user.
4. Check or uncheck the SSO User checkbox to enable or disable Single Sign-On for this user. When the box is unchecked, the user receives an email with a temporary password and is prompted to change the password on login.

 **Important:**

You are not able to Copy users flagged for Single Sign-On.

Reviewing a User's History

The User History File provides a chronological list of the changes that have been made to a user's User Profile.

You need the User Admin permission to view a history of the changes made to the information in the User Profile for a program user. The User History also provides the date the user was added to the system, along with the dates the user was disabled/re-enabled, if applicable. If a user was replaced by transferring their responsibilities to another user, a record of the replacement displays in the History screen of both User Profiles.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users browse screen, locate the user whose history you want to view, and click their user record to select it.
3. In the User Profile screen, click View History in the toolbar.
4. In the History screen, view the changes that have been made to the User Profile.

 **Tip:**

A change has been made if there is information in the Updated Value column for a field. The original information for the field is displayed in the corresponding Original Value column. If the Original Value field is blank, the information in the Updated Value field was provided after the Profile was initially created.

Generating a User Report

You need the User Admin permission to run a User Report, which is a comprehensive report that lists all the active and disabled users in Contracts. The report not only includes each user's name, but their login ID, user status, and the roles and functions assigned to them. The report also includes any other information captured in the User Profile, and displays the date (and time) the report was generated.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, click User Report in the toolbar.
3. In the User Report Options dialog box:
 - Select PDF, XLS, or HTML in the Report Format list.
 - Selecting XLS displays the report in an Excel spreadsheet, and the HTML option displays the report in a Report Preview window.
4. Click OK.

Generating a User Login History Report

You need the User Admin permission to run a User Login History Report, which identifies the users who are logging into Conga Contracts, how often they are logging in, and how much

time they are spending during each login session. The report includes each user's name, their login ID, and a history of their login and log-out times. The report also shows the date and time the report was generated.

1. Click the Gear Icon in the Navigation Toolbar, and click the Users link in the menu.
2. In the Users screen, click Login History Report in the toolbar.
3. In the Login History Report window:
 - Select one of the following date ranges for the report:
 - Use the default selection of Past 30 Days to run a monthly report.
 - Select the Past 90 Days radio button to run a 3-month report.
 - Select the Date Range radio button to set a custom timeframe for the report:
 - Click in the Start Date field and use the calendar to select the start date for the report.
 - Click in the End Date field and use the calendar to select the end date if the end date is not the current date.
 - Make a selection in the Report Format list:
 - Select PDF to download the report as a Portable Document Format file, XLS to download the report as an Excel spreadsheet, or HTML to display the report in a Report Preview window.
4. Click OK.

Conga Contracts Single Sign On (SSO)

Page notifications On Share Contracts provide a Single--Sign--On Service ("SSO") for our clients to provide ease of user administration and greater security controls.

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Conga Contracts Single Sign On Implementation Guide

This document outlines the basic elements that Contracts will provide for the implementation of Single Sign On and the information required from the customer.

The implementation of the Contracts Single Sign On solution is dependent on the identity provider platform selected by the customer. This document outlines the basic elements that Contracts will provide for the implementation and the information required from the customer. The last section includes the steps to implement a simple ADFS Relying Party Trust configuration.

- [Elements Provided by Contracts](#)
- [Elements Provided by the Customer](#)

- [Example AD FS 2.0 Configuration](#)

Conga Contracts Single Sign-On Overview

An overview of Contracts Single Sign-On.

Contracts provides a Single Sign-On Service “SSO” for our clients to provide ease of user administration and greater security controls. This solution is successfully deployed for other Global 1000 Contracts clients. Ideal for clients with a large user base, the ease of implementation and affordable cost, makes this a great solution for all Contracts customers. Contracts utilizes the widely used SAML method for our SSO Solution.

- [SSO Technical Services Description](#)
- [SAML Solution Options](#)
- [SSO Technical Services Summary](#)

Elements Provided by Conga Contracts

Contracts will provide two key elements. These include:

Service Provider Endpoint URL

The service provider endpoint URL is the location that the user’s browser will post the resulting signed assertion to and will be custom to the organization.

SAML Issuer for AuthnRequest

The issuer for the AuthnRequest coming from the Contracts SSO application will be by default:

- <https://congacontracts.com/SSO> (Americas 2)
- <https://sso.novatuscontracts.com> (Americas 1, Legacy Clients)

 **Note:**

This is configurable if issuer needs to be in a different format.

Elements Provided by Customer

The customer is responsible for providing Contracts with the following items:

Identity Provider Endpoint URL

This is the URL that will consume the SAML2 AuthnRequest. It must be able to understand the SAML 2.0 HTTP Redirect Binding.

Public Key of the Assertion Signing Certificate

Contracts need the Public Key portion of the company's certificate in order to validate the signature on the assertions passed from the customer. This must be standard x509 certificate format.

Authentication Only or Authentication and Authorization

Contracts will need to know whether the organization would like to manage the users and roles within the application (authentication only) or if customer would like the SSO solution to also create and manage the role membership of users based on data provided within the attributes of the assertion. If company chooses to handle authorization through the SSO solution Contracts will also need the users first name, last name, email address and group membership passed as attributes in the assertion.

Sample Assertion for Testing

The sample assertion is only for validating the signature and any mappings necessary based on the selection of authentication or authentication and authorization.

Example AD FS 2.0 Configuration

This is a quick example of configuring the Relying Party Trust in AD FS 2.0 with SAML 2.0. This guide will not cover setting up and configuring the AD FS system on a Windows Server. For more information on initial setup, please consult the Microsoft setup and configuration guides. To configure the Relying Party Trust in AD FS 2.0 with SAML 2.0, take the following steps:

1. Go to Administrative Tools and click on AD FS 2.0 Management Console.
2. Click on Trust Relationships section, and then Relying Party Trusts
3. Add Relying Party Trust.

4. On the Select Data Source screen, select to Enter data about the relying party manually.
5. Select a descriptive display name for service. This is only for your organization and does not impact the integration.
6. Select the AD FS 2.0 Profile. SAML2 was not introduced until version 2.0 of AD FS.
7. Skip the Configure Certificate step.
8. Check the Enable Support for the SAML 2.0 WebSSO protocol box and enter the URL provided by Contracts for the Relying party SAML 2.0 SSO service URL.
9. Enter in the issuer that the Contracts AuthnRequest provides. It is sso.novatuscontracts.com by default but this identifier must be unique across all relying party trusts so if more than one is configured (as in for testing purposes), a different identifier needs to be entered for each user.
10. Select issuance authorization rules. This is determined by the organization, but it is easiest to just permit all users access to this relying party. The following screen is a summary screen.
11. Click next to add the trust relationship.
12. On the final page, leave the Open the Edit Claim Rules dialog for this relying party trust when the wizard closes unchecked and click the close button to launch the dialog.
13. The dialog opens to the first tab for Issuance Transform Rules. Click the Add Rule... button at the bottom of the screen. This launches the Add Transformation Claim Wizard.
14. Select the Send LDAP Attributes as Claims as the Claim rule template to user.
15. For the claim rule name, select any descriptive name. For example, you can use "Default Mapping".
16. Click the attribute store dropdown and select Active Directory. Now for the basic authentication only scheme, Contracts will only need to map the first attribute, which is User--Principal-- Name LDAP attribute to the Name ID outgoing claim type. The rest of the attributes shown are necessary to handle authorization as well.
17. Click Finish.
18. Relying Party Trust is configured and ready to be used.

Managing SSO Self-Service Integrations

Contracts allows you to manage your own Self-Service integrations. After initial setup by Conga, your IT team can manage any further updates to SSO integrations themselves.

Prerequisites

- SSO Admin
- System Settings Admin

Important:

You must have a role assigned with the following Permission Types. Admins do not have these assigned by default, so check and verify they are added.

To enable this feature and manage your integrations, take the following steps:

1. Go to Admin.
2. Under Global, click System Settings.
3. Click on the SSO Settings tab.
Note: If you cannot see the SSO Settings Tab, refer back to the section above about assigning Permission Types to your Role.
4. Select one of the listed line items by clicking on the IDP URL.
5. In the left corner beneath PEM Signing Certificate, paste your certificate text and click Decode. If the code returns as valid, then click Create to add it to the list of certificates on the right.
6. Verify that the information listed under Identity Provider Details is correct.
7. After your changes are made, click Save.

SAML Solution Options

For clients who are considering deployment of SAML to support SSO for their contract management solution, Contracts provides the following information for your reference. SAML is a widely used, easy to deploy, and affordable solution. Security Assertion Markup Language 2.0 (SAML 2.0) is a version of the SAML OASIS standard for exchanging authentication and authorization data between security domains. SAML 2.0 is an XML--based protocol that uses security tokens containing assertions to pass information about a principal (usually an end--user) between an identity provider and a web service. SAML 2.0 enables web--based authentication and authorization scenarios including single sign--on (SSO). There are a number of reputable suppliers in the identity management space. The following are the major solution providers:

Siteminder (now owned by CA)

A large suite for your identity management needs which includes federation using SAML2. This suite is in use by our clients currently in conjunction with our SSO offerings. You can find more information at: <http://www.ca.com/us/internet--access--control.aspx>

Ping Identity

Another total suite that integrates with Active Directory to provide federation and single sign--on across the enterprise. More information at: <http://www.pingidentity.com/>

Microsoft AD FS 2.0

AD FS 2.0 added the ability to use SAML2 for federation and as a Microsoft product integrates completely with existing Active Directory deployments. You can find more information at: [http://technet.microsoft.com/en--us/library/adfs2\(WS.10\).aspx](http://technet.microsoft.com/en--us/library/adfs2(WS.10).aspx) The download for the software is available at: <http://www.microsoft.com/downloads/e...lyID=118c3588--9070--426a--b655--6cec0a92c10b&displaylang=en>

SSO Technical Services Description

The Contracts SAML SSO service is based on SAML2, utilizing the HTTP Redirect binding for SP to IDP communication and the HTTP Post binding for IDP to SP communication. We require the assertions to be digitally signed in order to validate the request. This solution offers two methods for authentication.

Authentication Only

Users are created and all user information is maintained within the application, the login name for a specific user then must match the Name ID in the subject passed via the assertion.

SSO Technical Services Summary

The Contracts Single Sign On Technical Services offering is performed by highly experienced senior technical resources who work with your internal IT organization. Upon installation of the SSO, Contracts performs testing and quality assurance with your IT work with the SEL Technical Team to ensure full accuracy. Upon completion of the installation and testing

the SSO solution will be immediately available. Upon login to your internal network, your Contracts users have the proper access and credentials in your Contracts management system.

Program Configuration

Conga Contracts program features that must be configured prior to use include screen Lists, Additional Forms, Profile Rules, Creation and Event Alert Templates, Contract Request Types, Flow and Workflow Templates, Supplier Registration Types, Scorecards, and Email Distribution and Task Lists.

Program Configuration Overview

Many Contracts program features must be configured prior to use, including screen Lists, Additional Forms, Profile Rules, Creation and Event Alert Templates, Contract Request Types, Flow and Workflow Templates, Supplier Registration Types, Scorecards, Task Lists, and System Settings.

Contracts requires several program configurations prior to use.

Configuration Overview

Several Contracts program features must be configured prior to use, including screen Lists, Additional Forms, Additional Fields, Profile Rules, Creation and Event Alert Templates, Contract Request Types, Flow and Workflow Templates, Supplier Registration Types, Scorecards, Task and Distribution Lists, and System Settings.

Administrators must configure several of the system features before Contracts is ready for use. Configuration of these features is accomplished from the Admin menu in the Navigation Toolbar, which also contains Security components (Users and Roles) and Global components (Advanced Edit, Global Messaging, System Settings, and Bulk Data Upload Tool).

Smart Document Generation

Conga Contracts offers the ability to generate documents with the proper clauses and fields merged into it depending on the data within the contract, company, and additional form profiles. With Smart Document Generation, Administrators select possible data fields where answers to questions are located so that they do not have to be entered manually. To set up Smart Document Generation:

1. Go to the Gear Icon.
2. Select Creation Templates.
3. Select a Template.
4. Click Template Question.
5. In the Questions section, click on the Answer Source column and make a selection.
An example of an Answer Source is Agreement Type.
6. In the Answers section, create Answers by selecting the Answer Text and optional Description.
An example of an Answer Text selection is Individual.
7. In the Actions section, create an Action by selection an Action Type and Action Actor associated with each Answer.
An example Action Type is Remove Section with the title of a section selected as the Action Actor.
8. Select Creation Template Fields and click Save.

Lists

Contracts program screens contain lists whose items selections must be managed prior to use, including the lists that appear in Company, Contract, Document, People, and Project Profile screens. The LISTS feature is also used to identify the required fields in the Company and Contract Profiles, and write Quick Tips to assist users in populating fields in program screens.

Overview of Lists

The Lists feature is used to add and manage the item selections that appear in the field lists in Contractsprogram screens. The Lists feature is also used to identify the required fields in the Company and Contract Profiles, and write Quick Tips to assist users in populating fields in program screens.

Lists Overview

Users with the List Admin permission manage the item selections in the default and additional field lists in Conga Contracts program screens. From the List Administration screen, List Admins define the available selections in a list to ensure users capture a specific type/category of information when populating the field in a Company, Contract, or Project Profile screen. The item selections in lists can also be managed in many of the program screens linked to these Profiles, such as company addresses, people, and relationships;

contract clauses and responsible people; and shared features like additional fields, additional forms, documents, global translations, and workflow routing tables.

The User Profile screen is a special use case of the Lists feature in that it contains five generic fields lists, labeled People Field 1 - People Field 5. List Admins not only define the item selections in each list, but also change the default name of each field in order to give meaning to the selections.

The Lists feature is also used to identify the required fields in the Company, Contract, and Project Profile screens, as well as required fields in the Person Profile screen, which is used to store information on company contacts, program users, and external people who participate in Conga Contracts. Another function of the Lists feature is to provide a Quick Tip, which assists a user in populating a field in a program screen and appears when the user hovers over the field.

Individual categories, as well as the field lists within each category, can be viewed and located in the List Administration screen and include the following:

Field Category	Field List Name	Profile Screen	Field Can Be Required	Field Has Quick Tip
Address	Location Type	Location Profile Click the Locations link in a Company Profile, and select the Add Location button	Yes	Yes
Clause Library	Clause Category, Clause Type, Clause Security	Clause Profile Click on the Clauses link in the Contracts menu in the Navigation Toolbar, and select the New Clause button.	No	No

Field Category	Field List Name	Profile Screen	Field Can Be Required	Field Has Quick Tip
Company	Company Category, Company Group, Company Type, Company Status, Company Additional Names	Company Profile Click on the New Company link in the Companies menu in the Navigation Toolbar.	Yes	Yes
Company Additional Fields	Variable - added by Administrators	Company Profile	Yes	Yes
Company Additional Forms	Variable - added by Administrators	Company Profile	Yes	Yes
Contract	Additional Party Type, Address Type, Contract Group, Agreement Type, Contract Status, Contract Type, Contract Responsibilities	Contract Profile Click on the New Contract link in the Contracts menu in the Navigation Toolbar.	Yes	Yes
Contract Additional Fields	Variable - added by Administrators	Contract Profile	Yes	Yes
Contract Additional Forms	Variable - added by Administrators	Contract Profile	Yes	Yes

Field Category	Field List Name	Profile Screen	Field Can Be Required	Field Has Quick Tip
Documents	Document Type Group, Document Types	Document Profile Click on the Documents link in a Company or Contract Profile, and select the New Document button.	No	No
Global Translations	Varies	Contract Profile, Company Profile, Project Profile	No	No
People	People Functions	Contract Profile, User Profile, Person Profile	Yes	No
Person	People Field 1 - People Field 5	User Profile	No	Yes
Project	Project Group, Project Status, Project Type	Project Profile	All fields required by default	No
Project Additional Fields	Variable - added by Administrators	Project Profile	Yes	Yes
Project Additional Forms	Variable - added by Administrators	Project Profile	Yes	Yes
Relationship	Company Relationship	Company Profile	No	No
Workflow	Routing Table Category	Contract Profile, Company Profile, Project Profile	No	No

Locating a List

The List Administration screen is used to manage the item selections in the field lists in Contracts program screens, designate required fields, and provide Quick Tips to assist users in populating fields in program screens.

Field lists are organized by categories and managed from the List Administration screen. Currently, there are 13 default list categories: Address, Clause Library, Company, Company Additional Fields, Contract, Contract Additional Fields, Document, Payment Terms, People, Project, Project Additional Fields, Relationship, and Workflow. Additional categories are added when an administrator adds an additional company, contract, or project additional form. These additional forms are added to the List Administration screen in alphabetical order by form name.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the Field Lists section of the screen, enter the name of the list, or the first few letters of the list name, in the Search field, and press the ENTER key on your keyboard. To clear the filter, click the icon.

Important: The Search option locates list names, not categories. For example, searching for workflow will yield no results, but searching for routing will show the Routing Table Category list in the Workflow category. Similarly, searching for contract will yield only those lists that begin with the word contract, but not Agreement Type, which is one of the field lists in the Contract Profile screen.

1. Click on the list name to select it, and display the existing items for the list.

If a field list contains a large number of items, click Excel in the toolbar to export the list to an Excel spreadsheet where you can more easily view and manage the list items.

The following table provides a list of default categories and lists, and the way in which the list is accessed in Conga Contracts.

<p>Address category</p>	<p>To add an item to any of the lists in this category, enter Location in the Search field, and press the ENTER key on your keyboard.</p> <p>Location Type - select to display buttons that allow you to add types of company locations, as well as edit, disable, or delete existing locations.</p> <ul style="list-style-type: none"> • Location Required Fields - select to display a list of fields that can be designated as required information, and click inside a field's check box to make it required. • Location Quick Tips - select to display the fields for which you can provide informational or instructional text in order to help users correctly populate a field. This text displays when the user hovers over the field. <p>Users access the list by clicking the Locations link in the Company Profile and selecting Add Location in the toolbar.</p>
<p>Clause Library category</p>	<p>To add an item to any of the lists in this category, enter Clause in the Search field, and press the ENTER key on your keyboard.</p> <ul style="list-style-type: none"> • Clause Category - select to display buttons that allow you to add the categories of clauses that are used as substitute language in your company's contracts, as well as edit, disable, or delete clause categories. • Clause Type - select to display buttons that allow you to add the types of clauses that are used as substitute language in your company's contracts, as well as edit, disable, or delete clause types. • Clause Security - select to display buttons that allow you to add different security levels that can be assigned to a clause, as well as edit, disable, or delete security levels. <p>Users access these three lists by clicking the Clauses link in the Contracts menu in the Navigation Toolbar, and selecting New Clause in the toolbar.</p> <p>Clause security is tied to user roles so that the access to substitute contract language can be controlled.</p>

<p>Company category</p>	<p>To add an item to the lists in this category, enter Company in the Search field, and press the ENTER key on your keyboard.</p> <ul style="list-style-type: none"> • Company Category, Company Type, Company Group, Company Status, and Company Additional Name Type - select to display buttons that allow you to add selections to these lists, as well as edit, disable, or delete existing selections. • Company Required Fields - select to display a list of fields that can be designated as required information. Click inside a field's check box to make the field required when a new company is being added to the system. • Company Quick Tips - select to display the fields for which you can provide informational or instructional text in order to help users correctly populate a field. <p>Users access these lists by clicking the New Company link in the Companies menu in the Navigation Toolbar.</p>
<p>Company Additional Fields category</p>	<p>To add an item to any of the lists in this category, locate the Company Additional Fields category by scrolling through the list.</p> <p>This category includes any field lists that were added to the default Company Profile by an Administrator.</p>

<p>Contract category</p>	<p>To add an item to the lists in this category, locate the Contract category by scrolling through the list. Tip: Entering Contract in the Search field will not return the the Additional Party Type,Address Type, and Agreement Type lists.</p> <ul style="list-style-type: none"> • Additional Party Type, Address Type, Agreement Type, Contract Location, Contract Group, Contract Type, Contract Status, and Contract Responsibilities - select to display buttons that allow you to add selections to these lists, as well as edit, disable, or delete existing selections. • Contract Required Fields - select to display a list of fields that can be designated as required information. Click inside a field's check box to make the field required when a new contract is being added to the system. • Contract Quick Tips - select to display the fields for which you can provide informational or instructional text in order to help users correctly populate a field. <p>The Contract Responsibilities list involves three intersecting components: contract responsibilities, user functions, and user types. Contract Responsibilities are not only used to assign positions of responsibility for a contract in a Contract Profile, but also to set the Requester and Approver roles in a contract request template.</p> <p>Users access these lists by clicking the New Contract link in the Contract menu in the Navigation Toolbar, or by selecting New Contract in the toolbar of the Company Profile.</p>
<p>Contract Additional Fields category</p>	<p>To add an item to any of the lists in this category, locate the Company Additional Fields category by scrolling through the list.</p> <p>This category includes any field lists that were added to the default Contract Profile by an Administrator.</p>

<p>Additional Forms</p>	<p>The fields lists added to a company additional form, contract additional form, and project additional form are listed as categories in alphabetical order by the name of the form. Therefore, it is recommended that Administrators precede the name of the additional form with "Company Additional" or "Contract Additional" or "Project Additional" so that the forms display in a central location in the List Administration screen.</p>
<p>Document category</p>	<p>To add an item to the lists in this category, enter Document in the Search field, and press the ENTER key on your keyboard.</p> <ul style="list-style-type: none"> • Document Type Group - select this list first to establish the groupings for your documents. Add selections to the list and manage the selections by editing, disabling, and deleting existing selections. • Document Types - after adding all the document type groups, add selections to this list and manage the selections by editing, disabling, and deleting existing selections. <p>Users access the Document Type list the Documents browse screen by clicking in the field, and in the Document Profile screen by clicking New Document in the toolbar.</p>
<p>Global Translations</p>	<p>To add an item to the lists in this category, enter Global in the Search field, and press the ENTER key on your keyboard.</p> <p>This category includes all of the list items contained in the additional form lists and additional field lists that Administrators have added to Conga Contracts, as well as some list items from default (system) fields in the Company, Contract, and Project Profiles so that Administrators can translate the list items into a language other than English.</p>

<p>People category</p>	<p>To add an item to the lists in this category, enter People in the Search field, and press the ENTER key on your keyboard.</p> <ul style="list-style-type: none"> • People Functions - select to display buttons that allow you to add selections to the list, as well as edit, disable, or delete existing selections. • People Required Fields - select to display a list of fields that can be designated as required information. Click inside a field's check box to make the field required when a new company is being added to the system. • Person Generic Fields - select to display the People Field 1 - People Field 5 generic field lists. Click in a list's Field Label column to rename the field. Click in the list's Description field to provide a quick tip that assists users in making the correct selection in the list. • To display all the person generic fields, enter Person in the Search field since a generic field that has been renamed will not display when you enter People in the Search field. • Once the field list is renamed, enter its new name in the Search field, and press the ENTER key on your keyboard. • Click the name of the field list to display buttons that allow you to add item selections for the list. <p>Users access the Functions list by clicking on the People link in a Company Profile and selecting Add Person in the toolbar. Administrators access the Functions list in the User Profile screen when adding a user.</p> <p>Users with the User Admin permission access the Person Generic Field lists in the Person Generic Fields section of the User Profile screen when adding a user or editing user information.</p> <p>People functions are used in other program features, including adding a responsibility for a contract in a Contract Profile, and identifying the users who can complete and/or approve a workflow step and a flow step.</p>
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<p>Project category</p>	<p>To add an item to the lists in this category, enter Project in the Search field, and press the ENTER key on your keyboard.</p> <ul style="list-style-type: none"> • Project Group - select to display buttons that allow you to add the groups to which a project can be assigned, as well as edit, disable, or delete existing groups. • Project Status - select to display buttons that allow you to add the statues that can be assigned to projects, as well as edit, disable, or delete existing statuses. • Project Type - select to display buttons that allow you to add the types used categorize projects, as well as edit, disable, or delete existing types. <p>Users access these three lists by clicking on the Projects link in either the Contracts menu or in the Companies menu in the Navigation Toolbar, and selecting New Project in the toolbar.</p>
<p>Project Additional Fields category</p>	<p>To add an item to any of the lists in this category, locate the Project Additional Fields category by scrolling through the list.</p> <p>This category includes any field lists that were added to the default Project Profile by an Administrator.</p>
<p>Relationship category</p>	<p>There is only one field list in this category: Company Relationships, which is found in the Relationships Profile. To access the list, click on the Relationships link in a Company Profile, and select the New Relationship button.</p> <p>Note: Administrators should add selections to the Company Relationships list, reflecting all the possible relationships between the companies in their Conga Contracts system.</p>
<p>Workflow category</p>	<p>There is only one field list in this category: Routing Table Category, which is found in the third step of the Workflow Wizard that can be launched from both a Company Profile and a Contract Profile. Administrators should first add selections to the Routing Table Category list, providing descriptive names for each selection, and then set up one or more routing tables.</p>

Company Lists

Company lists include the five field lists in the default Company Profile screen: Company Group, Company Category, Company Type, Company Additional Name Type, and Company Status. If additional field lists are added to the Company Profile, their list items must also be managed. The links in a Company Profile display program screens that also include field lists, including the Locations, People, Documents, Relationships, Workflows, and the Additional Forms screens.

Company Lists Overview

The Company Profile contains five default field lists that a user with the List Admin permission must populate with selections: Company Group, Company Category, Company Type, Company Additional Name Type, and Company Status. These lists allow the List Admin to control how companies are categorized, typed, named, and grouped, which facilitates searching for specific data. Managing the items in the field lists in a Company Profile is accomplished from the List Administration screen.

Important:

The Company Group field list is used as a security measure to control user access to Company Profiles. A List Admin can create a restricted company group list item and assign companies whose profiles need to be available to only select users to the restricted company group through their user role.

A List Admin can also identify the required fields in a Company Profile, as well as provide a Quick Tip for a field, which displays when a user hovers over the field.

A List Admin can perform the following tasks associated with the default field lists in a Company Profile:

- [Add an Item to a Company List](#)
- [Edit and Move Items in a Company List](#)
- [Disable and Delete Items in a Company List](#)
- [Identify a Required Company Profile Field](#)
- [Set Up a Company Quick Tip](#)

In addition to the default field lists in the Company Profile screen, lists can be added to program screens for other features linked to a Company Profile: Additional Fields, Locations, People, Documents, Relationships, Workflows, and Additional Forms.

Company Additional Fields

Within the Company Profile is a section where a user with the Additional Forms Admin permission can add additional fields in order to customize the default Profile screen. If any of the fields added to the Company Additional Fields section of the Profile are field lists, a user with the List Admin permission must provide these list selections and then manage the selections, which includes editing and moving list items, and disabling and deleting list items.

Company Locations List

The Company Profile contains a Locations link, which displays a Locations screen where users can provide multiple addresses for a company. This screen contains a Location Type field list that a List Admin must populate with selections, such as billing location and shipping location, so users can identify the type of location for every company address they add. A List Admin can also designate the required fields in the Locations screen, as well as provide Quick Tips to assist users in populating a field.

The locations added to a Company Profile are available for use in all of its Contract Profiles through the Addresses screen, which is accessed by clicking the Addresses link.

A List Admin can perform the following tasks associated with the fields and lists in the Locations screen:

- [Add an Item to a Location Type list](#)
- [Edit and Move Items in a Location Type List](#)
- [Disable and Delete Items in a Location Type List](#)
- [Identify a Required Location Field](#)
- [Set Up a Location Quick Tip](#)

Company People Lists

The Company Profile contains a People link, which takes users to a screen where they can add all of the people associated with a company and/or the company's contracts. The People screen contains one Functions field list, which allows users to identify one or more functions for each person. A List Admin is responsible for identifying all of the functions associated with creating, managing, and negotiating contracts.

A List Admin can perform the following tasks associated with the people Functions field list:

- [Add a Functions List Item](#)
- [Edit and Move Items in a Functions List](#)
- [Disable and Delete Items in a Functions List](#)
- [Identify a Required Person Field](#)

Company Document Lists

The Company Profile contains a link to the Documents screen, where users can upload, edit, and download documents. The Documents screen contains two field lists used to capture specific data about the document: Document Type Groups and Document Types. A List Admin is responsible for providing the selections in both of these field lists.

A List Admin can perform the following tasks associated with the field lists in the Documents screen:

- [Add an Item to a Document Type Group List](#)
- [Edit, Disable, and Delete Items in a Document Type Group List](#)
- [Add an Item to a Document Type List](#)
- [Edit, Disabling, and Delete Items in a Document Type List](#)

Company Relationships List

The Company Profile contains a link to the Relationships screen where users can add, edit, and delete relationships between companies. The Relationships screen contains a field list that identifies the various types of relationships that can exist between companies. A List Admin is responsible for providing the selections in this list.

A List Admin can perform the following tasks associated with the field list in the Relationships screen:

- [Add an Item to a Company Relationship List](#)
- [Edit and Move Items in a Relationship List](#)
- [Disable and Delete Items in a Company Relationship List](#)

Company Workflows

The Company Profile contains a Workflows button in the toolbar, which displays a Workflow Wizard when selected. The Wizard walks the user through the process of adding a workflow for a company-related procedure.

A user with the Workflow Admin permission creates the templates used in the Workflow Wizard. If a step in the workflow template requires the approval of more than one person, the Workflow Admin must add a routing table to identify the user functions that can approve the Gateway, or approval step. When adding a routing table, there is a Category list in the Routing Table Edit screen that is used to identify the type of routing table being added, and a Workflow Admin must provide the list selections for the Category list. Therefore, the Workflow Admin must also have the List Admin permission.

A List Admin can perform the following tasks associated with the Category field list in the Routing Table Edit screen:

- [Add an Item to a Routing Table List](#)
- [Edit and Move Items in a Routing Table List](#)

- [Disable and Delete Items in a Routing Table List](#)

Additional Form Lists

The Company Profile contains an Additional Forms link, which takes users to a browse screen listing all of the forms that have been linked to the Profile for the purpose of capturing additional company information. Users with the Additional Forms Admin permission design these forms using the Additional Forms feature and the forms are listed as categories in the List Administration screen, according to the name given to the form, if the form contains one or more field lists. Field lists appear as entries under the form name category and a user with the List Admin permission must manage the selections in the additional form field lists using the same procedures used to manage those in other Company Profile lists.

Adding an Item to a Company List

A List Admin must provide item selections for the five field lists in the default Company Profile screen: Company Category (broad classification of the types of companies with which your organization does business, such as corporation), Company Type (secondary classification for a company, such as customer or supplier), Company Group (security measure to restrict access to companies by user role), Company Additional Name Type (other names by which a company is known), and Company Status.

In addition to these default field lists, a user with the Additional Forms Admin permission can add additional field lists to the Company Profile screen, and must also have the List Admin permission to add selections to the field lists they add.

Item selections are added to all field lists in the Company Profile screen using the steps shown in the Company Group example shown below. However, the Quick Tip and Required Fields lists are handled differently.

Tip:

The Company Group list works in conjunction with user roles so that access to Company Profiles can be controlled. Therefore, at least one security identifier (such as Restricted or Proprietary) should be added as an item selection in the Company Group list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.

2. In the List Administration screen, enter company in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Company (7 Items) category.
4. In the Company category, click the Company Group list to display the existing groups in the right side of the screen.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

5. (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
7. Click in the Name field and enter a name for the group list item.
8. (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
9. (Optional) Click the Disabled check box to temporarily remove this group from the list of options in the Company Group field in the Company Profile screen.
10. Click Save.

 **Tip:**

To change the order of an item in the list, clear the Alphabetical check box, click the list item record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the prompt displays during the move.

Editing and Moving Items in a Company List

A user with the List Admin permission can edit a company list item can to accommodate changes in the way company information is categorized. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering of list items.

A company list item can also be disabled or deleted.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter company in the Search field and press the ENTER key on your keyboard.

3. When the results display in the Fields List section, locate the Company (7 Items) category.
4. In the Company category, locate the list with the item selection you want to edit or move.
5. Click the list to display its existing items in right side of the screen.
6. Perform any of the following edits for a list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list in the Company Profile screen, or clear the check box to display the items in the order in which they were entered.
 - Add another item to the list.
7. Change the order in which items appear in the field list in the Company Profile screen:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
8. Click Save.

Disabling and Deleting Items in a Company List

A user with the List Admin permission can disable an item selection in a list in the Company Profile screen so that it is temporarily removed as an option, or permanently delete it if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter company in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Company (7 Items) category.
4. In the Company category, locate the list with the item selection you want to to disable or delete.
5. Click the list to display its existing items in right side of the screen.
 - Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the field list in the Company Profile screen.
 - Locate the list item you want to delete, and click its delete icon.
 - Click Yes in the Remove List Item confirmation prompt.

6. Click Save.

Setting Up a Company Quick Tip

A user with the List Admin permission can provide a quick tip to assist users in correctly populating a field in the Company Profile screen. A quick tip is usually a phrase or a short sentence that provides guidance when users have several items to choose from in a field list. Quick tips are also used to ensure users populate or format a text field correctly.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter company in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Company (7 Items) category.
4. In the Company category, click the Company Quick Tips list to display the fields that can have a quick tip in right side of the screen.
5. Add a quick tip for any of the fields listed:
 - Locate the field in the alphabetized list.
 - Click inside the field's Quick Tip field to enable it, and enter information or instructions to assist users in populating the field.

 **Tip:**

You can use HTML formatting options in your quick tips, including placing key words or phrases inside bold tags () or italics tags (<i> </i>).

6. Click Save.

Managing Company Additional Field Lists

A user with the Additional Forms Admin permission can add one or more additional fields or lists to the default Company Profile screen. In adding a field or a list to the Profile screen, the Additional Forms Admin can make the field required and/or add a quick tip to help users populate the field. The Additional Forms Admin must also have the List Admin permission if any of the additional fields added to the Company Profile screen are combo or multi-select lists since item selections must be added. Once the item selections are added, the List Admin manages the list items in the same way as other types of list items are managed.

1. Open a Company Profile.
2. Scroll down to the Company Additional Fields section, and click to expand the section.
3. Identify the additional field list you want to manage.

 **Tip:**

If the field list is not present, add it to the Profile.

4. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
5. In the List Administration screen, scroll through Fields List section, and locate the Company Additional Fields category.
6. Locate the field list in the category, and click it to perform any of the following:
 - Add a list item to the field.
 - Edit or move an item selection for the field.
 - Disable or delete an item selection for the field.

Contract Lists

Contract lists include the eight field lists in the default Contract Profile screen: Contract Group, Additional Party Type, Address Type, Location, Agreement Type, Contract Type, Responsibilities, and Status. If additional field lists are added to the Contract Profile, their list items must also be managed. The links in a Contract Profile display program screens that also include field lists, including the Documents, Addresses, Workflows, Clauses, and the Additional Forms screens.

Contract Lists Overview

The Contract Profile contains eight default field lists that a user with the List Admin permission must populate with selections: Contract Group, Additional Party Type, Address Type, Agreement Type, Contract Type, Status, Location, and Responsibility. Contract lists allow a List Admin to control how contracts are categorized, typed, and grouped, which facilitates searching for specific contract data. Managing the items in the field lists in a Contract Profile is accomplished from the List Administration screen.

 **Important:**

The Contract Group field list is used as a security measure to control user access to Contract Profiles. A List Admin can create a restricted contract group list item and assign contracts whose profiles need to be available to only select users to the restricted contract group through their user role.

Three of the contract lists are managed differently than the others:

Contract Responsibilities involves three linked elements: contract title, person function(s), and user types.

Contract Type allows a hierarchy to be set for a contract type that has subsets, such as a Purchasing contract type that can be for either goods or services.

- Contract Group is used as a security measure to control user access to the Contract Profiles based on their group. For example, the List Admin can create a Proprietary, Confidential, or Restricted contract group list item and assign contracts whose profiles need to be available to only select users to one of these groups. A List Admin can also identify the required fields in a Contract Profile, as well as provide a Quick Tip for a field, which displays when a user hovers over the field.

A List Admin can perform the following tasks associated with the default field lists in a Contract Profile:

- [Add an Item to a Contract List](#)
- [Edit and Move Items in a Contract List](#)
- [Disable and Delete Items in a Contract List](#)
- [Add a Contract Responsibility](#)
- [Edit, Disable, and Delete Contract Responsibilities](#)
- [Add a Contract Type](#)
- [Edit a Contract Type](#)
- [Disable and Delete Contract Types](#)
- [Identify a Required Contract Profile Field](#)
- [Set Up a Contract Quick Tip](#)

In addition to the default field lists in the Contract Profile screen, lists can be added to program screens for other features linked to a Contract Profile: Additional Fields, Documents, Addresses, Workflows, Clauses, and Additional Forms.

Contract Additional Fields

Within the Contract Profile is a section where a user with the Additional Forms Admin permission can add additional fields in order to customize the default Profile screen. If any of the fields added to the Contract Additional Fields section of the Profile are field lists, a user with the List Admin permission must provide these list selections and then manage the selections, which includes editing and moving list items, and disabling and deleting list items.

Contract Document Lists

The Contract Profile contains a link to the Documents screen, where users can upload, edit, and download documents. The Documents screen contains two field lists used to capture specific data about the document: Document Type Groups and Document Types. Administrators are responsible for providing the selections in both of these field lists. The Document Types list is also used in role security to control user access to certain types of documents, and in clause processing to process the clauses in uploaded documents, as well as documents added to Conga Contracts in other ways, including an approved contract request with a document attachment.

A List Admin can perform the following tasks associated with the field lists in the Documents screen:

- [Add an Item to a Document Type Group List](#)
- [Edit, Disable, and Delete Items in a Document Type Group List](#)
- [Add an Item to a Document Type List](#)
- [Edit, Disabling, and Delete Items in a Document Type List](#)

Contract Address Type List

The Contract Profile contains an Addresses screen where users can add an existing company location from its Company Profile and then change the address type to fit the contract stored in the Contract Profile. A List Admin must provide the item selections for this Address Type list.

If none of the locations recorded in its Company Profile are correct, a user can add a new address from the Addresses screen, which will also add the address to the Locations screen in the Company Profile. The user then copies the new location as a contract address in the Addresses screen, and edits the selection in the Address Type field.

A List Admin can perform the following tasks associated with the fields and lists in the Locations screen:

- [Add an Item to a Location Type list](#)
- [Edit and Move Items in a Location Type List](#)
- [Disable and Delete Items in a Location Type List](#)
- [Identify a Required Location Field](#)
- [Set Up a Location Quick Tip](#)

Contract Workflow List

The Contract Profile contains a Workflows button in the toolbar, which displays a Workflow Wizard when selected. The Wizard walks the user through the process of adding a workflow for a contract-related procedure.

A user with the Workflow Admin permission creates the templates used in the Workflow Wizard. If a step in the workflow template requires the approval of more than one person, the Workflow Admin must add a routing table to identify the user functions that can approve the Gateway, or approval step. When adding a routing table, there is a Category list in the Routing Table Edit screen that is used to identify the type of routing table being added, and a Workflow Admin must provide the list selections for the Category list. Therefore, the Workflow Admin must also have the List Admin permission.

A List Admin can perform the following tasks associated with the Category field list in the Routing Table Edit screen:

- [Add an Item to a Routing Table List](#)
- [Edit and Move Items in a Routing Table List](#)
- [Disable and Delete Items in a Routing Table List](#)

Contract Clause Lists

Users store alternative language for the contracts they create, manage, and negotiate in their Clause Libraries. When a user adds a new clause to their Clause Library, the fields in the New Clause screen requires that each clause is assigned a category, type, and security level.

A List Admin can perform the following tasks associated with the clause field lists:

- [Adding a Clause Category and Type List Item](#)
- [Editing and Moving Items in a Clause Category and Type List](#)
- [Disabling and Deleting Items in a Clause Category and Type List](#)
- [Adding a Clause Security List Item](#)
- [Editing, Disabling, and Deleting Items in a Clause Security List](#)

The clauses in the Clauses screen linked to a Contract Profile are the result of document processing using the [Clause Identification & Management](#) feature.

Additional Form Lists

The Contract Profile contains an Additional Forms link, which takes users to a browse screen listing all of the forms that have been linked to the Profile for the purpose of capturing additional contract information. Users with the Additional Forms Admin permission design these forms using the Additional Forms feature and the forms are listed

as categories in the List Administration screen, according to the name given to the form, if the form contains one or more field lists. Field lists appear as entries under the form name category and a user with the List Admin permission must manage the selections in the additional form field lists using the same procedures used to manage those in other Contract Profile lists.

Adding an Item to a Contract List

There are eight field lists in the default Contract Profile: Contract Location, Group, Type and Status, Contract Responsibilities, Agreement Type, Additional Party Type, and Address Type. In addition to these default field lists, a user with the Additional Forms Admin permission can add additional field lists to the Contract Profile screen, and must also have the List Admin permission to add selections to the field lists they add.

A List Admin must provide item selections for the eight field lists in the default Contract Profile screen: Additional Party Type (types of additional parties to a contract, such as a limited partner), Address Type (different locations specified in a contract, such as shipping and billing addresses), Contract Location (place where contract was written or stored), Contract Group (security measure to restrict access to contracts by user role), Agreement Type, Contract Status, Contract Type (classification of contracts using a hierarchy), and Contract Responsibility (responsibility is defined and linked to user functions and types).

In addition to these default field lists, a user with the Additional Forms Admin permission can add additional field lists to the Contract Profile screen, and must also have the List Admin permission to add selections to the field lists they add.

Item selections are typically added to a field list in the Contract Profile screen using the steps in the Contract Status and Agreement Type examples shown below. The Contract Type field and Contract Responsibility fields involve variations to the basic procedure. The Quick Tip and Required Fields lists are also handled differently.

Contract Status

Tip:

The Contract Status list in the List Administration screen works in conjunction with Contract Profile Rules in that a Profile Rule will be applied even if the Status field in a Contract Profile is set to something other than Active, as long as the Status Type for the contract status is set to Active in the List Administration screen.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter contract in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Contract (7 Items) category.
4. In the Contract category, click the Contract Status list to display the existing statuses in the right side of the screen.

 **Tip:**

To display all 10 default lists in the Contract Profile, scroll through the alphabetized list until you locate the Contract (10 Items) category, which includes the lists that do not begin with the word Contract: Additional Party Type, Address Type, and Agreement Type.

5. (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the contract status.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
 - Make a selection in the Status Type list.
 - Select Active if a Contract Profile Rule that includes the Status field will be written. If the Status Type field is populated with anything other than Active, the profile rule will not be applied to any Contract Profiles, no matter what their status.
 - (Optional) Click the Disabled check box to temporarily remove this status from the list of options in the Status field in the Contract Profile screen.
7. Click Save.
8. Tip: To change the order of an item in the list, clear the Alphabetical check box, click the list item record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the prompt displays during the move.

Agreement Type

The Agreement Type and Contract Status lists are the only contract lists that contain a Status Type list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.

2. In the List Administration screen, scroll through the alphabetized list in the Fields Lists section until you locate the Contract (10 Items) category.
3. Click the Collapse icon for a category to increase the viewing area.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

4. In the Contract category, click Agreement Type to display the existing agreement types in right side of the screen.
5. (Optional) Clear the Alphabetical check box if you want the items to appear in the list in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and type over the existing text to name the agreement type.
 - (Optional) Click in the Description field and type over the existing text to add a description.
 - Select Root or Incorporated in the Status Type list.
 - Select Root if the contract does not require any supporting documents to be legally enforceable. Select Incorporated if the agreement relies on another document for its meaning or enforceability.
 - (Optional) Click the Disabled check box to temporarily remove this agreement type from the list of options in the Agreement Type field in the Contract Profile screen.
7. Click Save.

Editing and Moving Items in a Contract List

A user with the List Admin permission can edit a contract list item can to accommodate changes in the way contract information is categorized. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering of list items.

A contract list item can also be disabled or deleted.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, scroll through the alphabetized list in the Fields Lists section until you locate the Contract (10 Items) category.
 Entering contract in the Search field and pressing the ENTER key will display only seven of the Contract Profile lists since three lists begin with the letter A (Additional Party Type, Address Type, and Agreement Type).

3. In the Contract category, locate the list with the item selection you want to edit or move.
4. Click the list to display its existing items in right side of the screen.
5. Perform any of the following edits for a list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Make a different selection in the Status Type list for a contract Agreement Type or Contract Status.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list in the Contract Profile screen, or clear the check box to display the items in the order in which they were entered.
 - Add another item to the list.
6. Change the order in which items appear in the field list in the Contract Profile screen:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
7. Click Save.

Disabling and Deleting Items in a Contract List

A user with the List Admin permission can disable an item selection in a list in the Contract Profile screen so that it is temporarily removed as an option, or permanently delete it if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, scroll through the alphabetized list in the Fields Lists section until you locate the Contract (10 Items) category.

 **Note:**

Entering contract in the Search field and pressing the ENTER key will display only seven of the contract lists since three lists begin with the letter A (Additional Party Type, Address Type, and Agreement Type).

3. In the Contract category, locate the list with the item selection you want to disable or delete.
4. Click the list to display its existing items in right side of the screen.
 - Locate the list item you want to disable, and click its Disabled check box.

- Clear the check box to display the list item in the field list in the Contract Profile screen.
 - Locate the list item you want to delete, and click its delete icon.
 - Click Yes in the Remove List Item confirmation prompt.
5. Click Save.

Adding a Contract Responsibility

The Contract Responsibility field list is a special list that ties together three elements in assigning a contract responsibility to a user in the Contract Profile screen:

- Type of contract responsibility, such as Contract Manager or Attorney
- User type in accessing the program (user, company contact, legal entity person, or external party), either through the Login screen or the Portal
- Function(s) assigned to a user, company contact, legal entity person, or external party

A user with the List Admin permission creates a contract responsibility and then associates it to one or more functions and user types. Contract responsibilities are also used to set up the restrictions for the Requester and Approver roles used in a contract request template.

A List Admin should exercise care in setting up contract responsibilities since the dynamic between user functions and types may result in assigning a contract responsibility to a person who is not qualified. It is recommended that you test each responsibility individually by adding a contract to the system, adding the responsibility to the contract, and then viewing the list of people who can be assigned this responsibility. An easy alternative is to only assign user functions and leave all the user type check boxes empty.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, scroll through the alphabetized list in the Fields Lists section until you locate the Contract (10 Items) category.
3. Entering contract in the Search field and pressing the ENTER key will display only seven of the contract lists since three lists begin with the letter A (Additional Party Type, Address Type, and Agreement Type).

 **Tip:**

If the list of contract responsibilities is lengthy, click Excel in the toolbar to generate a spreadsheet showing the existing responsibilities before adding a new one.

4. In the Contract category, click Contract Responsibilities to display the Contract Responsibilities, Person Functions, and Person Type sections in the right side of the screen.
5. Click Add in the toolbar to display a blank New Item record:
6. Click in the Name field and type over the existing text to name the responsibility.
 - (Optional) Click in the Description field and type over the existing text to add a description.
 - (Optional) Select Sign in the eSignature Role list if a person with this contract responsibility has the authority to sign a contract document when the eSignature Package Wizard is run; otherwise, choose the blank (-) option.
 - Select the functions that a person must have to hold the contract responsibility in the Person Functions section by selecting one or more check boxes.
 - Select the user types that can hold the contract responsibility in the Person Types section by selecting one or more check boxes.
 - (Optional) Click the Required check box to make this responsibility a required field in all Contract Profile screens.
 - (Optional) Click the Disabled check box to temporarily remove this responsibility from the list of options when a user adds a contract responsibility in the Contract Profile screen.
7. In the Person Functions section of the screen, select the check box(es) for the function(s) that individuals must have in their User Profile or Person Profile to be assigned this new contract responsibility.
8. In the Person Type section, select the check box(es) for the person type(s) that can be assigned to this new contract responsibility.
9. Click Save.

Editing, Disabling, and Deleting Contract Responsibilities

A user with the List Admin permission can edit a contract responsibility by changing its name and the function(s) and user type(s) assigned to the responsibility. The List Admin can also grant or deny the eSignature role so that only those with a specific contract responsibility have the authority to sign a document during the eSignature process. The List Admin can temporarily disable a contract responsibility if it will be needed again in the future, or permanently delete it.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter contract in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Contract (7 Items) category.

4. In the Contract category, click the Contract Responsibilities option to display the Contract Responsibilities, Person Functions, and Person Type sections in the right side of the screen.
5. In the Contract Responsibilities section, locate the responsibility you want to update, and click it to select it. Perform one or more of the following:
 - Click in the Name field and type over the existing text to change the name the responsibility in the Contract Profile screen.
 - Click in the Description field and type over the existing text to edit the description.
 - Change the selection in the eSignature Role list to grant or deny the person with this contract responsibility the authority to sign a contract document when the eSignature Package Wizard is run.
 - Select Sign to grant the authority, or - (blank) to deny it.
 - Update the functions that a person must have to hold the contract responsibility in the Person Functions section by selecting or clearing check boxes.
 - Update the user types that can hold the contract responsibility in the Person Types section by selecting or clearing check boxes.
 - Select or clear the Required check box to make this responsibility a required or optional field in all Contract Profile screens.
 - Select or clear the Disabled check box to make the contract responsibility unavailable or available in the Add Responsibility list in the Contract Profile screen.
 - Click to permanently delete the contract responsibility, and select Yes in the Remove Person prompt.
6. Click Save.

Adding a Contract Type

A user with the List Admin permission creates the contract types used to categorize the contracts stored in Conga Contracts. A List Admin can set up a hierarchy to accurately identify each contract type and facilitate searching and/or reporting when locating a general contract type or specific sub-type. For example, if your company sells software and also provides support for the software, a Sales contract type could be created and contain two different types of contracts: Products (for customers who only purchase the software) and Products & Services (for customers who purchase the software and customer support).

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.

2. In the List Administration screen, enter contract in the Search field and press the ENTER key on your keyboard.
3. When the alphabetized results display in the Fields List section, locate the Contract (7 Items) category.
4. In the Contract category, click the Contract Type list to display the existing types in right side of the screen.
5. Tip: To display all 10 default lists in the Contract Profile screen, scroll through the alphabetized list until you locate the Contract (10 Items) category, which includes the lists that do not begin with the word contract: Additional Party Type, Address Type, and Agreement Type.
6. Add a contract type.

 **Tip:**

If the list of contract types is lengthy, click Excel in the toolbar to generate a spreadsheet showing the existing types before adding a new one.

7. Right-click the icon at the top of the list to display an Add/Delete menu, and select Add.
8. Click the icon if the top-level folder is not expanded.
9. When the New Item record displays at the bottom of the list:
 - Click in its Contract Type field, and enter a name for the contract type.
 - (Optional) Click the Disabled check box so the contract type does not immediately display in the Contract Type list in the Contract Profile screen.
 - (Optional) Add a sub-type to a contract type:
10. Right-click the icon for a contract type to display an Add/Delete menu, and select Add.
11. If present, click the icon for a contract type to display its sub-types.
12. When the New Item record displays immediately below the contract type as an indented record, click in its Contract Type field, and enter a name for the contract sub-type.
 - (Optional) Click the Disabled check box so the contract sub-type does not immediately display in the Contract Type list in the Contract Profile screen.
13. Click Save.

Editing a Contract Type

A user with the List Admin permission can update the names assigned to the contract types (and sub-types) stored in Contracts to meet their organization's changing policies and procedures.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.

2. In the List Administration screen, enter contract in the Search field and press the ENTER key on your keyboard.
3. When the alphabetized results display in the Fields List section, locate the Contract (7 Items) category.
4. In the Contract category, click the Contract Typelist to display the existing types in right side of the screen.

 **Tip:**

If the list of contract types is lengthy, click Excel in the toolbar to generate a spreadsheet showing the existing types.

5. Edit a contract type:
 - (Optional) Click the expand icon if the top-level folder is not expanded.
 - Locate the contract type, click in its Contract Type field, and type over the existing text to rename it.
 - Select or clear the Disabled check box to hide or display the item as a selection in the hierarchy in the Contract Type list in the Contract Profile screen.
6. Edit a contract sub-type:
 - Click the expand icon for a contract type to display its sub-types.
 - Locate the sub-type, click in its Contract Type field, and type over the existing text to rename it.
 - Select or clear the Disabled check box to hide or display the item as a selection in the hierarchy in the Contract Type list in the Contract Profile screen.
7. Click Save.

Disabling and Deleting Contract Types

A user with the List Admin permission can temporarily disable an item selection in the hierarchy in the Contract Type list in the Contract Profile screen if it will be needed again in the future, or permanently delete it if it is no longer relevant or applicable.

A contract type can only be deleted if it is not being used by a Contract Profile. Deleting a contract type will also delete all its sub-types.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter contract in the Search field and press the ENTER key on your keyboard.
3. When the alphabetized results display in the Fields List section, locate the Contract (7 Items) category.
4. In the Contract category, click the Contract Typelist to display the existing types in right side of the screen.

 **Tip:**

If the list of contract types is lengthy, click Excel in the toolbar to generate a spreadsheet showing the existing types.

5. Disable a contract type by clicking its Disabled check box.
6. Disable a contract sub-type by clicking the the expand icon for a contract type to display its sub-types. Click the sub-type's Disabled check box to hide the sub-type in the Contract Type list in the Contract Profile screen.
7. Delete a contract type:
 - Right-click the folder icon for a contract type to display an Add/Delete menu, and select Delete.
 - Click Yes in the Delete Contract Type confirmation prompt.
8. Delete a contract sub-type:
 - Click the expand icon for a contract type to display its sub-types.
 - Right-click the icon for a sub-type to display an Add/Delete menu, and select Delete.
 - Click Yes in the Delete Contract Type confirmation prompt.
9. Click Save.

Adding a Contract Group

To add a new contract group and ensure that it is visible to the proper users, take the following steps:

 **Note:**

These are the same steps to add a new Company Group.

1. Click on the administrator gear icon and select Lists from the admin drop down.
2. Search for Contract Group.
3. Click on Contract Group in the left hand menu.
4. Click Add.
5. In the existing list, click on the new line item named New Item to rename it.
6. After you rename your new line item, click Save.
7. Next, grant access to this group through Roles by going to the administrator gear icon, and select Roles.
8. Click into a Role that you want to grant access to the new Contract Group.
9. Click Edit.
10. Click Contract Groups.

11. Find the Contract Group you created and assign the proper permission level to this Role using the checkboxes to the right. If you select Full this will not select Run eSignature Wizard by default. This last permission type only applies to Request/View users. Full users have this permission checked by default.
12. Click Save.

In order to grant access to more Roles repeat steps 8 through 12 for each Role. Once the above steps are done, users are able to see and interact with Contract Groups in searching, reporting, and on the profiles.

Identifying a Required Contract Profile Field

Contracts requires that certain fields in the Contract Profile must be populated. In addition to these system-required fields, a user with the List Admin permission can designate additional fields that users must populate.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter contract in the Search field and press the ENTER key on your keyboard.
3. When the alphabetized results display in the Fields List section, locate the Contract (7 Items) category.
4. In the Contract category, click the Contract Required Fields list to display the fields that can be designated as required in right side of the screen.
5. Click the Required check box for a field to make it required in the Contract Profile screen.
6. Clear the check box to make the field optional.

 **Tip:**

Since Contract Location is a list that can be designated as a required field, the List Admin must ensure all item selections have been added before making the field required.

7. Click Save.

Setting Up a Contract Quick Tip

A user with the List Admin permission can provide a quick tip to assist users in correctly populating a field in the Contract Profile screen. A quick tip is usually a phrase or a short sentence that provides guidance when users have several items to choose from in a field list. Quick tips are also used to ensure users populate or format a text field correctly.

Important: The Contract Description field is used as a quick tip during the contract request process, rather than in the Contract Profile screen. When a user initiates a contract request and selects a Contract Request Type template, a quick tip icon displays for the Contract Description field in the template so that when the user hovers over the icon, the information provided as a quick tip assists the user in populating the field. The information the user enters into this field is transferred to the Contract Description field in the Contract Profile once the contract request is approved and the Profile is created.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter contract in the Search field and press the ENTER key on your keyboard.
3. When the alphabetized results display in the Fields List section, locate the Contract (7 Items) category.
4. In the Contract category, click the Contract Quick Tips list to display the fields that can have a quick tip in right side of the screen.
5. Add a quick tip for any of the fields listed:

 **Tip:**

You can use HTML formatting options in your quick tips, including placing key words or phrases inside bold tags (` `) or italics tags (`<i> </i>`).

- Locate the field in the alphabetized list.
 - Click inside the field's Quick Tip field to enable it, and enter information or instructions to assist users in populating the field.
6. Click Save.

Managing Contract Additional Field Lists

A user with the Additional Forms Admin permission can add one or more additional fields or lists to the default Contract Profile screen. In adding a field or a list to the Profile screen, the Additional Forms Admin can make the field required and/or add a quick tip to help users populate the field. The Additional Forms Admin must also have the List Admin permission if any of the additional fields added to the Contract Profile are combo or multi-select lists since item selections must be added. Once the item selections are added, the List Admin manages the list items in the same way as other types of list items are managed.

1. Open a Contract Profile.
2. Scroll down to the Contract Additional Fields section, and click to expand the section.
3. Identify the additional field list you want to manage.

 **Tip:**

If the field list is not present, add it to the Profile

4. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
5. In the List Administration screen, scroll through Fields List section, and locate the Contract Additional Fields category.
6. Locate the field list in the category, and click it to perform any of the following:
 - Add a list item to the field.
 - Edit or move an item selection for the field.
 - Disable or delete an item selection for the field.

Address Lists

Addresses related to the companies and contract documents stored in Conga Contracts are accessed via the Locations link in the Company Profile and the Addresses link in the Contract Profile. Both the Locations Profile and the Addresses screen contain at least one field list, whose items selections are managed by Administrators from the List Administration screen.

Address Lists Overview

The Location Type field list in the List Administration screen is used to define and manage the company and contract location types that are recorded and stored in a Location Profile screen, which is linked to both the Company and Contract Profiles, and used to add a company location.

The Company Profile contains a link to a Locations screen with a Location Type field list that a user with the List Admin permission must populate with additional company locations, such as a billing or shipping address.

The counterpart of the Locations screen in the Contract Profile is the Addresses screen, which is used to associate a contract address with an existing company location. If none of the locations recorded in the Company Profile are correct, a user can add a new address from the Addresses screen, which will also add the address to the Locations screen in the Company Profile.

A user with the List Admin permission can perform the following tasks associated with the Location Type field list in a Company Profile:

- [Add an Item to a Location Type List](#)
- [Edit and Move Items in a Location Type List](#)

- [Disable and Delete Items in a Location Type List](#)
- [Identify a Required Location Field](#)
- [Set Up a Location Quick Tip](#)

Adding an Item to a Location Type List

A user with the List Admin permission must provide item selections for the Location Type field list, which is used in adding a company location for a company or contract. This list is used to record additional address types for a company, such as a branch office or a sales office, as well as a location for the hard copy of an executed contract, such as a HQ or an off-site storage facility.

The Location Type field list is found in the screen that displays when:

Locations link is selected in a Company Profile, and the Add Location button is selected.

Addresses link is selected in a Contract Profile, the Edit Address button is selected, and then the New Company Location button is selected.

The Location Quick Tip and Required Fields lists are handled differently than the Location Type list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter location in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Address (3 Items) category.
4. In the Address category, click the Location Type list to display the existing address types in the right side of the screen.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

5. (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the location list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the location type.
 - (Optional) Click the Disabled check box so the location type does not immediately display in the Location Type list in the Locations screen in the Company or Contract Profile.
7. Click Save.

✓ Tip:

To change the order of an item in the list, clear the Alphabetical check box, click the list item record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the prompt displays during the move.

Editing and Moving Items in a Location Type List

A user with the List Admin permission can edit an item in the Location Type list, which is used in adding a company location for a company or contract. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering for the items in the list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter location in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Address (3 Items) category.
4. In the Address category, click the Location Type list to display the existing address types in right side of the screen.
5. Perform any of the following edits for a location type list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list, or clear the check box to display the items in the order in which they were entered.
 - Add another item to the list.
6. Change the order in which items appear in the Location Type list:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
7. Click Save.

Disabling and Deleting Items in a Location Type List

A user with the List Admin permission can disable an item selection in the Location Type list so that it is temporarily removed as an option when a user adds a company location from a Company or Contract Profile. The List Admin can also permanently delete the list option if is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter location in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Address (3 Items) category.
4. In the Address category, click the Location Type list to display the existing address types in right side of the screen.
 - Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the Location Type field list.
5. Locate the list item you want to delete, and click its icon.
6. Click Yes in the Remove List Item confirmation prompt.

Identifying a Required Location Field

Contracts designates one field list in the default Location Profile screen as required. Administrators can also designate any of the other system fields and lists as required.

Contracts requires that the Location Name field in the Location Profile screen must be populated. In addition to this system-required field, a user with the List Admin permission can designate additional fields that users must populate.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter location in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Address (3 Items) category.
4. In the Address category, click the Location Required Fields list to display the fields that can be designated as required in right side of the screen.
5. Click the Required check box for a field to make it required in the Location Profile screen.
 - Clear the check box to make the field optional.
6. Click Save.

Setting Up a Location Quick Tip

A user with the List Admin permission can provide a quick tip to assist users in correctly populating a field in the Location Profile screen. A quick tip is usually a phrase or a short sentence that provides guidance when users have several items to choose from in a field list. Quick tips are also used to ensure users populate or format a text field correctly.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter location in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Address (3 Items) category.
4. In the Address category, click the Location Quick Tips list to display the fields that can have a quick tip in right side of the screen.
5. Add a quick tip for any of the fields listed:

 **Tip:**

You can use HTML formatting options in your quick tips, including placing key words or phrases inside bold tags () or italics tags (<i> </i>).

- Locate the field in the alphabetized list.
 - Click inside the field's Quick Tip field to enable it, and enter information or instructions to assist users in populating the field
6. Click Save.

Additional Form and Field Lists

An Administrator who creates an Additional Form that contains a field list must add and manage the item selections for the list. An Administrator who adds an Additional Field list to the default Company, Contract, or Project Profile screen must also add and manage the item selections for the Profile list.

Additional Form and Field Lists Overview

Additional forms are created and designed by users with the Additional Forms Admin permission so that supplemental information can be captured and stored for a company, contract, or project. Additional fields are the fields and lists that users with the Additional Forms Admin permission add to the default Company, Contract, and

Project Profile screens to capture standard information for every company, contract, and project.

Whenever an Additional Forms Admin designs an additional form that includes a field list, or adds an additional field list to a Profile screen, the items in that list are managed from the List Administration screen. Therefore, the Additional Forms Admin should also be granted the List Admin permission in their user role(s).

Field lists that have been added to an additional form are stored as categories under the name of the form in the List Administration screen. Since all categories in this screen appear in alphabetical order, a new additional form can be located by scrolling through the list to locate the form name. Additional field lists that have been added to the Company, Contract, or Project Profile screen are stored in the Company Additional Fields, Contract Additional Fields, or Project Additional Fields category in the screen. The Search option in the List Administration screen is useful in locating a field list in a category, but cannot be used to locate a category of lists.

From the List Administration screen, Administrators can also designate a field list as required, as well as add a Quick Tip, which is Setting Up a Contract Quick Tip instructional or informational text that displays when a user hovers over the field).

There are six types of lists used in the Additional Forms and Additional Fields features:

- **Combo List** - List Admin adds two or more items to the list, and users can select one item. Combo list items in an additional form are added, edited, moved, disabled, and deleted in the same way as items in an additional field are added, edited, moved, disabled, and deleted.
- **Multi-select List** - List Admin adds two or more items to the list, and users can select more than one item. Multi-select list items in an additional form are added, edited, moved, disabled, and deleted in the same way as items in an additional field are added, edited, moved, disabled, and deleted.
- **Linked Combo Field** - List Admin sets up a hierarchy of items in this field, which correspond to each selection in a combo list, so that when a user makes a selection in the combo list, the options in the linked combo field are limited to those defined by the List Admin. The items in a linked combo field can be added, edited, disabled, and deleted. Users can make only one selection in the linked combo list.
- **Linked Multi-Select Field** - List Admin sets up a hierarchy of items in this field, which correspond to each selection in a combo list, so that when a user makes a selection in the combo list, the options in the linked multi-select field are limited to those defined by the List Admin. The items in a linked multi-select field can be added, edited, disabled, and deleted. Users can make multiple selections in the linked multi-list.

- **Tree Field** - List Admin creates a hierarchy of items, allowing users to drill down one or more levels and select the most appropriate option. Items selections in tree fields can be added, edited, disabled, and deleted.
- **Person Field** - List Admin defines the functions that program users, company contacts, and external participants will have in Conga Contracts. List Admin can then add a Person Field to an additional form for a Company, Contract, or Project Profile, or an additional field in a Company, Contract, or Project Profile screen. List Admin provides a name for the field and assigns a single user function to the field. Conga Contracts translates the user function into a list of people who hold this function so that when a user populates the field in an additional form or field, they must select one of the people in the list.

Adding an Item to an Additional Form List

When a user with the Additional Forms Admin permission adds a field list to an additional Company, Contract, or Project form, they must also have the List Admin permission to add the items selections for the list.

There are six types of field lists that a user with the List Admin permission can add to an additional Contract, Company, and Project form: Combo List, Multi-select List, Linked Combo Field, Linked Multi-select Field, Tree field, and Person Field.

The Combo List, Multi-select List, Linked Combo Field, Linked Multi-select Field, Tree Field, and Person Field can also be added as an additional field in a Contract, Company, or Project Profile screen.

The steps below show how to add an item to a combo list or a multi-select list in an additional contract form, but the procedure is the same for an additional company form and an additional project form.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
 - The screen displays an alphabetical listing of categories. Additional forms are listed alphabetically as categories. Additional fields are listed under the categories: Company Additional Fields, Contract Additional Fields, and Project Additional Fields.
2. In the List Administration screen, locate the list by typing its name (or the first few letters of its name) into the Search field, and pressing the ENTER key on your keyboard.
3. Click the list in the Fields List section to select it and display the existing list items in right side of the screen.
 - (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.

4. Click Add in the toolbar to add a blank record.
5. When a New Item record displays:
6. Click in the Name field and enter a name for the list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
 - (Optional) Click the Disabled check box to temporarily hide this item so that it does not display in the field list.
7. Repeat steps 5-6 to add more selections to the list.
 - To change the order of an item in the list, clear the Alphabetical check box, click on the list record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the 1 selected row prompt displays during the move.
8. Click Save.

Editing and Moving Items in an Additional Form List

A user with the List Admin permission can edit an item in a list in an additional form associated with a Contract, Company, or Project Profile. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering for the items in the list.

A linked field, tree field, and person field in an additional form can also be edited, disabled, and deleted.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, locate the combo list or multi-select list by typing its name (or the first few letters of its name) into the Search field, and pressing the ENTER key on your keyboard.
3. Click the list in the Fields List section to select it and display the existing list items in right side of the screen.
4. Perform any of the following edits for a list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list, or clear the check box to display the items in the order they appear in the program screen.
 - Add another list item.
5. Change the order in which items appear in the field list:

 **Tip:**

An item in an additional field list in the Company, Contract, or Project Profile can also be disabled or deleted.

- Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
6. Click Save.

Disabling and Deleting Items in an Additional Form List

A user with the List Admin permission can disable an item selection in a field list in an additional form linked to a Contract, Company, or Project Profile so that the item no longer appears in the field list in the form. The List Admin can permanently delete the list item if it is no longer needed.

✓ Tip:

A linked field, tree field, and person field that has been added as an additional field to a Company, Contract, and Project Profile can also be edited, disabled, and deleted.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, locate the combo list or multi-select list by typing its name (or the first few letters of its name) into the Search field, and pressing the ENTER key on your keyboard.
3. Click the list in the Fields List section to select it and display the existing list items in right side of the screen.
4. Locate the list item you want to disable, and click its Disabled check box.
5. Clear the check box to display the list item in the field list in the additional form.
6. Locate the list item you want to delete, and click its icon.
7. Click Yes in the Remove List Item confirmation prompt.
8. Click Save.

Adding an Item to a Linked Field List

A user with the List Admin and Additional Forms Admin permission can add two types of linked fields to an additional form or to an additional field in a Contract, Company, or Project Profile:

- Linked Combo Field and Linked Multi-Select Field. Both fields work in conjunction with the Combo List, which must be added to the form or Profile first. Next, one of the linked fields is associated to the Combo List:
- Linked Combo Field - restricts the selection in the linked field to one item when a selection is made in the Combo List.
- Linked Multi-Select Field - allows multiple selections in the linked field when a selection is made in the Combo List.

Linked fields have a hierarchical relationship, which allows the List/Additional Forms Admin control over user responses by limiting the number of options in a secondary (linked) list when the user makes a selection in the primary (combo) list. The relationship between a combo list and a linked field is complex, and Administrators should carefully plan the association before adding linked fields to an additional form or to an additional field in a Profile.

A linked field can be added to a company, contract, and project additional form, and to an additional field in a Company, Contract, and Project Profile screen.

In the steps below, which use the example provided in the Adding a Contract Additional Form topic, the List/Additional Forms Admin first adds items to the combo list. Each item that is added to the combo list will automatically display in the linked multi-select field, and item selections can be added for each combo list option.

1. Create an additional form and add a combo list to the form, and then associate the combo-list with a linked combo field or linked multi-select field using the Lists feature.
2. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.

 **Tip:**

The screen displays an alphabetical listing of categories. Additional forms are listed alphabetically as categories. Additional fields are listed under the categories: Company Additional Fields, Contract Additional Fields, and Project Additional Fields.

3. In the List Administration screen, locate the Combo List by typing its name (or the first few letters of its name) into the Search field, and pressing the ENTER key on your keyboard.
4. Click the combo list in the Fields List section to select it and display the existing list items in right side of the screen.
5. (Optional) Clear the Alphabetical check box if you want the items to appear in the list in the order you add them, instead of alphabetical order.
6. Click Add in the toolbar to add a blank record.
7. When a New Item record displays:
8. Click in the Name field to enable it, and enter the name for the item selection.

9. (Optional) Click in the Description field and enter a description for the list item to provide users with information or instructions when they hover over the item.
10. Click Save.
11. In the List Administration screen, locate the Linked Combo Field or the Linked Multi-Select Field that is associated with the Combo List, and click it to select it. All of the item selections you added to the Combo List display in a hierarchy, allowing you to add item selections for each option.
12. Right-click the icon for a Combo List option to display an Add/Delete menu, and select Add.
13. When a New Item record displays, click in the New Item field to enable it, and enter the name of an item selection for the list option.
14. (Optional) Click to add a second tier of items to a list, or a multi-select list. In the New Item record, click to enable the field, and enter the name of the sub-list item for the list item.
15. Click Save.

Once you add list items to a linked field in an additional form, you can edit, disable, and delete the items.

Editing, Disabling, and Deleting Items in a Linked Field

A user with the List Admin permission can edit a linked field by adding or making changes to the Combo List options, as well as adding or editing the Linked Combo Field or Linked Multi-Select Field list items for a Combo List option. A List Admin can also temporarily disable or delete a combo list option or any of the list items for an option.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, locate the linked field by typing its name (or the first few letters of its name) into the Search field, and pressing the ENTER key on your keyboard.
3. Click the linked field in the Fields List section to select it, and display the Combo List options for the Linked Combo Field or linked Multi-Select Field in the right side of the screen.
4. Click to expand a Combo List option and display the linked list items.

 **Tip:**

The Combo List options associated with a Linked Combo Field or Linked Multi-Select Field are edited, disabled, and deleted independently of the linked field. In the screen shot provided, the Archiving, Creation, Management, Negotiation, and Renegotiation combo list options cannot be edited, deleted, or disabled in the same screen as the linked field.

5. Edit the name of a combo list option by clicking its icon to enable the field, and typing over the existing text.
6. Edit the name of a linked list item by clicking the icon for the combo list option, clicking the list item's icon to enable the field, and typing over the existing text.
7. Add a linked list item by right-clicking the icon for a Combo List option, and selecting Add in the Add/Delete menu. In the New Item record, click to enable the field, and enter the name of the list item for the linked field.
 - a. To add a sub-item to a linked list item, right-click its icon, and select Add in the Add/Delete menu.
8. Disable a combo list option or a linked list item by selecting its Disabled check box.

 **Tip:**

While a combo list option and its linked list items must be disabled individually, deleting a combo list option will automatically delete all of its linked list items.

9. Delete an individual linked list item:
 - a. Click to expand the Combo List option.
 - b. Right-click the list item's icon to display an Add/Delete menu, and select Delete.
 - c. In the confirmation prompt, click Yes.
10. Delete a combo list option, which will delete all its linked list items:
 - a. Right-click the combo list's icon to display an Add/Delete menu, and select Delete.
 - b. In the confirmation prompt, click Yes.
11. Click Save.

Adding Categories and Items to a Tree Field

A user with the List Admin and Additional Forms Admin permission can add a tree field to an additional form or to an additional field in a Contract, Company, or Project Profile to allow users to capture multi-level information using a single field.

In the steps below, which use the example provided in the Adding a Company Additional Form topic, the Administrator first adds categories to the tree field, and then adds items to each category.

1. Create an additional form and add a tree field to the form, and then create the categories and item selections for each category using the Lists feature.
2. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.

 **Tip:**

The screen displays an alphabetical listing of categories. Additional forms are listed alphabetically as categories. Additional fields are listed under the categories: Company Additional Fields, Contract Additional Fields, and Project Additional Fields.

3. In the List Administration screen, locate the tree field by typing its name (or the first few letters of its name) into the Search field, and pressing the ENTER key on your keyboard.
4. Click the tree field in the Fields List section to select it and display any existing items for the field in the right side of the screen.
5. Click the icon at the top of the hierarchy to display a blank field, and enter the name for the tree field.
6. Use the same name as the list selected in the Fields List section.
7. Right-click the icon at the top of the hierarchy to display an Add/Delete menu, and select Add to add a category.
8. When a New Item record displays, click in the New Item field to enable it, and enter the name for the category by typing over the existing text.
 - (Optional) Click in the Description field and enter a description for the category to provide users with information when they hover over the category.
9. Right-click the icon for the new category to display an Add/Delete menu, and select Add to add an item to the category.
10. When a New Item record displays, click in the New Item field to enable it, and enter the name of list item for the category by typing over the existing text.
 - (Optional) Click in the Description field and enter a description for the list item to provide users with information when they hover over the item.
 - (Optional) Add additional list items to the category.
11. (Optional) Click to add a second tier of selections to a list item. In the New Item record, click to enable the field, and enter the name of the sub-list item for the list item. The maximum depth for a list item is three tiers.
12. Click Save.

Once you have added categories and items to a tree field in an additional form, you can edit, disable, and delete items and categories, as needed.

Editing, Disabling, and Deleting Items in a Tree Field

A user with the List Admin permission can edit a tree field by making changes to a category name and/or any of the list items in the category. A tree field can also be edited by adding new categories and list items. An entire category, as well as individual list items in the category, can be temporarily disabled if they will be needed again in the future, or permanently deleted if they will never be used again.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, locate the tree field by typing its name (or the first few letters of its name) into the Search field, and pressing the ENTER key on your keyboard.
3. Click the tree field in the Fields List section to select it and display any existing items for the field in the right side of the screen.
 - Click to expand a category and display the list items.
4. Edit a category name by clicking its icon to enable the field, and typing over the existing text.
 - Edit a list item for a category by clicking the expand icon for the category, clicking the list item's icon to enable the field, and typing over the existing text.
5. Add a list item for a category by right-clicking on the icon for the category, and selecting Add in the Add/Delete menu. In the New Item record, click to enable the field, and enter the name of the list item for the category.
 - To add a sub-item to a list item, right-click on its icon, and select Add in the Add/Delete menu.
6. Disable a linked list item by selecting its Disabled check box.

 **Tip:**

While a category and its list items must be disabled individually, deleting a category will automatically delete all of its list items.

- Delete an individual list item in a category:
 - Click to expand the category.
 - Right-click the list item's icon to display an Add/Delete menu, and select Delete.
7. In the confirmation prompt, click Yes.
 8. Delete a category, which will delete all its list items:
 - Right-click the category's icon to display an Add/Delete menu, and select Delete.
 - In the confirmation prompt, click Yes.
 9. Click Save.

Adding an Item to an Additional Field List

When a user with the Additional Forms Admin permission adds an additional field to a Company, Contract, or Project Profile, they must also have the List Admin permission to add the items selections for the list.

There are six types of field lists that a user with the List Admin permission can add to an additional Contract, Company, and Project form: Combo List, Multi-select Field, Linked Combo Field, Linked Multi-select Field, Tree field, and Person Field. These fields can also be added as an additional field in a Contract, Company, or Project Profile screen.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links. The screen displays an alphabetical listing of categories. Additional forms are listed alphabetically as categories. Additional fields are listed under the categories: Company Additional Fields, Contract Additional Fields, and Project Additional Fields.
 - In the List Administration screen, scroll through Fields List section, and locate the Contract Additional Fields category. To add an additional field for a Company Profile, locate the Company Additional Fields category. To add an additional field for a Project Profile, locate the Project Additional Fields category.
2. Locate the field list that needs the list items and click it to select it and display the existing items in right side of the screen.
 - (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
3. Click Add in the toolbar to add a blank record.
4. When a New Item record displays:
5. Click in the Name field and enter a name for the list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
 - (Optional) Click the Disabled check box to temporarily hide this item so that it does not display in the field list.
6. Repeat steps 5-6 to add more selections to the list.
 - To change the order of an item in the list, clear the Alphabetical check box, click on the list record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the 1 select row prompt displays during the move.
7. Click Save.

Once you have added list items to a linked field in a Contract, Company, or Project Profile, you can edit, disable, and delete the items, as needed.

Editing and Moving Items in an Additional Field List

A user with the List Admin permission can edit an item in a list that has been added to the default Contract, Company, or Project Profile screen. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering for the items in the list.

A linked field, tree field, and person field that has been added as an additional field to a Company, Contract, and Project Profile can also be edited, disabled, and deleted.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, scroll through the categories in the Fields List section, and locate the Contract Additional Fields category.
 - To edit an additional field for a Company Profile, locate the Company Additional Fields category. To edit an additional field for a Project Profile, locate the Project Additional Fields category.
3. In the Additional Fields category, locate the field list whose item selection(s) you want to edit or move.
4. Click the list to select it and display its existing items in right side of the screen.
5. Perform any of the following edits for a list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list, or clear the check box to display the items in the order they appear in the program screen.
 - Add another list item.
6. Change the order in which items appear in the field list:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
7. An item in an additional field list in the Company, Contract, or Project Profile can also be disabled or deleted.

Disabling and Deleting Items in an Additional Field List

A user with the List Admin permission can disable an item selection in an additional field list in a Contract, Company, or Project Profile screen so that it no longer appears in the list. The List Admin can permanently delete the list item if it is no longer needed.

A linked field, tree field, and person field that has been added as an additional field to a Company, Contract, and Project Profile can also be edited, disabled, and deleted.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, scroll through the categories in the Fields List section, and locate the Contract Additional Fields category.
 - To edit an additional field for a Company Profile, locate the Company Additional Fields category. To edit an additional field for a Project Profile, locate the Project Additional Fields category.
3. In the Additional Fields category, locate the field list with the item selection you want to disable or delete.
4. Click the list to select it and display its existing items in right side of the screen.
 - Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the field list in the Company, Contract, or Project Profile screen.
 - Locate the list item you want to delete, and click its delete icon.
 - Click Yes in the Remove List Item confirmation prompt.
5. Click Save.

People Lists

The User Profile and Person Profile screens both contain a Functions field list, whose item selections must be defined in order to identify the functions that can be performed in Conga Contracts.

The Functions list, which is a required field in the User Profile and Person Profile screens, allows program users, company contacts, and external participants in Conga Contracts to be assigned one or more job functions in the program. The items selections in the list must contain all the possible job functions that will be used in Conga Contracts. A hierarchy of functions can be established to ensure a task is always completed, even if no user holds the job function assigned to the task. Conga Contracts ensures all tasks are completed by continuing up the chain in the hierarchy until a user capable of performing the task is found.

People Lists Overview

The People Functions list in the List Administration screen is used to define and manage the functions that program users, company contacts, and external participants can be assigned in performing program tasks. The Person Field, which is added to an additional form or as an additional field in a Company, Contract, or Project Profile, is linked to the People Functions list.

The People Functions list is present in the following program screens:

- [User Profile](#) screen - User Admin assigns functions to individual users.
- [Person Profile](#) screen in a Company Profile - Users assign functions to company contacts.
- [Person Profile](#) screen in a Company Profile - Users assign responsibilities to a contract.
- Person Profile screen for a company contact or an external person, which is available to individual users from theirTools by selecting the People link and then clicking a person record in the [Person Browse](#) screen.

The Person Field is a system-generated list that replaces a function with the names of the users who can perform the selected function whenever an Additional Forms Admin adds the field to the default Contract, Company, or Project Profile screen as an additional field, or to an additional Company, Contract, or Project form.

A user with the List Admin permission can perform the following tasks associated with the Functions list:

- [Add a Functions List Item](#)
- [Edit and Move a Functions List Item](#)
- [Disable and Delete a Functions List Item](#)
- [Identify a Required Person Profile Field](#)

There are five [People Field lists](#) that are used as additional combo lists in the User Profile screen and managed from the List Administration screen.

Adding a Functions List Item

A user with the List Admin permission must provide item selections in the Functions multi-select list, which appears in the User Profile screen and the Person Profile screen for a company contact, individual who holds a responsibility for a contract, and an external person who typically participates in program activities using the DocuSign or Adobe Sign cloud or the Portal.

A person function is similar to a job title in that it reflects the function that a program user, company contact, or external person serves in the program. A List Admin must define all the person functions that will be needed, which include functions that give individuals the ability to create, negotiate, manage, and archive a contract, as well as make or approve contract requests, and approve flow and workflow steps.

A List Admin can set up individual functions or set up a hierarchy of functions, which ensures that there are several qualified individuals who can complete a task, instead of relying on a single individual who may be unavailable for a period of time. A hierarchy of functions ensures a task is always completed, even if no one holds the function assigned to the task.

since Conga Contracts continues up the chain in the hierarchy until a person capable of performing the task is found.

Adding Individual Functions

Individual functions are recommended if you are not going to be using the Contract Request feature, or if you will not use approvals for contract requests, or approval steps for flows and/or workflows.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter people in the Search field, and press the ENTER key on your keyboard.

 **Tip:**

If the list of functions is lengthy, click Excel in the toolbar to generate a spreadsheet showing the existing functions before adding a new one.

3. When the results display in the Fields List section, locate the People (7 Items) category. People Fields 1-5 are used to provide additional fields in the User Profile. If a field has been renamed, it will not appear in the People category and the number of items will reflect a number other than 7. To locate all renamed People Fields, enter person in the Search field.
4. In the People category, click the People Functions list to display the existing list items in the right side of the screen.
5. Add a function:
 - Right-click the icon at the top of the list to display an Add/Delete menu, and select Add.
 - Click the icon if the top-level folder is not expanded.
 - When the New Item record displays at the bottom of the list:
 - Click in the Name field, and enter a name for the function.
6. (Optional) Click in the Description field and enter information that will display when a user hovers over the function.
7. (Optional) Click the Disabled check box so the function does not immediately display in the Functions list in the User Profile or Person Profile screen.
8. Click Save.

Setting Up a Hierarchy of Functions

Setting up a hierarchy is recommended if you will be using the Contract Request feature and approval steps in flows and/or workflows. In creating a hierarchy, you create a top-level user function, and then add lower level functions (sub-functions).

1. Set up a user function that requires a hierarchy of sub-functions by following steps 1-5 in Adding Individual Functions.
2. Right-click the icon for the function to display an Add/Delete menu, and select Add.
 - If present, click the icon for a function to display its sub-functions.
3. In the New Item record:
 - Click in the Name field, and enter a name for the sub-function.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the sub-function.
 - (Optional) Click the Disabled check box so the function does not immediately display in the Functions list in the User Profile or Person Profile screen.
4. Click Save.
5. Click the icon for the function to display the sub-function. To collapse the hierarchy, click .

Editing and Moving Items in a Functions List

A user with the List Admin permission can edit an item selection in the Functions multi-select list, which appears in the User Profile screen and the Person Profile screen. A List Admin can edit a person function by changing its name or description, its position in the hierarchy, or by adding a sub-function. A List Admin can also move a list item to change its position in the hierarchy.

You can also disable and delete a person function.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, type people into the Search field, and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the People (2 Items) category.

If People Fields 1-5 display in the results, these additional fields have not been renamed for use in the User Profile, and list items have not been added. Once these tasks are completed, the People Fields will not display in the People category, but can be located by entering person in the Search field.

1. In the People category, click People Functions to display the existing functions in the right side of the screen.

2. Perform any of the following edits for a function list item:
3. Click in the Name field and type over the existing text to change its name.
4. Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
5. Add another item to the list, or add a sub-function to a list item.
6. Move a function or sub-function by clicking on the list record to select it, and then dragging-and-dropping it upwards or downwards. If you are successfully moving a list item, the prompt displays during the move.
7. To move a function to the bottom of the list, click the function record, and then drag-and-drop it onto the top-level folder in the hierarchy.
8. To move a sub-function to the bottom of its function list, click the icon for the function to display the sub-functions. Click the sub-function record to select it, and then drag-and-drop it onto the folder for the function.
9. To make a sub-function a function, click the icon for the function to display the sub-functions. Click on the sub-function record to select it, and drag-and-drop it onto the top-level folder in the hierarchy. The sub-function displays as a function at the bottom of the list.
10. To make a function a sub-function, click the function record, and then drag-and-drop it onto another function's folder.

 **Tip:**

To clear the changes you made to the hierarchy, exit the List Administration screen.

11. Click Save.

Disabling and Deleting Items in a Functions List

A user with the List Admin permission can disable an item selection in the Functions multi-select list so that it is temporarily removed as an option when a user adds a company contact, external person, or program user. The List Admin can also permanently delete the list option if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link.
2. In the List Administration screen, type people into the Search field, and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the People (2 Items) category.

If People Fields 1-5 display in the results, these additional fields have not been renamed for use in the User Profile, and list items have not been added. Once these tasks are completed,

the People Fields will not display in the People category, but can be located by entering person in the Search field.

1. In the People category, click People Functions to display the existing functions in the right side of the screen.
 - Disable a function (and its sub-functions) by selecting its Disabled check box.
 - To disable a single sub-function, click the function's > icon to display its sub-functions. Locate the sub-function, and select its Disabled check box.
2. Delete a function (and its sub-functions) by right-clicking the function's folder icon, and selecting Delete in the Add/Delete menu. In the confirmation prompt, click Yes.
 - To delete a single sub-function, click the function's > icon to display its sub-functions. Locate the sub-function, right-click its folder icon to display an Add/Delete menu, and select Delete. In the confirmation prompt, click Yes.
3. Click Save.

Identifying a Required Person Profile Field

Contracts requires that the Name and Email Address fields and the Functions multi-select list in the Person Profile screen must be populated. In addition to these system-required fields, a user with the List Admin permission can designate additional fields that users must populate.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists links.
2. In the List Administration screen, type people into the Search field, and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the People (2 Items) category.

 **Tip:**

If People Fields 1-5 display in the results, these additional fields have not been renamed for use in the User Profile, and list items have not been added. Once these tasks are completed, the People Fields do not display in the People category, but can be located by entering person in the Search field.

4. In the People category, click People Required Fields to display a list of the optional fields in the Person Profile that can be designated as required fields.

 **Tip:**

A Person Profile is created by (1) selecting the People link in a Company Profile, and (2) selecting the Add External Person or Add Company Person button in the Person Browse screen, which is accessed from your Tools menu.

5. Click the Required check box for a field to make it required in the Person Profile screen.
 - Clear the check box to make the field optional.
6. Click Save.

Relationship Lists

The Relationships screen in a Company Profile contains two field lists whose item selections must be managed in order to define the types of relationships between companies in Conga Contracts, such as parent companies and their subsidiaries, partnerships, and joint ventures.

Relationships List Overview

The Company Relationships list in the List Administration screen is used to define and manage the types of relationships that exist between the companies stored in Conga Contracts. The item selections in the list would typically include common types of company relationships, such as parent companies and their subsidiaries or acquisitions, partnerships, and joint ventures.

The Relationship list is present in the Relationships screen, which is linked to the Company Profile and used to record relationships between companies.

A user with the List Admin permission can perform the following tasks associated with the Relationships list:

- [Add an Item to a Company Relationship List](#)
- [Edit and Move Items in a Company Relationships List](#)
- [Disable and Delete Items in a Company Relationship List](#)

Adding an Item to a Company Relationship List

A user with the List Admin permission must provide item selections for the company relationship list, which is used to record the connection between two companies. The list items must include both sides of any company relationship, such as Parent of and Child of. However, one list item can be used to identify both sides of the relationship, such as Relates to.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter relationship in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Relationship (1 Item) category.

4. In the Relationship category, click the Company Relationships list to display the existing relationship types in the right side of the screen.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

5. (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
 - Click in the Related Relationship field to display the list of existing related relationships.
 - If one of the relationships is present, select it in the Related Relationship list.
 - Click in the Relationship field and enter the name of the companion relationship.
 - Click Save.
 - If the relationship is not present, but the same relationship can be applied to both companies:
 - Click in the Relationship field and enter the name of the relationship.
 - Click in the Related Relationship field and select the new relationship in the list so that both fields now display the same relationship type.
 - Click Save.
 - If the neither of the relationships is present:
 - Click in the Relationship field and enter the name of the first relationship.
 - Click in the Related Relationship field and select any relationship in the list.
 - Click Save.
 - Click Add in the toolbar.
 - Click in the Relationship field and enter the name of the second relationship.
 - Click in the Related Relationship field and select the fist relationship you added.
 - Click Save.
 - Return to the first relationship record, and change the selection in the Related Relationship list to the second relationship type.
 - Click Save.

 **Tip:**

To change the order of an item in the list, clear the Alphabetical check box, click the list item record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the prompt displays during the move.

Editing and Moving Items in a Relationship List

A user with the List Admin permission can edit an item in the relationship type list, which is used to record the connection between two companies. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering for the items in the list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter relationship in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Relationship (1 Item) category.
4. In the Relationship category, click the Company Relationships list to display the existing relationship types in the right side of the screen.

 **Tip:**

Changing the name of a relationship will also change its name in the Related Relationship list.

5. Perform any of the following edits for a relationship type list item:
 - Click in the Relationship field and type over the existing text to change its name.
 - Select a different option in the Related Relationship list.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list, or clear the check box to display the items in the order in which they were entered.
 - Add another item to the list.
6. Change the order in which items appear in the relationship list:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
7. Click Save.

Disabling and Deleting Items in a Relationship List

An item in the company relationship list can easily be edited to keep up with the types of relationships that develop between the companies in your system. A relationship type can also be temporarily disabled if it will be needed again in the future, or permanently deleted if none of the companies in your system currently maintain this type of relationship.

A user with the List Admin permission can disable an item selection in the relationship list so that it is temporarily removed as an option when a user records a relationship between two companies. The List Admin can also permanently delete the list option if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter relationship in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Relationship (1 Item) category.
4. In the Relationship category, click the Company Relationships list to display the existing relationship types in the right side of the screen.
5. Locate the relationship list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the relationship field list in the Relationships screen.
6. Locate the relationship list item you want to delete, and click its icon.
7. Click Yes in the Remove List Item confirmation prompt.

Document Lists

The Document Profile screen, which is linked to all Company, Contract, and Project Profiles, contains both a Document Type field list and a Document Type Group field list. Item selections in the Document Type Group list can reflect groupings by company, contract, and global documents. Item selections in the Document Type list typically identify the document types that users upload to profiles, such as contracts, correspondence, financial statements, and invoices.

Document Lists Overview

The Document Profile screen, which is linked to Company, Contract, and Project Profiles, contains both a Document Type Group and a Document Type field list. The item selections for the Document Type Group can include groupings by Company, Contract, Project, or Global documents. The item selections for the Document Type field list should reflect all possible selections for the types of documents that users will be uploading to profiles.

The Document Type Group and Document Types lists in the List Administration screen are used to define and manage the document groups and types that are used when a document is uploaded to a Company, Contract, or Project Profile. A document type group list can include items such as Company, Contract, Project, and Global to identify a category of documents that corresponds to the Profiles used in the program, as well as shared documents. A document type list can include items such as Draft, Final Version, Template, Certificate, Invoice, Financials, and Correspondence to identify the version of a contract document, or the classification of a company or project document.

A user with the List Admin permission identifies the item selections in the Document Type Group list and then links a group to each document type when adding a list item to the Document Types list.

A List Admin can perform the following tasks associated with the field lists in the Document screen:

- [Add an Item to a Document Type Group List](#)
- [Edit, Disable, and Delete Items in a Document Type Group List](#)
- [Add an Item to a Document Type List](#)
- [Edit, Disable, and Delete Items in a Document Type List](#)

Adding an Item to a Document Type Group List

A user with the List Admin permission must provide item selections for the Document Type Group field list, which is then used to create items selections in the Document Types field list. When item selections have been added to both lists, users are able to add a document to a Company, Contract, or Project Profile.

The Document Type Group list is used to categorize the documents uploaded to a Profile. An easy way to group documents is to use the default program groupings: Company, Contract, Project, and Global. A Restricted group should also be added if security is going to be applied to documents through a user role.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter document in the Search field and press the ENTER key on your keyboard.
3. In the Document category, click the Document Type Group list to display the existing list items in the right side of the screen.



Tip:

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

4. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the document group list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
 - (Optional) Click the Disabled check box to temporarily remove this group from the list of options when adding a document type list item.
5. Click Save.

Editing, Disabling, and Deleting Items in a Document Type Group List

A user with the List Admin permission can edit a document type group by changing its name or description. A List Admin can also disable/enable the group to change its availability to a document type list item, or permanently delete the group if it is no longer needed.

If you delete a Document Type Group, you not only delete the group, but all the Document Types associated with that group. If you want to keep one or more of the Document Types in a document group that is to be deleted, assign the Document Type to a new Document Type Group before deleting the group.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter document in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Document (2 Items) category.

Tip:

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

4. In the Document category, click the Document Type Group list to display the existing groups in right side of the screen.
5. Locate the list item you want to edit, and perform any of the following edits:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Add another item selection to the document group list.
6. Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the Document Types field list.

7. Locate the list item you want to delete, and click its - icon.
8. Click Yes in the Remove List Item confirmation prompt.

Adding an Item to a Document Type List

A user with the List Admin permission must provide item selections for the Document Types field list after at least one item selection has been added to the Document Type Group field list since a document type associated with document type group. When item selections have been added to both lists, users are able to add a document to a Company, Contract, or Project Profile.

The Document Types list is used to classify the documents that are uploaded to a Contract, Company, or Project Profile. For example, contract document types can include the various stages of a contract, such as Draft, Final Version, and Executed Document.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter document in the Search field and press the ENTER key on your keyboard.
3. In the Document category, click the Document Types list to display the existing list items in the right side of the screen.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

4. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the document type list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
 - Click in the Group field to enable the list, and select the appropriate group for the document type list item.
 - (Optional) Click in the Retention Period field and enter the amount of time (in months) this document type will be retained in the system after the status of the Contract Profile is changed to an Inactive status. The Retention Period option is applied only to documents uploaded to a Contract Profile.

 **Tip:**

If a retention period is set, a document uploaded to a Contract Profile will automatically be purged from the system at the end of the retention period once the status of the Contract Profile is changed to Inactive. For

example, if the status of the Contract Profile is changed to Inactive on 11/30/2017 and the retention period is 12 months, the document will be purged on 11/30/2018.

- Leave the value at 0 to retain the document type indefinitely.
 - (Optional) Click the Analyze Clauses check box to apply the Clause Identification and Management feature when a user uploads a document of this type to a Contract Profile.(Optional) Click the Disabled check box to temporarily remove this group from the list of options when adding a document type list item. (Optional) Click the Role Security check box to allow security to be applied to this document through a user role. When a Role Admin adds a user role, they can grant or deny users holding this role access to this document type, as well as the level of access if permission is granted.
6. Click Save.

Editing, Disabling, and Deleting Items in a Document Type List

A user with the List Admin permission can edit a document type by changing its name or description, linking it to a different document group, changing its retention period and role security, and employing clause management. A List Admin can also disable a document type so that it is temporarily removed as an option when a user adds a document, or permanently delete it if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter document in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Document (2 Items) category.
4. In the Document category, click the Document Type Group list to display the existing list items in right side of the screen.

Tip:

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

5. Locate the list item you want to edit, and perform any of the following edits:
 - Click in the Name field and type over the existing text to change its name.
 - Change the selection in the Group list to associate the document type with a different document group.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.

- Click in the Retention Period field and enter/edit the number of months the document type will be retained in the system after the status of the Contract Profile is changed to an Inactive status.
 - Click or clear the Analyze Clauses check box to apply or disable the Clause Identification and Management feature when a user uploads a document of this type to a Contract Profile.
 - Click or clear the Role Security check box to apply or remove security from this document type using role-based security.
 - Add another item selection to the document type list.
6. Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the Document Type list when adding a document.
 7. Locate the list item you want to delete, and click its icon.
 8. Click Yes in the Remove List Item confirmation prompt.

Workflow Lists

The Routing Table Category field list is used in the Workflow Wizard and the items selections in the list define the categories of the routing tables that can be used when a workflow step requires approval. The approval process is defined by the routing table, which identifies one or more steps in the approval process and the functions of the people who can approve the step.

Workflow Lists Overview

The Routing Table Category field list in the List Administration screen is used to define and manage the routing table categories that are used when a Workflow Admin creates a routing table. A routing table is used in a workflow template when a workflow step requires the approval of more than one person. A routing table identifies one or more steps in the approval process and the functions of the people who can approve a workflow step.

When a Workflow Admin creates a routing table, the selections in Category list are managed from the List Administration screen. Therefore, a Workflow Admin should also be granted the List Admin permission in their user role(s).

A routing table is used in the Workflow Wizard when the wizard is run using a template that includes a Gateway step, which requires the approval of more than one person.

A List Admin can perform the following tasks associated with the Routing Table Category field list:

- [Add an Item to a Routing Table List](#)

- [Edit and Move Items in a Routing Table List](#)
- [Disable and Delete Items in a Routing Table List](#)

Adding an Item to a Routing Table List

When a user with the Workflow Admin permission adds a routing table, they must also have the List Admin permission to add the items selections for the Routing Table Category list. A routing table is used in a workflow template when a workflow step requires the approval of more than one person. A routing table is also used in the Workflow Wizard when the wizard is run using a template that includes a Gateway step, which requires the approval of more than one person.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter routing in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Workflow (1 Item) category.
4. In the Workflow category, click the Routing Table Category list to display the existing category types in the right side of the screen.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

5. (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the routing table category list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
 - (Optional) Click the Disabled check box so the list item does not immediately display in the Category list in the Routing Table Edit screen.
7. Click Save.

 **Tip:**

To change the order of an item in the list, clear the Alphabetical check box, click the list item record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the prompt displays during the move.

Editing and Moving Items in a Routing Table List

A user with the List Admin permission can edit an item in the Routing Table Category field list, which is used in adding a routing table and running the Workflow Wizard. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering for the items in the list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter routing in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Workflow (1 Item) category.
4. In the Workflow category, click the Routing Table Category list to display the existing category types in right side of the screen.
5. Perform any of the following edits for a routing table category list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list, or clear the check box to display the items in the order in which they were entered.
 - Add another item to the category list.
6. Change the order in which items appear in the Category list:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
7. Click Save.

Disabling and Deleting Items in a Routing Table List

A user with the List Admin permission can disable an item selection in the Routing Table Category list so that it is temporarily removed as an option when a Workflow Admin adds a routing table. The List Admin can also permanently delete the list option if is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter routing in the Search field and press the ENTER key on your keyboard.

3. When the results display in the Fields List section, locate the Workflow (1 Item) category.
4. In the Workflow category, click the Routing Table Category list to display the existing category types in right side of the screen.
5. Locate the category type you want to disable, and click its Disabled check box.
 - Clear the check box to display the category type in the Category list in the Routing Table Edit screen.
6. Locate the category type you want to delete, and click its icon.
7. Click Yes in the Remove List Item confirmation prompt.

Clause Library Lists

Clause lists include the four field lists in the Clause screen, which can be accessed by all users via the Clause Library link in their Contracts menu: Clause Category, Clause Group, Clause Type, and Clause Security. Administrators define the categories and types that are used to classify the clauses that are added by users (with the appropriate permissions) and stored in the Clause Library. Administrators also control user access to clauses by defining the security levels that can be assigned to individual clauses, and then assigning a specific security level to each user role. Users are then assigned roles in Conga Contracts via their User Profile, which determines the clauses that they can view in the Clause Library.

Clause Lists Overview

The Clause Type, Clause Group, Category, and Security field lists in the List Administration screen are used to define and manage the clauses that a user with the Clause Admin permission can add to the Clause Library. Therefore, a user with the Clause Admin permission should also have the List Admin permission.

When adding a clause, the Clause Security field list controls user access to the clause, which works in conjunction with the clause security defined in their user role(s). A user can view the clauses at the security level set in their user role, as well as clauses at lower security levels. A user accesses their Clause Library by selecting the Clause Library link in their Contracts menu.

The clauses in the Clause Library serve as alternative language for a contract's terms during contract negotiations and renewals. Clauses are also used in the Clause Identification & Management module, and can be inserted into a creation template during the contract creation process.

A List Admin can perform the following tasks associated with the clause field lists:

- [Add an Item to a Clause Category or Type List Item](#)
- [Edit and Move Items in a Clause Category or Type List](#)

- [Disable and Delete Items in a Clause Category List](#)
- [Add a Clause Security List Item](#)
- [Edit, Disable, and Delete Items in a Clause Security List](#)
- [Adding a Clause Group List Item](#)
- [Edit, Disable, and Delete Items in a Clause Group List](#)

Adding an Item to a Clause Category or Type List

The Clause Profile contains four default field lists that a user with the List Admin permission must populate with selections: Clause Category, Clause Group, Clause Type, and Clause Security. The lists are used when adding a clause to the Clause Library by a user with the Clause Admin permission. Therefore, a user should have both the List Admin and Clause Admin permissions in order to add a clause after providing the item selections for its field lists.

Clause Category is used to identify the language used in the contract, such as business, government, standard, or alternative language. Clause Type refers to the subject of the clause, such as an Assignment, Payment Terms, or Termination clause.

The steps below pertain to the Clause Category and Clause Type lists, which are required fields when adding a clause. Although Clause Security is not a required field in the Clause Profile or in the Role Profile screens, list items should also be added for this field list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter clause in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Clause Library (3 Items) category.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

4. In the Clause Library category, click the Clause Category or Clause Type list to display the existing items in the right side of the screen.
5. Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the clause category or type list item.

- (Optional) Click in the Description field and enter information that will display when a user hovers over the item.
- (Optional) Click the Disabled check box so the list item does not immediately display in the Clause Category or Clause Type list in the Clause Profile.

7. Click Save.

 **Tip:**

To change the order of an item in the list, clear the Alphabetical check box, click the list item record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the prompt displays during the move.

Editing and Moving Items in a Clause Category or Type List

A user with the List Admin permission can edit an item in the Clause Category, Clause Group, or Clause Type list, which a Clause Admin uses in adding a clause to the Clause Library. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering for the items in the list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter clause in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Clause Library (3 Items) category.
4. In the Clause Library category, click the Clause Category or Clause Type list to display the existing items in the right side of the screen.
5. Perform any of the following edits for a clause category or clause type list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list, or clear the check box to display the items in the order in which they were entered.
 - Add another item to the list.
6. Change the order in which items appear in the Clause Category or Clause Type list:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.

7. Click Save.

Disabling and Deleting Items in a Clause Category or Type List

A user with the List Admin permission can disable an item selection in the Clause Category or Clause Type list so that it is temporarily removed as an option when a user with the Clause Admin permission adds a clause to the Clause Library. The List Admin can also permanently delete the list option if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter clause in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Clause Library (3 Items) category.
4. In the Clause Library category, click the Clause Category or Clause Type list to display the existing items in the right side of the screen.
 - Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the Clause Category or Clause Type field list.
5. Locate the list item you want to delete, and click its - icon.
6. Click Yes in the Remove List Item confirmation prompt.

Adding a Clause Security List Item

The Clause Profile contains four default field lists that a user with the List Admin permission must populate with selections: Clause Security, Clause Groups, Clause Category, and Clause Type. All lists are used to add a clause to the Clause Library by a user with the Clause Admin permission, while the Clause Security list is also used to assign security to a user role by a user with the Role Admin permission. The clause security in a user role determines the clauses that are available to users in their Clause Library. Therefore, a user should have the List Admin, Clause Admin, and Role Admin permissions to add a clause after providing the item selections for its field lists and then assign a clause security level to individual user roles.

Administrators must also identify the clause categories and types that will be used in adding clauses to the Clause Library since they work in conjunction with clause security levels.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.

2. In the List Administration screen, enter clause in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Clause Library (3 Items) category.
4. In the Clause Library category, click the Clause Security list to display the existing items in the right side of the screen.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

5. Click Add in the toolbar to display a blank New Item record at the bottom of the list:
 - Click in the Name field and enter a name for the clause security list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the item.
 - Use the and reorder icons to change the order in which the list item appears in the list in the Clause Profile or Role Profile screen.
 - (Optional) Click the Disabled check box so the list item does not immediately display in the Clause Security list in the Clause Profile or Role Profile screen.
6. Click Save.

Editing, Disabling, and Deleting Items in a Clause Security List

A user with the List Admin permission can edit an item in a Clause Security list by changing its name or description, or changing the order in which it displays in the list. A List Admin can also disable a list item so that it is temporarily removed as an option in the list when a Clause Admin adds a clause or a Role Admin adds a user role. A List Admin can permanently delete a list item if it is no longer needed, as long as it is not currently being used by a clause or user role.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter clause in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Clause Library (3 Items) category.
4. In the Clause Library category, click the Clause Security list to display the existing items in the right side of the screen.
5. Locate the list item you want to edit, and perform any of the following edits:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.

- You can reorder icons to change the order in which the list item appears in the Clause Security list in the Clause Profile or Role Profile screen.
 - Add another item selection to the Clause Security list.
6. Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the Clause Security list when adding a clause or user role.
 7. Locate the list item you want to delete, and click its icon.
 8. Click Yes in the Remove List Item confirmation prompt.

Adding a Clause Group List Item

The Clause Profile contains four default field lists that a user with the List Admin permission must populate with selections: Clause Security, Clause Category, Clause Group, and Clause Type. All lists are used to add a clause to the Clause Library by a user with the Clause Admin permission, while the Clause Group list is also used to create new Clause Groups for the Clause Library. The clause group permissions assigned to a user role determines what clauses are available to users in their Clause Library.

To add a Clause Group list item, take the following steps:

1. Click the Gear Icon in the Administrator Navigation Toolbar and click the Lists link in the menu.
2. In the List Administration screen, enter Clause Library in the Search field and press the ENTER key on your keyboard, or scroll down to the Clause Library section.
3. In the Clause Library category, click the Clause Group list to display the existing items in the right side of the screen.

Tip:

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

4. Click Add in the toolbar to display a blank New Item record at the bottom of the list:
 - Click in the Name field and enter a name for the clause security list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the item.
 - Use the and reorder icons to change the order in which the list item appears in the list in the Clause Profile or Role Profile screen.
 - (Optional) Click the Disabled check box so the list item does not immediately display in the Clause Group list in the Clause Profile or Role Profile screen.
5. Click Save.

Editing, Disabling, and Deleting Items in a Clause Group List

A user with the List Admin permission can edit an item in a Clause Group list by changing its name or description, or changing the order in which it displays in the list. A List Admin can also disable a list item so that it is temporarily removed as an option in the list when a Clause Admin adds a clause or a Role Admin adds a user role. A List Admin can permanently delete a list item if it is no longer needed, as long as it is not currently being used by a clause or user role.

1. Click the Gear Icon in the Administrator Navigation Toolbar and click the Lists link in the menu.
2. In the List Administration screen, enter Clause Library in the Search field and press the ENTER key on your keyboard, or scroll down to the Clause Library section.
3. In the Clause Library category, click the Clause Group list to display the existing items in the right side of the screen.
4. Locate the list item you want to edit, and perform any of the following edits:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - You can reorder icons to change the order in which the list item appears in the Clause Group list in the Clause Profile or Role Profile screen.
 - Add another item selection to the Clause Group list.
5. Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the Clause Group list when adding a clause or user role.
6. Locate the list item you want to delete, and click its icon.
7. Click Yes in the Remove List Item confirmation prompt

Project Lists

Project lists include the three field lists in the default Project Profile screen: Project Group, Project Type, and Project Status. If additional field lists are added to the Project Profile, their list items must also be managed. The links in a Project Profile display program screens that also include field lists, including the Documents, Workflows, and Additional Forms screens.

Project Lists Overview

The Project Profile contains three default field lists that a user with the List Admin permission must populate with selections: : Project Group, Project Type, and Project

Status. These lists allow the List Admin to control how projects are categorized and typed, which facilitates searching for specific project data. Managing the items in the field lists in a Project Profile is accomplished from the List Administration screen.

⚠ Important:

The Project Group field list is used as a security measure to control user access to Project Profiles. A List Admin can create a restricted project group list item and assign projects whose profiles need to be available to only select users to the restricted project group through their user role.

A List Admin can perform the following tasks associated with the default field lists in a Project Profile:

- [Add an Item to a Project List](#)
- [Edit and Move Items in a Project List](#)
- [Disable and Delete Items in a Project List](#)
- [Manage Project Additional Fields](#)

In addition to the default field lists in the Project Profile screen, lists can be added to program screens for other features linked to a Project Profile: Additional Fields, Documents, Workflows, and Additional Forms.

Project Additional Fields

Within the Project Profile is a section where Administrators can add additional fields in order to customize the default Profile screen. If any of the fields added to the Project Additional Fields section of the Profile are field lists, Administrators must also provide these list selections and then manage the selections, which includes editing, disabling, and deleting list selections.

Project Document Lists

The Project Profile contains a link to the Documents screen, where users can upload, edit, and download documents. The Documents screen contains two field lists used to capture specific data about the document: Document Type Groups and Document Types. A List Admin is responsible for providing the selections in both of these field lists.

A List Admin can perform the following tasks associated with the field lists in the Documents screen:

- [Add an Item to a Document Type Group List](#)
- [Edit, Disable, and Delete Items in a Document Type Group List](#)

- [Add an Item to a Document Type List](#)
- [Edit, Disabling, and Delete Items in a Document Type List](#)

Project Workflow List

The Project Profile contains a link to the Workflows screen, where users can use the Workflow Wizard to create a workflow for a project-related task.

A user with the Workflow Admin permission creates the templates used in the Workflow Wizard. If a step in the workflow template requires the approval of more than one person, the Workflow Admin must add a routing table to identify the user functions that can approve the Gateway, or approval step. When adding a routing table, there is a Category list in the Routing Table Edit screen that is used to identify the type of routing table being added, and a Workflow Admin must provide the list selections for the Category list. Therefore, the Workflow Admin must also have the List Admin permission.

A List Admin can perform the following tasks associated with the Category field list in the Routing Table Edit screen:

- [Add an Item to a Routing Table List](#)
- [Edit and Move Items in a Routing Table List](#)
- [Disable and Delete Items in a Routing Table List](#)

Additional Form Lists

The Project Profile contains an Additional Forms link, which takes users to a browse screen listing all of the forms that have been linked to the Profile for the purpose of capturing additional project information. Users with the Additional Forms Admin permission design these forms using the Additional Forms feature and the forms are listed as categories in the List Administration screen, according to the name given to the form, if the form contains one or more field lists. Field lists appear as entries under the form name category and a user with the List Admin permission must manage the selections in the additional form field lists using the same procedures used to manage those in other CompanyProject Profile lists.

Adding an Item to a Project List

A List Admin must provide item selections for the five field lists in the default Project Profile screen: Project Type (categorization of the project), Project Group (security measure to restrict access to companies by user role), and Project Status.

In addition to these default field lists, a user with the Additional Forms Admin permission can add additional field lists to the Project Profile screen, and must also have the List Admin permission to add selections to the field lists they add.

Item selections are added to all field lists in the Project Profile screen using the steps shown in the Project Group example shown below.

 **Tip:**

The Project Group list works in conjunction with user roles so that access to Project Profiles can be controlled. Therefore, at least one security identifier (such as Restricted or Proprietary) should be added as an item selection in the Project Group list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter project in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Project (3 Items) category.
4. In the Project category, click the Project Group list to display the existing groups in the right side of the screen.

 **Tip:**

If the list is lengthy, click Excel in the toolbar to download a spreadsheet showing the existing list items before adding a new one.

5. (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
6. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the group list item.
 - (Optional) Click in the Description field and enter information that will display when a user hovers over the list item.
 - (Optional) Click the Disabled check box to temporarily remove this group from the list of options in the Project Group field in the Project Profile screen.
7. Click Save.

 **Tip:**

To change the order of an item in the list, clear the Alphabetical check box, click the list item record to select it, and then drag-and-drop it upwards or downwards to a different location in the list. If you are successfully moving a list item, the prompt displays during the move.

Editing and Moving Items in a Project List

A user with the List Admin permission can edit a project list item can to accommodate changes in the way project information is categorized. The List Admin can also move a list item to change its position in the list if the default alphabetical sort order is not the most appropriate ordering of list items.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter project in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Project (3 Items) category.
4. In the Project category, locate the list with the item selection you want to edit or move.
5. Click the list to display its existing items in right side of the screen.
6. Perform any of the following edits for a list item:
 - Click in the Name field and type over the existing text to change its name.
 - Click in the Description field and type over the existing text to edit the information that displays when a user hovers over the list item.
 - Select the Alphabetical check box to display the items in alphabetical order in the field list in the Project Profile screen, or clear the check box to display the items in the order in which they were entered.
 - Add another item to the list.
7. Change the order in which items appear in the field list in the Project Profile screen:
 - Clear the Alphabetical check box if it is selected.
 - Click a list item record to select it.
 - Drag the record upwards or downwards to the desired location, making sure the prompt is displayed.
 - With the prompt still displayed, release your mouse.
8. Click Save.

Disabling and Deleting Items in a Project List

A user with the List Admin permission can disable an item selection in a list in the Project Profile screen so that it is temporarily removed as an option, or permanently delete it if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter project in the Search field and press the ENTER key on your keyboard.

3. When the results display in the Fields List section, locate the Project (3 Items) category.
4. In the Project category, locate the list with the item selection you want to disable or delete.
5. Click the list to display its existing items in right side of the screen.
 - Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the field list in the Project Profile screen.
 - Locate the list item you want to delete, and click its icon.
 - Click Yes in the Remove List Item confirmation prompt.
6. Click Save.

Managing Project Additional Fields

A user with the Additional Forms Admin permission can add one or more additional fields or lists to the default Project Profile screen. In adding a field or a list to the Profile screen, the Additional Forms Admin can make the field required and/or add a quick tip to help users populate the field. The Additional Forms Admin must also have the List Admin permission if any of the additional fields added to the Project Profile are combo or multi-select lists since item selections must be added. Once the item selections are added, the List Admin manages the list items in the same way as other types of list items are managed.

1. Open a Project Profile.
2. Scroll down to the Project Additional Fields section, and click to expand the section.
3. Identify the additional field list you want to manage.

 **Tip:**

If the field list is not present, add it to the Profile

4. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
5. In the List Administration screen, scroll through Fields List section, and locate the Project Additional Fields category.
6. Locate the field list in the category, and click it to perform any of the following:
 - Add a list item to the field.
 - Edit or move an item selection for the field.
 - Disable or delete an item selection for the field.

Global Translation Lists

Translations are available for some of the field list item selections that appear in the default Company, Contract, and Project Profile screens. Translations are also available for item selections for some of the field lists that are added to additional forms, as well as item selections for some of the additional field lists that are added to Company, Contract, and Project Profile screens. Currently, the available languages are French, German, Spanish, Dutch, Portuguese Brazil, and Simplified Chinese.

Global Translation Lists Overview

The Global Translation feature allows a user with the Global Translate Admin and List Admin permissions to translate the list items added to additional forms and additional fields to other languages. A user with these permissions can also translate list items in the default field lists that appear in the standard Company, Contract, and Project Profile screens. Currently, the languages that have been translated from English are French, German, Spanish, Dutch, Portuguese Brazil, Simplified Chinese, Polish, Romanian, Russian, Turkish, and Traditional Chinese.

A user with the Global Translate Admin and List Admin permissions can perform the following tasks associated with translating the field list items:

- [Translate a list item](#)
- [Edit a translated list item](#)
- [Download a translation file](#)

Translating a List Item

A user with the Global Translate Admin and List Admin permissions can translate the item selections that display in some of the default (system) lists in the Contract, Company, and Project Profile screens. A user with these permissions can also translate the item selections in the additional field and additional form lists that have been added to a Contract, Company, or Project Profile.

The languages that can be translated from English are French, German, Spanish, Dutch, Portuguese Brazil, Simplified Chinese, Polish, Romanian, Russian, Turkish, and Traditional Chinese.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter global in the Search field and press the ENTER key on your keyboard.

3. When the results display in the Fields List section, locate the Global Translations (1 Item) category.
4. In the Global Translations category, click the Global Translations list to display the list items available for translation in the right side of the screen.
5. In the Locale list, select the language for the list item translation(s) you want to provide.
6. In the Discovered column, locate the list item you want to translate, and click in its Translated field to activate it.
7. Enter (or paste) the translation for the list item.
8. Click Save.

Editing a Translated List Item

A user with the Global Translate Admin and List Admin permissions can edit an existing translation for a list item to correct an error or if the name of a list item changes.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter global in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Global Translations (1 Item) category.
4. In the Global Translations category, click the Global Translations list to display the list items available for translation, along with their translations, in the right side of the screen.
5. In the Locale list, select the language for the list item translation you want to edit.
6. In the Discovered column, locate the list item whose translation you want to edit, and click in its Translated field to activate it.
7. Enter (or paste) the corrected translation for the list item.
8. Click Save.

Downloading a Translation File

A user with the Global Translate Admin and List Admin permissions can download a Portable Object (.PO) file, which contains all of the translated words and phrases that have been entered and saved, along with the original text. The PO file associates each original, translatable string of a given package with its translation in a particular target language.

A PO file can be read and edited, as needed, by a translator. However, Conga Contracts plans to provide additional functionality in the future, which will allow

List and Global Translate Admins to re-import a PO file so that any updates to the file are automatically made in the List Administration screen.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, enter global in the Search field and press the ENTER key on your keyboard.
3. When the results display in the Fields List section, locate the Global Translations (1 Item) category.
4. In the Global Translations category, click the Global Translations list to display the list items available for translation in the right side of the screen.
5. In the Locale list, select the language for the list item translations you want to download.
6. Click Download PO File in the toolbar to download a file with a .PO extension.
7. Click the downloaded file to open it.

The PO file type is primarily associated with GNU Gettext, a program of the Free Software Foundation, but can also be opened using [AppleWin](#).

Person (User Profile) Lists

The User Profile screen contains five Administrator-defined field lists that are used to capture additional information for Conga Contracts program users.

Overview of Person (User Profile) Lists

The User Profile screen contains five generic field lists that are used to capture the user information that is not captured by the default fields. The five generic fields are initially labeled People Field 1 - People Field 5, but must be renamed to reflect the information captured by the field. Items selections must then be provided for each renamed field. If all five of the generic fields are not needed to capture supplemental user information, the remaining fields can be hidden.

Renaming the generic fields, as well as managing the selections in each field list is accomplished from the List Administration screen. A user with the List Admin permission can perform the following tasks associated with generic field lists:

- [Rename a Person Generic Field](#)
- [Add an Item to a Person Generic Field List](#)
- [Add a Quick Tip to a Person Generic Field](#)
- [Edit and Hide Person Generic Fields](#)
- [Edit, Disable, and Delete Items in a Person Generic Field List](#)

Renaming a Person Generic Field

A user with the List Admin permission must rename a person generic field or it will not be available to capture additional information in the User Profile screen. There are five generic fields with the default labels of People Field 1 - People Field 5, and each field is a combo list that requires item selections. A List Admin must rename each generic field that will be needed in the User Profile, and then add item selections to each renamed field. In the event not all five of the fields are needed to capture additional information for a user, the remaining fields can be hidden from view.

A generic field can be renamed to capture information with several options, or only two options. For example, to capture a user's department, rename a generic field Department, and then add several item selections to identify the different departments at the company. To capture whether or not the user holds a managerial or supervisory position, rename the field Manager or Supervisor? and then add Yes and No as the item selections.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, locate the generic fields:
 - Enter person in the Search field in the Fields List section.
 - Press the ENTER key on your keyboard.
3. When the Person Generic Fields result displays, click it to display the generic fields in the right side of the screen.

 **Tip:**

When a generic field has been renamed, the new name of the field will display instead of the default name: People Field 1 - People Field 5.

4. Locate the generic field you want to rename, and click in its Field Label column to enable it.
5. Enter the name for the field, and press the ENTER key on your keyboard.
6. (Optional) Add a quick tip for the field, which displays when a user hovers over the field:
 - Click in the Description field to enable it.
 - Enter information or instructions for using the field.
7. (Optional) Select the Hidden check box if you do not want the generic field to immediately appear in the User Profile screen. Clear the check box to display the field.
8. Click Save.
9. Add items selections for the renamed generic combo list.

Adding an Item to a Person Generic Field List

A user with the List Admin permission must provide item selections for any person generic field that they rename so that when the list appears in the User Profile screen, there will be options in the list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
2. In the List Administration screen, locate the renamed generic field by entering its name in the Search field and pressing the ENTER key on your keyboard.

 **Tip:**

To display a list of all the renamed generic fields, enter person in the Search field and press the ENTER key on your keyboard. When the Person Generic Fields result displays in the Fields List section, click it to display the list of generic fields in the right side of the screen. Locate the name of the generic field, enter it into the Search field, and press ENTER.

3. When the result displays in the Field List section, click it to select it and display any existing item selections in the right side of the screen.
4. (Optional) Clear the Alphabetical check box to display list items in the order in which you add them, instead of alphabetical order.
5. Click Add in the toolbar to display a blank New Item record:
 - Click in the Name field and enter a name for the list item.
 - (Optional) Click in the Description field and enter a description of the list item.
 - (Optional) Click the Disabled check box so the list item does not immediately display in the generic list in the User Profile screen.
6. Click Save.

Adding a Quick Tip to a Person Generic Field

AA user with the List Admin permission can provide a quick tip to assist users in making the correct selection in a generic list in the User Profile screen. A quick tip is usually a phrase or a short sentence that provides guidance when users have several items to choose from in a field list. Quick tips are also used to ensure users populate or format a text field correctly.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
 1. In the List Administration screen, locate the generic fields by entering person in the Search field and pressing the ENTER key on your keyboard.
 2. When the Person Generic Fields result displays in the Fields List section, click it to display the generic fields in the right side of the screen.

3. Locate the renamed generic field that needs the quick tip, and click in its Description field.

 **Tip:**

When a generic field has been renamed, the new name of the field will display instead of the default name (People Field 1, 2, 3, 4, or 5).

4. Enter the instruction or information you want displayed when a user hovers over the field's icon in the User Profile screen.
5. Click Save.

Editing and Hiding Person Generic Fields

A user with the List Admin permission can edit the name given to a generic field in the User Profile screen. Once the name is changed for a generic field list, the item selections may also need to be updated. A List Admin can also hide any of the five default or renamed person generic fields so that the field does not display in the User Profile screen.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.
 1. In the List Administration screen, locate the generic fields by entering person in the Search field and pressing the ENTER key on your keyboard.
 2. When the Person Generic Fields result displays in the Fields List section, click it to display the generic fields in the right side of the screen.
 3. Locate the generic field you want to edit, and perform the necessary updates:
 - Click in the Field Label field and type over the existing text to change the name of the field.
 - Click in the Description field and type over the existing text to edit the quick tip.
 - Click a field's Hidden check box to hide the field in the User Profile screen.
 4. Click Save.

Editing, Disabling, and Deleting Items in a Person Generic Field List

A user with the List Admin permission can edit the items in a generic field list in the User Profile screen to accommodate changes in the data captured for a user. A List Admin can also disable an item selection in the list so that it is temporarily removed as an option, or permanently delete it if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Lists link in the menu.

2. In the List Administration screen, locate the generic fields by entering person in the Search field and pressing the ENTER key on your keyboard.
3. When the Person Generic Fields result displays in the Fields List section, click it to display the generic fields in the right side of the screen.
4. Locate the generic field with the list item you want to edit, disable, or delete.
5. Enter the name of this generic field in the Search field, and press the ENTER key on your keyboard.
6. When the result displays in the Fields List section, click it to display the list items for the generic field in the right side of the screen.
 - Locate the list item you want to edit:
 - Click in the Field Label field and type over the existing text to change the name of the field.
 - Click in the Description field and type over the existing text to edit its description.
7. Locate the list item you want to disable, and click its Disabled check box.
 - Clear the check box to display the list item in the field list.
8. Locate the list item you want to delete, and click its icon.
 - Click Yes in the Remove List Item confirmation prompt.
 - Click a field's Hidden check box to hide the field in the User Profile screen.
9. Click Save.

Additional Forms and Fields

An additional form is an Administrator-created form that contains one or more fields and lists that are designed to capture information for a company, contract, or project. An additional field is an Administrator-created field or list that is added to the default Company Profile, Contract Profile, or Project Profile screen.

Additional forms are used to capture and store information in a Company, Contract, and Project Profile, while additional fields capture and store information not captured in the default Company, Contract, and Project Profile screen.

Additional Forms and Fields Overview

An additional form is an Administrator-designed form that contains one or more fields and/or lists used to capture information for a company, contract, or project. A user with the Additional Forms Admin permission creates a form and then links it to specific Company, Contract, or Project Profiles so that when a user adds a Profile that matches the restrictions specified in the additional form, the form is available for completion from the Additional Forms screen in the Profile. If the Additional Forms Admin designates a form as

required, users are prompted to complete the form every time a Profile matching the restrictions in the form is created or opened.

An additional field is an Administrator-defined field or list that is added to the default Company, Contract, or Project Profile screen to capture standard information that is not captured by the default Profile.

As a security measure, access to Additional Forms and Fields, company, contract, or project additional form can be controlled through the roles that are assigned to individual users.

Field Types for Additional Forms and Fields

The following types of fields can be added to an additional form or field:

- Text (256 characters or less) and Long Text (up to 40 pages)
- Date (for example, start and end dates)
- Number (whole numbers only; no decimals or fractions)
- Currency (both dollars and cents)
- Hyperlink (allows users to provide a URL or an Additional Forms Admin can furnish a default URL)
- GIS Geometry (visual representation of location data). An Additional Forms Admin can provide the coordinates for the location of a company or an individual, and when the user clicks on the field, a map displays showing the location.

The GIS Geometry field is only available in environments that have POST-GIS enabled on their database. Conga Contracts will perform this service upon customer request.

Field List Types for Additional Forms and Fields

The following types of field lists can be added to an additional form or field:

- [Combo List](#) - users can select one option.
- [Multi-select List](#) - users can select more than one option.
- [Linked Fields](#) - combo list can be linked to either a linked combo field or a linked multi-select field. The Additional Forms Admin associates the individual values in a combo list with corresponding values in a linked field list so that when the user makes a selection in the combo list, the system automatically provides the user with options, based on their selection.
- [Tree Field](#) - users can select from a hierarchy of information. The Additional Forms Admin can set up a hierarchy of text/values that can be used to organize and store several options for a single field. For example, a tree field can include a hierarchy with a top level of Division, and a secondary hierarchical level of Departments. Once

the user select a division, a sub-folder displays with a list of departments within the division.

- **Person Field** - The user functions that a List Admin adds in the List Administration screen display as item selections when a Person Field is added to an additional form or an additional field in a Company, Contract, or Project Profile. The List Admin must then select a single function for the list that will be used in the additional form or profile. When a user views the list in an additional form or in the Additional Fields section of a Contract, Company, or Project Profile, the selected function is translated into the names of the people who hold that function in Conga Contracts.

An Additional Forms Admin can perform the following tasks associated with additional forms from the [Additional Form Admin Browse screen](#):

- [Locate the additional form](#)
- [Add an additional company form](#)
- [Add an additional contract form](#)
- [Add an additional project form](#)
- [Edit an Additional Form](#)
- [Hide Fields in an Additional Form](#)

An Additional Forms Admin can perform the following tasks associated with additional fields from the [Additional Form Admin Browse screen](#):

- [Locate the additional field](#)
- [Add an additional field](#)
- [Edit an additional field](#)
- [Hide an additional field](#)

Additional Form Admin Browse Screen

Additional forms are viewed and managed from the Additional Form Admin Browse screen. The screen is subdivided into four Form Type categories: Additional Fields, Company, Contract, and Project.

- The Additional Fields category houses the fields that Administrators have added to the default Company, Contract, and Project Profiles. Users access the Administrator-defined fields for a profile by displaying the Additional Fields section in a Company, Contract, or Project Profile.
- The Company, Contract, and Project categories contain a list of the forms that Administrators have created and linked to specific groups/types of companies, contracts, and projects. Users access the Administrator-defined forms that are linked

to a Profile by clicking on the Additional Forms link in a Company, Contract, or Project Profile.

Navigation Toolbar	Click Admin to display a menu, and select the Additional Forms link to display the Additional Form Admin Browse screen.
Company Additional Fields link	Click to display a screen that allows you to add an additional field to the default Company Profile, as well as view, edit, and hide the additional fields that have already been added to the Company Profile screen.
Contract Additional Fields link	Click to display a screen that allows you to add an additional field to the default Contract Profile, as well as view, edit, and hide the additional fields that have already been added to the Contract Profile screen.
Project Additional Fields link	Click to display a screen that allows you to add an additional field to the default Project Profile, as well as view, edit, and hide the additional fields that have already been added to the Project Profile screen.
Company Form records	Click to display a screen that allows you to view, edit and hide fields in an Additional Company Form.
Contract Form records	Click to display a screen that allows you to view, edit and hide fields in an Additional Contract Form.
Project Form records	Click to display a screen that allows you to view, edit and hide fields in an Additional Project Form.
Search option	To quickly locate an additional form, type the first few letters of the form name in the Search field and click the icon.

Screen display	To manage the display of information in the screen: Sort the data in a column by clicking (toggling) on a column heading. Reorder and resize the columns to manage the display of information in the browse screen.
New Company Additional Form button	Click to create a new form to capture additional company information.
New Contract Additional Form button	Click to create a new form to capture additional contract information.
New Project Additional Form button	Click to create a new form to capture additional project information.

Locating an Additional Form or Field

The existing additional forms for companies, contracts, and projects are listed in the Additional Form Admin Browse screen. From the Browse screen, the additional fields added to the default Company, Contract, and Project Profile screens can also be accessed.

Locating an Additional Field

The Additional Fields category houses the fields that Administrators have added to the default Company, Contract, and Project Profiles. Users access the Administrator-defined fields for a profile by displaying the Additional Fields section in a Company, Contract, or Project Profile.

1. Click the Gear Icon in the Navigation Toolbar, and click the Additional Forms link in the menu.
2. In the Additional Form Admin Browse screen, locate the Form Type: Additional Fields category.
3. In the Additional Fields category, click Contract Additional Fields, Company Additional Fields, or Project Additional Fields to display the Profile Edit screen for the selected Profile.
4. Scroll through the additional fields in Column 1 and Column 2 to locate the field you want to edit, hide, or needs an Information Panel.

Locating an Additional Form

The Company, Contract, and Project categories in the Additional Form Admin Browse screen contain a list of the forms that Administrators have created and linked to specific groups/types of companies, contracts, and projects. Users access the Administrator-defined forms that are linked to a Profile by clicking on the Additional Forms link in a Company, Contract, or Project Profile.

1. Click the Gear Icon in the Navigation Toolbar, and click the Additional Forms link in the menu.
2. In the Additional Form Admin Browse screen, locate the Form Type: Company, Form Type: Contract, or Form Type: Project category, depending on the additional form you want to locate.
3. In the Company, Contract, or Project category, locate the additional form using any of the following options:

 **Tip:**

All categories in the screen are expanded by default, displaying all the additional fields and the additional forms. Click on the collapse icon for one or more categories to increase the viewing area for another category.

- Enter a beginning word or value for the form name or description in the Search field, and press the ENTER key on your keyboard.
 - Scroll through the list of forms.
 - Click on the Additional Form Name header to sort the list of forms in ascending or descending order.
4. Click the additional form record to display the Profile Edit screen for the form.
 5. Locate the field you want to edit, hide, or needs restrictions or an Information Panel.

Adding a Company Additional Form

A user with the Additional Forms Admin permission can design an additional company form that contains different types of fields, and then link the form to specific company types and groups so that users are prompted to capture additional information whenever they create a Company Profile that matches the types/groups specified in the form. The types of fields that can be added to an additional form include Text (256 characters or less), Long Text (up to 40 pages), Date, Number, Currency, Hyperlink, and GIS Geometry. However, the GIS Geometry field, which generates a map using location coordinates provided by the Additional Forms Admin, is only available in environments that have POST-

GIS enabled on their database, and Conga Contracts will perform this service upon customer request.

An Additional Forms Admin can also add different types of field lists to an additional form, including a list that requires the user to make a single selection (combo list), or a list that allows the user to select more than one of the list items (multi-select list). Two of the lists in an additional form can be linked so that when a user makes a selection in one list, only the options for that selection display in the linked list. Another type of list that can be added to an additional form is a tree field, which allows a hierarchy to be set so that multiple levels of information can be captured.

The Person field is a special type of field, which includes all the functions that a user can hold in Conga Contracts. When this field is added to an additional form, and a user function is selected, the names of people who can perform this function display as selections in the list when the form is added to the appropriate Company, Contract, or Project Profile.

An Additional Forms Admin can make an additional form required so that users must complete the form and capture the requested information, or they can make the form optional, allowing users to provide the information, if available.

- A required form forces the Additional Forms screen to display when a new Company Profile is added, as well as redisplay in the Links section at the bottom of the screen every time the profile is opened, until a user completes the form and captures the required information. A Missing Required Additional Forms heading appears at the top of the Additional Forms screen and a required form displays with a pink background.
- An optional form associated with a profile is accessed by clicking on the Additional Forms link in a Company Profile.

 **Tip:**

An alternative to Additional Forms is the Additional Fields feature, which can be used to update the default Company Profile by adding fields to the Profile screen.

Adding a Field to an Additional Form

1. Click the Gear Icon in the Navigation Toolbar, and click the Additional Forms link in the menu.
2. In the Additional Form Admin Browse screen, click New Company Additional Form in the toolbar.
3. In the Additional Profile Edit screen, populate the Form Name and Description fields. The API Name field will auto-populate once you save the form.

The developers at your company can alter the Application Programming Interface (API) to customize the additional form.

4. Click Add Field in the toolbar.

 **Important:**

Use caution when adding a field to an additional form since you cannot delete a field once you add it to the form. However, you can hide a field by right-clicking on it and selecting the button. The field will not display when a user adds the additional form to a Company Profile.

5. In the Add Field prompt:
 - Populate the Field Name field.
 - Make a selection in the Field Type list.
 - Click Save.
6. (Optional) Click on the field to select it. An active field is outlined with a red segmented line and its properties display in the Field Properties table.
7. (Optional) In the Field Properties table:

 **Tip:**

The Field Type cannot be edited and the API Name field will auto-populate once you save the form. The API Name field should only be populated by a developer from your company.


- Make the field required by selecting true in the Required? list.
 - Enter information or instructions in the Quick Tip field to assist users in populating the field. When a user hovers over the field, the information you enter displays.
 - Rename the field by clicking in the Field Label field and type over the existing text
8. (Optional) Move a field by clicking on it to select it. Hover over the field until the icon displays. Click on the icon, and then drag-and-drop the field to the desired location in Column 1 or Column 2.
 9. Add additional fields (steps 4-8) and define the restrictions for using the form.
 10. (Optional) Add an Information Panel to provide a descriptive heading for two or more fields, and/or add organization to the form.
 11. Click Save.
 12. Add list items for any lists added to the form from the List Administration screen.

Adding a Tree Field

The tree field allows you to capture a hierarchy of information using a single field.

In the steps below, we are using a tree field to create the credit ratings used by three different credit rating agencies: Moody's, Standard & Poor's, and Fitch.

1. In the Additional Profile Edit screen, click Add Field in the toolbar.
2. In the Add Field prompt:
 - Enter Customer Credit Rating in the Field Name field.
 - Select Tree Field in the Field Type list.
 - Click Save.
3. (Optional) Click on the field to select it. An active field is outlined with a red segmented line and its properties display in the Field Properties window.
4. (Optional) In the Field Properties table:

 **Tip:**

The Field Type cannot be edited and the API Name field will auto-populate once you save the form. The API Name field should only be populated by a developer from your company.

- Make the field required by selecting true in the Required? list.
 - Enter information or instructions in the Quick Tip field to assist users in populating the field. When a user hovers over the field, the information you enter displays.
 - Rename the field by clicking in the Field Label field and type over the existing text.
5. Click Save.
 6. Add list items for any lists added to the additional form from the List Administration screen.
 7. In this example, you would add a category for the Moody, Standard & Poor, and Fitch credit rating agency, and then add the possible ratings for each agency.

Adding a Contract Additional Form

A user with the Additional Forms Admin permission can design an additional contract form that contains different types of fields, and then link the form to specific contract types and groups so that users are prompted to capture additional information whenever they create a Contract Profile that matches the types/groups specified in the form. The types of fields that can be added to an additional form include Text (256 characters or less), Long Text (up to 40 pages), Date, Number, Currency, Hyperlink, and GIS Geometry. However, the

GIS Geometry field, which generates a map using location coordinates provided by the Additional Forms Admin, is only available in environments that have POST-GIS enabled on their database, and Conga Contracts will perform this service upon customer request.

The Additional Forms Admin can also add different types of field lists to an additional form, including a list that requires the user to make a single selection (combo list), or a list that allows the user to select more than one of the list items (multi-select list). Two of the lists in an additional form can be linked so that when a user makes a selection in one list, only the options for that selection display in the linked list. Another type of list that can be added to an additional form is a tree field, which allows a hierarchy to be set so that multiple levels of information can be captured.

The Person field is a special type of field, which includes all the functions that a user can hold in Conga Contracts. When this field is added to an additional form, and a user function is selected, the names of people who can perform this function display as selections in the list when the form is added to the appropriate Company, Contract, or Project Profile.

The Additional Forms Admin can make an additional form required so that users must complete the form and capture the requested information, or they can make the form optional, allowing users to provide the information, if available.

- A required form forces the Additional Forms screen to display when a new Contract Profile is added, as well as redisplay in the Links section at the bottom of the screen every time the profile is opened, until a user completes the form and captures the required information. A Missing Required Additional Forms heading appears at the top of the Additional Forms screen and a required form displays with a pink background.
- An optional form associated with a profile is accessed by clicking on the Additional Forms link in a Company Profile.

 **Tip:**

An alternative to Additional Forms is the Additional Fields feature, which can be used to update the default Contract Profile by adding fields to the Profile screen.

Adding a Field to an Additional Form

1. Click the Gear Icon in the Navigation Toolbar, and click the Additional Forms link in the menu.

2. In the Additional Form Admin Browse screen, click New Contract Additional Form in the toolbar.
3. In the Additional Profile Edit screen, populate the Form Name and Description fields. The API Name field will auto-populate once you save the form. The developers at your company can alter the Application Programming Interface (API) to customize the additional form.

 **Important:**

Use caution when adding a field to an additional form since you cannot delete a field once you add it to the form. However, you can hide a field by right-clicking on it and selecting the button. The field will not display when a user adds the additional form to a Contract Profile.

4. Click Add Field in the toolbar.
5. In the Add Field prompt:
 - a. Populate the Field Name field.
 - b. Make a selection in the Field Type list.
 - c. Click Save.
6. (Optional) Click on the field to select it. An active field is outlined with a red segmented line and its properties display in the Field Properties table.
7. (Optional) In the Field Properties table:
8. Make the field required by selecting true in the Required? list.
9. Enter information or instructions in the Quick Tip field to assist users in populating the field. When a user hovers over the field, the information you enter displays.
10. Rename the field by clicking in the Field Label field and type over the existing text.

 **Tip:**

The Field Type cannot be edited and the API Name field will auto-populate once you save the form. The API Name field should only be populated by a developer from your company.

11. (Optional) Move a field by clicking on it to select it. Hover over the field until the icon displays. Click on the icon, and then drag-and-drop the field to the desired location in Column 1 or Column 2.
12. Add additional fields (steps 4-8) and define the restrictions for using the form.
13. (Optional) Add an Information Panel to provide a descriptive heading for two or more fields, and/or add organization to the form.
14. Click Save.
15. Add list items for any lists added to the form from the List Administration screen.

Adding Linked Fields

When a Combo List is added to an additional form, it can be associated with the Linked Combo Field or the Linked Multi-select Field. This association is useful if an Administrator wants to control the options that display in a secondary list (Linked Combo Field or Linked Multi-select Field) when the user makes a selection in a primary list (Combo List). The only difference between the two linked fields is that the Linked Combo Field allows the user to make only one selection in the list, and the Linked Multi-select Field allows the user to make multiple selections. The selections in a Combo List that is associated with a Linked Combo Field or a Linked Multi-select Field are managed using the [Lists](#) feature.

In the steps below, we are linking a Milestone combo list to a Milestone Completed By multi-select list to identify the person or persons who completed a milestone.

1. In the Additional Profile Edit screen, click Add Field in the toolbar.
2. In the Add Field prompt:
 - Enter Milestone in the Field Name field.
 - Select Combo List in the Field Type list.
 - Click Save.
3. (Optional) In the Field Properties table for the combo list:
 - Make the field required by selecting true in the Required? list.
 - Enter information or instructions in the Quick Tip field to assist users in populating the field. When a user hovers over the field, the information you enter displays.
 - Rename the field by clicking in the Field Label field and type over the existing text.
4. Add the linked field to the form:
 - Click Add Field in the toolbar.
 - In the Add Field prompt:
 - Enter Milestone Completed By in the Field Name field.
 - Select Linked Multiselect Field in the Field Type list.
 - Click Save.
 - In the second Add Field prompt:
 - Select Milestone in the Parent Field list to link the combo list to the Milestone Completed By multi-select field.
 - Click Save.
5. (Optional) In the Field Properties table for the linked multi-select list:

 **Tip:**

When a user captures the additional form and makes a selection in the Milestone list, they can select one or more individuals in the Milestone Completed By list to identify the person or persons who completed the milestone.

6. Make the field required by selecting true in the Required? list.
7. Enter information or instructions in the Quick Tip field to assist users in populating the field. When a user hovers over the field, the information you enter displays.
8. Rename the field by clicking in the Field Label field and type over the existing text.
9. Change the selection in the Parent Field list, if needed.
10. Click Save.
11. Add list items for any lists added to the additional form from the List Administration screen.
12. In this example, you would add list items to the Milestone combo list, and user names (or functions/departments/teams) to the Milestone Completed By multi-select list.

Adding an Information Panel to an Additional Form or Field

A user with the Additional Forms Admin permission can enhance the design of a Company, Contract, or Project additional form by adding column headings and then grouping fields under the appropriate headings using an Information Panel. An Information Panel can also be used to organize the additional fields added to a Company, Contract, or Project Profile screen by adding headings to draw attention to the fields, ensuring users capture the requested information.

1. Locate the additional field or additional form that needs the Information Panel, and display its Profile Edit screen.
2. Click Add Information Panel in the toolbar.
3. Locate the panel in Column 1 or Column 2, and click on it to select it. An active field is outlined with a red segmented line and its properties display in the Field Properties table.
4. In the Field Properties table:
 - Type over the existing text in the Display Text field to provide a name for the panel.
 - Make a selection in the Style list to select a style for the panel.
 - None - text display is the default system text.
 - Exclamation - display is a pink background and an "!" icon.
 - Important - display is a blue background and an "i" icon.
 - Bold - text displays in a bold font style.

5. Drag-and-drop the Information Panel to the desired location in the screen.

 **Tip:**

Tip: To delete an Information Panel, right-click on the panel and click .

6. Click Save.

Adding Restrictions to an Additional Form

A user with the Additional Forms Admin permission can set restrictions for the company, contract, and projects that can capture an additional form. A restriction is set based on how the Type and Group fields are populated in aCompany,Contract, orProjectProfile screen. When a restriction matches the type and group selections in a Profile screen, the additional form is available for capture. The Restrictions option is also used to limit user access to an additional form by granting or denying permissions to the form based on individualuser roles.

 **Warning:**

If you do not set restrictions for an additional form, a user will be able to capture the information in the form from any Profile. If the form is not appropriate to the Contract, Company, or Project Profile, extraneous and possibly inaccurate, information will be stored in the Profile.

The Additional Forms Admin can also make an additional form mandatory so that a reminder continually displays until a user captures (adds) the form. If the information captured by the form should only be captured once, the Additional Forms Admin can designate the additional form as a single-use form.

In the steps below, we are setting restrictions for a contract additional form, but the procedure is the same for a company additional form and a project additional form, except the contract form has an Agreement Type field, which is not present for the other two forms.

1. Locate the additional form that needs the restrictions, and display its Profile Edit screen.
2. In the Profile Edit screen, click the Restrictions tab.
3. In the Restrictions view of the screen:

- Locate the contract group(s) that should complete the additional form, and click on each group to select it.
 - To de-select a selection, click on the selection.
 - Locate the agreement type(s) that should complete the additional form, and click on each type to select it.
 - Locate the contract type(s) that should complete the additional form, and click on each type to select it.
4. (Optional) Select the Mark additional form as required check box to make this form required whenever a Profile matching the group and type restrictions is added to Conga Contracts.
 5. (Optional) Select the Use role-based security check box to make access to the additional form contingent on a user's role.
 6. (Optional) Select the This is a single use form check box to ensure this form can only be added to a Profile once.
 7. Click the Dynamic Profile tab to return to the default view of the screen.
 8. Click Save.

Editing an Additional Form

A user with the Additional Forms Admin permission can edit an additional form by changing the properties of any of the fields in the form, including the name of the field, the Quick Tip that displays when a user hovers over the field, and making the field required or optional.

If an additional form contains a special field list, the Additional Forms Admin can update the Person Filter (Person Field), edit the Parent Field (Linked Combo Field or Linked Multi-select Field), or alter the Default Value (Hyperlink Field). The Admin can also add more fields to an additional form, but they cannot delete any of the existing fields, or delete the form. However, a field can be hidden so that users no longer see the field when they add the form to a Company, Contract, or Project Profile.

Other edits include re-designing the form by adding/removing headings (Information Panels), moving fields from one column to another, and updating a form's restrictions.

In the steps below, we are editing a contract additional form, but the procedure is the same for a company additional form and a project additional form.

1. Locate the additional form that you want to edit, and click on it to display its Profile Edit screen.
2. In the Additional Profile Edit screen, the following edits can be made:
3. Update the Form Name and/or Description fields.
4. Click Add Field in the toolbar to add a field.
5. Edit a field's properties by clicking on the field to select it. In the Field Properties table:

- Select true in the Required? list to make the field required, or false to make it optional.
 - Enter or update the information in the Quick Tip field to assist users in populating the field.
 - Rename the field by clicking in the Field Label field and type over the existing text.
6. The Field Properties table may include the following fields:
 - Decimal Precision (present for Currency field) - the number of decimal places can range from 0 to 5.
 - Parent Field (present for Linked Combo Field or a Linked Multi-select Field) - a different Combo List can be selected as the parent field for the linked field.
 - Person Filter (present for Person Field) - the function of the person named in this field can be changed.
 - Default Value (present for Hyperlink Field) - the URL for a website can be updated.
 7. Move a field by clicking on it to select it. Hover over the field until the icon displays. Click on the icon, and then drag-and-drop the field to the desired location in Column 1 or Column 2.
 8. Add or remove an Information Panel.
 9. Hide a field in the form.
 10. Update the restrictions for the form.
 11. Click Save.

Hiding a Field in an Additional Form

Additional forms cannot be deleted. However, Administrators can "hide" the individual fields in a form, and also delete the Informational Panels, which are used as headings to organize the fields in the form.

Although a field added to company, contract, and project additional form cannot be deleted, a user with the Additional Forms Admin permission can hide a field in the form so that it does not display when users add the form to a Profile. The Informational Panels, which provide headings to organize the fields in the form, can be deleted.

Tip: An additional field can also be hidden in the Company, Contract, and Project Profile screen.

In the steps below, we are hiding a field in a contract additional form, but the procedure is the same for a company additional form and a project additional form.

1. Locate the additional form containing the field you want to hide, and display its Profile Edit screen.

2. Locate the field in Column 1 or Column 2, and click on it to select it. An active field is outlined with a red segmented line and its properties display in the Field Properties table.
3. Right-click on the field, and click the icon. The hidden field is grayed out.

 **Tip:**

To delete an Information Panel, right-click on the panel and click the icon.

4. Click Save.

Adding an Additional Field

A user with the Additional Forms Admin permission can add additional fields and lists to the Company, Contract, and Project Profile screens to capture supplemental data that is not captured in the default Profile screens, but considered required information by their organization. The types of fields and lists that can be added to a Profile screen are the same as those that can be added to an additional form.

There are seven types of fields that can be added to a Profile screen: Text (256 characters or less), Long Text (up to 40 pages), Date, Number, Currency, Hyperlink (to link to a web page), and GIS Geometry. However, the GIS Geometry field, which generates a map using location coordinates provided by the Additional Forms Admin, is only available in environments that have POST-GIS enabled on their database, and Conga Contracts will perform this service upon customer request.

There are six types of lists that can be added to a Profile screen:

- [Combo List](#) - two or more items are added to the list, and users must select one item.
- [Multi-select Field](#) - two or more items are added to the list, and users can select more than one item.
- [Linked Combo Field](#) - a set of list items that correspond to each selection in a combo list is created so that when a user makes a selection in the combo list, the options in the linked combo field are limited to those defined by the Administrator. Users can make only one selection in the linked combo field.
- [Linked Multi-select Field](#) - a set of list items that correspond to each selection in a combo list is created so that when a user makes a selection in the combo list, the options in the linked multi-select field are limited to those defined by the Administrator. Users can make more than one selection in the linked multi-select field.
- [Tree Field](#) - a hierarchy of list items is created, allowing users to drill down one or more levels and select the most appropriate option at each level.
- [Person Field](#) - a system-generated list that requires an Administrator to create all the functions that users, company contacts, and external participants will need in Conga

Contracts. Once the functions are defined, the Administrator adds the Person Field as an additional field in a Company, Contract, or Project Profile, and selects one user function. When a user populates the field, the selected user function is replaced with the names of all the people who can perform this function.

In the steps below, we are adding a date field and multi-select field to the Contract Profile screen. The date field reflects the date the request to create the contract was approved, and the multi-select field identifies the person or persons responsible for initiating and submitting the contract request. The procedure for adding fields to a Company Profile and Project Profile screen is the same when the appropriate substitutions are made.

1. Click the Gear Icon in the Navigation Toolbar, and click the Additional Forms link.
2. In the Additional Form Admin Browse screen, locate the Form Type: Additional Fields category, and click Contract Additional Fields.

 **Note:**

Use caution when adding an additional field since you cannot delete it once you add it to the Profile screen. However, you can hide a field by right-clicking on it and selecting the button. The field will not display when a user adds a Contract Profile, Company Profile, or Project Profile.

3. In the Add Field prompt, populate the fields:
 - Field Name - enter a name for the new field
 - Field Type - select Date Field in the list
 - Click Save
4. (Optional) Click the field to select it. An active field is outlined with a red segmented line and its properties display in the Field Properties grid.
5. (Optional) In the Field Properties grid:
6. Make the field required by selecting true in the Required? list.
7. Enter information or instructions in the Quick Tip field to assist users in populating the field. When a user hovers over the field, the information you enter displays. The Field Type cannot be edited and the API Name field will auto-populate once you save the form. The API Name field should only be populated by a developer from your company. Rename the field by clicking in the Field Label field and typing over the existing text.
8. Click Add Field in the toolbar to add a second field to the Profile screen.
9. In the Add Field prompt:
 - Populate the Field Name field.
 - Select Combo List in the Field Type list
 - Click Save
10. (Optional) Repeat steps 5-6 to set the field properties for the combo list.

11. (Optional) Move a field by clicking on it to select it. Hover over the field until the icon displays. Click on the icon, and then drag-and-drop the field to the desired location in Column 1 or Column 2.
12. (Optional) Add an Information Panel to group and organize related fields.
13. Click Save. Add list items for any lists added to the Profile from the List Administration screen. In this example, you would add list items to the Person Who Approved Contract Request combo list.

Hiding an Additional Field

An additional field that has been added to the Additional Fields section of the default Contract, Company, or Project Profile cannot be deleted. However, a user with the Additional Forms Admin permission can prevent users from populating the field by hiding the field.

 **Tip:**

A field in an additional form can also be hidden.

In the steps below, we are hiding a field in the Additional Fields section of a Contract Profile, but the procedure is the same for a Company Profile and a Project Profile.

1. Locate the contract additional field you want to hide, and display its Profile Edit screen.
2. Locate the field in Column 1 or Column 2, and click on it to select it. An active field is outlined with a red segmented line and its properties display in the Field Properties table.
3. Right-click on the field, and click the icon. The hidden field is grayed out.

 **Tip:**

To delete an Information Panel, right-click on the panel and click the icon.

4. Click Save.

Editing an Additional Field

A user with the Additional Forms Admin permission can edit an additional field that has been added to the default Contract, Company, or Project Profile screen by changing its name, editing the Quick Tip that displays when the user hovers over the field, and making the field optional/required. The Admin can also re-design the Additional Fields section of

the Profile screen by adding/removing headings (Information Panels) and moving fields from one column to another.

If the field is one of the special field lists, the Additional Forms Admin can update the Person Filter (Person Field), edit the Parent Field (Linked Combo Field or Linked Multi-select Field), or change the Default Value (Hyperlink Field). The Admin can also add more fields to the Additional Fields section of the Contract, Company, or Project Profile screen, but they cannot delete any of the existing fields. However, a field can be hidden so that users do not see the field when they add the Profile.

In the steps below, we are editing the additional fields in the Contract Profile screen, but the procedure is the same for the additional fields in a Company Profile and Project Profile.

1. Locate the additional field you want to edit, and click on it to display its Profile Edit screen.
2. In the Additional Profile Edit screen, the following edits can be made:
 - Update the Form Name field.
 - Click Add Field in the toolbar to add a field.
 - Edit a field's properties by clicking on the field to select it. In the Field Properties table:
 - a. Select true in the Required? list to make the field required, or false to make it optional.
 - b. Enter or update the information in the Quick Tip field to assist users in populating the field.
 - c. Rename the field by clicking in the Field Label field and type over the existing text.
3. The Field Properties table may include the following fields:
 - Decimal Precision (present for Currency field) - the number of decimal places can range from 0 to 5.
 - Parent Field (present for Linked Combo Field or a Linked Multi-select Field) - a different Combo List can be selected as the parent field for the linked field.
 - Person Filter (present for Person Field) - the function of the person named in this field can be changed.
 - Default Value (present for Hyperlink Field) - the URL for a website can be updated.
 - Move a field by clicking on it to select it. Hover over the field until the icon displays. Click on the icon, and then drag-and-drop the field to the desired location in Column 1 or Column 2.
 - Add or remove an Information Panel.
 - Hide a field in the form.
4. Click Save.

Mapping Additional Forms

Contracts supports the syncing of Additional Forms between Contracts and Conga Contracts for Salesforce with the exception of contract requests.

To enable this feature, take the following steps:

1. Go to Contracts and click Contracts Setup.
2. Click Platforms.
3. Under Connections, click Object Mapping.
4. Additional Forms are available as an object to select. Once selected, you can map fields within additional forms to Salesforce objects.

Adding an Additional Form API Endpoint Configuration

This article provides the steps to add an additional form API endpoint configuration.

 **Note:**

This feature must be enabled by Conga. Contact your CSM for your information.

Adding an additional Form API endpoint configuration allows you to pull in data from an external source into a contract profile when requesting a contract. To add an Additional Form API Endpoint configuration, take the following steps:

1. Click on the Gear icon at the top right of your screen.
2. Click Additional Forms.
3. Click New Contracts Additional Forms.
4. Click the tab API Endpoint Configuration.
5. Enter your Endpoint URL. At this time Conga only supports REST calls, and https endpoints.
6. Click Add Substitution Data to populate data in the Fields Labels.
7. Click the Dynamic Profile tab.
8. Enter a name for the form.
9. Click Add Field.
10. Name the Field, select Text Field for the Field Type, and click Save.
11. Click the field to display Field Properties.
12. Within the API Mapping Key, enter the json path to map the text fields to the json fields. This will use the scientific name within the API Mapping Key.
13. Click the Gear icon at the top right of your screen.
14. Click Contract Request Types.

15. Click New Bundle Request Type.
16. Enter a name for the bundle in the Bundle Name field.
17. Select the approvers within the Bundle Approvers field.
18. Select Edit Mode: Enhanced.
19. Click the tab New Request Type to the right of Bundle Configuration.
20. Click the Additional Forms tab.
21. Locate the name of the Contract Additional Form you created.
22. Check on the checkbox under the Available column.
23. Click Back to return to the Bundle Configuration screen and click Save.
24. The request is now available to used who have permissions to submit requests. To create a new request, click Contracts from the navigation toolbar.
25. Click Requests.
26. Click New Request and select the request.
27. Scroll down and select the form you created previously.
28. Click into the field under API Endpoint Search Fields.
29. Paste or enter your search information.
30. Within the grid that display, click on one of the rows. When the search result is clicked, it is mapped to the field added to the additional form.
31. Click Submit Request. The request needs to be approved by the users named within the bundle approvers.
32. After the contracts is accepted, go to Links > Additional Forms > and select the name of the form you created.

API External Data Fields Overview

Conga Contracts offers robust system fields that allow you to easily submit requests with special data from external databases.

Configuring API External Data Fields as an Administrator

To configure API External Data Fields for use, take the following steps:

 **Important:**

The API External Data Fields feature must be enabled by Conga first.

1. From the Navigation Toolbar, click on the Administrator gear icon and select Additional Forms.
2. Click on Contract Additional Forms.

3. Click on the API Endpoint Configuration URL tab.
4. Enter the Endpoint URL.
Note: When substituting a variable, you must use a colon (:) followed by your variable. If a colon is needed in your header, use double colons (::).
5. Click Add Substitution Data.
6. Enter Field Labels (taken from your Endpoint URL).
Warning: If you make any changes to the Endpoint URL, any substitutions you entered are cleared.
7. To add Headers, click Add Headers and fill out the Key and Value field. Click Add Substitution Data to add these values beneath Header Substitutions.
8. Once you've entered all your values, run a test to ensure that the expected data is returned by clicking Validate URL Endpoint.
9. Click on the Dynamic Profile tab.
10. Click Add Field to enter your desired fields. Only text fields are supported, and the API Mapping Key must be filled out.
Important: When you fill out the API Mapping Key, you must use the following format that is used a path to the proper JSON data: `$.[*].examplePath`
11. Go to Administrator gear icon and click Contract Request Types.
12. Click on the name of the Request Type where you want to add your external data fields.
13. Click Add Additional Form to add the form with the external data you created to the Request Type.

Submitting a request using API External Data Fields

To submit a contract request that includes data from API External Data Fields, take the following steps:

1. From the Navigation Toolbar, go to Contracts > Requests.
2. Under My Requests, click on New Request.
3. Select a request type.
4. Scroll down to locate the API Endpoint Search Fields, enter your values, and click Search.
5. At the bottom of the search results section, click Add Additional (name of Form) to run another search with different values

The results of these searches are available to merge into a Contract document.

Processing a request using API External Data Fields

To process a request that includes data from API External Data Fields, take the following steps:

1. From the Navigation Toolbar, go to Contracts > Approvals.
2. Click + next to the name of the request to begin processing the request.
3. The data from the API External Fields is included under the Documents section for review.
4. Click Accept Request.
5. Click Save.

A Contract Profile is now created with the external data saved to an Additional Form.

Profile Rules

A Profile Rule is similar to an "if...then" statement, and is used to link two fields in a Company, Contract, or Project Profile so that when a user populates one of the linked fields, the Contracts system automatically determines the value or accessibility of the second linked field. A Profile Rule can be written for an Additional Form or an Additional Field.

Profile Rules Overview

A profile rule is similar to an "if...then" statement, and is used to link two fields in a Company, Contract, or Project Profile so that when a user populates one of the linked fields, Conga Contracts automatically determines the value or accessibility of the second linked field using a rule that is created by a user with the Profile Rules Admin permission. For example, a Profile Rules Admin can set up a rule that says "if a user selects Fixed - Manual Inactivate in the Term Type list in the Contract Profile screen, then the Notice Period field is automatically populated with the number 60 since the company policy for contracts of this term type is to provide 60 days notice of intent to renew or cancel.

A profile rule can be set up for:

- Default field in a Contract, Company, or Project Profile screen, which is a Contracts defined field that appears in every Profile screen.
- Additional field, which is an Administrator-defined field that is added to the default Company, Contract, or Project Profile screen. When an additional field is added, it becomes part of the default Profile screen and appears in the Additional Fields section of the screen.
- Additional form, which is an Administrator-created form that contains fields designed to capture specific information for a Company, Contract, or Project Profile. When an additional form is captured, it is stored in the Additional Forms screen, which is linked to the Profile and accessed by clicking on the Additional Forms link.

In setting up a profile rule, a Profile Rules Admin first defines the condition (if a user selects an item in a field list or populates a field with a certain value), and then defines the actions. For a full list of actions, see [Profile Rule Action Types](#). Some possible system actions include:

- Make an optional field a required field, or make a required field an optional field
- Disable a field, or enable a field
- Hide a field, or show a field
- Specify a default value for a field if there is no existing value
- Force a value for a field
- Set up a profile rule formula

Profile Rules Admins can perform the following tasks:

- [Locating a Profile Rule](#)

Profile Rules for Default and Additional Fields in a Profile Screen

- [Adding a Rule for a Profile Field](#)
- [Editing a Rule for a Profile Field](#)
- [Deleting a Rule for a Profile Field](#)

Profile Rules for Contract, Company, and Project Additional Forms

- [Adding a Rule for an Additional Form](#)
- [Editing a Rule for an Additional Form](#)
- [Deleting a Rule for an Additional Form](#)

Locating a Profile Rule

The Profile Rules Admin screen provides access to profile rules for both the Company, Contract, and Project Profiles, as well as the additional forms associated with the Profiles. The screen is divided into four Profile Type categories: Profile, Company Additional Forms, Contract Additional Forms, and Project Additional Forms.

- The Profile category is further divided into Company Profile, Contract Profile, and Project Profile and houses the profile rules for both the default fields and the additional fields that Profile Rules Admins have added.
- Users access the additional fields for a profile by displaying the Additional Fields section in a Company, Contract, or Project Profile.
- The Company, Contract, and Project Additional Forms categories display only if an Additional Forms Admin has added at least one company, contract, and project additional form to Conga Contracts.
- Users access the additional forms that are linked to a profile by clicking the Additional Forms link in a Company, Contract, or Project Profile.

1. Click the Gear Icon in the Navigation Toolbar, and click the Profile Rules link in the menu.
2. In the Profile Rules Admin screen, locate the Profile or the Additional Form category.

 **Tip:**

All categories in the screen are expanded by default, displaying all the additional fields and the additional forms. Click on the collapse icon for one or more categories to increase the viewing area for another category.

3. In the category, locate the Profile or the Additional Form containing the profile rule, and click on it to select it.
4. In the Profile Rules Edit screen, you can:
 - Add, edit, or delete a rule for a default or additional field in the Company, Contract, or Project Profile screen. Add, edit, or delete a rule for a Company, Contract, or Project Additional Form.

Adding a Rule for a Company, Contract, or Project Profile Field

A user with the Profile Rules Admin permission can add as many profile rules as needed to ensure users capture accurate and appropriate information in Company, Contract, and Project Profiles.

Profile Rules are used to control the population or availability of one field, based on the way in which a user populates another field in the Company, Contract, or Project Profile screen. The linked fields can be two system (default) fields, two additional fields that an Additional Forms Admin has added to the default profile, or one field can be an additional field and the other can be a system field.

Important: In writing a profile rule that includes the Status field in the Contract Profile, you must ensure that the Status Type for the contract status you are using in the rule is set to Active in the List Administration screen. Otherwise, the profile rule will not be applied to Contract Profiles, even though the value in their Status field matches the condition for this field, as defined by the profile rule.

The example below provides the steps in adding a profile rule for a system (default) field in a Contract Profile, but the procedure is the same for adding a profile rule to a Company Profile or a Project Profile.

1. In the Profile Rules Admin screen, locate the Profile Type: Profile category, and click the Contract Profile (or Company Profile or Project Profile) record.

2. In the Profile Rules Edit screen, click Add Rule to display a blank rule record.
3. Populate the Rule Name and Rule Description fields.
 - (Optional) In the Conditions section, click Add Condition to display three fields used to define a condition for the rule.
4. Field - select a field to define the rule.
5. Operation - select the appropriate option:
 - In to specify a value or text
 - Not In to exclude a value or text
 - Null to identify an unpopulated field
 - Not Null to identify a field populated with any data
 - Value - make a selection in the list to complete the condition.
 - If the Value component is a field rather than a list, enter text or a number in the field. If it is a multi-select list, click on additional items to define all the items that will be affected by the rule.
 - A single profile rule can contain multiple conditions and multiple actions for a condition.
6. In the Actions section, click Add Action to display three fields used to define the system action that you want to occur if the user meets the condition(s) of the rule. For a list of the available action types, see [Profile Rule Action Types](#).
 - Action Type - make a selection in the list to identify the system action.
 - Field - select the field for the action specified in the Action Type list.
 - Value - enter text or a value to define the parameter for the action if the field is enabled.
 - The field is enabled only if you select Default Value, Force Value, or Calculate Field in the Action Type list.
 - The field is disabled for the other system actions: Enable/Disable Field, Require/Unrequire Field, and Hide/Unhide Field.
 - To define the notice period for a contract with a Fixed - Manual Inactive term type, select Term Type in the Field list, In in the Operation list, and Fixed - Manual Inactivate in the Value list in the Conditions section. In the Actions section, select Force Value in the Action list, Notice Period in the Field list, and enter 60 in the Value field.
7. Click Save.

Editing a Rule for a Company, Contract, or Project Profile Field

A user with the Profile Rules Admin permission can edit a profile rule for a system field or an additional field in a Contract, Company, or Project Profile.

1. In the Profile Rules Admin screen, locate the Profile Type: Profile category, and click the Contract Profile (or Company Profile or Project Profile) record.
2. In the Profile Rules Edit screen, locate the profile rule you want to edit in the Rules section.
3. Click on the rule name to select it and enable its Condition and Action fields.
4. Edit the information in the Rules, Conditions, and Actions sections.

 **Note:**


A single profile rule can contain multiple conditions and multiple actions for a condition.

5. Click Save.

Deleting a Rule for a Company, Contract, or Project Profile Field

A user with the Profile Rules Admin permission can delete a Profile Rule for a system field or an additional field in a Contract, Company, or Project Profile screen if the rule no longer applies or becomes invalid. Alternatively, a Profile Rules Admin can delete an individual condition or action for a Profile Rule if the rule contains more than one condition or action.

Deleting an Entire Profile Rule

1. In the Profile Rules Admin screen, locate the Profile Type: Profile category, and click the Contract Profile (or Company Profile or Project Profile) record.
2. In the Profile Rules Edit screen, locate the profile rule you want to delete in the Rules section, and click its  icon.
3. In the confirmation prompt, click Yes.

Deleting a Condition or Action for a Profile Rule

1. Click Admin in the Navigation Toolbar, and click the Profile Rules link in the menu.
2. In the Profile Rules Admin screen, locate the Profile Type: Profile category, and click the Contract Profile (or Company Profile or Project Profile) record.
3. In the Profile Rules Edit screen, locate the profile rule whose condition/action you want to delete in the Rules section.
4. Click on the rule name to select it and enable its Condition and Action fields.

- To delete a condition, locate the condition record in the Conditions section of the screen, and click its icon. Click Yes in the confirmation prompt.
 - To delete an action, locate the action record in the Actions section of the screen, and click its icon. Click Yes in the confirmation prompt.
5. Click Save.

Adding a Rule for an Additional Contract, Company, or Project Form

A user with the Profile Rules Admin permission can add as many profile rules as needed to ensure users capture accurate and appropriate information for the additional forms added to Company, Contract, and Project Profiles.

Profile Rules are used to control the population or availability of a field in an Additional Form based on the user's selection in a related field in the same form. Since additional forms can be added to Contract, Company, and Project Profiles, a Profile Rules Admin can create profile rules for all three types of profiles.

A profile rule can also be used to control the population or availability of a system (default) field or an additional field that an Administrator adds to a Company, Contract, or Project Profile based on the selection a user makes in one of the other fields in the profile.

The example below provides the steps in adding a profile rule for Contract Additional Form, but the procedure is the same for adding a profile rule to a Company Additional Form or a Project Additional Form.

1. In the Profile Rules Admin screen, locate the Profile Type: Contract Additional Forms category (or Profile Type: Company Additional Forms or Profile Type: Project Additional Forms).

 **Tip:**

All categories in the screen are expanded by default, displaying all the additional fields and the additional forms. Click on the collapse icon for one or more categories to increase the viewing area for another category.

2. Locate the additional form that needs the profile rule, and click on it to select it.
3. In the Profile Rules Edit screen, click Add Rule to display a blank rule record.
 - Populate the Rule Name and Rule Description fields.
4. In the Conditions section, click Add Condition to display three fields used to define a condition for the rule.
5. Field - select a field to define the rule.
6. Operation - select the appropriate option:

- In to specify a value or text
 - Not In to exclude a value or text
 - Null to identify an unpopulated field
 - Not Null to identify a field populated with any data
7. Value - make a selection in the list to complete the condition.
 - If the Value component is a field rather than a list, enter text or a number in the field. If it is a multi-select list, click on additional items to define all the items that will be affected by the rule.
 - A single profile rule can contain multiple conditions and multiple actions for a condition.
 8. In the Actions section, click Add Action to display three fields used to define the system action that you want to occur if the user meets the condition(s) of the rule.
 9. Action Type - make a selection in the list to identify the system action.
 10. Field - select the field for the action specified in the Action Type list.
 11. Value - enter text or a value to define the parameter for the action if the field is enabled.
 12. The field is enabled only if you select Default Value, Force Value, or Calculate Field in the Action Type list.
 13. The field is disabled for the other system actions: Enable/Disable Field, Require/Unrequire Field, and Hide/Unhide Field.
 14. To require the Completion Date and Due Date fields to be populated in a Milestone additional form, the milestone must be completed. Select Milestone Completed? in the Field list, In in the Operation list, and Yes in the Value list in the Conditions section. In the Actions section, select Require Field in the Action list and Milestone Completion Date in the Field list. To make more than one field required, repeat the procedure and make a different selection in the Field list.
 15. Click Save.

Editing a Rule for an Additional Contract, Company, or Project Form

A user with the Profile Rules Admin permission can edit a profile rule for an additional form that is linked to a Contract, Company, or Project Profile in order to change the type or amount of information captured by the form.

1. In the Profile Rules Admin screen, locate the Profile Type: Contract Additional Forms category (or Profile Type: Company Additional Forms or Profile Type: Project Additional Forms).

 **Tip:**

All categories in the screen are expanded by default, displaying all the additional fields and the additional forms. Click on the collapse ^ icon for one or more categories to increase the viewing area for another category.

2. Locate the additional form whose profile rule you want to edit, and click on it to select it.
3. In the Profile Rules Edit screen, locate the profile rule in the Rules section.
4. Click on the rule name to select it and enable its Condition and Action fields.
5. Edit the information in the Rules, Conditions, and Actions sections.

 **Tip:**

A single profile rule can contain multiple conditions and multiple actions for a condition.

6. Click Save.

Deleting a Rule for an Additional Contract, Company, or Project Form

A user with the Profile Rules Admin permission can delete a profile rule for an additional form that is linked to a Contract, Company, or Project Profile if the rule no longer applies or becomes invalid. If a profile rule contains more than one condition or action, an individual condition and/or action can also be deleted.

Deleting an Entire Profile Rule

1. In the Profile Rules Admin screen, locate the Profile Type: Contract Additional Forms category (or Profile Type: Company Additional Forms or Profile Type: Project Additional Forms).

 **Tip:**

All categories in the screen are expanded by default, displaying all the additional fields and the additional forms. Click on the collapse icon for one or more categories to increase the viewing area for another category.

2. Locate the additional form whose profile rule you want to delete, and click on it to select it.
3. In the Profile Rules Edit screen, locate the profile rule in the Rules section, and click its - icon.

4. In the confirmation prompt, click Yes.

Deleting a Condition or Action for a Profile Rule

1. Click the Gear Icon in the Navigation Toolbar, and click the Profile Rules link in the menu.
2. In the Profile Rules Admin screen, locate the Profile Type: Profile category, and click the Contract Profile (or Company Profile or Project Profile) record.
3. Locate the additional form with the profile rule whose condition/action you want to delete, and click on it to select it.
4. In the Profile Rules Edit screen, locate the profile rule in the Rules section.
5. Click on the rule name to select it and enable its Condition and Action fields.
 - To delete a condition, locate the condition record in the Conditions section of the screen, and click its - icon. Click Yes in the confirmation prompt.
 - To delete an action, locate the action record in the Actions section of the screen, and click its - icon. Click Yes in the confirmation prompt.
6. Click Save.

Profile Rules for Requests

Profile Rules allow Administrators to use if/then statements to perform actions, like hiding/showing fields or assigning a default value to fields, when certain conditions are met.

To access and setup Profile Rules:

1. Click the Gear Icon at the top of the page and select Contract Request Type.
2. Select the Request Bundle to which you'd like to add a Profile Rule.
3. On the Request Type Bundle Edit screen, click on the Request Bundle name.
4. Click on Profile Rules.
5. Under the Rules, select Add Rule, and give the rule a name and optional Description.
6. Under the Conditions, clickAdd Condition and select the conditions you want applied to this rule. If you don't have any conditions to add, skip to the next step to create an Action without any Conditions assigned.

 **Note:**

For example, you can set Field to Agreement Type, Operation to In, and Value to Individual, so that when the Agreement Type is an Individual, the assigned Action takes place.

7. Under Actions, clickAdd Actionand select the actions you want applied to this rule.

Note:

For example, you can set Action Type to Default Value, Field to Attorney, and Value to an attorney name, so that when the Agreement Type is an Individual, the assigned Action takes place and the request defaults to the selected Attorney.

8. Click Bundle Configuration and select Save.
9. The rules you created are applied to requests.

Profile Rule Action Types

A list of available Action Types. An Action Type performs the following actions based on the defined Conditions of a Profile Rule. Multiple Actions may be defined within a Profile Rule, as long as they do not logically conflict with each other.

An Action Type performs the following actions based on the defined Conditions of a Profile Rule. Multiple Actions may be defined within a Profile Rule, as long as they do not logically conflict with each other. The available Action Types are:

- Default Value defaults the value of the named field to the value defined in the Value column the first time the Profile record is opened. Once a different selection is made, the Action is ignored and the new selection will remain.
- Force Value forces the value of a named field to the value defined in the Value column. This Action Type does not allow the field to be overwritten. The Profile Rule forces the value to the named value each time the Profile record is opened, even if the User changes the value. Changes are not saved.
- Calculate Field calculates a date or cost in a Contract, Company, or Project Profile screen or an additional form using the Formula Editor window.
- Enable Field allows a field to be edited. This assumes that the field was disabled via another Profile Rule.
- Disable Field allows the User to see field and the value selected in the field, but grays it out so that a User may not edit it.
- Require Field places a red outline around a field and requires a User to enter a field value in order to save the Profile record.
- Un-require Field removes a field requirement. This assumes the field is defined as required in the Field Properties Panel or in another defined Profile Rule.
- Replace Responsibility The replace responsibility rule will do two basic things: replace any existing responsible parties and if there are no responsibilities of that type on the profile it will add them. The replacement will overwrite an existing person assigned to a specific responsibility type with another person of that same responsibility type If

there is no person of a certain responsibility type then the rule will add that person and assign them to that type.

- Hide Field removes the field from visibility to the end User, as opposed to Disable Field, which simply grays it out.
- Un-hide Field reveals the field, making it visible to the end User. This assumes that the field was hidden via another Profile Rule.
- Four more values are available for Profile Rules within Requests:
- Hide Dynamic Object removes the Additional Form from visibility to the end User. This assumes the Additional Form Available checkbox is checked on the Request Template.
- Un-hide Dynamic Object reveals the Additional Form, making it visible to the end User. This assumes the Additional Form Available checkbox is checked on the Request Template and was hidden via another Profile Rule.
- Hide Request removes the Request Form from visibility to the end User. This assumes the Request Bundle contains more than one Request.
- Un-hide Request reveals the Request Form, making it visible to the end User. This assumes that the Request Form was hidden via another Profile Rule.

Profile Rule Formulas

A Profile Rule can contain a formula that performs a calculation on a field in the Company, Contract, or Project Profile screen, or a field in an additional form linked to a profile. A Profile Rule Formula can also be used to concatenate, or link, fields in a Profile screen or an additional form.

Profile Rule Formulas Overview

A Profile Rule can include a formula that is applied to a field in an additional form or a field in the Contract, Company, or Project Profile screen, resulting in the automatic population of the field. A formula is typically comprised of one or more of the default and/or additional fields in a Profile screen that are combined with math operators (+, -, *, and /) in order to calculate the value of a related field in the Profile screen. A formula can also be created to calculate and auto-populate a field in an additional form captured in a Company, Contract, or Project Profile using one or more of the related fields in the form.

A second use of a formula in a Profile Rule is to concatenate, or link, two or more fields in an additional form or fields in the Contract, Company, or Project Profile screen, and then display these linked fields as a string of characters in another field in the additional form or Profile screen.

In creating a Profile Rule formula, the formula is set up as an action, and this action is carried out by Conga Contracts through the population of a field in a Profile screen or an additional form. For example, you can set up a Profile Rule for a Project Profile that includes a formula that auto-populates the Project Cost additional field in the Profile screen when a user populates the Number of Man-Hours and the Cost Per Man-Hour additional fields by setting up a formula that states $\text{Project Cost} = \text{Number of Man-Hours} * \text{Cost Per Man-Hour}$.

A formula can be contingent upon a condition, as defined in the Profile Rule, which must be met before Conga Contracts applies the formula to the field, but if no condition is set, the Profile Rule runs the formula on all Contract, Company, or Project Profiles. All fields used in a formula in a Profile Rule must be mandatory in order to capture the data necessary to correctly calculate or concatenate the targeted field.

In creating a formula for a Profile Rule, the following topics apply:

- [Review the Components of the Formula Editor](#)
- [Build a Cost Calculation](#)
- [Build a Date Calculation](#)
- [Build a Concatenation](#)

Components of the Formula Editor

The Formula Editor window is used to build a cost or date calculation or a concatenation for a Profile Rule that is applied to an additional form or a Contract, Company, or Project Profile. The formula created is designed to auto-populate a field in an additional form or a field in the Contract, Company, or Project Profile screen.

The calculation or concatenation formula is built using existing fields in a Profile screen or an additional form, along with math and precedence operators, as well as static text and values.

Formula Editor - Cost Calculation

The Formula Editor window is launched from the Profile Rules Edit screen by clicking Add Action, selecting Calculate Field in the Action Type list, selecting a text, list, or value field in the Field list, and clicking in the Value field.

A Profile Rule for a Project Additional Form includes a formula that calculates the total cost of a project and populates a field in the form with the result. Five variables are used in the formula, which includes math and procedure operators, and a static value.

<p>Variables list</p>	<p>Click on a variable to add to it to the Formula Editor. Tip: Variable names are the same as the field names in the Profile or additional form. The variables in the list depend on the selection made in the Field list in the Actions section of the Profile Rules Edit screen when Calculate Field is selected in the Action Type list.</p>
<p>Variable fields</p>	<p>Right-click on a variable to display a menu that allows you to perform tasks, such as selecting all the components of the formula in order to copy it or delete it.</p> <ul style="list-style-type: none"> • To remove a variable from the formula, click in the field, and press the Delete button on your keyboard.
<p>Math operators</p>	<p>Use standard symbols to perform mathematical functions in the formula:</p> <ul style="list-style-type: none"> + adds variables - subtracts variables * multiplies variables / divides variables
<p>Parenthesis (Precedence Operator)</p>	<p>Use to identify precedence in performing calculations in the formula.</p> <ul style="list-style-type: none"> • Encase variables and math operators in parenthesis to ensure the result is calculated before other calculations are performed.
<p>Static values</p>	<p>Type in a value to ensure the calculation is always updated by the addition, subtraction, division, or multiplication of this value.</p>
<p>Save button</p>	<p>Click to save the formula.</p>

Formula Editor - Date Calculation

The Formula Editor window displays different options if the action to be performed by the Profile Rule involves calculating a date. To access the window, open the Profile Rules

Edit screen, click Add Action, select Calculate Field in the Action Type list, select a date field in the Field list, and click in the Value field.

A Contract Profile Rule includes a formula that calculates the original expiration date of all Service contracts, which have a 2-year term, using the contract's effective date.

Variables list	<p>Click on a date variable to add to it to the Formula Editor.</p> <p>Tip: Variable names are the same as the field names in the Profile or additional form. The date variables in the list depend on the selection made in the Field list in the Actions section of the Profile Rules Edit screen when Calculate Field is selected in the Action Type list.</p>
Variable field	<p>Click the Edit button, and then right-click on a date variable to display a menu that allows you to perform tasks, such as selecting all the components of the formula in order to copy it or delete it.</p> <ul style="list-style-type: none"> • To remove the date variable, click in the field, and press the Delete button on your keyboard.
Date Part list	<p>Select Day, Month, or Year as the time frame for the formula.</p>
Number field	<p>Enter a number in the field based on the selection made in the Date Part list and the date field selected in the variables list.</p> <ul style="list-style-type: none"> • For example, to calculate a date that is two (2) years from the effective date of a contract, select Year in the Date Part list, and enter 2 in the Number field. You could also select Month in the Date Part list, and enter 24 in the Number field.
Edit / Read Only toggle button	<p>Click to edit the formula, where you can manually enter the formula directly into the window without using the Date Part list or the Number field, or remove components of the formula.</p> <p>Tip: The Edit/Ready Only toggle button also populates the variables list with all fields in the Profile or additional form, not just the date fields.</p>
Save button	<p>Click to save the formula.</p>

Formula Editor - Concatenation

The Formula Editor window can be used to build a concatenation, which is the linking of two or more fields to produce a character string that is used to populate a related field in an additional form or a field in a Contract, Company, or Project Profile screen, including any additional fields that have been added to the Profile.

The Formula Editor window is launched from the Profile Rules Edit screen by clicking Add Action, selecting Calculate Field in the Action Type list, selecting a text, list, or value field in the Field list, and clicking in the Value field.

A Company Profile Rule includes a formula that concatenates one of the default fields in the Company Profile with two additional fields that were added to the Profile, and then populates a third additional field with the concatenated character string.

Variables list	<p>Click on a variable to add to it to the Formula Editor.</p> <p>Tip: Variable names are the same as the field names in the Profile or additional form. The variables in the list depend on the selection made in the Field list in the Actions section of the Profile Rules Edit screen when Calculate Field is selected in the Action Type list.</p>
Variable fields	<p>Right-click on a variable to display a menu that allows you to perform tasks, such as selecting all the components of the formula in order to copy it or delete it.</p> <ul style="list-style-type: none"> • To remove a variable from the formula, click in the field, and press the Delete button on your keyboard.
Static data	<p>Add text or a value, encased in single quotes, to the formula to ensure this information is always displayed in the character string.</p> <ul style="list-style-type: none"> • For example, adding 'INT-' to the formula ensures the character string always begins with this prefix to denote it is an internal identifier. A dash can also be inserted between variables to separate the information in the concatenation, as long as it is encased in singles quotes ('-'). <p>Important: Make sure there is a space between every variable, operator, and symbol.</p>

Pipe symbol	Ensure all variables are encased in symbols, except the last variable, which requires only a leading symbol. Tip: The Pipe symbol is produced by holding down the Shift key on your keyboard and depressing the backslash (\) key twice.
Save button	Click to save the formula.

Building a Date Calculation

A user with the Profile Rules Admin permission can set up a Profile Rule that calculates a cost or date in a Contract, Company, or Project Profile screen or an additional form using the Formula Editor window. A Profile Rule Admin builds a date formula using one or more date fields, along with a Day, Month, or Year operator and a Number field that Conga Contracts uses to calculate the date for a related field in the Profile screen or additional form. Admins with a coding background can use the free-form option and directly enter the formula, along with math and precedence operators, into the Formula Editor using all the available fields in the additional form or Profile. For example, an Admin would enter `date()` or `today()` as one of the parameters in the Formula Editor to ensure the current date is used in performing the calculation for the Profile Rule.

The fields used to build the date formula must be required in order to produce an accurate calculation. Therefore, a Profile Rules Admin must ensure the date fields in the Company, Contract, or Project Profile screen that are used in their formula are required fields. If the formula uses an additional field in a Company, Contract, or Project Profile screen, or a field in an additional form captured in a Profile, these profile and additional form fields must also be designated as required.

A company's standard Services contract is a 2-year contract. A Contract Profile Rule is created for all Services contracts to calculate the original expiration date using the contract's effective date.


1. In the Profile Rules Admin screen, click the Contract Profile link under the Profile Type: Profile heading.
2. In the Profile Rules Edit screen, click Add Rule to display a blank rule record.
3. In the Rules section of the screen, enter Expiration Date Calculation in the Rule Name field.
4. In the Conditions section, click Add Condition to display three fields, and define the condition that will apply the rule to Service contracts:
 - Select Contract Type in the Field list.
 - Select In (equals) in the Operation list.
 - Select Services in the Value list.

5. In the Actions section, click Add Action to display three fields, and build a formula that will populate the Original Exp Date field for all 2-year Services contracts using the date entered into the Effective Date field:
 - Select Calculate in the Action Type list.
 - Select Original Exp Date in the Field list.
 - Click in the Value field to open the Formula Editor window.
6. In the Formula Editor window, build the formula that says the Original Exp Date for a Services contract is two years from the contract's effective date:

 **Tip:**

Selecting the Edit button in the toolbar of the Formula Editor window allows you to manually type the formula directly into the window using math and precedence operators. The Edit/Ready Only toggle button also populates the variable list with all fields in the Profile or additional form, not just the date fields.

- Select Year in the Date Part field to select year as the unit of measure.
 - Enter 2 in the Number field.
 - Select Effective Date in the variable list.
 - Click Save.
7. A negative value can be entered in the Number field in the Formula Editor. For example, to calculate a 30-day Notice Period for a contract, you would select Calculate Field in the Action Type list and select Notice Date in the Field list. In the Formula Editor, select Days in the Date Part field, enter -30 in the Number field, and select Original Exp Date in the field list.

 **Tip:**

Tip: Another option is to select Month in the Date Part field and enter 24 in the Number field, or select Day in the Date Part field and enter 730 in the Number field.

8. In the Profile Rules Edit screen, click Save.

Building a Cost Calculation

A user with the Profile Rules Admin permission can set up a Profile Rule that calculates a date or cost in a Contract, Company, or Project Profile screen or an additional form using the Formula Editor window. A Profile Rules Admin builds a cost formula using one or more fields in a Profile screen or an additional form, along with math and precedence operators

that identify the relationships between the fields. Static values can also be added to a formula if a constant needs to be applied to the calculation. In building a complex formula, precedence operators, which are denoted by parenthesis are used to encase the fields whose calculation must be performed before other components of the formula are calculated.

The fields used to build the cost formula must be required in order to produce an accurate calculation. Therefore, a Profile Rules Admin must ensure the fields in the Company, Contract, or Project Profile screen that are used in their formula are required fields. If the formula uses an additional field in a Company, Contract, or Project Profile screen, or a field in an additional form captured in a Profile, these profile and additional form fields must also be designated as required.

There are four Math operators that can be used in a formula: Add (+), Subtract (-), Multiply (*), and Divide (/).

A Project Team is regularly assembled to test the current version of a software package before it is released to customers. The team includes a variable number of employees from Quality Assurance (QA), Development (DEV), and Customer Service (CS). A cost calculation is run for every release to determine the cost of testing based on the number of employees and the time spent in testing. Therefore an additional project form was created to track the data, and a Profile Rule was created for the additional form.

1. Click Admin in the Navigation Toolbar, and click the Profile Rules link in the menu.
2. In the Profile Rules Admin screen, click the Release Testing Project link under the Profile Type: Project Additional Forms heading.
3. In the Profile Rules Edit screen, click Add Rule to display a blank rule record.
4. In the Rules section of the screen, enter Release Testing Cost in the Rule Name field.

The Conditions section is not available for additional forms.

5. In the Actions section, click Add Action to display three fields, and build a formula that will populate the Projected Project Cost field in the additional form using the other fields in the form, along with math operators and symbols:

- Select Calculate in the Action Type list.
- Select Projected Project Cost in the Field list.
- Click in the Value field to open the Formula Editor window.

6. In the Formula Editor window, build the formula that says the projected cost = total number of employees testing the software X the average daily cost of using these employees X the number of days spent testing.

Make sure there is a space between every variable, operator, and symbol.

- Select Number of CS Team Members in the variable list, and enter the + (addition) operator, making sure there is a space before and after the operator.
- Repeat the process using Number of Dev Team Members.
- Repeat the process using Number of QA Team Members, but do not enter the + operator.
- Enclose the three variables in parenthesis to indicate this calculation should be performed first, making sure there is a space after the opening parenthesis and space before and after the closing parenthesis.
- Enter the * (multiplication) operator, select Average Daily Rate for Resources in the variable list, and then insert a space after the variable.
- Enter another * (multiplication) operator, insert a space, and then select Average Daily Rate for Resources in the variable list.
- Click Save.

7. In the Profile Rules Edit screen, click Save.

Building a Concatenation

A formula can be added to a Profile Rule, which requires Contracts to perform a concatenation, or linking of fields, to produce a character string, which can include both text and numbers.

A user with the Profile Rules Admin permission can set up a Profile Rule that includes a formula, which is concatenated by Conga Contracts and then used to auto-populate a related field in a Company, Contract, or Project Profile screen, or a field in an additional form that has been captured in a Profile.

Concatenation is the action of linking field values together in a series and displaying this string of information in another field in a Company, Contract, or Project Profile screen, or in a field in an additional form that has been captured in a Profile.

A Profile Rules Admin builds the concatenated formula using one or more of the fields in a Profile screen or an additional form, along with symbols, which identify the linkage between the fields. Static text and symbols can also be added if a constant needs to be applied to the concatenation.

The fields used to build the concatenation must be required in order to produce an accurate result. Therefore, a Profile Rules Admin must ensure the fields in the Company, Contract, or Project Profile screen that are used in their formula are required fields. If the concatenation uses an additional field in a Company, Contract, or Project Profile screen, or a field in an additional form captured in a Profile, these profile and additional form fields must also be designated as required.

A Company Profile Rule is written for all the supplier companies stored in Conga Contracts to populate an additional field in the Company Profile named Internal Company Code by concatenating the values captured in one default field and two other additional fields in the Profile.

1. In the Profile Rules Admin screen, click the Company Profile link under the Profile Type: Profile heading.
2. In the Profile Rules Edit screen, click Add Rule to display a blank rule record.
3. In the Rules section of the screen, enter Internal Company Code in the Rule Name field.
4. In the Conditions section, click Add Condition to display three fields, and define the condition that will apply the rule to companies that are suppliers:
 - Select Company Type in the Field list.
 - Select In (equals) in the Operation list.
 - Select Supplier in the Value list.
5. In the Actions section, click Add Action to display three fields, and build a formula that will populate the Internal Company Code field in the Additional Fields section of the Company Profile by concatenating a default field in the Profile and two other other additional fields that were added to the Profile:
 - Select Calculate in the Action Type list.
 - Select Internal Company Code in the Field list.
 - Click in the Value field to open the Formula Editor window.
6. In the Formula Editor window, build the formula that says the Internal Company Field should be populated with a character string that incorporates the information users provide in three fields in the Company Profile, preceded by the prefix INT, and separated by dashes.

 **Tip:**

Make sure there is a space between every variable, operator, and symbol. 2. All static information in the formula must be encased in single quotes, such as 'INT-' where INT is the prefix used to indicate internal information and the dash (-) is used as a separator. 3. All concatenated variables must be encased in Pipe (||) symbols, except the last variable, which only needs a leading Pipe symbol.

- Enter 'INT-' into the window to identify the string as an internally-generated identifier, and then add a space.
- Enter a Pipe symbol (||) by holding down the Shift key and depressing the backslash (\) key twice.
- Select Effective Year of First Contract - 4 Digits in the variable list.
- Enter another Pipe symbol so that the variable is encased in the symbols.

- Enter a dash enclosed in single quotes ('-') to separate the first variable from the second, making sure there is a space before and after the '-'.
 - Repeat the process, except for the first step, but select Company Category in the variable list.
 - Repeat the process, except for the first step, but select Company Financial Rating in the variable list, and do not add a closing Pipe (||) symbol.
 - Click Save.
7. In the Profile Rules Edit screen, click Save.

Creation Templates

A Creation Template allows a company's standard contract document to be uploaded to Conga Contracts as a template, making it available to users who run the Creation Wizard, and ensuring the documents created using the Wizard conform to a standard. Prior to upload, a company's standard contract must be formatted in MS Word to identify variable information using merge fields. After upload, the variable information must be mapped to Contract Profile fields, additional forms, and clauses.

Creation Templates Overview

A user with the Creation Template Admin permission can upload their company's standard contract as a creation template so that it is available as a selection in the Creation Wizard whenever a user runs the wizard from a Contract Profile. Running the wizard generates the contract and stores the document in the Documents screen in the Profile.

A Creation Template Admin can perform the following tasks associated with creation templates:

- [Locate a Creation Template](#)
- [Add a Creation Template](#), which includes the following steps:
 - [Format a MS Word Document as a template](#)
 - [Map fields in a Creation Template](#)
 - [Map MS Word merge fields to additional form fields](#)
 - [Map MS Word merge fields to clauses](#)
 - [Add questions for a Creation Template](#)
 - [Add restrictions for a Creation Template](#)
 - [Activate and deactivate a Creation Template](#)
- [Edit a Creation Template](#), which includes the following tasks:
 - [Upload a revision to a template document](#)

- [Compare document revisions](#)
- [Delete a Creation Template](#)

Locating a Creation Template

Existing contract creation templates are viewed and managed from the Creation Template Browse screen. Creation templates are used whenever a user runs the Creation Wizard from a Contract Profile in order to generate a contract document. The generated contract is automatically stored in the Documents screen in the Contract Profile.

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link in the menu.
2. In the Creation Template Browse screen, locate the template by its name, description, creation date, or the person who created the template.
 - Click on a column heading to change the sort order of the data.
3. Click on the template record to display its Creation Template Edit screen, which contains additional functionality for the template, including mapping, questions, restrictions, and document revisions.

Adding a Creation Template

Adding a creation template involves (1) formatting a company's standard contract in MS Word by inserting merge fields at the locations where variable information appears in the document (2) uploading the document and mapping the variable fields to Contract and Company Profile fields, additional forms, and clauses (3) adding questions/actions and identifying restrictions for using the template, and (4) activating the template.

A user with the Creation Template Admin permission adds a creation template using a four-step process:

1. Format the MS Word document so that it can be used as a template by Contracts
 - Use the Standard Numbering or Multi-level Numbering feature in MS Word to number the sections (or paragraphs) of your contract.
 - Include all optional sections of the contract. Sections will be removed, as needed, when Administrators add questions and define actions based on user responses to the questions. If your company's contract does not include any optional sections or paragraphs, you do not have to number the paragraphs in your contract using Word's Standard Numbering or Multi-level Numbering feature. However, it is recommended that you apply the same style to all the paragraphs in your document to ensure the font type and size are consistent after the contract is created in Conga Contracts.

- Insert merge fields for all variables that will be mapped to data fields in a Contracts Contract Profile, Company Profile, Additional Form, or to a Clause in the Clause Library.
2. Upload the MS Word document to the creation template and map the document merge fields to Conga Contracts fields.
 - Map the variable information (merge fields) in the document to the appropriate data fields in a Contract or Company Profile, as well as any additional fields.
 - Map a document merge field to a field in an additional form linked to the Contract Profile.
 - Map a clause merge field in the document to a clause from the Clause Library.
 3. Identify questions/actions and restrictions for the template.
 - Create the appropriate questions to include/exclude sections of the contract document based on user responses to the questions. However, if your company's contract does not contain any optional sections or paragraphs, you do not need to create any questions.
 - Apply restrictions to identify the agreement types and contract types/groups that can use the creation template to create a contract using the Creation Wizard.
 4. Activate the template in order to make it available as a selection when the Creation Wizard is run.

Formatting a MS Word Document as a Template

AA Creation Template is used to create a contract using your company's own paper. The first step is to format your company's standard contract in MS Word so that it can be used as a Creation Template in the Creation Wizard.

Other steps include mapping fields, adding questions, adding restrictions, and activating the template.

1. Use MS Word's Standard Numbering or Multi-level Numbering feature to tag the paragraphs in the contract, and be sure to include any optional sections or paragraphs. Since the creation template allows sections (paragraphs) to be removed when the user runs the Creation Wizard and answers Administrator-defined questions about the contract, the final document will vary, depending on customer requirements and circumstances.

 **Note:**

If your contract does not contain any optional sections, you do not need to use MS Word's Numbering feature. However, it is recommended that you apply the same Word style (e.g., Normal) to the sections (paragraphs) to ensure the font size and type will be consistent in the contract generated by the Creation Wizard.

2. Standardize the spacing between lines in the Word document by selecting all the clauses in the contract, displaying the Paragraph window, and entering a value in the Before and After fields in the Spacing section. Do not use hard returns to separate paragraphs of text in your formatted document.
3. Insert merge fields into the Word document for all contract variables that need to be mapped to a field in the Contract Profile or Company Profile, or mapped to a Clause, or Additional Form field. Position your cursor at the first location in your contract where variable information must be provided, and use Word's Merge Field feature to add the merge field to the document. Make sure the name of the merge field is very similar to, or exactly matches, the name of the field in Conga Contracts to ensure you map the field correctly. For example, if you want to add a merge field to capture the state in which a company is located, be sure to enter State/Province as the name of the merge field. The merge field will display as «State/Province» in your Word document.

 **Important:**

If you merge to the same field on an additional form, you must give it a unique name each time in the document. As an example, for Hourly Rate you would use the names HourlyRate1 and HourlyRate2. Also, NEVER copy and paste a merge field from one location in the document to another, and then edit the text since this will cause the Creation Wizard to improperly create your contract document. To correctly edit a merge field in a Word document, right click on the field to display a menu, and select Edit Field to display the Field window (shown below).

- For the 2013 and 2016 versions of MS Word, click the Insert tab, click Quick Parts to display a menu, and select Field. In the Field window (shown below), select Mail Merge in the Categories list, click MergeField in the Field names list box, and then enter the name of the field from the Contract or Company Profile in the Field name text box. If the name of the field contains more than one word, be sure to add an underscore between the words. (Example: Effective_Date).
- For the 2003, 2007, and 2010 versions of MS Word, click the Insert tab, and select Field in the menu. In the Field window, follow the instructions in the paragraph above to insert a merge field into the document.

4. Insert merge fields for all clauses, additional fields, and additional form fields that you want to insert into the contract document.

Clauses

In setting up a merge field for a clause, follow the steps outlined in #3 above to display the Field window in Word. In the Field name text box, enter the word Clause, followed by a colon (:), and then enter the name of the clause, making sure to place an underscore between the words if the name of the clause consists of more than one word. For example, to insert a clause called Governing Law that is stored in your Clause Library, enter Clause:Governing_Law in the "Field name" box. In the contract, the merge field will display as <<Clause:Governing_Law.

Additional Fields

In setting up a merge field for an additional field, insert the merge field in the appropriate location in the document and ensure that the name of the merge field exactly matches the name of the additional field in the Company or Contract Profile. For example, if an Administrator has added a "State of Incorporation" field to the Company Profile, and you want to insert this into the body of the contract, add a merge field called State_of_Incorporation. The display in your contract document would be <<State_of_Incorporation.

Additional Forms

In setting up a merge field for a field in an additional form, you need to use the TableStart and TableEnd identifiers since additional forms are stored in a secondary table in Conga Contracts, unlike the fields in the Contract and Company Profiles, which are stored in the Main table. For example, if you want users to insert the Calculated Payment field from an additional form entitled Payment Terms into the contract, you need to insert three merge fields (with no spaces between the three fields) into the appropriate location in the document: first, add TableStart:Payment_Terms, then add Calculated_Payment, and then add TableEnd:Payment_Terms. The display in your contract document would be <<TableStart:Payment_Terms

<<Calculated_Payment

<<TableEnd:Payment_Terms

If you want to add more than one additional form to the document, make sure each merge field set appears on a separate line in your document.

- If an additional field or an additional form field appears a second time in the contract document, you must append the merge field with a "2." For example, the second occurrence of the State of Incorporation additional field must be entered as <<State_of_Incorporation_2
- Similarly, the second occurrence of the Calculated Payment field for an additional form must be entered as <<TableStart:Payment_Terms
- <<Calculated_Payment_2
- <<TableEnd:Payment_Terms
- Additional occurrences of a merge field would be appended by a 3, 4, etc.

You can add more than one field from an additional form into a contract document. For example, if you wanted to add both the Calculated Payment and the Payment Start Date fields from the additional form entitled Payment Terms, you would couch the additional form fields inside the TableStart and TableEnd merge fields so that your MS Word document would be formatted as follows: Licensee agrees to make payments in the amount of <<TableStart:Payment_Terms>> <<Calculated_Payment>> beginning on <<Payment_Start_Date>><<TableEnd:Payment_Terms>>. Also, if you have more than one merge field set containing the TableStart and TableEnd identifiers, make sure each merge field set appears on a separate line in your document.

Once you have mapped all the fields in the contract, you are ready to upload the document as a creation template and map the merge fields in the document to Conga Contracts fields.

Mapping Fields in a Creation Template

A Microsoft Word contract document that has been formatted so that it can be used as a Creation Template must be uploaded, and the variable information (merge fields) in the document are then mapped to system fields.

Once a user with the Creation Template Admin permission has formatted your company's contract so that it can be used as a Creation Template in the Creation Wizard, the Creation Template Admin must upload the Microsoft Word document and map the variable information (merge fields) in the document to Conga Contracts system fields. Each merge field in the Word document must be mapped to one of the following types of fields:

- [Default field in the Company or Contract Profile screen](#)
- [Additional field](#) added to the Company or Contract Profile screen
- [Field in an Additional Form](#) that has been captured in a Company or Contract Profile
- [Clause in the Clause Library](#)

Uploading the Formatted Microsoft Word Document

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link.

2. In the Creation Template Browse screen, click New Template.
3. In the New Template Creation screen:
 - Enter a name and description for the template.
 - Select the type of document you are uploading from the list of available document types.
 - Click Browse to open the File Upload window, navigate to the formatted document, and click on it to select it. Click Open to upload the document.
4. Click Save.

If there are any formatting errors in the document you are uploading, the system will display an error message that identifies the types of errors in your document.

In the Creation Template Edit screen, map the merge fields in the document to the Conga Contracts system fields, additional form fields, and clauses.

Mapping Microsoft Word Merge Fields to Profile Fields

Once you upload a Microsoft Word document as a Creation Template, the Creation Template Edit screen displays. To continue creating the template, you must map the merge fields in the document to Conga Contracts fields in the Contract and Company Profiles. If the uploaded document contains any merge fields that correspond to the additional fields that have been added to a Contract or Company Profile, these fields must also be mapped.

1. In the Creation Template Edit screen, ensure the Creation Template Fields tab is selected.
2. Select Main in the Merge Table list.
3. Double-click in the first System Field Name field to activate the list, and select the Company or Contract field that matches the corresponding Merge Field Name field. For example, the Address_Line_1 merge field is mapped to the Company Address Line 1 system field.
4. Map the remaining fields.
 - For any date or currency fields, double-click in the Format field to activate the list, and then select a date or currency format.
5. (Optional) Select the Allow Alternate Locations check box to allow users to select any of the addresses stored for the company, including the address of its Legal Entity, when creating a contract using this template in the Creation Wizard.
6. (Optional) Select the Keep Unused Regions check box to prevent text preceding an additional form merge field in the generated contract to be erased when the additional form has not been captured in the Contract Profile from which the Creation Wizard was launched.
7. (Optional) Change the default selection in the Output File Type list to create the contract as a PDF file or a different version of Microsoft Word.

- ✓ To use the True-Up option, ensure Microsoft Word OOXML Document (.docx) is selected.

8. Select the Active check box to make the creation template available to users when you are finished developing the template.
9. Click Save.

In the Creation Template Edit screen, map any additional form merge fields in the document to system fields, as well as any clause merge field to a clause in the Clause Library.

Mapping Microsoft Word Merge Fields to Additional Form Fields

Once you upload a Microsoft Word document as a creation template, and map the merge fields in the document to system and additional fields in the Contract and Company Profiles, you must also map any merge field in the document that corresponds to a field in an additional form that has been added to Conga Contracts.

1. In the Creation Template Edit screen, ensure the Creation Template Fields tab is selected.
2. In the Merge Table list, change the selection from Main to an additional form name. For example, Payment_TerMicrosoft.
3. When the screen refreshes, make a selection in the Data Table list that corresponds to the selection in the Merge Table list, and click on it to select it. The Data Table list contains three separate and consecutive alphabetized lists for additional forMicrosoft: (1) a mixed listing of all the company, contract, and project additional forMicrosoft that Administrators have added to Conga Contracts (2) a listing of the item selections that Administrators have added to the Contract Responsibilities list in the Contract category in the List Administration screen, and (3) a listing of the item selections that Administrators have added to the Location Type list in the Address category of the List Administration screen.
4. Double-click in the first System Field Name field to activate the list, and select the additional form field that matches the corresponding Merge Field Name field. For example, the Monthly_Payment_Amount merge field is mapped to the Monthly Payment Amount system field.
5. Map the remaining fields.
 - For any date or currency fields, double-click in the Format field to activate the list, and then select a date or currency format.
6. Click Save.

In the Creation Template Edit screen, map any clause merge field to a clause in the Clause Library.

Mapping Microsoft Word Merge Fields to Clauses

Once you upload a Microsoft Word document as a creation template, map the merge fields in the document to system and additional fields in the Contract and Company Profiles, and map any additional form fields, you must then map any merge field that has been linked to a clause in your Clause Library.

1. In the Creation Template Edit screen, click the Clause Mapping tab.
2. Double-click in the first Clause Type/Clause Name field to activate the list, and select the clause that matches the clause displayed in the corresponding Merge Field Name field. For example, the Governing_Law merge field is mapped to Clause:Governing Law in the Clause Library.

 **Important:**

If you are running Clause ID & Management, there will be clauses that include the phrase System Added Description or Default Description. In selecting a clause for mapping, use only the clauses that follow the Clause: [Clause Name] format. For example, Clause:Software Warranty.

3. Map the remaining clauses.
4. Click the Creation Template Fields tab to return to the main view, and click Save.

Once you have completed the mapping, you can add questions/actions to the template, as well as restrictions to control the types of contracts that can be created using the template.

Adding Questions for a Creation Template

One or more sections of a contract document that is being used as a creation template can be eliminated based on individual customer requirements. To achieve this customization, a user with the Creation Template Admin permission adds a question to the template and links the question to a system action to remove a section when the user provides a particular response to the question during contract creation using the Creation Wizard.

Questions are added after the Creation Template Admin formats their company's contract so that it can be used as a template in the Creation Wizard, and maps the merge fields in the formatted document to system fields, additional form fields, and clauses stored in the Clause Library.

1. In the Creation Template Edit screen, click the Template Questions tab.
2. In the Questions section, click Add Question.
3. In the blank question record:

- Click in the Question Text field, and type in a question whose answer will determine whether or not a numbered section of the contract should be removed from the document.
 - (Optional) Click in the Question Description field, and provide information or instruction to assist users in answering the question.
4. In the Answers section, click Add Answer.
 5. In the blank answer record:
 - Click in the Answer Text field, and type in a possible answer to the question.
 - (Optional) Click in the Question Description field, and provide the user with the impact on the contract if they select this response.
 6. Repeat Steps 4-5 to provide all other possible responses to the question.
 7. In the Answers section, locate an answer that requires a section of the contract to be removed, and click on it to select it. Typically, only one answer will require the action of removing a section in the contract.
 8. In the Actions section, click Add Action. In the Action Type list, select Remove Section or Remove Table.
 - Remove Section removes a numbered paragraph in the contract, and Remove Table removes one or more additional form fields.
 9. In the Action Actor list, locate the numbered section that should be removed from the contract, and click on it to select it.
 10. (Optional) Repeat Steps 7-10 to add a second action for the same answer, or to select another answer that requires a section of the contract to be removed.
 11. Click the Creation Template Fields tab to return to the default view.
 - If the Creation Template is complete, ensure the Active? check box is selected to make the template available as a selection in the Creation Wizard.
 12. Click Save.

Once you have completed the mapping and added questions/actions to the template, you can set up restrictions to control the types of contracts that can be created using the template.

Adding Restrictions for a Creation Template

Restrictions are added to a Creation Template to ensure the template is available as a selection only when the Creation Wizard is run from a Contract Profile whose Agreement Type, Contract Type, and/or Contract Group match the restrictions identified in the template.

If no restrictions are set, the Creation Template will be available for creating all types of contracts. Restrictions should always be set to ensure a Creation Template is used properly.

Restrictions are added after a user with the Creation Template Admin permission formats their company's contract so that it can be used as a template in the Creation Wizard, creates questions/actions to customize a contract by removing sections, and maps the merge fields in the formatted document system fields, additional form fields, and clauses stored in the Clause Library.

1. In the Creation Template Edit screen, click the Restrictions tab.
2. Click in the Contract Group field to activate the list, and select all the contract groups that can use the template when a user runs the Creation Wizard. More than one selection can be made in all field lists by simply clicking on another contract group, agreement type, or contract type.
3. Click in the Agreement Type field to activate the list, and select all the agreement types that can use the template.
4. Click in the Contract Type field to activate the list, and select the check boxes for all the contract types that can use the template.
5. Click the Creation Template Fields tab to return to the default view.
 - If the Creation Template is complete, ensure the Active? check box is selected to make the template available as a selection in the Creation Wizard.
6. Click Save.

Activating and Deactivating a Creation Template

Once a user with the Creation Templates Admin permission adds a Creation Template, it must be activated for it to be available as a template selection in the Creation Wizard. Conversely, a template can be deactivated to make it temporarily unavailable as a selection in the wizard, which is recommended when the template is being edited.

Activating a Creation Template

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link.
2. In the Creation Template Browse screen, locate the template you want to activate. A deactivated template is displayed in gray text.
3. Click on the template record to display its Creation Template Edit screen.
4. Select the Active? check box.
5. Click Save.

Deactivating a Creation Template

A Creation Template can be temporarily deactivated if it needs to be updated. Alternatively, a template can be deleted if it will no longer be used.

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link.
2. In the Creation Template Browse screen, locate the template you want to deactivate. An active template is displayed in black text.
3. Click on the template record to display its Creation Template Edit screen.
4. Clear the Active? check box.
5. Click Save.

Editing a Creation Template

A user with the Creation Template Admin permission can edit a creation template by (1) renaming the template or changing its description (2) mapping the merge fields in the uploaded document to different system or additional field in the Contract or Company Profile, or to a different additional form field or clause (3) updating the questions that a user must answer when they run the Creation Wizard, as well as changing the available answers to these questions and revising any actions that Conga Contracts will take based on user's responses, and (4) updating the restrictions by changing the contract groups, contract types, and agreement types that can use the creation template when they run the Creation Wizard.

A creation template can also be edited by uploading a revision to the MS Word document used to create the template. If there are several revisions to the document used in the creation template, it is recommended that you view and compare the document revisions that have already been uploaded to the template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link.
2. In the Creation Template Browse screen, locate the template you want to edit.
3. Click on the template record to display its Creation Template Edit screen, and edit the template:
 - Rename the template or change its description.
 - Map the merge fields in the template document to a different system or additional field, additional form field, or clause.
 - Add or update the questions, answers, and actions associated with the template.
 - Update the restrictions for using the template.
 - Upload a revision to the MS Word document used to create the template.
4. Click Save from the Creation Template Fields tab.

Uploading a Document Revision for a Creation Template

A user with the Creation Template Admin permission can edit a creation template by uploading a revision to the original document used to create the template. However, any new merge fields (variable information) in the revised document will have to be mapped to system fields, additional form fields, or clauses. If needed, new questions and actions may also have to be added to the template, as well as additional restrictions on the contract types and groups that can use the template when a user runs the Creation Wizard.

Tip: Before uploading a revision to the document used to create the template, review the list of documents that have already been uploaded as revisions.

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link.
2. In the Creation Template Browse screen, locate the template that needs the document revision.
3. Click the template record to display its Creation Template Edit screen.
4. Click Upload New Revision.
5. In the Add New Revision prompt, click Yes.
6. In the New Creation Template screen:
 - Click Browse to open the File Upload window, navigate to the document revision, and click on it to select it. Click Open to upload the document.
 - (Optional) Update the name and description for the template.
 - (Optional) Update the type of document you are uploading from the list of available document types.
7. Click Save.
8. When the screen refreshes, review the mapping:
 - Locate any blank fields in the System Field Name column.
 - Map the Profile fields and additional form fields in the document that have not been mapped to Conga Contracts fields.
 - Click the Clause Mapping tab.
 - Locate any blank fields in the Clause Name/Clause Type column.
 - Map a clause in the Merge Field Name column to a clause in the Clause Library.
9. (Optional) Select the Active? check box to activate the template and make it available as a selection in the Creation Wizard.
10. Click Save.

Comparing Document Revisions in a Creation Template

A user with the Creation Template Admin permission can view a list of all the revisions, as well as the original MS Word document used to develop the creation template. The Creation Template Admin can also run a comparison between document revisions to quickly identify the differences and download any of the documents if further revisions are necessary.

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link.
2. In the Creation Template Browse screen, locate the template containing the document revisions you want to compare.
3. Click on the template record to display its Creation Template Edit screen.
4. Click View Documents in the toolbar.
5. In the Creation Template Documents window, click Compare Revisions.
6. When the screen refreshes, select the check boxes for the two versions of the document you want to compare, and click Compare.
7. In the Preview screen, review the differences between the two documents.
 - Added information displays in red text that is underlined.
 - Deleted information displays in red strikethrough text.
8. (Optional) Use the icons in the toolbar to perform tasks, such as printing, downloading, searching, and opening the document in MS Word.

Deleting a Creation Template

A user with the Creation Template Admin permission can delete a creation template if it is no longer needed. Alternatively, the Creation Template Admin can deactivate a creation template so that it is temporarily unavailable, and then reactivate it at a later time.

1. Click the Gear Icon in the Navigation Toolbar, and click the Creation Templates link.
2. In the Creation Template Browse screen, locate the template you want to delete.
3. Click on the template record to display its Creation Template Edit screen.
4. Click Delete Template in the toolbar.
5. In the Delete Template prompt, click Yes.

Contract Request Types

A Contract Request Type Template works in conjunction with the Contract Request feature, which allows a user who does not have permission to add a contract to Conga Contracts to make a request for a contract. Administrators create contract request type templates, which contain one or more forms that correspond to the documents in the entire contract

agreement, and then add fields to each form in order to capture the variable information necessary to create the contract.

Contract Request Types Overview

The Contract Request Type Bundle feature allows a user with the Request Admin permission to design the form that is used to capture the information needed when a user, who has limited permissions, makes a request for a new contract in Conga Contracts. A Request Admin is responsible for creating templates for the kinds of contracts that users will request, as well as identifying those who have permissions to request a contract and those who have the authority to approve a contract request. For example, a Sales Representative who lands a new account would request that a contract be created so that the customer could sign it as soon as the terms were approved by the rep's Sales Manager.

In designing the contract request "bundle" template, a Request Admin adds one or more forms to the bundle and then add fields to each form in order to capture the variable information needed for their company's contract. The forms in a bundle can be reordered and deleted to meet changing needs. The Bundle feature is useful if the company's standard contract includes more than one document, such as a Master contract and a Schedule. A Request Admin can link a form in the bundle to an existing additional form in order to capture additional information for the new contract.

A Request Admin can also apply a profile rule to the template to hide a form in the bundle when a specific condition is met so that the user does not have to complete the form when making a contract request. Similarly, a profile rule can be written to hide an additional form linked to the Request template. Profile rules can also be written to perform other actions when the template is used to make a contract request, such as disabling a field, requiring a field to be populated, forcing the value of a field, or populating a field with a default value.

For those contract requests that do not require approval, there is a Self Service option that can be enabled in the template so that the user's contract request automatically generates a Contract Profile in Conga Contracts and the attached document is stored in the Profile.

Contract requests are submitted from the Contracts menu in the Navigation Toolbar when the user selects the Requests link, and then clicks the New Request button in their My Requests screen. This New Request button only displays if an Administrator allows the user to make a contract request by selecting Full or Contract Request Only in the Classification field in their User Profile.

A Request Admin can perform the following tasks associated with a request bundle type template:

- [Locate a Contract Request Type](#)
- [Add a Contract Request Type](#)
- [Add Restrictions for a Contract Request Type](#)
- [Link an Additional Form to a Contract Request Type](#)
- [Add a Profile Rule for a Contract Request Type](#)
- [Add and Move Forms for a Contract Request Type](#)
- [Copy a Contract Request Type](#)
- [Edit a Contract Request Type](#)
- [Delete a Contract Request Type](#)

A Request Unlock Admin (user with the Request Unlock Admin permission) can perform the following task for a locked self-self contract request:

- [Refresh a Locked Self Service Contract Request](#)

Locating a Contract Request Type

Existing contract request types are viewed and managed from the Request Type Browse screen. Request Type templates are used whenever a user who does not have permissions to create a Contract Profile in Conga Contracts makes a contract request.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the contract request type by its name or description.
 - Click on a column heading to change the sort order of the data.
3. Click a request type record to display its Request Type Bundle Edit screen, where you can perform the following tasks:
 - a. add basic information and design the contract request type form
 - b. add restrictions
 - c. link the request type to an existing additional form
 - d. add forms to the request type to capture information for contracts with multiple document types, as well as reorder forms to change their sequencing in a contract request
 - e. write a profile rule to control the display of fields, forms, and additional forms when users make a contract request using this contract request type.
4. For contract requests that do not need approval, you can designate the request type as Self-Service.

Adding a Contract Request Type

A user with the Request Admin permission creates the contract request bundle types that will be used as templates whenever a user makes a contract request. The Request Admin can create a request type template that captures information for a single contract document, or a request type for a contract that includes multiple documents, such as a Master contract with several Exhibits.

Tip: A contract request bundle can be comprised of a single standalone contract document, or it can be comprised of a Master contract and one or more supporting documents. For example, if you are creating a contract request bundle for a Software Licensing Agreement that also had a Professional Services Schedule, enter Software Licensing Agreement in the Bundle Name field, and when you create the main request type form in the bundle, enter Software License in the Request Name field. Then add a second request type form, and enter Professional Services Schedule in the Request Name field. For "bundles" with only one standalone contract, you can use the same name in both the Bundle Name and Request Name fields.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, click New Request Bundle Type.
3. In the Request Type Bundle Edit screen, populate the following:
 - Bundle Name field - enter a descriptive name for the contract request type.
 - Bundle Approvers multi-select list - click in the field to display the Address Book, and select the individual(s) who can approve the contract requests made by requestors who use this template.
 - (Optional) Bundle Description field - enter information to provide users with assistance in completing the contract request made using this template. The information entered displays as a Quick Tip when the user hovers over the field.
4. (Optional) Select the Legacy radio button to run the classic contract request process, which involves two or more program screens to capture the information needed to approve a contract request. A Legacy request type can only be used if the entire contract is comprised of a single document.
5. The enhanced (default) Contract Request process uses a single program screen to capture all the information needed for the contract request. It must be used when the entire contract is comprised of two or more documents types, such as a Master Agreement and a Schedule.
6. Click the New Request Type tab to refresh the screen.

Designing the Request Form

The forms and fields that Administrators add to a request type bundle template reflect the variable information that needs to be captured when a user makes a contract request using this template.

1. In the form view of the Request Type Bundle Edit screen, populate the following:
 - Request Name field - enter a descriptive name for the form.
 - Verify the New Request Type tab changes to match the name you entered in the Request Name field.
 - (Optional) Request Description field - enter information for using the form.
2. (Optional) Select the Prevent requesters from uploading documents on this request check box if you do not want users who use this template to be able to upload any documents to the request.
3. Add fields to the form to capture the information the approver will need to grant a contract request submitted using the template:

 **Tip:**

To allow users making a contract request to select the person who reviews/ approves their request, you must add an Approver field to the form. Bundle approvers are defined in Step 3 above and the Approver option is adding through the request type's restrictions.

- Click Add Field in the toolbar.
 - In the Add Field prompt, select a company or contract field in the Field Type list, and click Save.
 - When the field displays in the screen, click t to enable it and display its Field Properties grid.
 - a. To move a field, mouse over any border of the field until the icon displays, click the icon, and drag-and-drop the field to the desired location.
 - b. To delete a field, right-click it to display a button, and click the button.
 - c. (Optional) In the Field Properties grid, set the properties for the field:
 - d. Field Name - edit the name of the field by typing over the existing text. If the field is a list, make sure you rename the field appropriately, based on the list selections.
 - e. Required? - change the selection from "false" to "true" to make the field required.
 - f. Quick Tip - enter instructional or informational text in the field to assist users in correctly populating the field.
4. (Optional) Add information panels to create headings that you can reposition over a group of fields in Column 1 or 2.

✓ **Tip:**

To allow the requester to select the person who will review their contract request, add the Approver field to the request form. If the Approver field is not in the Field Type list in the Add Field prompt, add it as an additional field (combo list) in the Contract Profile. The approvers that will appear in the list are those you selected in the Bundle Approvers list in the default template screen.

- Click Add Information Panel in the toolbar.
 - When the panel displays in the screen, click it to enable it and display its Field Properties grid.
 - Mouse over the panel until the icon displays, click the icon, and drag-and-drop the panel to the desired location.
 - In the Field Properties grid:
 - Type over the default text in the Value field for Display Text to provide a name for the heading.
 - Click in the Value field for Style and make a selection in the list to identify the way you want the panel to display in the form.
 - i. To delete an information panel, right-click it to display a button, and click the button.
5. Click the Bundle Configuration tab.
 6. Click Save.

After adding the fields designed to capture the needed information for a contract request, you can add restrictions to control when the template is available to a user making a contract request, link the template to an existing additional form to capture supplemental information, add forms to the template for contracts that contain multiple document types, as well as reorder the sequencing of the forms, and write a profile rule to control the display of fields, request forms, and additional forms when a user makes a contract request using the template. For contract requests that do not need approval, you can designate the request type template as Self-Service.

Adding Restrictions for a Contract Request Type

A user with the Request Admin permission can limit the use of a contract request type so that it is only available as a template when the user who makes the contract request has permissions to the restricted contract and company groups based on their user role(s). The Request Admin can also set restrictions so that only users with a specific role can make a

contract request using the template and/or approve a contract request made using the template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the request type, and click it to select it.
3. In the Request Type Bundle Edit screen, click the Restrictions tab.
4. In the Contract Group list, select all the groups that the user who is making the contract request must hold permissions based on their user role(s).
5. In the Company Group list, select all the groups that the user who is making the contract request must hold permissions based on their user role(s). If no selections are made, the template will be available to any user who makes a contract request.
6. (Optional) Select the Allow Reassignment check box to allow an approver to reassign their responsibility for approving this type of contract request to another program user.
7. (Optional) Select the Assign Requester check box to limit the users who can make a contract request using the template to a specific user role.
 - When the check box is selected, the Requestor Role list is enabled. Make a selection in the list.
8. (Optional) Select the Assign Approver check box to limit the users who can approve a contract request that was made using the template to a specific user role.
 - When the check box is selected, the Approver Role list is enabled. Make a selection in the list. If you are allowing users to select the person who approves their contract request, do not select the check box and assign a user role unless you are sure that all of the users identified in the Bundle Approvers list have been assigned to this user role.
9. Click the Bundle Information tab.
10. Click Save.

After adding restrictions to control the availability of the template in making a contract request, you can link the template to an existing additional form to capture supplemental information, add forms to the template for contracts that contain multiple document types, as well as reorder the sequencing of the forms, and write a profile rule to control the display of fields, forms, and additional forms when a user makes a contract request using the template. For contract requests that do not need approval, you can designate the request type template as Self-Service.

Linking an Additional Form to a Contract Request Type

A user with the Request Admin permission can link an existing additional form to a contract request type template to capture the additional information needed when a user makes a

contract request using the template. During the request process, the user must not only provide the information in the fields of the contract request type form, but also the information requested by the linked additional form.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the request type, and click it to select it.
3. In the Request Type Bundle Edit screen, click the tab to the right of the Bundle Configuration tab. The name of the tab will vary since it reflects the name the Request Admin provided in the Request Name field when designing the request form.
4. When the screen refreshes, click the Additional Forms tab.
5. Locate the additional form you want to link.
 - Select the form's Available check box to link the form to the template and make the fields in the form optional when a user makes a contract request using the template.
 - Select the form's Required check box to link the form to the template and make the fields in the form required when a user makes a contract request using the template.
6. Click the Bundle Configuration tab.
7. Click Save.

After linking the template to an existing additional form to capture supplemental information, you can add restrictions to control the availability of the template in making a contract request, add forms to the template for contracts that contain multiple document types, as well as reorder the sequencing of the forms, and write a profile rule to control the display of fields, request forms, and additional forms when a user makes a contract request using the template. For contract requests that do not need approval, you can designate the request type template as Self-Service.

Adding a Profile Rule for a Contract Request Type

A Profile Rule can be added to a contract request type template to auto-populate a field, disable/enable a field, and make a field required/optional based on how a user populates another field when using the template to make a contract request. Using the Hide Request action, a Profile Rule can be written to hide an additional field added to the request type, an additional form linked to the request type, or one of the forms in the contract request type.

A user with the Request Admin and Profile Rule Admin permissions can add a profile rule to a contract request type template to auto-populate a field, disable/enable a field, and make a field required/optional based on how a user populates another field while using the

template to make a contract request. However, a Profile Rule cannot be written for any of the fields in an additional form linked to the contract request type.

A Profile Rule Admin can hide an additional field added to a contract request type, or an additional form linked to the request type so that it does not display when the user makes a contract request using the template. Using the Hide Request action, an Admin can even hide one of the forms in the request type template when a certain condition is met.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the request type, and click it to select it.
3. In the Request Type Bundle Edit screen, click the tab to the right of the Bundle Configuration tab for the request type form that needs the Profile Rule. The name of the tab will vary since it reflects the name the Request Admin provided in the Request Name field when designing the request form.
4. When the screen refreshes, click the Profile Rules tab.
5. In the Rules section, click Add Rule to display a blank rule record.
 - Populate the Rule Name and Rule Description fields.
6. In the Conditions section, click Add Condition to display three fields used to define a condition for the rule.
 - Field - select a field to define the rule,
 - Ensure the field is designated as required in the contract request type
 - Operation - select the appropriate option:
 - In to specify a value or text
 - Not In to exclude a value or text
 - Null to identify an unpopulated field
 - Not Null to identify a field populated with any data
 - Value - make a selection in the list to complete the condition.
 - If the Value component is a field rather than a list, enter text or a number in the field. If it is a multi-select list, click on additional items to define all the items that will be affected by the rule.
 - A single profile rule can contain multiple conditions and multiple actions for a condition.
7. In the Actions section, click Add Action to display three fields used to define the system action that you want to occur if the user meets the condition(s) of the rule.
 - Action Type - make a selection in the list to identify the system action.
 - Field - select the field for the action specified in the Action Type list.
 - Value - enter text or a value to define the parameter for the action if the field is enabled.
 - The field is enabled only if you select Default Value, Force Value, or Calculate Field in the Action Type list.

- The field is disabled for the other system actions: Enable/Disable Field, Require/Unrequire Field, and Hide/Unhide Field, Request, and Dynamic Object.
 - To hide one of the forms a user must complete when making a contract request, you can select the action that hides the form based on a condition, such as the user selecting a specific agreement type during the contract request process. In this example, you would select Agreement Type in the Field list, In in the Operation list, and Amendment in the Value list. To hide one of the forms in the request type bundle when the user indicates the contract request is for an Amendment to a contract, select Hide Request in the Action list and select the form (Professional Services Schedule) in the Field list.
8. Click the Bundle Configuration tab.
 9. Click Save.

Other tasks related to a contract request type are adding restrictions to control when the template is available to a user making a contract request, linking the template to an existing additional form to capture additional information, as well as reorder the sequencing of the forms, and adding forms to the template for contracts that contain multiple document types. For contract requests that do not need approval, you can designate the request type template as Self-Service.

Adding and Moving Forms for a Contract Request Type

A user with the Request Admin permission can add additional forms to an existing contract request type template. For example, when a Schedule is added to a Master contract, the Schedule can be added to the template to capture the variable information in the Schedule.

A Request Admin permission can also change the order in which forms display in a contract request type template so that when a user makes a contract request using the template, the forms they are required to complete will display in the desired sequence.

Adding a Bundle Form

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the request type, and click it to select it.
3. In the Request Type Bundle Edit screen, click the icon to the left of the Bundle Configuration tab.
4. When the screen refreshes:

- Add the basic information for the new request form.
 - Design the request form by adding fields and information panels.
5. (Optional) Add restrictions to the request form.
 6. (Optional) Link an existing additional form to the request form.
 7. (Optional) Write a profile rule to control the display of fields, forms, and additional forms when a user makes a contract request using the template.
 8. (Optional) Designate the request type template as Self-Service.
 9. Click the Bundle Configuration tab.
 10. Click Save.

Moving a Bundle Form

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the request type, and click it to select it.
3. In the Request Type Bundle Edit screen, locate the form you want to move.

 **Tip:**

Tip: Forms in the bundle display as tabs to the right of the Bundle Configuration tab.

4. Click the form, and then drag-and-drop it to the right (or left) to change its location in the bundle.
5. Click the Bundle Configuration tab.
6. Click Save.

Other tasks related to a contract request type template are adding restrictions to control when the template is available to a user making a contract request, linking the template to an existing additional form to capture additional information, and writing a profile rule to control the display of fields, request forms, and additional forms when a user makes a contract request using the template. For contract requests that do not need approval, you can designate the request type template as Self-Service.

Designating a Contract Request Type as Self Service

A user with the Request Admin permission can designate a contract request type template as Self Service if the request to create this type of contract does not need to be approved. The request type template can be linked to a creation template so that the Self Service request not only generates a Contract Profile, but also a contract document that was created using your company's standard contract.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the request type, and click it to select it.
3. In the Request Type Bundle Edit screen, click a tab to the right of the Bundle Configuration tab for the request type form you want to make self-service. The name of the tab will vary since it reflects the name the Request Admin provided in the Request Name field when designing the request form.
4. When the screen refreshes, click the Self Service tab.
5. Select the Self Service check box.
6. When the screen refreshes, populate the required fields. Conga Contracts will automatically approve the contract request and create a Contract Profile using the information provided.
7. (Optional) Make a selection in the Creation Template list to ensure the user making the contract request uses one of your company's standard contracts. When the request is automatically approved, a contract document is created using the template, and stored in the newly-created Contract Profile.
8. (Optional) Select the Stop Processing When New Company? check box to prevent users from creating a self-service contract for a new company.
9. (Optional) Select the Stop Processing When Company Is Inactive? check box to prevent users from creating a self-service contract for an existing company with an Inactive status.
10. (Optional) Make a selection in the Currency Type field.
11. Click the Bundle Configuration tab.
12. Click Save.

Other tasks related to a contract request type are adding restrictions to control when the template is available to a user making a contract request, linking the template to an existing additional form to capture additional information, adding forms to the template for contracts that contain multiple document type, as well as reorder the sequencing of the forms, and writing a profile rule to control the display of fields, request forms, and additional forms when a user makes a contract request using the template.

Copying a Contract Request Type

The Copy feature can be used to quickly create another contract request type if an existing contract request type contains the same forms and fields, restrictions, and profile rules needed for the new contract request type.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.

2. In the Request Type Browse screen, click Copy Request Bundle Type in the toolbar.
3. In the Select a Request Type to Copy window, locate the contract request type you want to copy, and click on it to select it.
4. In the Request Type Bundle Edit screen, enter a name for the new contract request type in the Bundle Name field.
5. Edit the template to customize the new contract request type.
6. Click the Bundle Configuration tab.
7. Click Save.

Editing a Contract Request Type

A contract request type can be edited in several ways. A contract request form can be edited, added, or deleted from the bundle. The restrictions for using the request type can be updated, and an additional form can be linked, or unlinked, to any of the forms in the bundle. In addition, profile rules can be edited, added, or deleted for any of the forms in the bundle, and any of the forms in the bundle can be marked, or unmarked, as self-service contract requests.

A user with the Request Admin permission can edit a contract request type in several ways. A single contract request form can be edited, added, or deleted from the bundle. The restrictions for using the request type can be updated, and an additional form can be linked, or unlinked, to any of the forms in the bundle. In addition, profile rules can be edited, added, or deleted for any of the forms in the bundle, and any of the forms in the bundle can be marked, or unmarked, as self-service contract requests.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the contract request type you want to edit, and click it to select it.
3. In the Request Type Bundle Edit screen, perform the necessary updates to:
 - [Basic information](#)
 - [Design of a contract request type form](#)
 - [Restrictions](#)
 - [Linked additional forms](#)
 - [Profile rules](#)
 - [Additional request forms](#)
 - [Self-Service option](#)
4. Click the Bundle Configuration tab.
5. Click Save.

Deleting a Contract Request Type

A user with the Request Admin permission can delete an entire contract request type if it is no longer being used. Alternatively, a Request Admin can delete any of the forms in a contract request type template.

Deleting a Contract Request Type

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the contract request type you want to delete, and click it to select it.
3. In the Request Type Bundle Edit screen, click Delete Form in the toolbar.
4. In the confirmation prompt, click Yes.

Deleting a Contract Request Type Form

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Request Types link in the menu.
2. In the Request Type Browse screen, locate the contract request type containing the form you want to delete, and click on it to select it.
3. In the Request Type Bundle Edit screen, locate the form you want to delete, and click its tab. Each tab in line with the Bundle Configuration tab bears the name of a form contained in the contract request type.
4. When the screen refreshes, click Delete Request in the toolbar.
5. In the confirmation prompt, click Yes.

Refreshing a Locked Self Service Contract Request

You need the Request Unlock Admin permission to refresh a locked self-service contract request that has failed to process correctly. All failed self-service requests now display in the My Approvals screen for a user who has both the Approver and Request Unlock Admin permissions. Failed self-service requests can also display in the My Requests screen for a user who has both the Requester and Request Unlock Admin permissions. A failed request is easily identified since it carries the refresh icon, which appears when the request has been locked for more than 15 minutes.

Tip: It is recommended that at least one role with the Approver permission also be granted the Request Unlock Admin permission so that locked requests can be identified and

refreshed by users who can approve contract requests. You also have the option of adding this permission to a role that also has the Requester permission so that users who make contract requests can identify and refresh a locked request.

Refreshing a Request from the My Approvals Screen

1. Click Contracts in the Navigation Toolbar, and click the Approvals link in the menu.
2. In the My Approvals screen, select Submitted in the Request Status list to filter the contract requests.
3. Locate a locked request, which contains a refresh icon, and click the icon.
4. In the Confirm Unlock prompt, click Yes.
5. Review the onscreen message that displays, notifying you whether or not the request was successfully unlocked.

Refreshing a Request from the My Requests Screen

1. Click Contracts in the Navigation Toolbar, and click the Requests link in the menu.
2. In the My Requests screen, select Submitted in the Request Status list to filter your contract requests.
3. Locate a locked request, which contains a refresh icon, and click the icon.
4. In the Confirm Unlock prompt, click Yes.
5. Review the onscreen message that displays, notifying you whether or not the request was successfully unlocked.

Workflows

Workflows are used to accomplish a list of tasks for a contract, company, or project. A user creates a workflow by running the Workflow Wizard and selecting a template that best describes the task list. Administrators configure the three workflow components used in the Wizard: Workflow Templates, Workflow Teams, and Routing Tables. Templates delineate the steps in the task list, Teams identify those who can perform tasks, and Routing Tables identify approval order for steps requiring approval.

Workflows Overview

The Workflows feature is an enhanced Task List with two additional elements: (1) an email message can be sent from a workflow step to members of the Workflow Team, and (2) an approval can be required for a workflow step.

A workflow typically defines one of your company's standard business practices or procedures, which is broken down into steps that can be assigned to a user function, giving any user who has been assigned this function the ability to complete (or approve) the step.

There are three components of Workflows, which are needed to run the Workflow Wizard:

Workflow Templates - Four types of steps are used to build a workflow:

- Action - user must perform a task, in or out of Conga Contracts, to complete the step.
- The Prerequisite Step option in a template ensures that workflow steps are completed in a specific order.
- Communication - user must send an email message to complete the step.
- Simple Gateway - one user must approve the step before the workflow can continue to the next step.
- Gateway - more than one user must approve the step before the workflow can continue to the next step. The Declined Step option identifies the step that must be repeated if a step is not approved, and the Approved Step option identifies the next step when a step is approved.

Workflow Teams - A team is comprised of people who are qualified to complete the steps in a specific type of workflow, and team members are typically selected based on the user functions they hold. However, a member of a workflow team that has been assigned to complete a workflow step can reassign the responsibility to another member of the team even if the team member does not hold the user function necessary to complete a workflow step.

Routing Tables - A routing table defines the user function(s) that can approve the Simple Gateway and Gateway steps in a company, contract, or project workflow. Users who hold any of the user functions defined in the routing table for the workflow step can approve the step.

- The Traverse option allows a Gateway step to be approved by a user having a function that is "higher" in the hierarchy than the designated function in the event that no users are currently assigned to the designated function.
- Restrictions can be set so that a routing table is only available as a selection in the Workflow Wizard when the criteria for the table is met by the Company, Contract, or Project Profile from which it is run.

A user with the Workflow Admin permission can perform both the administrative tasks (shown below) and the user tasks for any workflow. User tasks include (1) completing, reassigning, and approving a step in the workflow (2) managing workflow documents, and (3) editing, closing, and deleting the workflow.

Workflow Templates

A user with the Workflow Admin permission creates workflow templates, which are used in the Workflow Wizard to add company, contract, and project workflows. A workflow template identifies the tasks that must be completed, as sequential steps, to accomplish a specific process or procedure. Restrictions can be set so that a workflow template is only available as a selection in the Wizard when it is run from a Company, Contract, or Project Profile matching these restrictions.

A Workflow Admin can perform the following tasks associated with a workflow template:

- [Locating a Workflow Template](#)
- [Adding a Workflow Template](#)
- [Copying a Workflow Template](#)
- [Editing a Workflow Template](#)
- [Deleting a Workflow Template](#)

Workflow Teams

A user with the Workflow Admin permission sets up workflow teams to identify the users who have the authority to complete the steps in a workflow. A Workflow Admin can perform the following tasks associated with a workflow team:

- [Locating a Workflow Team](#)
- [Adding a Workflow Team](#)
- [Copying a Workflow Team](#)
- [Editing a Workflow Team](#)
- [Deleting a Workflow Team](#)

Routing Tables

A user with the Workflow Admin permission must create a routing table for any workflow that contains one or more approval (Gateway) steps. A routing table identifies the user functions that can approve the step in a company, contract, or project workflow. A Workflow Admin can perform the following tasks associated with routing tables:

- [Locating a Routing Table](#)
- [Adding a Routing Table](#)
- [Copying a Routing Table](#)
- [Editing a Routing Table](#)
- [Deleting a Routing Table](#)

Locating a Workflow Template

Existing workflow templates are viewed and managed from the Workflow Templates browse screen. A workflow template contains a set of steps used in one of your company's processes or procedures and is used in conjunction with a Workflow Team that identifies a group of people who can complete the steps, as well as a Routing Table if any of the workflow steps require approval.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Templates.
2. In the Workflow Templates browse screen, locate a template using one of the following options:
3. Scroll through the list.
4. Click on the Name header to sort workflow templates in ascending or descending order.
5. Click on a workflow template to display the Workflow Template Edit screen where you can review the steps in the workflow, as well as the restrictions for using the workflow.
 - From this screen, you can also edit and delete the workflow template.
6. To add a new workflow template, or make a copy of an existing template, click New in the toolbar of the Workflow Templates browse screen.

Adding a Workflow Template

A user with the Workflow Admin permission create the company, contract, and project workflow templates that are used by the Workflow Wizard, which is launched whenever a user adds a workflow to a Company, Contract, or Project Profile. In creating a workflow template, a Workflow Admin develops a set of steps designed to accomplish one of their company's business processes or procedures.

Creating a workflow template involves (1) identifying all the steps in the workflow (2) assigning an owner (responsible party) for each step (3) identifying any prerequisite steps that must be performed before an action or communication step can be completed, as well as stipulate what steps must be revisited/completed if a step that requires approval is declined/approved, and (4) setting restrictions for the use of the workflow template.

Important: Prior to creating a workflow template, at least one workflow team must exist. If any of the steps in the workflow require approval, at least one applicable routing table must exist.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Templates.
2. In the Workflow Templates browse screen, click New in the toolbar.

✓ **Tip:**

If your organization has many similar workflows with only minor differences in the steps, create a Master Workflow Template that contains all possible steps. Using the workflow template's Copy feature, simply make a copy of the Master Workflow Template and edit the workflow steps accordingly.

3. In the Workflow Template Edit screen:

- Enter a descriptive name for the workflow in the Template Name field.
- Provide a concise description of the purpose of the workflow in the Template Description field since precise names and descriptions will help users select the correct template when running the Workflow Wizard.

4. Click Add Step to add a step to the workflow.

✓ **Tip:**

To re-order the steps in the template, click on a step record to select it, and then drag-and-drop the step to the desired position in the list. If you are successfully moving the step, the prompt displays.

- Make a selection in the Type list.
- Action Item - requires a user to perform a task or action.
- Communication - requires a user to send an email message.
- Simple Gateway - requires the approval of one user.
- Gateway - requires the approval of more than one user and employs a routing table.
- Click in the Step Name field to activate it, and enter a name for the step.
- Click in the Step Description field to activate it, and enter a description of the step.
- Be concise, but clear since this description displays when a user is assigning the step in the Workflow Wizard, and it also appears in the email message that is delivered to the those who can complete the step.
- Click in the Function/Routing table list to activate it, and select all the user roles that have the authority to be a "step owner" for an Action Item or Communication step.
- For a Simple Gateway step, select the user function(s) that can approve the step.
- For a Gateway step, select the appropriate routing table category for the step.
- (Optional) Select the Lock Object check box to lock the contract at this step so that no further edits can be made.

- (Optional) Click in the Contract Status list to activate it, and select the new status that Conga Contracts should assign to the contract when this step is completed.
5. Assign Declined/Approved Steps:
 - Click on any Gateway or Simple Gateway step to display a Declined Step and an Approved Step list.
 - In the Declined Step list, select the number of the step that should be repeated if the Gateway step is not approved.
 - In the Approved Step list, select the number of the step that should be performed next if the Gateway step is approved.
 6. (Optional) Assign Pre-Requisite Steps:
 - Click on any Action Item or Communication step to display a Prerequisite Step(s) multi-select list.
 - Select all the steps that must be completed prior to the selected step.
 7. Click Save.

Setting Workflow Template Restrictions

Restrictions must be set for workflow templates so that only the appropriate templates are available when users runs the Workflow Wizard from a Company, Contract, or Project Profile.

1. In the Workflow Template Edit screen, click the Restrictions tab.
2. Make the appropriate selections to restrict the use of the routing table when the Workflow Wizard is run from a Company, Contract, or Project Profile:
 - Company multi-select lists
 - Company Group
 - Legal Entity
 - Contract multi-select lists
 - Contract Type
 - Contract Group
 - Agreement Type
 - Project Type multi-select list
3. Define the Properties for the workflow template:
 - Lock Workflow Teams check box - select to ensure the workflow team selected for this template in the Workflow Wizard cannot be edited by a user.
 - Limit Workflow Owners to Admins check box - select to ensure that all the individual step owners for this workflow have at least one Administrator permission.

- Allow Reassign Step Owner check box - select to permit the step owners in the workflow to assign their responsibility for completing the step assigned to them to another person.
 - Automatically Assign Step Owners to a Contract Responsibility check box - select to ensure Conga Contracts assign all the step owners in the workflow to the same position of responsibility for the contract, displaying their name/responsibility in the Responsibilities section of the Contract Profile.
 - When the Contract Responsibility list displays, select the responsibility to be assigned to all step owners.
 - Limit Workflow Teams to My Teams check box - select to limit the workflow teams that can use the template to only those teams to which the Administrator who created the workflow belongs.
 - Auto Assign Runner to Step Owner check box - select to ensure the Administrator who creates the workflow template to be included in the list of possible step owners for all workflow steps.
 - Allow Reassign Approver check box - select to allow the original approver of a step to reassign the responsibility of approving the step to another user.
 - Allow Step Reassignment to Anyone Regardless of Function check box - select to allow a step owner to reassign the responsibility for completing the step to any member of the Workflow Team, even if the team member does not hold the user function needed to complete the step.
4. Click Save.

Copying a Workflow Template

The Copy feature is a quick and easy way to create a new workflow template using an existing, similar workflow template. Once you create the duplicate template, you can rename it, edit the steps appropriately, update the restrictions, and edit the template's properties.

1. If you do not change the name of the template, you will have two workflow templates with the same name.
2. Click the Gear Icon in the Navigation Toolbar, and click Workflow Templates.
3. In the Workflow Templates browse screen, click New in the toolbar.
4. In the Workflow Template Edit screen, click Copy in the toolbar.
5. In the Copy Workflow Template prompt:
 - Make a selection in the Copy Template list.
 - Click Copy.
 - When the screen refreshes, displaying the copied workflow template, update the name of the template in the Template Name field.

6. Make the appropriate edits to the new template, including the restrictions for using the template.
7. Click Save.

Editing a Workflow Template

A user with the Workflow Admin permission can edit a workflow template by changing its name and description, adding and deleting steps, editing existing steps, and changing the restrictions to control when and how the template is used to create a workflow using the Workflow Wizard.

A workflow template works in conjunction with a workflow team, as well as a routing table if the template contains a step that requires approval.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Templates.
2. In the Workflow Templates browse screen, locate the template you want to edit, and click on it to select it.
3. In the Workflow Template Edit screen, you can edit:
 - Template Name and Template Description fields to clarify the use of the template when users run the Workflow Wizard.
 - Steps in the template, which include:
 - Adding and/or deleting steps.
 - Reordering the steps in the template.
 - Updating a step type, name, and description.
 - Updating the user function(s) required for an Action, Communication, or Simple Gateway step, which changes the role(s) a user must have in order to complete the step.
 - Changing the routing table used for a Gateway step, which updates the list of users who must approve the step.
 - Updating the prerequisite step(s) for an Action or Communication step.
 - Updating the declined/approved steps for a Gateway or Simple Gateway step to identify the steps that must be repeated/performed next.
 - Restrictions and properties for the template.

For more information, see [Adding a Workflow Template](#).

Deleting a Workflow Template

A user with the Workflow Admin permission can delete a workflow template if it is no longer needed. Once a workflow template is deleted, it is no longer available as a selection when users run the Workflow Wizard.

 **Tip:**

If a Workflow Team and/or a Routing Table was created for use with the Workflow Template you are deleting, you may want to also delete the workflow team and routing table.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Templates.
2. In the Workflow Templates browse screen, locate the template you want to delete, and click on it to select it.
3. In the Workflow Template Edit screen, click Delete in the toolbar.
4. In the Delete Workflow Template confirmation prompt, click Yes.

Locating a Workflow Team

Existing workflow teams are viewed and managed from the Workflow Teams browse screen. A workflow team identifies the people who can complete the steps in a Workflow Template. The template contains the steps to be followed in one of your company's processes or procedures, and may be used in conjunction with a Routing Table if any of the workflow steps require approval.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Teams.
2. In the Workflow Teams browse screen, locate a team using one of the following options:
 - Scroll through the list.
 - Click on the Name header to sort workflow teams in ascending or descending order.
3. Click on a workflow team to display the Workflow Team Edit screen where you can review the members of the team.
 - From this screen, you can also edit and delete the workflow team.

 **Tip:**

To add a new workflow team, or make a copy of an existing team, click New in the toolbar of the Workflow Teams browse screen.

Adding a Workflow Team

A user with the Workflow Admin permission can create one or more workflow teams to identify the individuals who participate in the workflows that need to be implemented for the companies, contracts, and projects stored in Conga Contracts. A workflow team works in conjunction with a workflow template, as well as a routing table if the template contains a step that requires approval.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Teams.
2. In the Workflow Teams browse screen, click New in the toolbar. To quickly and easily create a Workflow Team, use the Copy feature if an existing team has many of the same members as the new Workflow Team you want to create.
3. In the Workflow Team Edit screen:
 - Enter a descriptive name for the workflow team in the Team Name field.
 - Provide a concise description of the functions of the team in the Team Description field since precise names and descriptions will help users select the correct team when running the Workflow Wizard.
4. Click Add Team Member to add members to the workflow team:

 **Tip:**

At a minimum, each team member must have a role with Viewable permissions to the company or contract types for the workflow (as defined in the Workflow Template Restrictions) or they will not be able to close a workflow step or approve a Gateway step.

- Using the Address Book, select the program users for the team, or select a distribution list.
 - Click on a person/distribution list record to select it, and add the person/list to the Workflow Team list box. To quickly locate a person/list, enter the first few letters of the person's first or last name, or the name of the list, in the Search field, and click the magnifying glass icon.
 - Click Submit to select the team members and close the Address Book.
 - Click to remove a team member.
5. Click Save in the toolbar of the Workflow Team Edit screen.

Copying a Workflow Team

The Copy feature is a quick and easy way to create a new Workflow Team using an existing, similar team. Once you create the duplicate Workflow Team, rename the team, and update the team by adding and/or deleting team members.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Teams.
2. In the Workflow Teams browse screen, click New in the toolbar.
3. In the Workflow Team Edit screen, click Copy in the toolbar.
4. In the Copy Workflow Team prompt:
 - Make a selection in the Select Team list.
 - Click Copy.
5. When the screen refreshes, displaying the copied workflow team:
 - Enter a descriptive name for the workflow team in the Team Name field.
 - Enter a description of the team in the Team Description field so that its purpose is easily distinguishable from other workflow teams.
 - Update the members of the team, which includes adding and/or deleting members.
 - Use the Address Book to add program users to the team.
 - Click on a person's record to select them and add their name to the Workflow Team list box. To quickly locate a person, enter the first few letters of their first or last name in the Search field, and click the magnifying glass. To clear the filter, click the X.
 - Click Submit to add the team member(s) and close the Address Book.
6. Click Save.

Editing a Workflow Team

A user with the Workflow Admin permission can edit a workflow team by adding and/or deleting members of the team. They can also edit its name and description to assist users in selecting the correct team for a workflow.

A workflow team works in conjunction with a workflow template, as well as a routing table if the template contains an approval step.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Teams.
2. In the Workflow Teams browse screen, locate the team you want to edit, and click on it to select it.
3. In the Workflow Team Edit screen, you can edit:
 - Team Name and Team Description fields to clarify the use of the workflow team when users run the Workflow Wizard.

- Members of the team by adding and/or deleting members.
 - Use the Address Book to add program users to the team.
 - Click on a person's record to select them and add their name to the Workflow Team list box. To quickly locate a person, enter the first few letters of their first or last name in the Search field, and click the magnifying glass. To clear the filter, click x.
 - Click Submit to add the team member(s) and close the Address Book.
4. Click Save.

For more information, see [Adding a Workflow Team](#).

Deleting a Workflow Team

A user with the Workflow Admin permission can delete a workflow team can easily be deleted if it is no longer needed by your company. Once a workflow team is deleted, it is no longer available to users when they run the Workflow Wizard.

1. Click the Gear Icon in the Navigation Toolbar, and click Workflow Teams.
2. In the Workflow Teams browse screen, locate the team you want to delete, and click on it to select it.
3. In the Workflow Team Edit screen, click Delete in the toolbar.
4. In the Delete Workflow Team confirmation prompt, click Yes.

Locating a Routing Table

Existing routing tables are viewed and managed from the Routing Tables browse screen. A routing table determines the user function(s) that can approve any Gateway steps in a workflow. Therefore, a routing table works in conjunction with a Workflow Template, which defines the workflow steps, and the Workflow Team, which identifies the users who can complete the steps.

1. Click the Gear Icon in the Navigation Toolbar, and click the Workflow link.
2. In the Workflows menu, click Routing Tables.
3. In the Routing Tables browse screen, locate a table using one of the following options:
 - Scroll through the list, which is organized by categories.
 - Click on the Name header to sort routing tables in ascending or descending order.
4. Click on a routing table to display the Routing Table Edit screen where you can review the list of approvers and the selected behavior (Standard, Parallel, Parallel Single), as well as the restrictions for using the table with workflows.

- From this screen, you can also edit and delete the routing table.
5. To add a new routing table, or make a copy of an existing routing table, click New in the toolbar of the Routing Tables browse screen.

Adding a Routing Table

A user with the Workflow Admin permission can create one or more routing tables to identify the approver roles and associated functions that a user must have in order to approve a Gateway step in a workflow. A Gateway step can be associated with an action, task, or a document that requires the approval of one individual ([Simple Gateway](#)), or more than one individual ([Gateway](#)).

A routing table is needed in the Workflow Wizard when a user adds a workflow to a Company, Contract, or Project Profile and selects a workflow template that contains a Gateway step. In order to successfully complete the wizard and add the workflow to the Profile, the user must select the routing table that was designed to work in conjunction with the workflow template since the user function(s) defined in the table must have the authority to approve the Gateway step(s) defined in the workflow template. Therefore, the Workflow Admin must create and name a routing table so that it is easily identifiable for the workflow template that it references, and the routing table must contain the appropriate approver roles and their associated functions. The appropriate restrictions must also be set so that the routing table is only available for the workflow templates for which it was designed.

Important:

Before setting up a routing table, ensure the categories for your routing tables have been added using the Lists feature. For example, you could add Company, Contract, and Project categories since workflows can be added to Company, Contract, and Project Profiles.

1. Click the Gear Icon in the Navigation Toolbar, and click Routing Tables.
2. In the Routing Tables browse screen, click New in the toolbar.
3. In the Routing Table Edit screen, enter a descriptive name for the routing table in the Name field.
4. Make a selection in the Category field to categorize the routing table.

Tip:

When a user runs the Workflow Wizard, all the routing tables in a category are available for selection in a Gateway step when the step in the Workflow Template is associated with the Routing Table category.

5. Enter a description of the routing table in the Description field so that its purpose is easily distinguishable from other routing tables.
6. In the Routing Table Behavior section of the screen, select one of the following radio buttons:
 - Standard - select if all approvers listed in the routing table must approve the step to complete it. Conga Contracts sends consecutive emails messages as each user approves the step. However, if any user declines approval, the other users are notified that the step was not completed.
 Tip: The order in which Conga Contracts send email messages, requesting approval of a Gateway step in a workflow is determined by the Workflow Step Owner Selection step in the Workflow Wizard.
 - Parallel - select if all approvers listed in the routing table must approve the step to complete it. Conga Contracts sends email notifications to all approvers at the same time.
 - Parallel Single - select if only one of the approvers listed in the routing table must approve the step to complete it. Conga Contracts sends email notifications to all approvers at the same time, but as soon as one user approves/declines the step, the other approvers are notified by email.
7. Click Add Approver to add an approval role to the routing table:
8. Double-click in the Description field to activate it, and then enter a description for this approver.
9. Be concise, but clear since this description displays when a user is assigning the Gateway step in the Workflow Wizard, and it also appears in the email message that is delivered to the those who can approve the step.
10. Double-click in the Functions list to activate it, and then select the user function(s) for the Gateway step, allowing users who hold the selected function(s) to approve the step.
11. (Optional) Select the Traverse check box to use the Conga Contracts hierarchy function for this approver, which automatically assigns the next higher user role to the Gateway step if there are no program users who currently hold the specified user role(s).
12. Click Save.

Setting Routing Table Restrictions

In order for a Routing Table to function properly, restrictions must be set limiting the table to ensure it is used properly. If you leave these fields blank, users can select the routing table when they run the Workflow Wizard and select any workflow template that uses a routing table.

1. In the Routing Table Edit screen, click the Restrictions tab.
2. Make the appropriate selections to restrict the use of the routing table when the Workflow Wizard is run from a Company, Contract, or Project Profile:
Company multi-select lists
 - Company Group
 - Legal Entity
 - Project Type multi-select list
 - Contract multi-select lists
 - Contract Type
 - Contract Group
 - Agreement Type
3. (Optional) Enter a value in the Minimum Value and/or Maximum Value fields to set the monetary range for the contracts, companies, or projects that can use this routing table.
4. Click Save.

Copying a Routing Table

The Copy feature is a quick and easy way to create a new routing table using an existing, similar routing table. Once you create the duplicate routing table, you can make edits to the user functions that approve Gateway steps and/or re-order the approval sequence, and update its restrictions.

1. Click the Gear Icon in the Navigation Toolbar, and click Routing Tables.
2. In the Routing Tables browse screen, click New in the toolbar.
3. In the Routing Table Edit screen, click Copy in the toolbar.
4. In the Copy Routing Table prompt, make a selection in the Copy Routing Table list.
5. Click Copy.
6. When the screen refreshes, displaying the copied routing table:
 - Enter a descriptive name for the routing table in the Name field.
 - Verify the selection in the Category field to categorize the routing table.
 - (Optional) Enter a description of the routing table in the Description field so that its purpose is easily distinguishable from other routing tables.

- (Optional) In the Routing Table Behavior section of the screen, change the selection to update the way Conga Contracts handles Gateway steps for the routing table.
 - Standard - select if all approvers listed in the routing table must approve the step to complete it. Conga Contracts sends consecutive email messages as each user approves the step. However, if any user declines approval, the other users are notified that the step was not completed.
 - Parallel - select if all approvers listed in the routing table must approve the step to complete it. Conga Contracts sends email notifications to all approvers at the same time.
 - Parallel Single - select if only one of the approvers listed in the routing table must approve the step to complete it. Conga Contracts sends email notifications to all approvers at the same time, but as soon as one user approves/declines the step, the other approvers are notified by email.
7. Make the appropriate edits to the new routing table, including the restrictions for using it.
 8. Click Save.

 **Tip:**

When a user runs the Workflow Wizard, all the routing tables in a category are available for selection in a Gateway step when the step in the Workflow Template is associated with the Routing Table category.

Editing a Routing Table

A user with the Workflow Admin permission can edit a routing table by changing its name, description, and how it is categorized. The Workflow Admin can add and delete approvers, edit an approver's description and user functions, as well as change the order in which approvals are obtained. The Admin can also update the restrictions to control how the routing table is used in a workflow.

A routing table works in conjunction with a workflow template and a workflow team in the Workflow Wizard.

1. Click the Gear Icon in the Navigation Toolbar, and click Routing Tables.
2. In the Routing Tables browse screen, locate the table you want to edit, and click on it to select it.
3. In the Routing Tables Edit screen, you can edit:

- Name, Category, and Description fields to clarify the use of the routing table when users run the Workflow Wizard.
- Routing Table Behavior by changing the selection to Standard, Parallel, or Parallel Single to update the way Conga Contracts handles Gateway steps for the routing table.
- Approvers in the routing table, which include:
 - Adding and/or deleting approvers.
 - Reordering approvers in the list.
 - Editing approver descriptions.
 - Updating the user function(s) required for an approver.
 - Restrictions for the routing table.

For more information, see [Adding a Routing Table](#).

Deleting a Routing Table

A user with the Workflow Admin permission can delete a routing table if it is no longer used in a workflow template. Once a routing table is deleted, it is no longer available in the Workflow Wizard.

1. Click the Gear Icon in the Navigation Toolbar, and click Routing Tables.
2. In the Routing Tables browse screen, locate the table you want to delete, and click on it to select it.
3. In the Routing Table Edit screen, click Delete in the toolbar.
4. In the Delete Routing Table confirmation prompt, click Yes.

Supplier Registration Types

A Supplier Registration Type is an Administrator-defined form that is designed to capture key information for the purpose of evaluating potential suppliers or vendors. Documents, such as insurance certificates and financial statements, can be uploaded to the form, which is completed by potential suppliers in the Conga Contracts Portal, a secure online forum.

Supplier Registration Types Overview

The Supplier Registration feature is used to gather information about the companies who want to do business with your organization. The representatives of these companies are granted access to the Contracts Portal using a secure URL where they can provide the information your organization needs to evaluate these companies as potential suppliers/vendors. This URL, which is a system-generated link, automatically displays whenever a

user with the Role Permission DescriptionsSupplier Registration Type Admin permission adds a Supplier Registration Type. The Supplier Registration Type Admin then provides the system-generated link to prospective suppliers/vendors by copying the link from the Registration Type and pasting it into an email message. Alternatively, the link can be posted in a secure location on your organization's website.

Once a supplier accesses the Portal, they must register by supplying contact information and creating a login name and password. After logging into the Portal, the supplier must provide the information requested and upload any required documents before submitting their registration. Submitted registrations are reviewed, and either approved or declined, by the approvers identified in the Supplier Registration Type form used in the registration process.

Each time a Supplier Registration Type Admin creates a Supplier Registration Type, a different URL is generated for the Portal so that the screens that display for each type of supplier registration are unique. Using the same URL for the same type of registration process ensures standardized information is captured for each supplier.

A Supplier Registration Type Admin can perform the following tasks associated with supplier registration types:

- [Locating a Supplier Registration Type](#)
- [Adding a Supplier Registration Type](#)
- [Attaching a Document to a Supplier Registration Type](#)
- [Editing a Supplier Registration Type](#)
- [Deleting a Supplier Registration Type](#)

A Supplier Registration Type Admin can provide suppliers with the following information to assist them in completing a supplier registration:

- [Registering as a Supplier](#)
- [Submitting a Supplier Registration](#)

Locating a Supplier Registration Type

Existing supplier registration types are viewed and managed from the Supplier Registration Types screen. A supplier registration type is used whenever a supplier/vendor wishes to do business with your company. Creating a registration type generates a link to the Portal, which is provided to the supplier/vendor so they can provide the information required to be considered as one of your company's suppliers/vendors.

1. Click the Tools in the Navigation Toolbar, and click the Supplier Registration Types link in the menu.

2. In the Supplier Registration Types screen, locate the supplier registration type using its name or description.
 - Click on a column heading to change the sort order of the data.
3. Click the supplier registration record to select it and display its Registration Type screen.

Adding a Supplier Registration Type

A user with the Supplier Registration Type Admin permission can create a supplier registration type to generate a link to the Portal. The Admin then provides the link to the supplier, usually by copying and pasting it into an email message. In the Portal, the supplier registers as a user and provides the information required by the registration type to be considered as one of your company's suppliers.

The Supplier Registration Type Admin designs a supplier registration type by adding fields to the form to capture the information that will be evaluated in processing the registration. The fields that can be added include two system fields in the Company Profile (Company Type and Category), along with any additional fields that have been added to the Profile.

The Supplier Registration Type Admin may require one or more documents to be attached prior to submitting the registration for approval. The Admin must also identify the program users who can approve the registration.

Before creating a supplier registration type that requires the supplier to complete an attached document, be sure to have the correct document template available and ensure it is in a format that can be edited (filled in) by the supplier. Documents in PDF format cannot be edited by most users.

1. Click Tools in the Navigation Toolbar, and click the Supplier Registration Types link in the menu.
2. In the Supplier Registration Types screen, click New in the toolbar.
3. Populate the required fields:
 - Name - enter a distinct name for the supplier registration type.
 - Description - enter a description, taking into account the supplier will be able to view your description.
 - Supplier Instructions - enter (or paste) instructions to the supplier for completing the form, including information for any documents that need to be attached to the registration.
 - Your instructions will be the first thing the supplier sees once they log into the Portal and finish providing basic information for their company.
 - Approvers - select one or more program users who have the authority to approve this type of supplier registration.

4. Add a field to the form:
 - Click Add Field in the toolbar.
 - In the Add Field prompt, make a selection in the Field Type list, and click Save.
5. The list contains the Company Type and Category fields from the Company Profile, along with any additional fields that have been added to the Company Profile.

 **Tip:**

To increase the viewable area in the bottom section of the screen, hover over the How To section until the icon displays. Click the icon and drag it upwards.

6. Set the properties for the field by clicking the field to display its default values in the Field Properties grid.
 - (Optional) Drag-and-drop the field to another location in Column 1 or Column 2.
7. In the Field Properties grid, click in the Value field to set any of the following properties:
 - Field Label - type over the existing text to change the name of the field.
 - Required - select the true option to make the field required or false to make it optional.
 - Quick Tip - enter (or paste) the information you want to display when the supplier hovers over the field.
 - Decimal Precision - this field is only present for a Currency field, and the number of decimal places can range from 0 to 5
 - Parent Field - this field is only present for a Linked Combo Field or a Linked Multi-select Field, and allows you to select a different Combo List as the parent field for the linked field.
 - Person Filter - this field is only present for a Person Field, and allows you to change the function of the person named in this field.
 - Default Value - this field is only present for a Hyperlink field, and is used to automatically populate the field. For example, the supplier can provide the URL for their company's website.
 - Field Type - this field cannot be edited.
 - Possible Values - this field displays only for fields that are lists.
8. Click in the Value field to display a Select the possible values widow.
9. In the Available Values list, click the values you want displayed as options in the field list.
10. Click to move all the selected values to the Selected Values list.
 - Remove a selected value by clicking it in the Selected Values list and then clicking .
11. Click Save.

12. (Optional) Add an Information Panel to provide a heading for the fields in Column 1 or Column 2:

✓ **Tip:**

To delete an Information Panel, right click it to display a button, and click the button.

- Click Add Information Panel in the toolbar.
 - When the field displays at the bottom of the screen, click it to display its default values in the Field Properties grid.
 - Drag-and-drop the panel above the fields it will describe.
 - In the Field Properties grid, click in the Value field to set the following properties:
 - Display Text - enter the name for the column heading.
 - Style - select a formatting option for the column heading:
 - None - Text display is the default system text.
 - Exclamation - Display is a pink background and the icon.
 - Information - Display is a blue background and the icon.
 - Bold - Text displays in a bold font style.
13. Click Save in the toolbar.
14. When the screen refreshes, copy the URL that now displays in the Supplier Link field.
- Provide the URL to any supplier who will be using this registration type to make a bid for your company's business in the Portal.
 - Copy and paste the URL into an email message and send it to the supplier, or place the link for the URL in a secure location on your company's website.
15. Select one of the following options:
- Attach a document to the registration type so the supplier can download the document, complete it, and upload the completed document.
 - Require the supplier to upload one or more of their company's documents.
 - Do not attach a document for the supplier registration type:
 - Click Back to Browse in the toolbar to return to the Supplier Registration Types screen.

Attaching a Document to a Supplier Registration Type

Some supplier registration types may require the supplier to attach one of their company's documents, such as proof of insurance, during the registration process. Other supplier registrations may require the supplier to download, complete, and then upload one of your company's documents or forms before submitting a registration in the Portal.

Requiring a Supplier to Complete Your Company's Document

When the supplier is required to complete a document supplied by your company, they must download it, complete it, and then upload the completed document in the Portal.

1. Click Tools in the Navigation Toolbar, and click the Supplier Registration Types link in the menu.
2. In the Supplier Registration Types screen, locate the supplier registration type.
3. Click the supplier registration record to select it and display its Registration Type screen.
4. In the bottom section of the screen, click Attach Document.
5. When the screen refreshes, populate the required fields for the document you are uploading:

 **Tip:**

To increase the viewable area in the bottom section of the screen, hover over the top of the secondary toolbar (with the Save and Cancel buttons) until the icon displays. Click the icon and drag it upwards.

- Name - enter a name for the document the supplier must complete.
 - Document Type - select the type of document in the list.
 - Instructions - enter instructions for the document, such as Download the form by clicking the hot link below, complete all portions, and then upload the completed form by clicking the Upload button. Instructions display under the name of the document in the Documents section of the Registrations screen in the Portal.
 - Require Document - select the check box if the supplier must attach this document before submitting the registration.
 - Include Template - select the check box to upload the document the supplier must complete and use the following fields to select and define it:
 - Open a File Upload window. Navigate to the document, click it to select it, and then click Open in the window to populate the File field.
 - Template Description - enter a description of the uploaded document.
6. Click Save.
 7. Copy the URL in the Supplier Link field, and provide it to any supplier who will be using this registration type to make a bid for your company's business in the Portal.
 8. Click Back to Browse in the bottom toolbar to attach another document, or Back to Browse in the top toolbar to return to the Supplier Registration Types screen.

Requiring a Supplier to Provide Their Company's Document

When the supplier is required to furnish one of their company's documents, the supplier uploads the document during the registration process in the Portal.

1. Click Tools in the Navigation Toolbar, and click the Supplier Registration Types link in the menu.
2. In the Supplier Registration Types screen, locate the supplier registration type.
3. Click the supplier registration record to select it and display its Registration Type screen.
4. In the bottom section of the screen, click Attach Document .
5. When the screen refreshes, populate the required fields for the document that the supplier must provide:
 - Name - enter a name for the document.
 - Document Type - select the type of document in the list.
 - Instructions - enter instructions for the document, such as Attach a copy of your company's proof of insurance.
 - Require Document - select the check box if the supplier must attach this document before submitting the registration.
 - Include Template - ensure the check box is not selected.
6. Click Save.
7. Copy the URL in the Supplier Link field, and provide it to any supplier who will be using this registration type to make a bid for your company's business in the Portal.
8. Click Back to Browse in the bottom toolbar to require another document attachment, or Back to Browse in the top toolbar to return to the Supplier Registration Types screen.

Editing a Supplier Registration Type

A user with the Supplier Registration Type Admin permission can edit a supplier registration type by changing its name and description, and revising the instructions provided to suppliers. The Supplier Registration Type Admin can update the amount and type of information captured, as well as change the documents required for a supplier registration. The Admin can also update the individuals designated as approvers for supplier registrations.

1. Click Tools in the Navigation Toolbar, and click the Supplier Registration Types link in the menu.
2. In the Supplier Registration Types screen, locate the supplier registration type you want to edit, and click its registration record to select it.
3. In the Registration Type screen, click Edit in the toolbar.

4. When the screen displays in edit mode, perform any of the following edits:
 - a. Name and/or Description fields - change the name or description of the registration type.
 - b. Supplier Instructions field - edit (paste) the information to assist suppliers in completing the registration type.
 - c. Approvers multi-select list - change the users that can process the registration by clicking their name. Clear an approver from the list by clicking their selected name.
 - d. Supplier Link field - although you can paste a link from another supplier registration type, ensure the new link is the one you want to use.

 **Warning:**

Warning: Changing the link will not only add any documents attached from the copied registration type, but also remove any documents attached to the registration type you are editing.

5. Edit an existing field:
 - a. Click a field in the bottom section of the screen to select it and display its Field Properties grid.
 - b. Click in the Value field for a field to edit it. Decimal Precision, Parent Field, Default Value, and Possible Value fields are only present for specific types of fields.
 - c. Click Add Field in the toolbar to add a field.
 - d. Hide a field by right-clicking it to display - button, and then click the button.
6. Edit an existing Information Panel:
 - a. Click a panel (header) in the bottom section of the screen to select it and display its Field Properties grid.
 - b. Update the name by clicking in the Value field for Display Text.
 - c. Change the type of Information Panel by making a different selection in the Style list.
7. Delete an Information Panel by right-clicking it to display an X button, and then click the button.
8. Click Save.

Updating the Documents Required for a Supplier Registration Type

In editing the documents attached to a supplier registration type, a Supplier Registration Type Admin can attach a new document or edit an existing document. The Admin can edit

a document by changing its name or type, updating the supplier instructions, or changing whether the document is required during the registration process. The Admin can also remove a document attachment from the supplier registration type.

1. Click Tools in the Navigation Toolbar, and click the Supplier Registration Types link in the menu.
2. In the Supplier Registration Types screen, locate the supplier registration type you want to edit, and click its registration record to select it.
3. In the Registration Type screen, scroll down to the Documents section of the screen.
4. Locate the document you want to edit, and click its document record to display its Document Profile screen.
5. In the Document Profile screen, click Edit in the toolbar.
6. When the screen displays in edit mode, perform any of the following edits:
 - Name field - change the name of the document the supplier must complete.
 - Document Type list - update the type of document the supplier must complete in the list.
 - Instructions field - edit the instructions to assist the supplier in uploading the document to the registration type.
 - Require Document check box - select if the supplier must attach this document before submitting the registration, and clear the check box if the document attachment is optional.
 - Include Template check box:
 - Clear if the supplier is not required to download, complete, and upload one of your company's documents.
 - This option requires the supplier to upload one of their company's documents.
 - Select if the supplier must download one of your company's documents, complete it, and then upload the completed document to the registration.
- When the following display:
 - Click to select and open a File Upload window. Navigate to the document, click it to select it, and then click Open in the window to populate the File field.
 - Enter a description of the template in the Template Description field.
7. Click Delete in the toolbar to remove the document attachment from the supplier registration type.
8. Click Save.



Tip:

To increase the viewable area in the bottom section of the screen, hover over the top of the Document Profile toolbar until the >> icon displays. Click the icon and drag it upwards.

Deleting a Supplier Registration Type

A user with the Supplier Registration Type Admin permission can delete a supplier registration type if it is no longer needed.

1. Click Tools in the Navigation Toolbar, and click the Supplier Registration Types link in the menu.
2. In the Supplier Registration Types screen, locate the supplier registration type you want to edit, and click its registration record to select it.
3. In the Registration Type screen, click Delete in the toolbar.
4. In the Confirm Delete prompt, click Yes.

 **Tip:**

To delete a document attachment from a supplier registration type, locate the attachment in the bottom of the screen, and click its document record to display its Document Profile screen. Click Delete in the toolbar of the Document Profile screen, and then click Yes in the Confirm Delete prompt.

Registering as a Supplier

Suppliers who express an interest in doing business with your company must first register in the Portal, complete the supplier registration process, and then submit the registration. The information provided during the registration process is used by your organization to determine whether or not you want the company to become one of your suppliers. A supplier gains access to the Portal using a URL that is provided by a representative of Conga Contracts. The representative can either send an email message to the supplier containing the URL link, or post the URL in a secure location on your organization's website.

1. Copy and paste the supplier registration URL, which was provide to you by a Conga Contracts representative, into a browser window.
2. When the Conga Contracts Login screen displays, select the I need to register radio button. If you already have Portal credentials, enter the email address that was used to notify you of the Portal invitation in the Email Address field, provide your Portal

password in the Password field, and click Login. See Submitting a Supplier Registration.

3. In the Register screen, enter your user information, including:
 - a. Email Address - enter the email address used in your Portal Invitation.
 - b. Password - use a password that is at least 8 characters long and contains at least one uppercase character (A-Z) and one lowercase character (a-z). Passwords must also contain one number (0-9) OR one symbol [!@#\$%^&*()].
4. In the Portal Settings section, clear the check box if you do not want to receive an email when a supplier registration document is checked out of or back into the Portal, or when a document for the supplier registration has been completed in the Portal.

 **Tip:**

Portal Settings are also used to control email notifications for documents used in Document and eSignature packages.

5. Click Register.
6. When you are redirected to the Login screen, enter your Portal email address and password so you can participate in the supplier registration

Submitting a Supplier Registration

Once a supplier registers in the Portal to become one of your company's vendors, they must provide basic company information in the default Supplier screen. In the Portal's Registrations screen, the vendor is typically required to provide additional information, as well as upload a requested document. For some supplier registrations, the vendor is required to download one of your company's documents, complete it, and then upload the completed document before submitting the registration.

If you have to exit the supplier registration process before submitting the registration, click the tab after logging back in to the Portal. Click a registration record to resume the supplier registration process.

1. Copy and paste the URL, which was provide to you by a Conga Contracts representative, into a browser window.
2. When the Conga Contracts Login screen displays, enter your credentials in the Email Address and Password fields, and click Login.

 **Tip:**

If you do not have a Portal account, you will be required to create an account by registering at the Login screen.

3. In the default Supplier screen:
 - Populate the required fields and the known optional fields.
 - Hover over the icon to display information that will help you populate a field.
 - Click Save.
4. When the Registrations screen displays:
 - Read the instructions provided to ensure you successfully complete the registration process.
 - Populate all fields to provide the requested information.
5. Provide a required document using one of the following options:
 - Upload one of your company's documents:
 - Click in the Documents section of the screen.
 - In the Upload Document window:
 - Click Select to display a File Upload window:
 - Navigate to the document, and click it to select it.
 - Click Open.
 - Click in the Notes field and enter information for the document.
 - Click Submit.
 - Download a document that you are required to complete:
 - Click the document link in the Documents section of the screen.
 - In the Opening window:
 - Open the document in its default program, or click the Save File radio button to download a copy of the document.
 - Click OK.
 - Complete the document.
 - Follow the steps above for uploading the completed document, making sure to select the correct button.
 - (Optional) When your uploaded document displays as a link, and a button appears, use the Download and Upload buttons to download another instance of the document and then upload the completed document to the registration.



Tip:

To edit your company's basic information, click the tab to redisplay the Supplier screen, and then click the Edit button to make the fields editable.

- Click Submit.
6. In the Confirm Submission window:
 - (Optional) Click in the Notes field and update the default text to provide additional information for the supplier registration.

- Click Submit.

Scorecards

Scorecards are used to rate the performance of companies, contracts, and projects. Users are assigned the task of completing a scorecard, while Administrators configure Scorecards, Answer Profiles, and Components. Components are the categories and questions that can be used in a scorecard. Answer Profiles are possible responses to questions, and each is assigned a weighted value. Scorecards are built using a mix of categories and questions.

Scorecards Overview

Scorecards allow users to rate companies, contracts, projects, as well as any of the other information linked to Company, Contract, and Project Profiles, such as products and services. A user with the Scorecard Admin permission is responsible for setting up scorecards, which involves three separate procedures:

- Scorecard Answer Profile - The possible responses to the questions in a scorecard are identified and assigned a value of 1-5, which is the default rating system for scorecard answers.
- Scorecard Components - Categories are defined and questions are written for each category. The weight of a category should equal the combined weight of the questions in the category.
- Scorecards - Individual scorecards are created using one or more of the pre-defined component categories (and questions). The weight of a scorecard should equal the combined weight of all the categories in the scorecard. Administrators make scorecards available for specific company, contract, and project groups/types so that users are prompted to complete the scorecard when they open the profile. Administrators can also limit the time frame in which scorecards are available for completion.

Once a scorecard is linked to a Company, Contract, or Project Profile, a user can assign the scorecard to themselves, as well as others using the Scorecards link in the profile. All users that have been assigned to complete a scorecard receive an email message with a link to the Conga Contracts Portal where they can provide their answers and complete the scorecard. Results of scorecard ratings are displayed numerically in the upper right-hand corner of a Company, Contract, or Project Profile screen in color-coded score boxes. The color of a score box depends on the rating: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.

Scorecard Answer Profiles

A Scorecard Admin must identify the options they want to give users in answering the questions (or statements) in a scorecard. An Answer Profile can contain as few as two responses (True/False or Yes/No) or up to 5 responses to accurately answer a question (or rate a statement). Following are four examples of rating systems using the default 1-5 rating system:

- True = 5 and False = 1
- Yes = 5 and No = 1
- Always = 5, Usually = 4, Often = 3, Sometimes = 2, Never = 1
- Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, Strongly Disagree = 1

A Scorecard Admin can perform the following tasks related to Scorecard Answer Profiles:

- [Locating a Scorecard Answer Profiles](#)
- [Adding a Scorecard Answer Profile](#)
- [Editing a Scorecard Answer Profile](#)
- [Deleting a Scorecard Answer Profile](#)

Scorecard Components

A Scorecard Admin must define the categories that will be used in scorecards, and then write the individual questions for each category, keeping in mind that they can use one or more of these categories (and questions) in each scorecard. Therefore, in defining the categories, it is recommended that each category be given a name that clearly identifies whether it is applicable to rating a company, contract, or project. It is also recommended that the questions (or statements) in a category are worded similarly so that a positive response, such as Always or Strongly Agree, will elicit a high rating, whereas a negative response, such as Never or Strongly Disagree, will elicit a low rating. For example, you would not include both of these questions in the same category since they elicit opposite responses and will not yield an accurate rating:

- Are deliveries made on time?
- Are items missing from deliveries?

A Scorecard Admin can perform the following tasks related to Scorecard Components:

- [Locating a Scorecard Component](#)
- [Adding a Scorecard Component](#)
- [Editing a Scorecard Component](#)
- [Deleting a Scorecard Component](#)

Scorecards

Once a Scorecard Admin has created at least one Answer Profile, and at least one Component (category with questions or statements), they can create a scorecard. A Scorecard Admin should restrict the use of each scorecard to specific company, contract, or project groups/types so that users are prompted to complete the scorecard only when they open a profile that has been linked to a scorecard. Finally, a Scorecard Admin determines how long a scorecard is available by indicating the number of days it is valid.

A Scorecard Admin can perform the following tasks related to Scorecards:

- [Locating a Scorecard](#)
- [Adding a Scorecard](#)
- [Editing a Scorecard](#)
- [Deleting a Scorecard](#)

There is also a [Scorecard Viewing permissions](#) that allows users to view, but not edit scorecards.

Locating a Scorecard Answer Profile

Existing scorecard Answer Profiles are viewed and managed from the Scorecard Answer Profiles browse screen. An Answer Profile contains the possible responses to a scorecard question, and the value assigned to each response.

1. Click Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecard Answer Profiles.
3. In the Scorecard Answer Profiles browse screen, locate a profile using one of the following options:
 - Scroll through the list.
 - Click the Name header to sort answer profiles in ascending or descending order.
4. Click an answer profile to display the Scorecard Answer Profiles screen where you can review scorecard answers and their corresponding weights.
 - From this screen, you can also edit and delete the answer profile.
5. To add a new answer profile, click New Scorecard Answer Profile in the toolbar of the Scorecard Answer Profiles browse screen.

Adding a Scorecard Answer Profile

Prior to creating a scorecard or a scorecard component (categories and questions), a user with the Scorecard Admin permission must create an Answer Profile containing the available responses to scorecard questions. The Answer Profile provides several options in

creating the profile since it can contain as few as two (2) answers (True/False or Yes/No), or as many as five (5) answers to accurately answer scorecard questions. The Scorecard Admin can also set up many different Scorecard Answer Profiles to accommodate different types of scorecards. For example, the following types of profiles can be created:

- Basic Profile - contains only True/False (or Yes/No) responses and each response is assigned a weight of 1, 2, 3, 4, or 5 since the default rating system used in all Answer Profiles must be between 1 and 5. For example, a Yes response could be assigned a weight of 5 and a No response could be assigned a weight of 1.

If the questions (or statements) in a scorecard will be worded in such a way that a Yes (or True) response will yield a higher scorecard rating, then a Yes (or True) response should be rated as a "5" and a No (or False) response should be rated as a "1." For example, if a scorecard contained questions such as "Has the company's Customer Service Department been responsive to our needs?" an Administrator would assign a weight of "5" to the 'Yes' response, and a weight of "1" to the 'No' response to ensure accurate scorecard ratings are captured.

- Question Profile - contains at least one (1), but no more than five (5), responses to a scorecard question, along with an assigned weight for each response. For example, 1 = Never, 2 = Rarely, 3 = Sometimes, 4 = Usually, and 5 = Always.
- Statement Profile - contains at least one (1), but no more than five (5), responses to a scorecard statement, along with an assigned weight for each response. For example, 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, and 5 = Strongly Agree.

1. Click Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecard Answer Profiles.
3. In the Scorecard Answer Profiles browse screen, click New Scorecard Answer Profile in the toolbar.
4. When the screen refreshes, provide basic information for the answer profile:
 - Enter a name for the profile in the Answer Profile Name field.
 - Enter a description in the Answer Profile Description field.
5. Add at least two scorecard answers and their corresponding values:
 - Click Add Answer in the toolbar.
 - In the New Item record:
 - Click in the Name field, and enter a response.
 - Click in the Value field, and enter a value for the response.
6. Click Save.

Editing a Scorecard Answer Profile

A user with the Scorecard Admin permission can edit a Scorecard Answer Profile by changing the name of the Profile and editing its description. The Scorecard Admin can also add, edit, and delete responses to scorecard questions, as well as update the values assigned to individual responses.

1. Click Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecard Answer Profiles.
3. In the Scorecard Answer Profiles browse screen, locate the profile you want to edit, and click it to select it.
4. When the screen refreshes, you can edit:
 - Basic information for the answer profile.
 - Answers, including the weight assigned to the answer.
 - To reorder an answer, click on it, and then drag-and-drop it upwards or downwards. You are successfully moving the answer if the selected row message displays.
5. Click Save.

For more information, see [Adding an Answer Profile](#).

Deleting a Scorecard Answer Profile

A user with the Scorecard Admin permission can delete a Scorecard Answer Profile if the answers in the Profile are no longer applicable to any existing scorecards or if it is a duplicate Profile.

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecard Answer Profiles.
3. In the Scorecard Answer Profiles browse screen, locate the profile you want to delete, and click it to select it.
4. When the screen refreshes, click Delete in the toolbar.
5. In the Delete Scorecard Answer Profile prompt, click Yes.

Locating a Scorecard Component

Existing scorecard components are viewed and managed from the Scorecard Components browse screen. Scorecard components include the categories and questions that are used to build scorecards, along with scorecard answer profiles.

1. Click Gear Icon in the Navigation Toolbar, and click the Scorecards link.

2. In the Scorecards menu, click Scorecard Components.
3. In the Scorecard Components browse screen, locate the component using one of the following options:
 - Enter a beginning word or value for the component name or description in the Search field, and press the ENTER key on your keyboard.
 - Scroll through the list of components.
 - Click the Name header to sort the components in ascending or descending order.
4. Click the component record to display the Scorecard Component Administration screen where you can review the component's questions and categories.
 - From this screen, you can also edit and delete scorecard components.
5. To add a new scorecard component, click New Category in the toolbar of the Scorecard Components browse screen.

Adding a Scorecard Component

Prior to creating a scorecard, a user with the Scorecard Admin permission must create an Answer Profile containing the possible answers to scorecard questions, and at least one Scorecard Component. A Scorecard Component consists of the categories and questions included in the scorecard.

A scorecard component is composed of:

- Category - a classification that defines a rating factor for your companies, contracts, and projects, such as Product Quality, Customer Service, and Deliveries.
- Questions - one or more questions or statements in a scorecard category, whose purpose is to solicit user feedback on the rating factors for your companies, contracts, and projects. Each scorecard question or statement is rated on a response scale from 1-5, which is defined in a Scorecard Answer Profile.

Important: Scorecards, Scorecard Questions, and Scorecard Categories are all assigned values or weights. In order to obtain accurate results, the total weight of the questions in a category must be equal the category weight (Category Weight = Combined Weight of Questions in Category). Similarly, the weight of the scorecard must equal the combined weight of all the categories in the scorecard (Scorecard Weight = Combined Weight of Categories in Scorecard). For example, if a scorecard contains two component categories and the scorecard weight must equal 100, equally weighting both categories at 50 is an option. If there are five questions in each component category (a total of 10 questions in the scorecard), and if each question is equally important, then each question should be assigned a weight of 10 to bring the total scorecard weight to 100.

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.

2. In the Scorecards menu, click Scorecard Components.
3. In the Scorecard Components browse screen, click New Category in the toolbar.
4. In the Scorecard Component Administration screen, provide basic information for the category:
 - Enter a name for the category in the Category Name field.
 - Enter a description in the Category Description field.
 - Assign a numerical weight for the category in the Category Default Weight field. This default weight should equal the sum of the weights of all the questions you add to the category.
 - Make a selection in the Scorecard Answer Profile list, depending on the type of answers you want displayed when a user competes a scorecard.
5. Add one or more questions to the category:
 - Click New Question in the toolbar of the My Questions and Categories section. Responses to scorecard questions use a rating system of 1-5. If the questions in a category equate an affirmative response, such as Always, with a high number (5) and a negative response, such as Never, with a low number (1), the questions should be worded so that eliciting affirmative responses will generate higher scores, and therefore, yield accurate results.
6. In the Scorecard Question dialog box:
 - Enter a question (or statement) in the Question Text field, which is designed to rate performance or quality in this category.
 - Enter information that will assist the user in answering the question in the Question Description field.
 - Assign a numerical weight for the question in the Question Weight field.
 - Click Save.
7. (Optional) Add an existing category, and all its questions, to the new category by clicking on it in the Categories section, and then dragging-and-dropping it into the My Questions and Categories section.
8. Click Save.

Editing a Scorecard Component

A user with the Scorecard Admin permission can edit a scorecard component by changing the name of the scorecard category, editing its description, and re-weighting the value of the category. The Scorecard Admin can also add, edit, re-weight, reorder, and delete questions (or statements) in any category.

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecard Components.
3. In the Scorecard Components browse screen, locate the component you want to edit, and click it to select it.

4. In the Scorecard Component Administration screen, you can edit:
 - Basic information for the scorecard component.
 - Questions, including the wording, as well as adding and deleting questions.
 - To reorder a question, click on it, and then drag-and-drop it upwards or downwards. You are successfully moving the question if the selected row message displays.
 - (Optional) My Questions and Categories section by dragging-and-dropping a Category into or out of the section.
5. Click Save.

For more information, see [Adding a Scorecard Component](#).

Deleting a Scorecard Component

A user with the Scorecard Admin permission can delete a Scorecard Component, which is composed of one or more categories and the questions (or statements) for that category.

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecard Components.
3. In the Scorecard Components browse screen, locate the component you want to delete, and click it to select it.
4. In the Scorecard Component Administration screen, click Delete in the toolbar.
5. In the Delete Scorecard Category prompt, click Yes.

Locating a Scorecard

Existing scorecards are viewed and managed from the Scorecards browse screen. A scorecard is comprised of the questions being asked and a set of answers that correspond to a rating system. A scorecard may include more than one category of questions.

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecards.
3. In the Scorecards browse screen, locate the scorecard using one of the following options:
 - Enter a beginning word or value for the scorecard name or description in the Search field, and press the ENTER key on your keyboard.
 - Scroll through the list of scorecards.
 - Click on the Name header to sort the scorecards in ascending or descending order.

4. Click on the scorecard record to display the Scorecard Administration screen where you can review the scorecard's questions and weights, as well as the categories used to create the scorecard
 - From this screen, you can also edit and delete scorecards.
5. To add a new scorecard, click New Scorecard in the toolbar of the Scorecards browse screen

Adding a Scorecard

After a user with the Scorecard Admin permission has created at least one Scorecard Component and one Answer Profile, they can add a scorecard using a Component and Answer Profile.

Adding a scorecard involves three steps:

- Designing the scorecard, which includes selecting components (categories and questions) that will be used, and assigning a weight (value) to the scorecard.
- Adding Restrictions by selecting the types of companies, contracts, and projects that are linked to the scorecard so that it is only available from specific profile types and groups.
- Defining Validity Options by setting the number of days the scorecard will be available to users, or alternatively, making it a repeating scorecard so that it can be used continually and without any time constraints.

Designing a Scorecard

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecards.
3. In the Scorecards browse screen, click New Scorecard in the toolbar.
4. In the Scorecard Administration screen, provide basic information for the scorecard:
 - Enter a name in the Scorecard Name field.
 - Enter a description of what the scorecard is trying to assess in the Scorecard Description field.
 - Select Company, Contract, or Project in the Scorecard Type list based on what the scorecard will be used to evaluate.
 - Assign a numerical weight for the scorecard in the Scorecard Weight field.
 - For example, if you are adding a single scorecard to assess contract fulfillment, and the scorecard will have more than one category, weight the scorecard at 100, and make sure the combined weight of the categories in the My Categories section is also 100.

5. Add a category to the scorecard by clicking it in the Categories section, and then dragging-and-dropping it into the My Categories section. You are successfully moving the category if the message displays.
 - a. (Optional) To quickly locate a category, enter the first few letters of the category name in the Search field, and click .
 - b. Optional) To view a list of the questions in a category, locate the category in the Scorecard Components browse screen, and click it to display its Scorecard Component Administration screen.
 - c. (Optional) To edit the weight of a category, click in its Weight field and update the value.

 **Important:**

Ensure the combined weight of the categories you add to the My Categories section is equal to the value in the Scorecard Weight field.

6. Click Save.

Adding Restrictions

Restrictions identify the Company, Contract, or Project Profiles that should make the scorecard available to users for completion. If you set no restrictions, users will be able to access the scorecard in all profiles.

1. In the Scorecard Administration screen, click the Restrictions tab.
 - To access this screen, follow Steps 1-2 in Designing a Scorecard, locate the scorecard record, and click it to select it.
2. Set the company, contract, or project restrictions by making one or more selections in the multi-select lists:
 - Company restrictions - use for company scorecards to identify companies by category, group, and type.
 - Contract restrictions - use for contract scorecards to identify contracts by group, legal entity, agreement type, and type.
 - Project restrictions - use for project scorecards to identify projects by group and type.
3. Click Save.

Defining Validity Options

Validity options identify the number of days the scorecard will be available to users. However, if a scorecard is designated as a repeating scorecard, it is always available to users.

1. In the Scorecard Administration screen, click the Advanced Options tab.
 - To access this screen, follow Steps 1-2 in Designing a Scorecard, locate the scorecard record, and click it to select it.
2. (Optional) Select the Required check box to make this scorecard required.
3. (Optional) Select the Standard Repeating Scorecard check box to give qualified users the ability to complete the scorecard as many times as they wish.
4. In the Valid for x Days field, enter the number of days you want the scorecard to be available from the Scorecards link in a Company, Contract, or Project Profile.
5. Click Save.

Editing a Scorecard

A user with the Scorecard Admin permission can edit a scorecard by changing its name, description, and type, and re-weighting its value. The Scorecard Admin can also add, edit, remove, and re-weight scorecard categories, as well as the questions (or statements) in a category. the Admin can update the types of companies, contracts, or projects that can access the scorecard, and change the timeframe during which it is available to users.

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecards.
3. In the Scorecards browse screen, locate the scorecard you want to edit, and click it to select it.
4. In the Scorecard Administration screen, you can edit:
 - Basic information for the scorecard.
 - Categories (and questions) used in the scorecard.
 - Restrictions for using the scorecard.
 - Advanced Options, including how long the scorecard is available for completion, and whether or not it is required.
5. Click Save.

Deleting a Scorecard

A user with the Scorecard Admin permission can delete a scorecard if it is no longer valid or needed. However, deleting a scorecard does not delete any of its components or answer profiles.

1. Click the Gear Icon in the Navigation Toolbar, and click the Scorecards link.
2. In the Scorecards menu, click Scorecards.
3. In the Scorecards browse screen, locate the scorecard you want to delete, and click it to select it.
4. In the Scorecard Administration screen, click Delete in the toolbar.
5. In the Delete Scorecard prompt, click Yes.

Event Alert Templates

Event Alert Templates are used to standardize the text in the email messages that are sent from Conga Contracts, notifying interested parties of upcoming events for a contract or company. Administrators create individual templates for different events, providing the message text that alerts recipients to a key event, such as a contract renewal date or the expiration of a company insurance certificate.

Event Alert Templates Overview

The Event Alert Templates feature is used to standardize the email messages (event alerts) that are sent from Conga Contracts, notifying all interested parties of upcoming contract and company events, such as contract expiration dates and company insurance certificate renewals. An event alert template provides the standard message that is used in the body of the email message, as well as the subject line for the message. An event alert template can also define the message sent in the reminder email messages, which are automatically sent if no action is taken for the event by a specific date.

A user must have the List Admin permission to create and manage event alert templates. A user who creates an event or adds an event alert for a contract's original expiration date using an event alert template only has to supply the relevant date(s) and the recipient list for the upcoming event.

A List Admin can perform the following tasks associated with event alert templates:

- [Locate an event alert template](#)
- [Add an event alert template](#)

- [Copy an event alert template](#)
- [Edit an event alert template](#)
- [Delete an event alert template](#)

Locating an Event Alert Template

Existing event alert templates are viewed and managed from the Event Alert Templates browse screen. Event alert templates are used to standardize the message in the emails sent to notify interested parties of an upcoming contract or company event.

1. Click the Gear Icon in the Navigation Toolbar, and click the Event Alert Templates link in the menu.
2. In the Event Alert Templates browse screen, locate the template by its name.
 - Click the Template Name column heading to change the sort order of the data.
3. Click an event alert template record to display its Event Template screen, where you can perform the following tasks:
 - Edit the event alert template
 - Copy the event alert template
 - Delete the event alert template

**Tip:**

You can add an event alert template from the Event Alert Templates browse screen.

Adding an Event Alert Template

You need the List Admin permission to create event alert templates if you want to standardize the messages in the email messages that are sent out, notifying interested parties of upcoming contract and company events. The List Admin can also define the follow-up, or reminder email messages that are automatically sent if no action is taken for the event.

When users set up event alerts, they have the option of using a template with a predefined message and notification date, or creating a unique event alert. Users also have the option of using a template and altering the message text in the event alert, as well as changing the date on which the alert is sent out.

Conga Contracts recommends tailoring the text in an event alert template to reflect your company's work processes. The message text should specify the nature of the event and what action the recipient(s) should take.

1. Click the Gear Icon in the Navigation Toolbar, and click the Event Alert Templates link in the menu.
2. In the Event Alert Templates browse screen, click New Template in the toolbar.
3. In the Event Template Edit screen, populate the following:
 - (Optional) Copy From list - make a selection to add a new template using an existing template. See [Copying an Event Alert Template](#).
 - Template Name field - enter a concise and descriptive name for the template to ensure users select the correct template when creating an event or adding an event alert for a contract's original expiration date.
 - Event Description field - enter a concise description of the event.
 - Event Notification field - enter any actions that need to be taken by the event owner or other recipients of the email message, as well as any additional information about the event. The information in the Event Description and Event Notification fields displays in the Event Info section of the email message that is sent to the event owner and all the recipients designated by the user who creates the event alert.
 - Event Reminder field (works in conjunction with Remind Days field) - enter a reminder email message for the event, which will be sent to the event owner and/or other recipients if the event is not completed (or closed) by the Reminder Date.
 - Reminder Date = Event Date - Number of Reminder Days (number of days in the Reminder Days field when creating an event).
 - Warn Days field - enter the number of days prior to the event date that you want Conga Contracts to send an email message to recipients, notifying them of the event. This date is known as the Notification Date. Notification Date = Event Date - Number of Warn Days (number of days in the Warn Days field when creating an event).
 - Remind Days field (works in conjunction with Event Reminder field) - enter the number of days prior to the event date that you want a reminder email message sent to recipients.
4. Click Save.

Copying an Event Alert Template

Once a user with the List Admin permission creates an event alert template, the Copy feature can be used to quickly create a new template if much of the same information will be used in the new template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Event Alert Templates link in the menu.

2. In the Event Alert Templates browse screen, locate the template you want to copy, and click it to select it.
3. In the Event Template screen, click Edit in the toolbar.
4. In the Event Template Edit screen, select the template you want to copy in the Copy From list.
5. In the Template Data section of the screen, make the necessary updates:
 - Template Name field - change the name of the template by providing a concise and descriptive name that will ensure users select the correct template when creating an event or adding an event alert for a contract's original expiration date.
 - (Optional) Event Description field - update the description of the template.
 - (Optional) Event Notification field - update any actions that need to be taken by the event owner or other recipients of the email message, as well as any additional information about the event. The information in the Event Description and Event Notification fields displays in the Event Info section of the email message that is sent to the event owner and all the recipients designated by the user who creates the event alert.
 - (Optional) Event Reminder field (works in conjunction with Remind Days field) - change the reminder email message for the event, which will be sent to the event owner and/or other recipients if the event is not completed (or closed) by the Reminder Date.
 - Reminder Date = Event Date - Number of Reminder Days (number of days in the Reminder Days field when creating an event).
 - (Optional) Warn Days field - change the number of days prior to the event date that you want Conga Contracts to send an email message to recipients, notifying them of the event. This date is known as the Notification Date. Notification Date = Event Date - Number of Warn Days (number of days in the Warn Days field when creating an event).
 - (Optional) Remind Days field (works in conjunction with Event Reminder field) - change the number of days prior to the event date that you want a reminder email message sent to recipients.
6. Click Save.

Editing an Event Alert Template

You need the List Admin permission to edit an event alert template. A List Admin can edit a template by changing its name, the description of the event, the message sent to those who will receive notification of the event, and the reminder message that is sent if no action is taken after the first email is sent. A List Admin can also change the dates on which the event alert (email message) and reminder alert are sent.

1. Click the Gear Icon in the Navigation Toolbar, and click the Event Alert Templates link in the menu.
2. In the Event Alert Templates browse screen, locate the template you want to edit, and click it to select it.
3. In the Event Template screen, click Edit in the toolbar.
4. In the Event Template Edit screen, make any of the following updates:
 - (Optional) Copy From list - select a template, or change the template used as the basis for this event alert template.
 - Template Name field - change the name of the template by providing a concise and descriptive name that will ensure users select the correct template when creating an event or adding an event alert for a contract's original expiration date.
 - Event Description field - update the description of the template.
 - Event Notification field - update any actions that need to be taken by the event owner or other recipients of the email message, as well as any additional information about the event. The information in the Event Description and Event Notification fields displays in the Event Info section of the email message that is sent to the event owner and all the recipients designated by the user who creates the event alert.
 - Event Reminder field (works in conjunction with Remind Days field) - change the reminder email message for the event, which will be sent to the event owner and/or other recipients if the event is not completed (or closed) by the Reminder Date.
 - Reminder Date = Event Date - Number of Reminder Days (number of days in the Reminder Days field when creating an event).
 - Warn Days field - enter or change the number of days prior to the event date that you want Conga Contracts to send an email message to recipients, notifying them of the event. This date is known as the Notification Date.
Notification Date = Event Date - Number of Warn Days (number of days in the Warn Days field when creating an event).
 - Remind Days field (works in conjunction with Event Reminder field) - change the number of days prior to the event date that you want a reminder email message sent to recipients.
5. Click Save.

Deleting an Event Alert Template

You need the List Admin permission to delete an event alert template if it is no longer applicable to your company's standard methods and practices.

1. Click the Gear Icon in the Navigation Toolbar, and click the Event Alert Templates link in the menu.
2. In the Event Alert Templates browse screen, locate the template you want to delete, and click it to select it.
3. In the Event Template screen, click Delete in the toolbar.
4. In the Delete Template prompt, click Yes.

Task Lists

A task list is an ordered set of tasks that identifies the steps in a process or procedure that is routinely performed for a company, contract, or project. A List Admin creates a task list by defining the tasks in the process or procedure, and then assigning each task to a program user for completion. Users who add a task list to a Contract, Company, or Project Profile can use a Task List created by an Administrator as a template, rather than creating a new task list.

Task Lists Overview

The Task List feature is used to create an ordered set of tasks that identify the steps in a process or procedure that is routinely performed for a company, contract, or project. Each task in the list is assigned to a program user who is responsible for completing the task.

A user with the List Admin permission can create and manage task lists. Once a List Admin creates a task list, it is available as a template when users create a task list for a Company, Contract, or Project Profile.

 **Tip:**

Since a Task List is a simplified version of the workflow, both features should be reviewed to determine which option better suits your organization's needs.

A List Admin can perform the following activities related to task lists:

- [Locate a task list](#)
- [Add a task list](#)
- [Edit a task list](#)
- [Delete a task list](#)

Locating a Task List

Existing task lists are viewed and managed from the Task List Browse screen. A task list is an ordered set of tasks that identify the steps in a process or procedure for a company, contract, or project. Once a task list is created, it is available as a template when users create a task list for a Company, Contract, or Project Profile.

1. Click the Gear Icon in the Navigation Toolbar, and click the Task Lists link in the menu.
2. In the Task List Browse screen, locate the list by its name or description.
 - Click a column heading to change the sort order of the data.
 - To resize a column, hover over the right or left border of the column heading until the resize icon appears. Click the icon and drag the border to the desired width.
3. Click a task list record to display its Task List Edit screen, where you can perform the following:
 - Edit the task list
 - Delete the task list

 **Tip:**

You can add a task list from the Task List Browse screen.

Adding a Task List

You need the List Admin permission to create task lists for the processes and procedures that are routinely performed for companies, contracts, and projects. Creating a task list includes defining all the tasks in a process or procedure in an ordered sequence, and identifying the individual responsible for completing each task. When a user adds a task list to a Company, Contract, or Project Profile, they use an existing list as a template and set the start and completion dates for each task.

1. Click the Gear Icon in the Navigation Toolbar, and click the Task Lists link in the menu.
2. In the Task List Browse screen, click Add Task List in the toolbar.
3. In the Task List Edit screen, populate the following:
 - Task List Name field - enter a concise and descriptive name for the task list.
 - (Optional) Task List Description field - enter a description of what the task list was created to accomplish.
4. Add a task list item to the task list:
 - Click Add Task List Item to add a blank list item record.

- Click in the Task List Item Subject field to enable it, and enter the first task (or step) in the task list. If the tasks in the list need to be completed in a specific order, number the steps so that they will display in the correct order when the task list is saved. Otherwise, the tasks will display in alphabetical order.
- Click in the Task List Item Owner list to enable it, and begin typing the name of the person responsible for completing the task into the field to display a drop-down list of possible matches.
- Click the correct name in the list to select it. After saving a task list, you can edit the individual task list items, but the change will not be reflected in existing task lists that were added to a Company, Contract, or Project Profile prior to the change. Similarly, adding or deleting a task in the list will not be reflected in existing task lists.

5. Click Save.

Editing a Task List

A task list can be edited by changing its name and/or description, or assigning the responsibility for completing a task in the list to a different user. A task list can also be edited by adding more tasks to the list, editing the existing tasks in the list, and deleting one or more tasks from the list.

You need the List Admin permission to edit a task list. A task list can be edited by changing its name and/or description, or assigning the responsibility for completing a task in the list to a different user. A task list can also be edited by adding more tasks to the list, editing the existing tasks in the list, and deleting one or more tasks from the list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Task Lists link in the menu.
2. In the Task List Browse screen, locate the task list you want to edit, and click it to select it.
3. In the Task List Edit screen, make any of the following updates:
 - Task List Name - click in the field and change the name of the task list.
 - Task List Description - click in the field and change the description of what the task list was created to accomplish.
 - Task List Item Subject - click in the field and update the task (or step) in the task list.
 - Task List Item Owner - click > in the field to display a list of users, and click on another user's name to select them and assign them the responsibility of completing the task.
 - Click + Add Task List Item to add another task to the list.
 - Click the - icon for a task to remove it from the task list.
4. Click Save.

Deleting a Task List

You need the List Admin permission to delete a task list if it is no longer needed by your organization to manage a process or procedure for a company, contract, or project. The individual tasks in a task list can also be deleted.

Deleting a Task List

1. Click the Gear Icon in the Navigation Toolbar, and click the Task Lists link in the menu.
2. In the Task List Browse screen, locate the task list you want to delete, and click it to select it.
3. In the Task List Edit screen, click Delete Task List in the toolbar.
4. In the Confirm Delete prompt, click Yes.

Deleting a Task in a Task List

1. Click the Gear Icon in the Navigation Toolbar, and click the Task Lists link in the menu.
2. In the Task List Browse screen, locate the task list with the list item you want to delete, and click it to select it.
3. In the Task List Edit screen, locate the task list item you want to delete under the Task List Item Subject header.
4. Click the delete icon for the task list item.
5. Click Save.

Flow Templates

Flow Templates are designed by users with the Flow Template Admin permission and used to provide step-by-step instructions to ensure users follow procedures and gather the data needed for contracts, companies, and projects that have been added to Contracts

Contract Flow Templates are designed by Administrators and used to provide step-by-step instructions to ensure users follow procedures and gather the data needed for contracts that have been uploaded to Contracts.

Flow-Templates

A Contract Flow template is used to to create a flowchart consisting of a series of connected steps that diagram the stages that a contract undergoes, while allowing for

alternative paths at individual steps. A flow template is linked to Contract Profile types and is prominently displayed in the Profile screen as a list of steps to assist users in performing tasks related to contract creation, negotiation, maintenance, renewal, and archival.

Flow Templates Overview

A flow template can be created by a user with the Flow Template Admin permission and involves adding action, approval, logic, and system steps, represented by rectangles, to a canvas in order to diagram the actions that must be taken in the individual stages in a procedure or the actions for a single-stage process. The canvas is similar to a flowchart in that steps are connected to one another with a directional arrow to indicate the progression of the flow.

A flow template involves adding action, approval, logic, and system steps, represented by rectangles, to a canvas in order to diagram the actions that must be taken in the individual stages in a procedure or the actions for a single-stage process. The canvas is similar to a flowchart in that steps are connected to one another with a directional arrow to indicate the progression of the flow. An approval step differs from other flow steps since it must be connected to two other steps to reflect alternate paths depending on whether it is approved or declined.

Restrictions and configurations can be applied to individual steps in a flow to ensure the steps are applied only to the intended Contract, Company, or Project Profiles. Alternatively, a filter can be applied to the entire flow if the same restrictions apply to all the steps in the flow. By default, most steps used in a flow are assigned to any user, which means any program user with access to the Contract, Company, or Project Profile can complete the step. However, the assignee for a flow step can be changed to one or more specific users, or a user who holds one or more functions or responsibilities.

A user must have the Flow Template Admin Role Permission Descriptions permission to create and publish a flow template. A template must be published for it to automatically run whenever a user adds a new Contract, Company, or Project Profile that matches the conditions defined in the template. A flow is prominently displayed at the top of the Profile screen as a list of steps, stages, and buttons, prompting users to complete the current active step. Users with the Flow Admin permission can run a flow template on an existing Profile.

Every time a change is made to an active flow template, and the template is either saved or republished, Conga Contracts stores the changes as the next version of the flow. At any time, you can load a previous version of the flow template to make it the current active version of the template.

The Flow feature is similar to the Workflows feature, but it has the added advantage of auto-running in the appropriate Contract, Company, or Project Profile, advising users on the current stage of the flow, and alerting them to the next step that needs to be taken.

Contract flow templates can be used to guide users in performing the tasks related to contract creation, negotiation, maintenance, renewal, and archival. For example:

- If your company uses a single contract for its customer or vendor contracts, a single contract flow template can be created to define the entire life cycle process using stages to define each phase, from initial contract request → negotiated contract → eSignature process (fully executed document) → maintenance period → renegotiation and renewal → archival. Alternatively, individual templates can be created, and ordered chronologically, to define the stages the contract must follow during its life cycle. If individual templates are created for each stage, it provides greater flexibility in reordering the stages in the life cycle process, and even allows for the removal of a stage.
- If your company uses several types of contracts for its customers and/or vendors, you can create a single contract flow template for each contract type by applying a filter, which limits the application of the contract flow to the selected contract type(s). Alternatively, individual templates can be created for each stage in the life cycle for each contract type. The individual templates can then be ordered so that they are applied in the correct chronological order, and filters can be applied so that the individual stages are applied to the appropriate contract type(s).

It is recommended that users with the Flow Template Admin permission review the following topics before creating a flow template:

- [Components of a Contract Flow Template](#)
- [Types of Flow Steps](#)
- [Flow Step Properties Window](#)
- [Property Categories for Flow Steps](#)

A Flow Template Admin can perform the following tasks associated with flow templates:

- [Locate a flow template](#)
- [Identify components of Published Flow Templates screen](#)
- [Add a flow template](#)
- [Add a workflow to a flow template](#)
- [Filter a flow template](#)
- [Publish a flow template](#)
- [Copy a flow template](#)
- [Edit a flow template](#)
- [Reorder flow templates](#)

- [Inactivate and reactivate a flow template](#)
- [Load a previous version of a flow template](#)
- [Delete a flow template](#)

Locating a Flow Template

Existing contract, company, and project flow templates are viewed and managed from their respective Published Flow Templates browse screen. A flow template contains the stages and steps in a process or procedure that must be administered to the companies, contracts, projects that are added to Conga Contracts. A flow automatically runs in a Profile when a new Contract, Company, or Project Profile matches the conditions defined by the restrictions, configurations, and/or filters identified in a flow template. However, a flow template can be manually run on an existing Profile by clicking the Start Flow button in the toolbar of the Profile screen for users with the Flow Admin permission.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate an active flow template in the top portion of the screen by scrolling through the list.
 - Locate a draft (inactive) flow template by scrolling through the list in the Flow Template Drafts section of the screen.
3. Double-click a flow template record to display its Flow Design Panel screen.
4. From the Flow Design Panel screen, you can edit, copy, publish, delete, and load a previous version of the flow template.

Published Flow Templates Screen

There is a separate Published Flow Templates browse screen for contracts, companies, and projects where both published and draft versions of flow templates are viewed and managed. The screen displays links to all the active flow templates that are currently running, and shows the order in which flows are applied when a new profile is created. The Flow Template Drafts section of the screen displays links to the templates that are currently being worked, but have not yet been published (activated). The number of times both published and draft flow templates have been revised is also shown in the screen as a version number.

To open the Published Flow Templates browse screen for contracts, companies, or projects, click Gear Icon in the Navigation Toolbar, and then click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.

Although the Published Contract Flow Templates screen is used below, the components are the same in the Published Company Flow Templates and Published Project Flow Templates screens.

<p>Published Flow Template records</p>	<ul style="list-style-type: none"> • Review the existing flow templates that have been published. • Identify the active flow templates, which are set to run on a Profile, from those that display an INACTIVE status. Double-click on a flow template record to display its Flow Design Panel screen containing the stages and steps in the flow. • From this screen, you can edit, copy, publish, delete, and load a previous version of the flow template.
<p>Template order</p>	<p>Identify the order in which flow templates are applied to a Contract, Company, or Project Profile.</p>
<p>Template Version column</p>	<p>Identify the number of times the template has been updated and/or published, indicated by the number in the column.</p>
<p>Draft Flow Template records</p>	<ul style="list-style-type: none"> • Review the draft flow templates that have been created, but not published. • Identify the number of times the template has been updated, indicated by the number in the column. Double-click on a flow template record to display the flow's Flow Design Panel screen containing the stages and steps in the flow.
<p>Save Template Order button</p>	<p>Click to save the current order in which active flow templates are applied when a new Contract, Company, or Project Profile is added. Tip: Users with the Flow Admin permission can run both active and inactive flow templates on an existing Profile by selecting the Start Flow button in the toolbar of the Profile.</p>

Toggle Template Active Status button	Change the status of a flow template by clicking on the template record to select it, and then clicking the toggle button.
New Template button	Click to create a new flow template. Tip: You can add an existing workflow to a published or draft contract flow, or create a new contract flow and insert the workflow.
Delete Template button	Click to permanently delete a draft flow template. You cannot delete a flow template once it is published, you can only inactivate it.

Adding a Flow Template

You need the Flow Template Admin permission to create flow templates to User Roles and Permission Types ensure the proper procedures are followed for the Contract, Company, and Project Profiles added to Conga Contracts. A flow template provides instructions to users on the actions that need to be taken for individual contracts, companies, and projects. You can create a single flow template containing multiple stages for a complex procedure, or individual templates for a simple process.

Once you create a flow, you must publish it before it is actively applied to the Contract, Company, or Project Profiles that are added to Conga Contracts.

Tip: Before adding a flow template, it is recommended that you review the components of the flow template, the steps that can be used in a template, and the properties for each step. To review a sample contract flow template, see [Sample Contract Flow Template](#) below. To use an existing workflow to create a flow template, see [Adding a Workflow to a Flow Template](#).

Creating a Flow Template

Although a contract flow template is shown in the screen shots below, the steps are the same for adding a company flow template and a project flow template. However, the Creation Template and eSignature action steps are only available for contract flow templates.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, click New Template in the Flow Template Drafts section of the screen.

3. In the Flow Design Panel screen:
 - Enter a descriptive name for the flow in the Flow Template Name field.
 - (Optional) Provide a concise description of the flow template in the Flow Template Description field.
 - Drag-and-drop steps from the Actions section of the screen into the grid to map out your flow.
 - Connect two steps by clicking in the bottom connector of the first step, dragging the cursor in the direction of the second step, and releasing the cursor on the top connector of the second step.
 - Ensure the START step is connected to the first step you add to the flow, and the arrow at the end of each connection line is moving in the correct direction for the flow.
 - (Optional) Remove a line connecting two steps by clicking on it.
 - Create alternative paths for any Approval and/or Query Binary Branch steps.
 - Connect the Approve and Decline ports of the Approval step, and the True and False ports of the Query Binary Branch, to a new step or an existing step.
4. (Optional) Define the system actions for any Query Matching and/or Update steps using the Properties window. The Query Branching step must validate the occurrence of an action or event before Conga Contracts moves the flow to the next step. The Update step defines the action that Conga Contracts will take when the task in the previous step is completed.
5. Set the properties for a step by clicking and selecting Edit Properties in the menu.
6. In the Properties window:
 - Add general information for the step, which includes changing the default name of the step.
 - Assign the user(s) to complete the step, which can be any user, one or more specific users, or a user who holds one or more functions or contract responsibilities.
 - Define the step's configuration, which is specific to the Communication, Complete Workflow, Creation Template, Query Binary Branch, Automatic Notification, Query Branching, and Update steps.
 - Apply restrictions to control the availability of the flow in a Contract, Company, or Project Profile.
 - Click Save.
7. (Optional) Add an additional stage to the flow:
 - Click Add Stage in the tool bar.
 - In the Name prompt, enter a name for the stage, and click OK.

- Add flow steps to the grid, connect the steps in the grid, and set the properties for each step.
- (Optional) Apply a filter to the flow template.
- Click Publish Template to save and publish (activate) the flow template.
- Save Flow Template to add the template to the Flow Template Drafts section of the screen if you are not ready to activate it.
- In the Template Saved prompt, click Yes to return to the Published Flow Templates screen, or No to remain in the Flow Design Panel screen.
- (Optional) Reorder the template to control the order in which it is applied to a Profile.

Sample Contract Flow Template

A contract flow containing three stages is created to outline the steps that must be followed in creating a new software licensing contract. A description of the steps in each stage of the flow is also provided in terms of what the user sees in the Contract Profile when the flow is running. See Flow Steps and Stages in a Profile to view the flow steps, buttons, and stages, as described below.

Stage 1: Contract Creation

All flow steps in a Profile include a button that allows a user to skip the step, and most steps contain a button that allows the user to provide information on their completion or disposition of a step.

CREATION TEMPLATE step - A Create button displays as the first step in the flow in the Contract Profile screen, and has been assigned to any user. When a user clicks the button, the Creation Wizard is launched and the user accepts the pre-selected template to create the contract, which is generated and then stored in the Contract Profile. When the step is completed, Creation Template displays in gray text, indicating the step is completed.

- If the Creation Template step was set to auto-run in the contract flow, the Creation Wizard will automatically run whenever a user creates a Contract Profile that matches the conditions for the flow, or when the user manually runs the flow from an existing Contract Profile.

QUERY MATCHING step - The step (Verify Contract Generation) is a system step that is automatically completed by Conga Contracts and does not display in the flow in the Contract Profile screen.

- In this example, a Contract → Document → Document Type = contract template restriction was set to ensure the document was created using the Creation Wizard. In setting up the template to be used in the Creation Template step, the document type identified in the creation template must match the document type in the restriction.

After verifying the document's type, Conga Contracts completes the step and moves the flow to the next step.

GENERIC step - The step was renamed "Verify Contract Terms" and assigned to a specific user. In the Profile screen, the step is only active (displayed in black text) for that user, who has the option of clicking the Complete Step button or the Reassign button reassigning the step to another user. The Verify Contract Terms step appears in gray text for all other users.

APPROVAL step - The step displays as Approval in the Profile screen, contains Approve, Decline, and Notes buttons, and is assigned to a specific user. When any user hovers over the word Approval, the information entered into the Description field in the General tab in the Properties window displays. In this case, Approve Contract displays since the contract terms must be approved internally before it is submitted to the counter-party.

- If the specified user approves the submission of the contract to the counter-party, he/she clicks the Approve button, and the step is completed. Since it is the last step in the stage, the stage is also completed.
- If the specified user does not approve the submission of the contract to the counter-party, he/she clicks the Notes button and enters the reasons for declining the contract terms, and then clicks the Decline button. Once the step is declined, the flow moves to a COMMUNICATION step where an email is sent to the CFO and an Attorney in Legal, asking for a meeting to edit the financial and legal terms of the contract before it is submitted to the counter party. The step can be configured so that any reply received from the email message sent from the step will complete it. By default, a response from the email message will not complete the step, and it must be manually completed by either the CFO or the Attorney.

Once all the steps in the stage have been completed, the flow moves to the next stage.

Stage 2: Negotiation and Legal Review

GENERIC step - The step was renamed "Email Contract to CP" and assigned to any user who holds the responsibility of Contract Manager for the contract. Once the Contract Manager sends the document to the counter-party, he/she has completed the task associated with the step, and clicks the Complete Step button.

APPROVAL step - The step displays as Approval in the Profile screen, contains Approve, Decline, and Notes buttons, and is assigned to a specific user. When any user hovers over the word Approval, the information entered into the Description field in the General tab in the Properties window displays. In this case, Updates by Counter-Party displays since any edits to the contract made by the counter-party must be approved for the flow to continue.

- If the counter-party accepts the contract without making any edits, the specified user selects the Approve button, and the stage ends.
- If the counter-party makes edits to the contract, the specified user clicks the Notes button and enters a summary of the changes made by the counter-party, and then selects the Decline button. Once the step is declined, the flow moves to a second GENERIC step that was renamed "Legal Review of CP Updates" and assigned to the user who was assigned the responsibility of Attorney for the contract. Once the Attorney reviews the edits made by the counter-party, the flow moves to an APPROVAL step where the attorney can either approve or decline the revised contract.

If the Attorney accepts the counter-party edits, he/she clicks the Approve button, which completes both the step and the stage since this is the last step.

If the Attorney declines the counter-party edits, he/she clicks the Notes button and enters the reasons for declining the edits, and then clicks the Decline button. Once the step is declined, the flow moves to a GENERIC step that was renamed "CEO Evaluation" and assigned to the user who holds the function of CEO. Once the CEO receives the email message, he/she contacts the counter-party and resolves the issue of the counter-party edits, resulting in a final contract that is ready for signature. The CEO must then complete the step by clicking its button in the flow in the Contract Profile screen, which will complete the step and the stage.

Once all the steps in the second stage have been completed, the flow moves to the final stage.

Stage 3: eSignature

GENERIC step - The step was renamed "Prepare Final Contract" and assigned to any user. Once a user has determined that the version of the contract that needs to be sent for electronic signature has been uploaded to the Contract Profile, he/she clicks the Complete Step button.

ESIGNATURE Types of Flow Step - A Launch eSignature button displays in the flow in the Contract Profile screen, and has been assigned to any user. When a user clicks the button, the eSignature Package Wizard is launched and the user selects the document to be sent for eSignature, identifies the email addresses of the signatories, and then tags the document with signature, initial, and other tags to indicate the locations where signatories are required to sign and initial the document, as well as provide other information, such as their title and the date they signed the document. The user completes the step by selecting the Send button in the wizard, which sends an email message to each signatory, requesting their electronic signature on the document contained in the email message. Until the signing process is complete, a message displays for the step. Once all signatories have provided their eSignatures, which completes the electronic signing process, Conga Contracts moves

the flow to the next step. However, if any signatory declines providing their eSignature, the button is reactivated in the flow.

APPROVAL step - The step displays as Approval in the Profile screen, contains Approve, Decline, and Notes buttons, and is assigned to any user. When the user hovers over the word Approval, the information entered into the Description field in the General tab in the Properties window displays. In this case, Send for eSignature displays since a user needs to indicate whether or not the counter-party's eSignature was obtained.

- If the counter-party signs the document electronically, the user clicks the Approve button, completing the step, the stage, and the flow.
- If the counter-party has not provided their eSignature in a timely manner, the user clicks the Decline button. Once the step is declined, the flow moves to a COMMUNICATION step that was renamed "Email CP Requesting eSignature" and assigned to any user who holds the responsibility of Contract Manager for the contract. Once the Contract Manager receives an email message about the signing issue, he/she contacts the counter-party, and ultimately obtains their eSignature, resulting in a fully executed legal document. The Contract Manager must complete the step by clicking its button in the flow in the Contract Profile screen, which will complete the step, the stage, and the flow.

Adding a Workflow to a Flow Template

You need the Flow Template Admin and Workflow Admin permissions to add the workflow templates stored in Conga Contracts to a flow template. Since the two features are compatible and are often used to accomplish similar tasks, you can create a flow template that is comprised entirely of existing workflow templates, or you can add a workflow template and then supplement the flow by adding steps and stages.

Although a contract flow template is shown in the screen shots below, the steps are the same for adding a workflow to a company flow template and a project flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, click New Template in the Flow Template Drafts section of the screen.
 - To add a workflow to an existing flow template, locate the template, double-click it to open its Flow Design Panel screen, and proceed to Step 5.
3. In the Flow Design Panel screen, enter a descriptive name for the flow in the Flow Template Name field.
4. (Optional) Provide a concise description of the flow template in the Flow Template Description field.

5. Click the Complete Workflow step in the Actions column to select it, and then drag-and-drop it into the grid.
6. Click in the bottom connector of the START step, and drag the cursor to the top connector of the Complete Workflow step to connect the steps.
7. Click the Complete Workflow step's and select Edit Properties in the menu to define the properties for the step.
8. In the General tab of the Complete Workflow window:
 - (Optional) In the Step Name field, change Complete > Workflow to a step name that is more understandable to users when it is displayed in the flow in the Contract Profile screen.
 - (Optional) In the Description field, add text to provide users with additional information when they hover over the step name in the flow.
 - (Optional) In the Notes field, add notes on the step for reference and/or to provide information for other users with the Flow Template Admin permission.
9. Click the Assignee tab, and assign the step to be completed by any user, one or more specific users, or users who hold one or more functions or contract responsibilities.
10. Click the Step Configuration tab, and select the workflow you want to add to the flow in the Workflow list.
11. Click the Restrictions tab, and define the criteria for the restriction using the field, inclusion, and value lists:
 - In the field list:
 - Click to display the Contract folder, and then display the contents of the folder by clicking .
 - Select Contract Type as the field to be used to restrict the Contract Profiles that can use the workflow.
 - In the inclusion list, select In (equals) to define contract type as the conditional field in the value multi-select list. If the selection in the field list is a date, the options are Before, On, After, Null, Not Null, and four options that allow you to pinpoint a specific date (After: today minus (x) days, After: today plus (x) days, Before: today minus (x) days, and Before: today plus (x) days). For example, if today is January 1, 2017 and you want to search for contracts that expire prior to January 1, 2018, you would select After: today plus (x) days and enter 364 in the Parameter Value field since there are 365 days in a year. Similarly, if you wanted to search for contracts that expired last year, you would select Before: today minus (x) days and enter 365 in the Parameter Value field. To designate today's date, select After: today minus (x) days and make x =1. To designate tomorrow's date, select Before: today plus (x) days and make x = 2.
 - In the value multi-select list, select Services as the contract type.
 - (Optional) Select additional contract types to expand the application of the flow.

- (Optional) Click to further limit the application of the flow, or click to expand its application. To remove a restriction, click its icon.
12. If the selection you make in the field list is a date or number, the value multi-select list becomes a value field you will be required to enter a date or number.
 13. Click Save.
 14. In the Flow Design Panel screen, click the End Flow step in the Actions column to select it, and then drag-and-drop it into the grid.
 - Use the End Stage step if more stages need to be added to the flow.
 15. Click in the bottom connector of the Complete Workflow step, and drag the cursor to the top connector of the End Flow step to connect the steps.
 16. Publish Template to save and publish (activate) the flow template.
 17. Save Flow Template to add the template to the Flow Template Drafts section of the screen if you are not ready to activate it.
 18. In the Contract Profile screen, a button displays when the flow runs on the Profile. When a user clicks the button, the Workflow Wizard runs so that the user can select the workflow team, and assign the steps in the workflow to members of the team.

Filtering a Flow Template

A flow template filter can be based on any field(s) in the Contract, Company, or Project Profile, including a default system field and/or any of the additional fields that have been added to the Profile. A filter should be added to a flow template if the same type of filter will be applied to all the steps in a flow, eliminating the need to set the same restrictions for every step.

You need the Flow Admin permission to apply a filter to a flow template, which you can add before or after publishing it. However, if you add the filter after publishing the template, you must be republish it or the filter will not be applied when the flow is run on new profiles.

A flow template filter can be based on any field(s) in the Contract, Company, or Project Profile, including a default system field and/or any of the additional fields that have been added to the Profile. A filter should be added to a flow template if the same type of filter will be applied to all the steps in a flow, eliminating the need to set the same restrictions for every step. If both step restrictions and a filter are applied to a flow template, the flow runs in new Profiles that meet the criteria defined in the flow steps, as well as the criteria established by the filter. Applying a flow filter restricts the templates that are listed as options when a user with the Flow Admin permission runs a flow on an existing Profile.

When a flow template is published without a filter, Conga Contracts automatically runs the flow in all the new Contract, Company, or Project Profiles that meet the criteria (restrictions) collectively defined in the steps comprising the flow.

Although a contract flow template is used in the screen shot below, the steps are the same for adding a filter to a company flow template and a project flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the template that needs the filter, and double-click it to select it.
3. In the Flow Design Panel screen, click Flow Filter in the toolbar.
4. In the Flow Filter window, set the criteria for the filter using the field, inclusion, and value lists:
5. In the field list:
 - Click the icon to display the Contract folder, and then display the contents of the folder by clicking.
 - Select Contract Group as the field to be used to restrict the Contract Profiles that can run the flow.
 - In the inclusion list, select In (equals) to define contract group as the conditional field in the value multi-select list. If the selection in the field list is a date, the options are Before, On, After, Null, Not Null, and four options that allow you to pinpoint a specific date (After: today minus (x) days, After: today plus (x) days, Before: today minus (x) days, and Before: today plus (x) days). For example, if today is January 1, 2017 and you want to search for contracts that expire prior to January 1, 2018, you would select After: today plus (x) days and enter 364 in the Parameter Value field since there are 365 days in a year. Similarly, if you wanted to search for contracts that expired last year, you would select Before: today minus (x) days and enter 365 in the Parameter Value field. To designate today's date, select After: today minus (x) days and make x =1. To designate tomorrow's date, select Before: today plus (x) days and make x = 2.
 - In the value multi-select list, select the Firm Fixed Price and Cost Reimbursement contract groups.
 - (Optional) Select additional contract groups to expand the application of the flow.
 - (Optional) Click the icon to further limit the application of the flow, or click the + to expand its application. To remove a restriction, click its X icon.
6. If the selection you make in the field list is a date or number, the value multi-select list becomes a value field you will be required to enter a date or number.
7. Click Save.
8. In the Flow Design Panel screen, click:

- Publish Template to save and publish (activate) the flow template with the filter.
- Save Flow Template to add the template to the Flow Template Drafts section of the screen if you are not ready to activate it the filter.

Publishing a Flow Template

You need the Flow Template Admin permission to publish a draft flow template once it has been created. Publishing a flow template activates it, allowing it to automatically run on the Contract, Company, or Project Profiles that meet the conditions for the flow. A user with the Flow Admin permission can run an active or inactive flow on an existing Profile if the populated fields in the Profile meet the conditions defined in the flow template, as well as any filters.

If you make any changes to a published flow template, you must republish the template in order to make the revised template active.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the template you want to publish, and double-click it to select it.
3. In the Flow Design Panel screen, click Publish Template in the toolbar.
4. (Optional) When the Published Flow Templates screen displays, verify one of the following:
 - Draft template moves from the Flow Templates Draft section of the screen to the top portion of the screen and displays a "0" in its Template Version field.
 - Republished template 's Template Version field has been incremented by 1.

Reordering Flow Templates

You need the Flow Template Admin permission to change the order in which flow templates are run in a Contract, Company, or Project Profile. For example, if three flow templates are published for a Contract Profile, and the conditions (restrictions) are the same in all three templates, you can manage the order in which the flows are applied.

Although a contract flow template is used in the screen shot below, the steps are the same for reordering company flow templates and project flow templates.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the flow template you want to move in the top section of the screen.

3. Click the flow template record to select it, and then drag-and-drop the template to the desired location in the numbered list. If the message displays, you are successfully moving the template.
4. Click Save Template Order in the toolbar.

Inactivating and Reactivating Flow Templates

You need the Flow Template Admin permission to inactivate and reactivate a contract, company, or project flow template. You would typically inactivate a flow template if you were making updates to the template so that Contracts would not automatically apply the old flow to new Profiles. Once you complete the updates, you must reactivate the flow template to allow it to automatically run in Profiles.

You can also use the Inactivate option to permanently inactivate a published flow template since there is currently no way to delete a published flow template. However, a draft flow template can be deleted.

Tip:

An inactive flow template still displays in the list of available templates when a user with the Flow Admin permission runs a flow from an existing Profile by selecting the Start Flow button in the toolbar.

Inactivating a Flow Template

Although a contract flow template is used in the screen shot below, the steps are the same for inactivating a company flow template and a project flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the active template you want to inactivate, and click it to select it.

Warning:

Before inactivating the template, ensure the template is not listed in the Flow Template Drafts section of the screen since this indicates the most current version of the template has not been published. Publish the latest version of the template before inactivating it.

3. Click Toggle Template Active Status in the toolbar.
4. In the Activate/Inactivate Template prompt, click Yes.
5. (Optional) Verify that the template is now appended with the word INACTIVE.

Reactivating a Flow Template

Although a contract flow template is used in the screen shot below, the steps are the same for reactivating a company flow template and a project flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the inactive template you want to activate, and click it to select it.
3. Click Toggle Template Active Status in the toolbar.
4. In the Activate/Inactivate Template prompt, click Yes.
5. (Optional) Verify that the word INACTIVE has been removed from the template.

Copying a Flow Template

The Copy option allows users with the Flow Template Admin permission to use an existing flow template to quickly create a new flow template. This timesaving feature is especially beneficial when the new flow template will have many of the same stages and steps that are already resident in the existing flow template. A Flow Template Admin can make a copy of any flow template, which includes both an active and inactive published flow template, as well as a draft flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the template you want to copy, and double-click it to select it.
3. In the Flow Design Panel screen, click Copy Flow in the toolbar.
4. When the screen refreshes, edit the name of the template in the Flow Template Name field.
5. Edit the flow template, as needed.
6. In the Flow Design Panel screen, click:
 - Publish Template to save and publish (activate) the copied template.
 - Save Flow Template to copy the template to the Flow Template Drafts section of the screen if you are not ready to activate it.
 - In the Template Saved prompt, click Yes to return to the Published Flow Templates screen, or No to remain in the Flow Design Panel screen.

Editing a Flow Template

You need the Flow Template Admin permission to edit a contract, company, or project flow template. You can edit a template by adding, removing, reordering, and updating its stages and steps, as well as altering the way steps are connected. The properties for a step can also be edited, including the person assigned to complete the step, its configuration, and any restrictions. The entire flow can be edited by changing its filter so that it runs on different Contract, Company, and Project Profiles.

Important: You can edit a draft flow template or a published flow template. When you edit a published template, a copy of the template displays in the Flow Template Drafts section of the screen. You must republish the template in order for your edits to take place.

Although a contract flow template is used in the screen shot below, the steps are the same for publishing a company flow template and a project flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the template you want to publish, and double-click it to open it.
3. In the Flow Design Panel screen, perform any of the following updates:
 - Edit the Flow Template Name and/or Flow Template Description fields.
 - Add a step or a legacy workflow to the template.
 - Delete a step by clicking its properties icon, selecting Delete in the menu, and clicking Yes in the Remove Item prompt.
 - Add a stage by clicking Add Stage in the toolbar, or delete a stage by clicking its X icon.
 - Rename a stage by clicking the stage to select it, and then clicking Rename Stage in the toolbar.
 - Change the order of stages in a flow by clicking on the tab for any stage name, and then dragging and dropping the tab horizontally to the left or right. The order of stages can also be changed by clicking the End Stage step's properties and selecting Edit Properties in the menu. In the End Stage properties window, click the Next Stage tab, and make a selection in the Go To Stage list.
 - Change the connections between steps:
 - Remove the line connecting two steps by clicking it.
 - Move a line by clicking it, and then dragging and dropping it from the top connector of one step to the top connector of another step.
 - Connect two steps by clicking in the bottom connector of the first step, dragging the cursor in the direction of the second step, and releasing the cursor on the top connector of the second step.

- Edit the properties of a step by clicking its properties icon, and selecting Edit Properties in the menu.
4. In the Properties window:
 - Edit the general information for the step, which includes changing the default name of the step.
 - Change the Flow Step Properties Window user(s) assigned to complete the step, which can be any user, one or more specific users, or a user who holds one or more functions or contract responsibilities.
 - Update the step's configuration, which is specific to the Communication, Complete Workflow, Creation Template, Query Binary Branch, Automatic Notification, Query Branching, and Update steps.
 - Edit the restrictions to control the availability of the flow in a Contract, Company, or Project Profile.
 - Click Save.
 5. Apply or edit the filter by clicking Flow Filter in the toolbar.
 6. In the Flow Design Panel screen, click:
 - Publish Template to save and publish the edits to the flow template.
 - Save Flow Template to add the template to the Flow Template Drafts section of the screen if you are not ready to publish the edits.
 - In the Template Saved prompt, click Yes to return to the Published Flow Templates screen, or No to remain in the Flow Design Panel screen.

The changes made to the flow template will be applied to future Contract, Company, or Project Profiles that are created/added to Conga Contracts. A user with the Flow Admin permission can apply the updated flow to an existing Profile by invalidating the current flow, clicking the Start Flow button in the toolbar, and then selecting the updated flow template in the list of available templates.

Loading a Previous Version of a Flow Template

You need the Flow Template Admin permission to make a previous version of a flow template the active version so that this is the flow that runs in a Contract, Company, or Project Profile. When you make changes to a published flow template, and then republish the template, Conga Contracts stores the changes as the next version of the flow. At any time, you can load a previous version of the flow template, making it the current active version. Users with the Flow Admin permission can then run this previous version of the flow on an existing Profile.

Although a contract flow template is used in the screen shots below, the steps are the same for loading a previous version of a company flow template and a project flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link in the menu.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the template whose previous version you want to activate, and double-click it to select it.
3. In the Flow Design Panel screen, click View Revisions in the toolbar.
4. In the Revision Selection window:
 - Locate the revision you want to make the active version of the flow template, and click it to select it.
 - Click OK.
5. When the screen refreshes, click Publish Template in the toolbar.

Deleting a Flow Template

You need the Flow Template Admin permission to delete a draft flow template that has not been published or activated. Although you cannot delete a published flow template, you can inactivate it so that it no longer automatically runs in any new Contract, Company, or Project Profiles that match the conditions defined in the template. However, a user with the Flow Admin permission can run an inactive flow template on an existing Profile.

Although a draft contract flow template is used in the screen shot below, the steps are the same for deleting a draft company flow template and a draft project flow template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Contract Flow Templates, Company Flow Templates, or Project Flow Templates link.
2. In the Published Flow Templates screen for contracts, companies, or projects, locate the template you want to delete in the Flow Template Drafts section of the screen.
3. Click the draft template to select it, and then click Delete Template in the toolbar.
4. In the Delete Template prompt, click Yes.

Flow Components and Properties

The components of a flow template include the stages of a flow, the different types of steps that can be used in the flowchart, and the properties that can be assigned to a step, such as naming the step, assigning it to a user, and setting its restrictions and conditions.

Overview of Flow Components and Properties

A flow is automatically displayed at the top of a Contract, Company, or Project Profile screen as a color-coded list of stages and steps with action buttons. A flow displays whenever a user adds a Profile that meets the criteria defined in an active flow template.

Flow templates are created by users with the Flow Template Admin permission and are comprised of the stages and steps in a required process or procedure, such as the steps that must be completed in creating, negotiating, maintaining, renewing, or archiving a contract.

Prior to creating a flow template, a Flow Template Admin should become acquainted with the following:

- [Components of a Flow Template](#)
- [Types of Flow Steps](#)
- [Flow Step Properties Window](#)
- [Property Categories of Flow Steps](#)
- [Flow Stages and Steps in a Profile](#)

Components of a Flow Template

The components of a contract flow template are shown below and include the drawing grid, flow steps (Action, Approval, Logic, and System), connection lines, flow stages, filters, and the Properties window for a flow step.

The components of a Company Flow Template and Project Flow Template are the same except these templates do not have the Creation Template and eSignature action steps.

Flow Template Name and Description fields	Provide a descriptive name for the flow template and a concise description to distinguish it from other flow templates.
Grid	View the grid, or working area, for the flow. The grid contains both vertical and horizontal rulers to assist you in correctly aligning the steps in the flow.

Action, Approval, Logic, and System steps	<p>Review the list of steps that can be added to the flow template. These steps include Action steps (Communication, Complete Workflow, Creation Template, Generic, and eSignature), an Approval step, and Logic steps (End Flow, End Stage, Or, and Query Binary Branch). System steps (Automatic Notification, Query Matching, and Update) are those steps that are automatically completed by Conga Contracts when a condition in the flow is met.</p> <ul style="list-style-type: none"> • To add a step to the drawing grid, click on it in the Actions section, and then drag-and-drop it into the grid. • To change the location of any step, click on it, and then drag-and-drop it to another location in the grid.
Active stage	The active stage in a flow is displayed in blue text.
START step	The step auto-displays in the grid for every stage and identifies the beginning point of the flow.
Connection lines	<p>Lines are used to connect the Start, Action, Approval, Logic, System, and End Stage/End Flow steps.</p> <ul style="list-style-type: none"> • To connect two steps, click in a bottom connector of the first step, drag the cursor in the direction of the second step, and release the cursor on the top connector of the second step. • To remove a connection line, simply click on it. • To move a connection line, click on it, and then drag-and-drop the line to the desired location. <p>A connection line contains an arrow, which indicates the direction of the flow.</p>
Properties menu	Click for a step to display a menu, and select Edit Properties to display its Properties window.

<p>Properties window</p>	<p>Click on a tab to define the step's properties:</p> <p>General - allows you to change the name of the step, provide a description to assist the user in completing the step when the flow displays in the Profile, and add notes to explain the step's purpose.</p> <p>Assignee - assign the step to a specific user, any user, or to a user who holds a specific function or contract responsibility in Conga Contracts.</p> <p>Restrictions - set restrictions to limit the activation of the step based on the populated fields in the Profile.</p> <p>Step > Configuration - define the condition(s) that the step must meet before Conga Contracts moves the flow to the next step.</p> <p>The Properties window can be re-sized and moved onscreen.</p>
<p>Notes icon</p>	<p>A notes icon displays inside the step when you populate the Notes field of the General tab in the Properties window.</p>
<p>End Flow or End Stage step</p>	<ul style="list-style-type: none"> • If there is only one stage in the flow, add the End Flow step to the grid, and connect it to the last step in the stage. • If there will be more than more than one stage in the flow, add the End Stage step to the grid, and connect it to the last step in the stage. In the last stage of the flow, connect the End Stage step to the End Flow step.
<p>Add Stage</p>	<p>Click to add a stage to the flow template.</p>
<p>Rename Stage</p>	<p>Click on the stage to select it, click Rename Stage in the toolbar, and follow the onscreen prompts.</p>
<p>Flow Filter</p>	<p>Click to add a filter to the entire flow.</p> <p>The Restrictions tab in the Properties window for a step is used to apply a filter to an individual step.</p>
<p>View Revisions</p>	<p>Click to review the number of times the flow template has been revised and load a previous version of the template.</p>

Save Flow Template	Click to add a flow template or save changes made to the template without publishing it.
Publish Template	Click to save and publish the template. You may need to reorder the template to control the order in which it is applied to a Profile.

Types of Flow Steps

A Flow Template Admin can create a flow template that includes several steps, which are linked together to identify the stages a contract, company, or project undergoes during a process or procedure. The Admin then defines the properties for each step, which include naming the step, assigning the step to one or more users, and providing users with instructions for completing the step.

Flow Template steps are grouped into four major categories: Action, Approval, Logic, and System.

Action Steps

Communication - allows users to send an email message from a flow step in a Profile by clicking the Send button, which displays a Messaging window. The step can be configured so that any reply received from the email message sent from the step will complete it. By default, a response from the email message will not complete the step, and it must be manually completed by a user.

- Complete Workflow - inserts an existing workflow into any Stage of a contract flow template so that the steps that need to be taken by a user are already defined.
 - Creation Template - uses a creation template so that a user is prompted to create the type of contract specified by the template. Administrators can then grant the permission to create this type of contract to a specific user, any user, or a user who holds a specific function or responsibility in Conga Contracts. An Administrator can set this step to automatically run when the Contract Profile is first created, or when the flow is manually run on the profile.
 - Generic - adds an Administrator-defined action to any stage in a contract flow template. Several generic steps can be added to a single stage. Administrators can assign a generic step to a specific user, any user, or a user who holds a specific function or responsibility in the Conga Contracts system.
 - eSignature - uses the eSignature Package Wizard to obtain an electronic signatures.
- Approval Step

- Approval - used to create alternate pathways for a step that can either be approved or declined. Administrators must connect both pathways (Approve and Decline) to either a new step or an existing step.
Customized Approval Step

The Approve and Decline options for an Approval step can be customized by clicking on the Approve or Decline text to display a Change Label prompt. Enter the substitute approve/decline language in the blank field, and click the OK button.

Logic Steps

- End Flow - used to signal the end of the flow in the contract flow template.
- End stage - used to signal the end of a stage in a multi-stage contract flow template.
- Or - identifies all those that can complete a step, and allows any of the persons identified to complete the step. For example, during the Legal review of a negotiated contract, both the lawyer in your corporate office and the lawyer in your branch office can be assigned the responsibility of completing the Or step by assigning the step to the "Attorney" responsibility. Either attorney can accept the responsibility of reviewing the document and complete the step.
- Query Binary Branch - used to create alternative pathways for a step, depending on whether the action defined in the step proves to be true or false. For example, if you send a contract for eSignature and the contract is not signed within a specified time frame, you can link the False option to a Generic step that requires a user to contact the counter-party via telephone. Alternatively, you can link the False option back to the eSignature Package Wizard step, which will cause the wizard to be rerun so that a second email request is sent to the counter-party. However, if the contract is signed in the time frame specified, the True option is fulfilled, and the flow simply moves to the next step.

System Steps

Automatic Notification - allows a notification email message to be provided by an Administrator, as well as the recipients for the message. When the previous step is completed, Conga Contracts automatically sends the email message to each recipient, providing them with information on updates to a flow without logging in to Conga Contracts.

- Query Matching - defines an action or event that must occur before the Conga Contracts system moves the contract flow to the next step. In effect, the flow is stalled at this step until a user completes the required action. For example, during the

contract creation process, you can set up a stipulation that a document with a document type of Contract Template must be generated by the Creation Wizard before the flow can move to the next step. Once the wizard is run and the contract is generated, the Conga Contracts system automatically moves the flow to the next step.

- Update - identifies the action that the Conga Contracts system will take when the task in the previous step is completed. For example, the Update step is configured to set the Contract Status field in the Contract Profile to "Active" when the previous step (e.g., Obtain Counter-Party Signature) is completed. The Conga Contracts system will automatically update the Contract Status field to Active when a user "completes" the generic Obtain Counter-Party Signature step.

Flow Step Properties Window

The Properties window for a flow step can contain up to four category tabs: General, Assignee, Step Configuration, and Restrictions. The End Stage step contains a Next Stage category tab.

The Properties window for a flow step is displayed by clicking the steps in the flow template to display a menu, and then selecting Edit Properties. The Delete option is used to remove the step from the flow.

The Properties window for a step can contain up to four category tabs: General, Assignee, Step Configuration, and Restrictions. The End Stage step contains a Next Stage category tab.

 **Tip:**

Currently, there are five action steps (Communication, Complete Workflow, Creation Template, Generic, and eSignature), four logic steps (End Flow, End Stage, Or, Query Binary Branch), three system steps (Automatic Notification, Query Matching, and Update), and one Approval step.

The Properties window for the Creation Template step is shown since it contains all four property categories. Additional windows for the Assignee category are also shown since options differ based on the assignee selected.

General Tab

General tab	Select to add general information for the step.
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<p>Step Name field</p>	<p>Click in the field and type over the existing text to edit the name of the step.</p> <p>The new name appears inside the step in the grid, and in the flow step in the Contract, Company, or Project Profile.</p>
<p>Description field</p>	<p>Enter a concise description for the step to display this information inside the step in the grid.</p> <p>Tip: The description only displays when a user hovers over the word Approval in a flow in a Profile screen for an approval step. It is recommended that a descriptive, but concise instruction be provided for every approval step so that users understand what they are being asked to approve.</p>
<p>Notes field</p>	<p>Enter information or instructions for completing the step, if necessary.</p> <p>Tip: If notes are added, the step includes an icon in the grid and the Profile. When a user hovers over the icon in the Profile, the notes display, providing information or instruction on completing the step.</p>
<p>Auto Run Creation Template check box</p>	<p>Select to automatically run the Creation Wizard when a user creates a Contract Profile that matches the criteria for the flow, or when the flow containing this step is manually run on an existing Profile.</p> <p>This check box is specific to the Creation Template step, and when selected, it displays the Not Auto Attach Document check box in the Step Configuration tab.</p>
<p>Save button</p>	<p>Click to save your changes to the step's general properties.</p>

Assignee Tab

<p>Assignee tab</p>	<p>Select to assign the step to any user, a specific program user, or a user function or responsibility.</p>
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Any radio button	<p>Use the default option to allow any Conga Contracts user to complete the step.</p> <p>The Any option is not available for the Automatic Notification step since specific users or users holding specific functions or responsibilities must be identified as recipients for the email message.</p>
Function radio button	<p>Select to assign the step to a user who holds one or more user functions in Conga Contracts.</p>
Function multi-select list	<p>Click on one or more functions to select them.</p> <p>Tip: Conga Contracts will send up to 100 email notifications to users holding the selected function(s), notifying them that the step is awaiting completion.</p>
Specific User radio button	<p>Select the radio button to assign the step to one or more specific users.</p>
User multi-select list	<p>Click on one or more user names to select them.</p>
Allow User Reassignment check box	<p>Select to allow the selected user(s) to reassign the step to another user for completion.</p>
Responsibility radio button	<p>Select to assign the step to a user who holds one or more contract responsibilities in Conga Contracts.</p>
Responsibility multi-select list	<p>Click on one or more responsibilities to select them.</p> <p>A contract responsibility consists of three elements: (1) title assigned to the contract responsibility, such as Contract Manager (2) functions assigned in Conga Contracts, such as Attorney or Sales Rep, and (3) user classification (system user, external participant, or company contact).</p> <p>Tip: When a step is assigned to the person holding a responsibility for a contract, the responsible person can reassign the flow step to another user by updating the Responsibility field in a Contract Profile. If this occurs, Conga Contracts sends out an email message to the new step owner, advising them that a flow step is awaiting their completion.</p>

Save button	Click to assign the step to any user, specific user(s), or a user function or responsibility.
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Step Configuration Tab

The Step Configuration tab is only available in the Complete Workflow, Creation Template, Query Binary Branch, Query Matching, Update, and Automatic Notification steps.

Step Configuration tab	Select to configure the step.
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Configuration options	<p>Configure the step, based on the type of step:</p> <p>Creation Template - make a selection in the Creation Template list.</p> <ul style="list-style-type: none">• Select the Not Auto Attach Document check box to ensure the document that is created by the Creation Wizard is not automatically uploaded to the Contract Profile. The user is given the option to open or upload the document when the Creation Wizard auto-runs.<ul style="list-style-type: none">• This check box only displays when the Auto Run Creation > Template check box is selected in the General tab. <p>Complete Workflow - make a selection in the Workflow template list.</p> <p>Communication - select the Automatically Complete the Step on Any Reply check box to move the flow to the next step whenever a response is received to the email message sent for the step.</p> <p>Query Binary Branch and Query Matching - set parameters to define what must occur for Conga Contracts to recognize a step as complete, and move the flow to the next step.</p> <p>Update - define an action that must be completed (or occur) before Conga Contracts makes a system update, such as changing the status of a contract.</p> <p>Automatic Notification - compose the notification message for the users, or the users holding a function or responsibility, who will receive the email message.</p>
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<p>Not Auto Attach Document check box</p>	<p>This check box is specific to the Creation Template step and only displays if the Auto Run Creation Template check box is selected in the General tab.</p> <p>Select if you do not want the contract document that is automatically generated when the Creation Wizard runs to be saved in the Documents screen in the Contract Profile. Important: When this check box is selected and the user runs the Creation Wizard step, they must click the download link in the prompt that displays after the wizard runs to download the document since it will not be automatically attached to the Profile. Therefore, it is recommended that you provide the user with this information in the Notes field in the General tab.</p>
<p>Save button</p>	<p>Click to configure the flow step.</p>

Restrictions Tab

<p>Restrictions tab</p>	<p>Select to add restrictions for completing the step.</p>
<p>Field list</p>	<p>Select the field to be used in the restriction.</p> <p>You may have to drill down in the hierarchy to locate the correct field.</p>
<p>Inclusion list</p>	<p>Select the option that will identify, include, or exclude the text, value, or date in the Value list.</p> <p>If the selection in the field list is a date, there are four options that allow you to pinpoint a specific date (After: today minus (x) days, After: today plus (x) days, Before: today minus (x) days, and Before: today plus (x) days). For example, if today is January 1, 2016 and you want to search for contracts that expire prior to January 1, 2017, you would select After: today plus (x) days and enter 364 in the Value field since there are 365 days in a year. Similarly, if you wanted to search for contracts that expired last year, you would select Before: today minus (x) days and enter 365 in the Value field. To designate today's date, select After: today minus (x) days and make x =1. To designate tomorrow's date, select Before: today plus (x) days and make x = 2.</p>

Value field or list	Make a selection in the list, or enter a value or date in the field.
Operand buttons	Click to add another restriction: AND button will refine the condition. OR button will expand the limits of the condition.F
Delete icon	Click the delete icon to remove a restriction.
Save button	Click to add restrictions to the flow step.

Next Stage Tab

The End Stage step is the only step that contains a Next Stage tab, which is used to update the order of stages in a flow in the event one of the existing stages in a flow needs to be skipped.

Properties menu	Click in the End Stage step to display a menu, and then select Edit Properties.
Next Stage tab	Select to define the consecutive stage for the current stage. If the next stage is not defined for each stage in a flow, the flow will proceed in the order in which the stages appear in the flow.
Go To Stage list	Select the stage that should follow the current stage in the flow.
Save button	Click to define the next stage for a flow stage.

Property Categories for Flow Steps

A user with the Flow Template Admin permission defines the properties for every step that they add to a flow template, including its name and any notes that will help users to complete the step. A Flow Template Admin can assign the responsibility for completing a step to a specific user, any user, or a user who holds a specific function Adding a Functions List Item or responsibility in Conga Contracts. When a step is assigned to a specific user, that user can reassign the step to another user.

Most steps allow a Flow Template Admin to set restrictions, as well as define the conditions that must be met before Conga Contracts recognizes the step as complete and

takes some action, such as moving the flow to the next step or changing the status of the Profile. An overview of the properties that can be defined for each flow step is provided in the tables below.

	GENERAL (Name, Description, Notes)	ASSIGNEE (Specific or Any user, Function, Responsibility)	Step Configuration	Restricti ons	next stage
ACTION STEPS		When step owner = specific user, step may be reassigned			
Communic ation	X	X	Configuration = automatically or manually complete step when reply is received from email message sent from step	X	
Complete Workflow	X	X	Configuration = select Workflow Template	X	
Creation Template	Option to require template to automatically run in Contract Profile	X	Configuration = select Creation Template	X	
Generic	X	X		X	
eSignature	X	X		X	

	GENERAL (Name, Description, Notes)	ASSIGNEE (Specific or Any user, Function, Responsibility)	Step Configurati on	Restriction s	next stage
APPROVAL STEP		When step owner = specific user, step may be reassigned			
Approval	X	X		X	

	GENERAL (Name, Description, Notes)	ASSIGNEE (Specific or Any user, Function, Responsibility)	Step Configuration	Restrictio ns	next stage
LOGIC STEPS		When step owner = specific user, step may be reassigned			
End Flow	X	X			
End Stage	X	X			X
Or	X	X			
Query Binary Branch	X	X	Configuration = set parameters for condition to be met		

	GENERAL (Name, Description, Notes)	ASSIGNEE (Specific or Any user, Function, Responsibility)	Step Configuration	Restrictio ns	next stage
SYSTEM STEPS		When step owner = specific user, step may be reassigned			
Automatic Notification	X	X	Configuration = provide email message and select recipients	X	
Query Matching	X	X	Configuration = set parameters for condition to be met		
Update	X	X	Configuration = define action that must occur	X	

Email Distribution Lists

Email Distribution lists are added to Contracts for use with the MESSAGING feature, as well as most of the other program features that use the Address Book to communicate with program users, company contacts, and external participants.

Email Distribution Lists Overview

Email distribution lists are primarily used with the Messaging feature, which is available from a Company, Contract, or Project Profile. Distribution lists are also available for any of the other program features that use the Address Book, including scheduled reports, events, event alerts for contract expiration dates, scorecards, workflow steps, and Project Teams. However, distribution lists are not available for use with the Document Package or eSignature Package wizards.

A user with the Email Distribution Lists permission can create and manage the lists that appear in the Address Book and are used by several program features. Although this permission is not technically an administrative function, email distribution lists are accessed from the Admin menu.

Granting the Email Distribution Lists permission can be achieved by adding the permission to an existing user role or creating a separate user role for the permission.

The following tasks are associated with creating and managing email distribution lists:

- [Locate an Email Distribution List](#)
- [Search an Email Distribution List](#)
- [Add an Email Distribution List](#)
- [Edit an Email Distribution List](#)
- [Delete an Email Distribution List](#)

Locating an Email Distribution List

Existing email distribution lists are viewed and managed from the Mail Distribution List Browse screen. A distribution list is used in the Messaging feature, as well as other program features that use the Address Book, such as scheduled reports, events, scorecards, workflow steps, and Project Teams.

1. Click the Gear Icon in the Navigation Toolbar, and click the Email Distribution Lists link in the menu.
2. In the Mail Distribution List Browse screen, locate the email distribution list:
 - Use the Search option
 - Scroll through the list of email distribution list records.
3. Click a record to display the Mail Distribution List profile, which provides the names of the people in the distribution list.

Searching an Email Distribution List

The email distributions lists that have been created by a user with the Email Distribution Lists Admin permission can be searched to locate all the lists that include a particular user, company contact, or external party. A list can also be searched by its name or description.

1. Click the Gear Icon in the Navigation Toolbar, and click the Email Distribution Lists link in the menu.
2. In the Mail Distribution List Browse screen:
 - Click Search in the toolbar.
 - In the menu, select Name, Description, Distribution People, or Select All to search all fields.

- Enter your search criteria in the Search field.
 - Press ENTER key on your keyboard Ensure All People is selected in the list to the left of the Search field to include everyone in the Address Book (users, company contacts, and external people).
3. Review the returned results in the Browse screen.
 4. Locate the distribution list and click its list record to display the Profile screen, which contains the names of the people in the distribution list.

Adding an Email Distribution List

You need the Email Distribution Lists permission to create a distribution list. An email distribution list facilitates communication when a single or a recurring message or report is sent from Conga Contracts to a group of people. Distribution lists are used in the Messaging feature, as well as other program features that use the Address Book, including scheduled reports, events, event alerts for contract expiration dates, scorecards, workflow steps, and Project Teams.

1. Click the Gear Icon in the Navigation Toolbar, and click the Email Distribution Lists link in the menu.
2. In the Mail Distribution List Browse screen, click New Distribution List in the toolbar.
3. In the Mail Distribution List screen, populate the following fields:
 - Distribution List Name - enter a descriptive name for the email distribution list.
 - (Optional) Distribution List Description - provide a clear and concise summary, describing how the distribution list can be used.
4. Click in the Distribution List People field to display the Address Book:
 - Add an individual to the distribution list by clicking their name.
 - Locate a person quickly by typing the first few letters of their first or last name into the Search field, and clicking. Click to clear the filter. Click Submit to add the individuals to the distribution list and close the Address Book. Ensure All People is selected in the list to the left of the Search field to include everyone in the Address Book (users, company contacts, and external people).
5. Click Save.

Editing an Email Distribution List

You need the Email Distribution Lists permission to edit a distribution list by changing its name, description, and/or updating the people included in the distribution list.

1. Click the Gear Icon in the Navigation Toolbar, and click the Email Distribution Lists link in the menu.

2. In the Mail Distribution List Browse screen, locate the distribution list you want to edit, and click it to select it.
3. In the Mail Distribution List screen, make any of the following edits:
 - Update the information in the Distribution List Name and Distribution List Description fields.
 - Click in the Distribution List People field to display the Address Book, and add/remove individuals from the distribution list.
 - Add an individual to the distribution list by clicking on their name.
 - Locate a person quickly by typing the first few letters of their first or last name in the Search field, and clicking . Click to clear the filter.
 - Remove an individual from the distribution list by clicking their icon in the Addresses list box.
 - Click Submit to close the Address Book. Ensure All People is selected in the list to the left of the Search field to include everyone in the Address Book (users, company contacts, and external people).
4. Click Save.

Deleting an Email Distribution List

You need the Email Distribution Lists permission to delete an email distribution list if it is no longer needed.

1. Click the Gear Icon in the Navigation Toolbar, and click the Email Distribution Lists link in the menu.
2. In the Mail Distribution List Browse screen, locate the distribution list you want to delete, and click it to select it.
3. In the Mail Distribution List screen, click Delete in the toolbar.
4. In the confirmation prompt, click Yes.

Clause ID and Management

The Clause ID and Management (CIM) feature is activated using the Document Types list in the List Administration screen. Individual users are then assigned to a CIM Processor role that allows them to upload the document types whose clauses can be processed.

Overview of Clause Identification and Management

Administrators must perform setup tasks before the Clause identification and Management (CIM) feature can be used, which include identifying the document types to be analyzed by CIM and granting users the permission to upload the document types that will be analyzed.

The Clause Identification and Management (CIM) feature provides users with a comparison match between the clause language in a document they upload to a Contract Profile and the Conga Contracts Model, which is the standard against which individual clauses in an uploaded document are evaluated. The Conga Contracts Model is based on the clauses found on the Law Insider website, but users with the Clause Admin permission can "train" the Model to learn the language in their company's contracts by adding, modifying, and deleting the clauses in their Clause Libraries through document processing. Document processing allows a user to select a match between a clause in a document uploaded to a Contract Profile and an existing clause type stored in the Model.

The Conga Contracts Model is updated on a nightly basis, allowing the Model to "learn" a company's preferred contract language. If there are existing clauses stored in the Library before the CIM feature is added, the Model will take this existing language into account when arriving at the new standard for any duplicate clauses during the first run of the nightly batch process. For example, if the Clause Library contains an Indemnification clause, which is also a pre-defined clause in the Model, the new standard that is applied to an uploaded document with an Indemnification clause will be arrived at using an algorithm that takes into account both the clause language in the Model and the language in the Clause Library.

A user with the List Admin, Role Admin, and Clause Admin permissions must perform four setup tasks before the CIM feature can be used:

Activate the feature by selecting the individual document types that need to be evaluated in the Document Types list in the List Administration screen.

- Grant the permission to upload documents based on contract group to existing user roles. Alternatively, you can create a separate CIM Clause Processor role with permissions to upload documents to specific contract groups, and assign this role to individual users.
- Ensure all the items used to classify the clauses in their company's contract document(s) have been added via the Clause Category, Clause Type, and Clause Security lists in the List Administration screen.
- Ensure all the negotiable and non-negotiable clauses used in their company's contract document(s) have been added to the Clause Library.

The Search & Report features can be used to identify and run reports on the clauses processed on uploaded documents. For example, you can run a report on documents using non-standard clauses, as well as a report that identifies all documents containing a specific clause.

Activating CIM (Identifying Document Types)

You need the List Admin permission to activate the Cause Identification and Management (CIM) module. To activate the module, you must select the individual document types whose clauses should be analyzed whenever these document types are uploaded to a Contract Profile. A secondary activation task involves identifying the user roles that can upload documents by document type.

1. Click the Gear Icon in the toolbar, and click Lists.
2. Display the Document Types list items.
3. Select the Analyze Clauses check boxes for the document types whose clauses should be analyzed when a document of this type is uploaded to a Contract Profile.
4. Click Save.

Important:

Your company's standard contract terms should be stored in the Clause Library prior to using CIM since Conga Contracts pulls language from the Library in calculating the percentage match between the clauses in a document uploaded by a user and the current standard for each clause. Adding a clause to the library requires all Clause Types, Categories, and Security Levels to be added from the List Administration screen.

Activating CIM (Adding a Clause Processor Role)

Once you activate the Clause Identification and Management (CIM) module by identifying the document types whose clauses need to be analyzed, you can add a Clause Processor role for the module or modify an existing role. The role must include the Document Upload permission for all contract groups whose uploaded documents need their clauses analyzed during CIM processing. Once you add or modify the role, you must assign it to the individual users who have permission to upload documents to Contract Profiles and process the clauses in the documents they upload.

1. Click the Gear Icon in the toolbar, and click Roles.
2. In the Roles screen, click New Role
3. In the Role Profile screen, populate the Role Name and Role Description fields.
4. (Optional) Make a selection in the Clause Security list.
5. Click the Contract Groups tab.
6. Select the Document Upload check boxes to allow users with this role to upload documents to the Contract Profiles belonging to the selected contract groups.
7. Click Save.

8. Assign the role to the individual users who have permission to upload documents and process document clauses.

Conga Contracts Analytics

The Analytics feature is configured by creating an Analytics role, and then granting individual users access to the feature by assigning them to the role.

Creating a Conga Contracts Analytics User Role

Administrators can create a Conga Contracts Analytics user role, or they can simply add the Conga Contracts Analytics permission to an existing role. However, it is recommended that Administrators create a new Analytics role that has only the Conga Contracts Analytics permission, and then assign that role to those users who have the expertise to use the feature.

Navigation Toolbar	Click on Admin to display the menu, and select Roles to display the Roles browse screen. If the Roles link is not in your Admin menu, you do not have the permissions to use this feature.
New Role button	Click to display the Role Profile screen.
Role Name fields	Enter a name for the Analytics user role in the Role Name field (e.g., Analytics User).
Role Description fields	Provide a concise description for the role in the Role Description field (e.g., Access to Conga Contracts Analytics feature).
Permission Types check boxes	Scroll through the alphabetical listing and click in the check box for Conga Contracts Analytics.
Save button	Click to add the Conga Contracts Analytics user role.

Assigning the Analytics Role to a User

Once the Contracts Analytics user role has been created or added to an existing role, Administrators can assign the role to those users who have the expertise to use the Analytics feature.

Navigation Toolbar	Click on Admin to display the menu, and select Users to display the Users browse screen. If the Users link is not in your Admin menu, you do not have the permissions to use this feature.
User records	Locate the user who needs the Analytics role, and click on the user record to display their User Profile.
Search option	To quickly locate a user, enter the first few letters of their first or last name (or other identifier) in the Search field, and click the icon. To clear the filter, click on the icon.
Edit button	Click to display the User Profile screen in edit mode.
Role Name check boxes	Scroll through the alphabetical listing and locate the Contracts Analytics (User) role, and then click in the check box to select it.
Save button	Click to assign the Contracts Analytics permission to the user.

Document Locking

The Document Locking feature for Contracts allows you to lock a document so that no new revisions of a document are uploaded to a document family. To enable Document Locking, take the following steps:

1. Navigate to Admin
2. Lists
3. Document Types
4. Locate Executed Contract
5. Check Lock Document
6. Click Save

Global Features

Global features allow program-wide changes to be made to Contracts. Currently, there are three global features: System Settings, Advanced Edits, System Messages, and Bulk Data Upload.

Global Features Overview

System Settings, Global Messages, Advanced Edits, and Bulk Data Loading are the features that are used to make program-wide changes in Contracts.

Overview of Global Features

Global features include System Settings, Global Messaging, Global Edits, and Bulk Data Loading.

Conga Contracts currently provides four global features, which the System Administrator can use to (1) define system, integration, email, and API settings for all users (2) send messages that will be seen by all users or a select group of users (3) globally replace information in Profiles and other program screens, and (4) perform bulk data uploads that create Company Profiles, Contract Profiles, and add Additional Forms to these Profiles.

Global features include:

- [System Settings](#), which include the display of data and performance of features in the program; Email Settings to customize the message content that will be used when different types of email messages are sent from the program; Integration settings for eSignatures and Salesforce; Data Exports/Imports for program updates for customers who host Conga Contracts on their server, and API Settings for *webhooks.
- [Global Messaging](#)
- [Advanced Edits](#)
- [Bulk Data Loading](#)

*A webhook is configured to monitor events in Conga Contracts and display messages in a URL. For example, a webhook links an event, such as a user creating a new Contract Profile, to a URL so that when the event occurs, a message displays in the URL, alerting the System Administrator that a user has added a Contract Profile.

Advanced Edit

The Advanced Edit feature allows program-wide replacements to be made to field values in the Contract and Company Profile screens. The feature also allows all the tasks and events assigned to one user to be reassigned to another user.

Advanced Edit Overview

Users with the System Settings permission use the Advanced Edit feature to make program-wide replacements to field values in the Contract and Company Profile screens, as well as globally reassign tasks and events from one user to another. A common use of the feature is to replace the user assigned to complete a task or event with another user in the event an employee leaves your company or is promoted to another job in your company. When an advanced edit is made, a record of the change is added to the History section of the Contract or Company Profile for all of the affected fields.

 **Warning:**

Great care should be taken in making advanced edits since their effects are far-reaching and advanced edits could have profound consequences on the functionality of Conga Contracts.

Performing an Advanced Edit

You need the System Settings Admin permission to perform an advanced edit, which globally replaces data in Contract Profile or Company Profile screens. The feature is also used to make program-wide edits to the fields in contract and company task records, as well as the fields in contract and company event records.

Administrators should take care in performing an advanced edit since it cannot be undone. However, an advanced edit can be overwritten by creating a second advanced edit that reverses the original edit.

An employee (Mark Williams), who was responsible for monitoring contract events, left the company on June 29, 2018. The man who replaced him (Eric Bayes) needs to be identified as the person who will now receive the event alert notifications that would have been sent to Mark.

1. Click the Gear Icon in the Navigation Toolbar, and click the Advanced Edit link in the menu.

2. In the Data Filter screen, select Contract Events in the Section list. When the criteria record displays:
3. Select Event Date in the field list.
4. Select After in the inclusion list.
5. Click and use the calendar to select 06/29/2018. To add additional criteria for an advanced edit, click the icon to decrease the number of data fields that are affected by the edit, or click to expand the number of data fields that are affected by the edit.
6. In the Replacement section of the screen, select Event Notification Person in the Field list.
7. Select Replace in the inclusion list.
8. Select Williams, Mark in the first value list.
9. Select Bayes, Eric in the second value list.
10. (Optional) Click to add a second criteria record if the Reminder option is used in your company events.
11. Select Event Reminder Person in the Field list.
12. Select Replace in the inclusion list.
13. Select Williams, Mark in the first value list.
14. Select Bayes, Eric in the second value list.
15. Click Submit.

 **Tip:**

The options in a value list will vary based on the type of field selected in the Field list. Also, the inclusion list will not display when the Field and value lists are sufficient in defining the criteria.

Global Messaging

Global messaging is used to display information or instructions in the Dashboard of program users for a specified period of time.

Global Messages Overview

Users with the Global Messaging Admin permission can send a message to all program users or only those users who hold a specific role. A Global Messaging Admin also determines the date on which the message first displays in each user's Dashboard, as well as the date the message is removed. A global message displays prominently in the Dashboard and is color-coded to identify the urgency of the message.

A Global Messaging Admin can perform the following tasks:

- [Locate a Global Message](#)
- [Add a Global Message](#)
- [Edit a Global Message](#)
- [Delete a Global Message](#)

Locating a Global Message

Existing global messages are listed in the Global Messages screen where they can be reviewed and managed. Since there are three categories of global messages, each message appears under the Alert, Information, or Warning heading to indicate the importance of the message and its level of distribution.

1. Click the Gear Icon in the Navigation Toolbar, and click the Global Messaging link in the menu.
2. In the Global Messages screen, locate the category for the message (Alert, Information, or Warning).
3. In the category, locate the message, which is listed alphabetically by the subject of the message.
4. Click the message record to display a screen whose name reflects the subject of the message and where you can edit or delete the message.

Adding a Global Message

You need the Global Messaging Admin permission to send a global message, which is a quick and effective means of communicating with program users about activities and key dates associated with the companies, contracts, and projects that are created, managed, and stored in Conga Contracts. A Global Messaging Admin can send a broadcast message to a single group of users who hold a specific role, several groups of users, or all program users. If you do not assign a Role to a Global Message, it will be visible to all users.

1. Click the Gear Icon in the Navigation Toolbar, and click the Global Messaging link in the menu.
2. In the Global Messages screen, click New Message in the toolbar.
3. In the New Global Messages screen, populate the following fields:
 - Subject - Enter the subject of the global message. The information in this field displays as the message header in user Dashboards.
 - Priority - Select Information, Warning, or Alert to identify the importance of the message.

- Start Date - Use the calendar to select the date the message should first appear in user Dashboards.
 - (Optional) End Date - Use the calendar to select the date the message should be removed from user Dashboards.
 - Message Body - Enter (or paste) the global message in the field. The information in this field displays under the message header in user Dashboards.
4. (Optional) Use the Formatting Toolbar to format the text in your message.
 5. (Optional) Add an active link to your message:
 - Click in the Formatting Toolbar.
 - In the Insert Link window, populate the following fields, and then click Ok:
 - URL - Paste (or enter) the link in the field, such as <https://www.conga.com>.
 - (Optional) Text to Display - field is auto-populated with the information from the URL field, but you can edit the text if you want to change the way in which the link is displayed in the global message.
 - (Optional) Title - enter a title for the link.
 - Target - defaults to New Page, which indicates that the link will open in a new browser window and is currently the only option.
 6. In the Roles section, select the check box for each user role that should receive the global message.
 7. Click Save.

Editing a Global Message

You need the Global Messaging Admin permission to edit a global message. You can change the subject of the message, the date it is scheduled to be displayed and/or removed, the message itself, and the recipients for the message. You can also change the way the message displays in user Dashboards (as a Warning, Alert, or simply an Informational message).

1. Click the Gear Icon in the Navigation Toolbar, and click the Global Messaging link in the menu.
2. In the Global Messages screen, locate the message you want to edit under the Alert, Information, or Warning heading. Global messages are listed alphabetically by the subject of the message.
3. Click the global message record to display a screen whose name reflects the subject of the message, and click Edit in the toolbar.
4. When the screen displays in edit mode, update the information in any of the fields:
 - Subject - Modify the subject of the global message. The information in this field displays as the message header in user Dashboards.

- Priority - Make a different selection (Information, Warning, or Alert) to change the importance of the message.
 - Start Date - Click calendar icon and use the calendar to change the date the message should first appear in user Dashboards.
 - (Optional) End Date - Click the calendar icon and use the calendar to change the date the message should be removed from user Dashboards.
 - Message Body - Modify the global message in the field. The information in this field displays under the message header in user Dashboards.
 - (Optional) Use the Formatting Toolbar to format the text in your message.
 - (Optional) Add an active link to the message by clicking + icon in the Toolbar.
5. (Optional) Change the user roles that will receive the global message by selecting/clearing the role's check box in the Roles section of the screen.
 6. Click Save.

Deleting a Global Message

You need the Global Messaging Admin permission to delete a global message. You would delete a broadcast message after it has been sent if you neglected to select an end date for the message and you want to remove it from user Dashboards. You can also delete a global message before it has been sent if circumstances change and the message is no longer valid or relevant.

1. Click the Gear Icon in the Navigation Toolbar, and click the Global Messaging link in the menu.
2. In the Global Messages screen, locate the message you want to delete under the Alert, Information, or Warning heading. Global messages are listed alphabetically by the subject of the message.
3. Click the global message record to display a screen whose name reflects the subject of the message, and click Delete in the toolbar.
4. In the Delete Global Message prompt, click Yes.

Bulk Data Loading

The Bulk Data Upload Tool allows the simultaneous upload of up to 10,000 companies, contracts, and additional forms to Conga Contracts using an Excel template for each data category. A Company, Contract, or Additional Form template containing column headings that match all the fields in the Profile or Form is downloaded, data for new companies or contracts, or existing additional forms is furnished by the user, and the completed template is uploaded back to Conga Contracts. Bulk Data Upload is reversible to protect against any errors made during data capture and upload.

Bulk Data Loading Overview

Standard Bulk Data Loading involves downloading the furnished Company, Contract, or Additional Form template, populating the Excel template with the necessary data, and then uploading the completed template back to Conga Contracts.

Bulk Data Loading allows a user with the Bulk Data Upload Tool Granting a User an Additional Role (Permission) to upload information for up to 10,000 companies, contracts, and additional forms simultaneously using an Excel template. Conga Contracts provides a separate Excel template for each data category: Company, Contract, and Additional Form, which results in the creation of Company Profiles, the addition of Contract Profiles to Company Profiles, and/or the addition of Additional Forms to existing Company or Contract Profiles. However, the Bulk Data Upload Admin can use their own Excel spreadsheet, providing the headings in their spreadsheet conform to the naming conventions used in the headings in the furnished template, which exactly match the default and additional field names in the default Company Profile screen, Contract Profile screen, and Additional Form.

Standard Bulk Data Loading involves downloading the furnished Company, Contract, or Additional Form template, populating the Excel template with the necessary data, and then uploading the completed template back to Conga Contracts. The Bulk Data Upload Admin must then map the fields in the completed template, as well as the selections for the lists, to the names of the fields and the list items in the Profile screen or the Additional Form, making sure they match exactly. Once the matches are verified, the data is then uploaded, creating a new Profile or Form and auto-populating the fields with the furnished data.

When performing a bulk data upload for new companies, the Company template must be populated with data and uploaded first since Contract Profiles are housed in Company Profiles. After successfully uploading the Company template, new Company Profiles are created and the fields in the Profile screen are auto-populated with data from the template. The Contract template, which includes the name of the company or the company number, is then populated and uploaded, resulting in Contract Profiles being added to the appropriate Company Profiles. When an Additional Form template is populated and uploaded, each field in the form is mapped to the correct Company or Contract Profile, which creates the additional form in the associated Profile.

To protect against any errors made during data upload, the Bulk Data Loading process is reversible.

A user with the Bulk Data Loading permission can perform the following tasks associated with the process:

- [Locate an Imported Record \(Bulk Data Upload\)](#)
- [Download a Bulk Data Template](#)
- [Complete a Bulk Data Template](#)
- [Upload a Bulk Company Template](#)
- [Upload a Bulk Contract Template](#)
- [Upload a Bulk Additional Form Template](#)
- [Roll Back a Bulk Data Upload](#)

Locating an Imported Record (Bulk Data Upload)

Previous bulk data uploads are listed in the Imported Records Report view of the Bulk Data Upload Tool Imported Records screen. The screen displays the type of bulk data upload (Company, Contract, or Additional Form), the date of the upload, and the number of records uploaded.

1. Click the Gear Icon in the Navigation Toolbar, and click the Bulk Data Upload Tool link in the menu.
2. In the Bulk Data Upload Tool screen, click Imported Records in the toolbar.
3. In the Imported Records Report screen, view the information for each bulk data upload. Click on a column heading to sort the data uploads by object type (Company, Contract, or Additional Form), date, or the number of imported records. You cannot view the imported records or the Excel spreadsheet used in the import. From this screen, you can only view bulk data uploads and reverse an upload.
4. Click Back to Bulk Data Upload Tool in the toolbar to return to the default Bulk Data Upload Tool screen.

Downloading a Bulk Data Template

You need the Bulk Data Upload Tool, permission to download the Company, Contract, and Additional Form templates that you can use to enter information simultaneously for several companies, contracts, and additional forms. Once you complete the Excel template by populating the fields with data, upload the company, contract, or additional form spreadsheet so that Conga Contracts can create the Company or Contract Profiles using the information you provided and/or add Additional Forms to existing Company or Contract Profiles.

Tip: Instead of using the furnished template, you can use your own spreadsheet, as long as it contains headings that match all the required fields that are currently present in your Company Profile screen and Contract Profile screen, as well as any required fields in an

Additional Form. When using your own form, simply upload the completed spreadsheet for companies, contracts, or additional forms.

1. Click the Gear Icon in the Navigation Toolbar, and click the Bulk Data Upload Tool link in the menu.
2. In the File Select view of the Bulk Data Upload Tool screen, select Company in the Object Type list.
 - Select Contract in the list if the Company Profile(s) already exist for the bulk contract data you are uploading.
 - Select the name of the additional form in the list if you are uploading bulk additional form data, and the Company and/or Contract Profiles already exist.
3. Click Download Template for Selected Object Type in the toolbar.
4. When the template downloads, click the Company.xlsx or Contract.xlsx link, or the link that reflects the name of the additional form.
5. When the Excel program launches, and the template displays, rename and save the template.
6. (Optional) Resize the columns in the template to display the full name of the field and accommodate your data.
7. (Optional) Remove any optional or additional fields from the template if you do not want to capture data for those fields. Do not remove required fields from the template.
8. Populate the template, and then upload the completed company, contract, or additional form template.

Completing a Bulk Data Template

You need the Bulk Data Upload Tool permission to download the Company, Contract, and Additional Form templates and perform a bulk data upload. You must populate the template by providing information for every required field, ensuring your data is correctly formatted before uploading the company, contract, or additional form template to Conga Contracts. If the field is a list, the information entered in the template must exactly match one of the options for the list, as defined in the List Administration screen.

 **Tip:**

You can change the order of the headings in the template, as well as delete headings for the optional and/or additional fields that you will not be populating.

- Company template - default required fields are Company Name, Company Group, and Status. However, other fields from the Company Profile screen should also be

populated if the information is available, as well as any required additional fields. The Mark as Legal Entity field in the template is an optional field, which you can leave blank, or populate with True or False, depending on whether or not the company can be a party to a legally binding contract document.

- Contract template - default required fields are Company Name Lookup or Company Number Lookup, Contract Group, Legal Entity, Agreement Type, Contract Type, Term Type, Original Exp Date, and Status. However, other fields from the Contract Profile screen, including any assigned contract responsibilities, should also be populated if the information is available, as well as any required additional fields.
- Additional Form template - required fields will vary since the Contract Lookup Number field is required for a contract additional form while the Company Name Lookup or Company Number Lookup field is required for a company additional form. Review the additional form to identify the required fields.

A Contract template is depicted in the two screen shots below, which show all the fields in the default. Contract Profile screen, as well as three responsibilities that were defined by an Administrator: Contract Manager, Attorney, and Sales Rep. The required fields in each line item of the spreadsheet are populated and properly formatted to ensure the Contract Profiles created during the bulk data upload contain all the required information.

1. Open the Company, Contract, or Additional Form bulk data template you downloaded from Conga Contracts.
2. (Optional) Remove the columns for any data fields you will not populate to make the template more manageable.

 **Warning:**

Do not remove any required fields in the Company Profile, Contract Profile, or Additional Form.

3. (Optional) Reorder the column headings to facilitate entering your data.
4. Click in Column A, Row 2 of the spreadsheet and enter the information for the first data field (heading) for the company, contract, or additional form record.
5. Tab to consecutive cells and enter data for the remaining fields.
 - Resize any column to accommodate your data.
6. Format the following field types in the spreadsheet: Contract Responsibility, Date, Combo list, Multi-Select list, Phone Number, Currency, Number, Tree field, Person field, Linked Combo list, Linked Multi-Select list, and Hyperlink field.
7. Click Save.

Formatting Fields for Bulk Data Loading

In completing an Excel template for bulk data loading, the information provided for each field type must be properly formatted to ensure a seamless import of your data. Conga Contracts field types and their required formatting include:

Contract Responsibilities - use one of the following formats: (1) FIRSTNAME LASTNAME (2) LASTNAME, (comma) FIRSTNAME or (3) [EMAIL@ADDRESS.COM](#)

- More than one person can be assigned to a responsibility by inserting a forward slash (/) between their names, such as Stephens, John/Winston, Paul. An active user can be assigned to a contract responsibility during the bulk data upload even if they do not hold that responsibility in Conga Contracts. A responsibility can also be assigned to a disabled user, a company contact, or an external person. However, if a responsibility is assigned to an archived user, their name will not be linked to that responsibility in the Contract Profile.
- Date field - dates must follow the format as defined in the System Settings screen. Options include Month/Day/Year, Day/Month/Year, and Year-Month-Day.
- Combo list - information must exactly match one of the selections in the field list, as defined in the List Administration screen.
- For example, the Company Type, Company Group, Status, Contract Type, Agreement Type, Contract Group, and Term Type fields are all combo lists.
- Multi-Select list - information must exactly match the selections in the field list, as defined in the List Administration screen, and the selections are separated by the forward-slash (/) symbol, which serves as a field delimiter.
- For example, a Financials multi-select list was added as an additional field to the Company Profile and contains three types of financial statements (Income Statement, Balance Sheet, and Cash Flow Statement). If a company being added during the bulk data upload has provided all three types of financial statements, you would enter Income Statement / Balance Sheet / Cash Flow Statement in the Excel cell for the Financials field.
- Tree field - information must exactly match the selections in the hierarchy, as defined in the List Administration screen, and the selections are separated by the forward-slash (/) symbol, which serves as a field delimiter.
- For example, a hierarchy for licenses has been set up for the Contract Type field in the Contract Profile, which includes License as the primary contract type and Software and Real Estate as secondary types. If a contract being added during the bulk data upload is a software license, you would enter License / Software in the Excel cell for the Contract Type field.

- Phone Number field – use one of the acceptable formats: XXX-XXX-XXXX (407-745-3030) or (XXX) XXX-XXXX ((407) 745-3030).
- Currency field – do not use the currency symbol (\$) or commas (1,000) when entering values since the program automatically adds these for you. For a dollar amount, you can add a number with decimals (1350.45) or a number without decimals (1350) and the program will automatically append the currency value with the default number of decimals (1350.00).
- Number field – whole numbers and numbers with decimal places must follow the format as defined in the System Settings screen. Options include the American format [0,000.00] and the International format [0.000,00].
- Person field – person’s name must follow the format of LASTNAME, (comma) FIRSTNAME, such as King, Chris.
- Linked Combo list – formatting is the same as the Combo list.
- Linked > Multi-Select list – formatting is the same as the Multi-Select list.
- Hyperlink field – enter a website URL using the standard format (www.conga.com) or an email address.

Once you complete the template, upload the Company, Contract, or Additional Form template to Conga Contracts.

Uploading a Bulk Company Template

You need the Bulk Data Upload Tool permission to upload a completed Company template back to Conga Contracts. Prior to uploading the template, you must download it and populate the company fields with data. For a company field that is a list, the information entered in the template must exactly match one of the options for the list, as defined in the List Administration screen.

Alternatively, you can use your own Excel spreadsheet as long as the headings in the spreadsheet exactly match the field names in the Company Profile screen, the Company Name field is included as one of the headings, and data is provided for the required fields (Company Name, Company Group, and Status).

During the upload process, the fields in the template are mapped to the fields in the Company Profile screen and the data is validated to ensure there are no errors. A successful bulk data upload results in multiple Company Profiles being added to Conga Contracts with the fields in the Profile screen automatically populated with data from the template.

If you are uploading several contracts for a company that already has an existing Company Profile in Conga Contracts, you can skip Company Bulk Data Uploading and proceed to Contract Bulk Data Uploading.

1. Click the Gear Icon in the Navigation Toolbar, and click the Bulk Data Upload Tool link in the menu.
2. In the File Select view of the Bulk Data Upload Tool screen, upload the completed company template:
 - Select Company in the Object Type list.
 - Click in the Data Loader Import File field.
 - In the Open/Upload window:
 - Navigate to the completed template, and then click it to select it.
 - Click Open.
3. When the Open/Upload window closes, click Continue to Mapping in the toolbar of the Bulk Data Upload Tool screen.
4. When the Field Mapping view of the screen displays, verify all the field names in your Excel spreadsheet exactly match the Company Profile fields.
 - If there is a field in Excel Column Header column that is not mapped to a field in the System Field Name column, click the Cancel button to reverse the upload, correct the column heading in your spreadsheet, and then re-upload the file to avoid an Error Report.
 - If there is a mis-match between any two fields, which is due to a typo in the name of a column heading in your Excel spreadsheet, click in the System Field Name column to activate the list, and manually map the fields by selecting the correct field name.
5. Click Validate Excel Data in the toolbar. If Conga Contracts is unable to match a column heading in your Excel spreadsheet to a system field, or match a data entry in the spreadsheet to an item selection in a system field list, an Error Report screen displays. Conga Contracts pinpoints the exact error by identifying the mis-matched field, or the inability to locate an item selection for a field list, and also provides the Excel spreadsheet row in which the error is located. Correct the error and repeat the process of uploading the template.
6. When the Review Data view of the screen displays, verify the company data to be uploaded is correct, and click Import Data in the toolbar.
7. When the Import Complete prompt displays, click OK.
8. In the Imported Records Report view of the Bulk Data Upload Tool Imported Records screen, verify the correct number of company records is displayed. The most recent import record displays at the top of the list, along with a time stamp for the import.
 - To reverse the data upload process, click and follow the onscreen prompts.
9. (Optional) Confirm the upload by searching for the new Company Profiles that were created using the Search option in the All Companies browse screen.

Uploading a Bulk Contract Template

You need the Bulk Data Upload Tool permission to upload a completed Contract template back to Contracts. Prior to uploading the template, you must download it and populate the contract fields with data. For a contract field that is a list, the information entered in the template must exactly match one of the options for the list, as defined in the List Administration screen.

Alternatively, you can use your own Excel spreadsheet as long as the headings in the spreadsheet exactly match the field names in the Contract Profile screen, the Company Name Lookup or Company Number Lookup field is included as one of the headings, and data is provided for the required fields (Contract Group, Legal Entity, Agreement Type, Contract Type, Term Type, Original Exp Date, and Status).

During the upload process, the fields in the template are mapped to the fields in the Contract Profile screen and the data is validated to ensure there are no errors. A successful bulk data upload results in multiple Contract Profiles being added to one or more Company Profiles. The fields in the Contract Profile screen are automatically populated with data from the template.

1. Click the Gear Icon in the Navigation Toolbar, and click the Bulk Data Upload Tool link in the menu.
2. In the File Select view of the Bulk Data Upload Tool screen, upload the completed contract template:
 - Select Contract in the Object Type list.
 - Click in the Data Loader Import File field.
 - In the Open/Upload window:
 - Navigate to the completed template, and then click it to select it.
 - Click Open.
3. When the Open/Upload window closes, click Continue to Mapping in the toolbar of the Bulk Data Upload Tool screen.
4. When the Field Mapping view of the screen displays, verify all the field names in your Excel spreadsheet exactly match the Contract Profile fields.
 - If there is a field in Excel Column Header column that is not mapped to a field in the System Field Name column, click the Cancel button to reverse the upload, correct the column heading in your spreadsheet, and then re-upload the file to avoid an Error Report.
 - If there is a mis-match between any two fields, which is due to a typo in the name of a column heading in your Excel spreadsheet, click in the System Field Name column to activate the list, and manually map the fields by selecting the correct field name.

- An acceptable mis-match is when Contract Responsibility appears in the System Field Name column since the corresponding value in the Excel Column Header column will be a type of contract responsibility, such as Contract Manager.
5. Click Validate Excel Data in the toolbar. If Conga Contracts is unable to match a column heading in your Excel spreadsheet to a system field, or match a data entry in the spreadsheet to an item selection in a system field list, an Error Report screen displays. Conga Contracts pinpoints the exact error by identifying the mis-matched field, or the inability to locate an item selection for a field list, and also provides the Excel spreadsheet row in which the error is located. Correct the error and repeat the process of uploading the template.
 6. When the Review Data view of the screen displays, verify the contract data to be uploaded is correct, and click Import Data in the toolbar.
 7. When the Import Complete prompt displays, click OK.
 8. In the Imported Records Report view of the Bulk Data Upload Tool Imported Records screen, verify the correct number of contract records is displayed. The most recent import record displays at the top of the list, along with a time stamp for the import.
 - To reverse the data upload process, click and follow the onscreen prompts.
 9. (Optional) Confirm the upload by searching for the new Contract Profiles that were created using the Search option in the All Contracts browse screen.

Uploading a Bulk Additional Form Template

You need the Bulk Data Upload Tool permission to upload a completed Additional Form template back to Conga Contracts. Prior to uploading the template, you must download it and populate the required fields with data. For an additional form field that is a list, the information entered in the template must exactly match one of the options for the list, as defined in the List Administration screen.

Alternatively, you can use your own Excel spreadsheet as long as the headings in the spreadsheet exactly match the field names in the additional form.

During the upload process, the fields in the template are mapped to the fields in the Additional Form and the data is validated to ensure there are no errors. A successful bulk data upload results in the additional form being added to Contract Profiles or Company Profiles.

1. Click the Gear Icon in the Navigation Toolbar, and click the Bulk Data Upload Tool link in the menu.
2. In the File Select view of the Bulk Data Upload Tool screen, upload the completed additional form template:

- Select the additional form in the alphabetized Object Type list.
 - Additional forms are preceded by Company or Contract, followed by a colon and the name of the form.
 - Click in the Data Loader Import File field.
 - In the Open/Upload window:
 - Navigate to the completed template, and then click it to select it.
 - Click Open.
3. When the Open/Upload window closes, click Continue to Mapping in the toolbar of the Bulk Data Upload Tool screen.
 4. When the Field Mapping view of the screen displays, verify all the field names in your Excel spreadsheet exactly match the Additional Form fields.
 - If there is a field in Excel Column Header column that is not mapped to a field in the System Field Name column, click the Cancel button to reverse the upload, correct the column heading in your spreadsheet, and then re-upload the file to avoid an Error Report.
 - If there is a mis-match between any two fields, which is due to a typo in the name of a column heading in your Excel spreadsheet, click in the System Field Name column to activate the list, and manually map the fields by selecting the correct field name.
 5. Click Validate Excel Data in the toolbar. If Conga Contracts is unable to match a column heading in your Excel spreadsheet to an additional form field, or match a data entry in the spreadsheet to an item selection in a field list, an Error Report screen displays. Conga Contracts pinpoints the exact error by identifying the mismatched field, or the inability to locate an item selection for a field list, and also provides the Excel spreadsheet row in which the error is located. Correct the error and repeat the process of uploading the template.
 6. When the Review Data view of the screen displays, verify the additional form data to be uploaded is correct, and click Import Data in the toolbar.
 7. When the Import Complete prompt displays, click OK.
 8. In the Imported Records Report view of the Bulk Data Upload Tool Imported Records screen, verify the correct number of additional form records is displayed. The most recent import record displays at the top of the list, along with a time stamp for the import.
 - To reverse the data upload process, click and follow the onscreen prompts.
 9. (Optional) Confirm the upload by searching for the new additional forms that were added to the individual Company or Contract Profiles in the Profile's Additional Forms screen.

Rolling Back a Bulk Data Upload

You need the Bulk Data Upload Tool permission to reverse the bulk data upload process, which will remove all the imported data from Conga Contracts. A bulk upload that has been rolled back displays in gray text with a strikethrough effect in the Imported Records Report view of the Bulk Data Upload Tool Imported Records screen.

1. Click the Gear Icon in the Navigation Toolbar, and click the Bulk Data Upload Tool link in the menu.
2. In the File Select view of the Bulk Data Upload Tool screen, click Imported Records in the toolbar.
3. When the Imported Records Report view of the Bulk Data Upload Tool Imported Records screen displays, locate the data import record you want to roll back, and click its icon.
4. In the Roll Back Data prompt, click Yes.
5. Click Back to Bulk Data Upload Tool in the toolbar to return to the default Bulk Data Upload Tool screen.

System Settings

The System Administrator defines basic and advanced system settings, such as the numbering format for Company and Contract Profiles, the parameters for password use, the rules for sending and receiving email messages in Conga Contracts, and the procedures for integrating the third party applications that work in conjunction with Conga Contracts, including DocuSign and Salesforce.

The System Administrator permission should be granted only to an individual who is very knowledgeable about Conga Contracts and understands how each change to the system's configuration can impact both the data stored in the system and the users who rely on this data.

System Settings Overview

The ability to set and change system settings is a permission that should be granted only to those who have an in-depth knowledge of Conga Contracts. They should also understand how each change to the system's configuration can impact both the data stored in the system and the users who rely on this data.

A user with the System Settings Admin permission defines basic and advanced system settings, such as the numbering format for Company and Contract Profiles, the parameters for password use, the rules for sending and receiving email messages, and the procedures for integrating third party applications that work in conjunction with Conga Contracts, such as Salesforce. The System Settings Admin can also control the amount and type of information that displays in each type of email message sent from the program, as well as the portlets that display in the Dashboard when a new user logs in to Conga Contracts for the first time.

For those customers who run Conga Contracts on their own server, the System Settings Admin must export the data that has been added to their program prior to each software release since syncing the customer's program with a new release results in the loss of added data, such as additional forms and the items selections in the lists in program screens. Once the customer is running the most recent version of the software on their server, they must re-import the data they exported to re-populate their database.

For those customers who use the Application Programming Interface (API) to monitor the new companies, contracts, and projects that their users add to Conga Contracts, the System Settings Admin must define the parameters for webhooks. The System Settings Admin can configure a webhook to send an alert to a specific URL whenever a user creates or saves a Company, Contract, and/or Project Profile.

The System Settings Admin can perform the following tasks:

- [Manage Conga Contracts System Settings](#)
- [Manage Email Settings](#)
- [Manage Platform Settings for Salesforce](#)
- [Manage Integration Settings for eSignatures](#)
- [Migrating Data](#)
- [Manage API Settings](#)
- [Manage Dashboard Settings](#)

Managing System Settings

You need the the System Settings Admin permission to define the way data is displayed, security is applied, and global permissions are applied in Conga Contracts.

The System Settings Admin can also edit the email settings to standardize the information contained in the different types of email messages sent from the program, as well as set the parameters for the products that can be integrated with Conga Contracts, such as DocuSign (or Adobe Sign) and Salesforce.

1. Click the Gear Icon in the Navigation Toolbar, and click the System Settings link in the menu.

2. In the System Settings screen, define the default settings for Conga Contracts:

- Base System URL - default URL is <https://appl.novatuscontracts.com>.
- The URL can be customized by clients who host Conga Contracts in-house and want the return address of the emails and deep links sent from the program to display their company name as the sender of the email message.
- Contract Number Format - Enter any combination of the following three variables, in any order, to name your contracts, making sure to enter a dash (-) between each variable:
 - {companyName} - A portion of the company name appears in the contract number. For example, if you want the contract number to contain the first three letters of the company name, add {companyName:3} to the field.
 - {effectiveYear} - reflects the year entered in the Effective Date field in the Contract Profile. For example, if you only want the last two digits of the year to display in the field, add {effectiveYear:2} to the field.
 - {sequence} - Conga Contracts provides a system-generated number to each new Contract Profile, but you can set the number of digits in the contract number. For example, if you anticipate up to 9,999 Contract Profiles will be added to Conga Contracts, add {sequence:4} to the field.
 - {agreementAbbr} - Conga Contracts provides a 3-digit abbreviation of the agreement type. For example, MAS would be added to the contract number for Master contract. For example, if you enter the following into the field: {agreementAbbr}-{companyName:3}-{effectiveYear:2}-{sequence:4}, the first Contract Profile added to a company named Verity Inc., which is a Master Agreement, would be assigned the following number: MAS-VER-18-0001.
- Contract Number Locked - Select if users are not allowed to edit the contract number.
- Request Numbering - Select if you want contract requests to be assigned a system-generated number. When the Request Number Wizard displays, you have the option of editing the numbering formats, as well as applying request numbering to existing contract requests.
 - Request Bundle Number Format - field defaults to {companyName:4}-{sequence:5} for numbering the contract request type bundle. The bundle number is the first four letters of the company name, followed by a system-generated 5-digit number assigned to the request type bundle, which will accommodate up to 99,999 contract requests for a company.
 - Request Number Format - field defaults to -{sequence:3} for numbering the requests for a Request Bundle Number. The request number is a system-generated 3-digit number, which is appended to the request bundle number, and will accommodate 999 contract requests for a company using a bundle type.

- Company Number Format - Use the following two variables, in either order, to create a numbering system for Company Profiles.
- {companyName} - The entire company name appears if you do not place a limit on the number of characters by appending the variable with a colon and a number. For example, if you want the Company Profile to contain the first five letters of the company name, add {companyName:5} to the field.
- {sequence} - Conga Contracts provides a system-generated number to each new Company Profile, but you can set the number of digits in the company number. For example, if you anticipate up to 9,999 Company Profiles will be added to Conga Contracts, add {sequence:4} to the field. For example, if you enter the following into the field: {companyName:5}-{sequence:4}, the first Company Profile added to Conga Contracts, which is for a company named Verity Inc., would be assigned the following number: VERIT-0001.
- Company Number Locked - Select if users are not allowed to edit the company number.
- Failed Login Lockout - Enter the number of times a user must fail to enter the correct login credentials before the system locks them out.
- Failed Lockout Login Delay - Enter the amount of time (in minutes) a user must wait before attempting to login again after they are locked out of the system due to failed login attempts.
- Auto Logout Timer - Enter the amount of time (in minutes) before the system automatically logs out a user when no user activity is detected.
- Password Max Age (days) - Enter the maximum number of days a user can go without changing their password.
- Password History length - Enter the number of new passwords that must be used before an old password can be re-used.
- Auto Disable Days - Enter the number of days a user can go without logging in, before their account is automatically disabled.
- Force Password Auto Disable Days - Enter the number of days a user has to log in and set a new password once an Administrator has issued them a temporary password. This value is also impacted by the value set in the Password Max Age (days) field.
- Begin Workflow Reminder Days - Enter the number of days that a workflow step can remain open. If the step is still open after the number of days has been surpassed, Conga Contracts sends daily messages to the step owner until the step is closed.
- Default Currency Type - Edit the default currency (USD United States of America, Dollars) if your company uses a different currency.
- Date Format - Edit the default date format (Month/Day/Year) if your company uses a different format.

- Number Format - Edit the default number format (American Format [0,000.00]) if your company uses a different format.
- Automatically CC Email Sender - Select if you want users to be copied on any email messages that they send from Conga Contracts. This check box is automatically selected if you select the Use Inbound Email Processing check box since it is included in the Inbound Email Processing option.
- Use Blank Email Template for Messaging - Select if you want users to send email messages from Conga Contracts that contain no HTML formatting, such as enhanced text (bold, italics), graphics, headers, and links.
- Use Inbound Email Processing - Select if you want the responses that users make to the emails they receive from Conga Contracts to be loaded back into the system, along with any document attachments. This feature also applies to the emails users receive requesting them to approve (or decline) a workflow step. If you select this check box, the Automatically CC Email Sender check box is automatically selected.
- Use Strict Inbound Email Checking - Select if you do not want to allow a workflow step owner, who has been assigned the duty of completing the step by the original step owner, to further delegate the authority to a third individual. Conga Contracts accomplishes this by disabling the link in the email message forwarded from the reassigned step owner to the third individual.
- Inbound Email Error Timeout (in Minutes) - Edit the default value (5 minutes) if you want to change the number of minutes that an email address is held in memory when an inbound error message is received stating the email is undeliverable, such as an Out-of-Office Response. This feature prevents emails from continually being sent back and forth (infinite looping) between Conga Contracts and a recipient whose email program generates an unavailable response by setting a time limit.
- Custom Logo - If you want to use your company's logo instead of the Conga Contracts logo in program screens, click the button and follow the onscreen prompts to upload your logo. Logos that are 185 pixels (wide) by 40 pixels (tall) are recommended.
- Auto Expand Additional Party - Select if you want the Additional Parties section of a Contract Profile to automatically be expanded whenever a user opens the Profile and there are additional parties to display.
- Use Difficult Passwords - Select if you want users to adhere to the following enhanced requirements for passwords: (1) Case sensitive (2) Eight (8) characters, or more (3) No white space allowed (4) Must have 3 of these 4 character groups: uppercase, lowercase, numeric, and symbol (5) No alphabetical sequences, such as LMNOP) (6) No numeric sequences, such as 789

- (7) No qwerty sequences, such as QWERTY or ASDFG, which are characters that appear in a line on the keyboard (8) No characters that repeat more than 3 times, and (9) No English dictionary words. The standard requirements are passwords must meet 3 of the following 4 requirements: (1) At least one uppercase alpha character [A-Z] (2) At least one lowercase alpha character [a-z] (3) At least one numeric character [0-9], and (4) At least one symbol [! @ # \$ % ^ & * () + < ? >].
- Enable Auto Passwords - Select if you would like Conga Contracts to create a system-generated password when a new user is added. If this option is selected, an email message is sent to the new user with their temporary password, which the user must change the first time they log in. If this checkbox is checked, and a System Admin's email address is added to the System Setting Forgot Email Password Address, that System Admin may also re-set a password when a User clicks the Forgot Password link, by opening a User Profile and clicking Reset Password. Saving the User Profile would send an email to the User with their temporary password, which the user must change the first time they log in.
 - Company People restricted by Company Group (enhanced people security) - Select to limit a user's access to the people that have been added to the Company Profiles for which the user does not have access. This option removes the access that would have been granted through the Address Book and the Person Browse/Person Profile screens in the user's Tools menu.
 - Enable OCR for uploaded documents - Select if you want Conga Contracts to perform Optical Character Recognition (OCR) on the Word, Excel, and PDF documents that users upload to Company, Contract, and Project Profiles. The OCR feature automatically recognizes text and values stored in all uploaded documents, which will then allow users to quickly and easily locate documents containing a keyword, name, value, or text string by running an Elastic Search or Document Search. However, if an OCR'ed PDF document is downloaded from Conga Contracts, it is no longer a text-searchable PDF.
 - Create a new revision of the OCR'ed PDF including the searchable text - Select if you want the scanned documents that users upload to Company, Contract, and Project Profiles to be converted to a searchable PDF so that the OCR feature can be used to locate text and values in the scanned document. This option creates a revision of the original document with the same file name, and the revision is used whenever an Elastic Search or Classic Search is run. If the revision is downloaded, it remains a text-searchable PDF that can be shared outside Conga Contracts.
 - Enable profile edit locks - Select if you want to prevent users from editing the same Company, Contract, or Project Profile at the same time, which results in only one user's edits being captured.

- Enable timezone calculation on reports - Select if you want users to be able to display their preferred time zone in any report they create/run that includes a time stamp field. Users can change the default time zone from UTC (Coordinated Universal Time) in their User Preferences window (System view) by making a different selection in the Time Zone list.
 - Show related company contracts when selecting an agreement link - Select if you want users to be able to link an incorporated contract to a contract of a related company using the Agreement Link list in the Contract Profile screen. The options in the Agreement Link list include the contracts of the original company, as well as the contracts of any companies identified the original company's Relationships screen.
 - Prevent Email from being sent to removed recipients - Select if you want users who respond to an email message sent from Conga Contracts to remove recipients when they respond to the message. Recipients can be removed from both the TO and CC fields.
 - Allow incorporated contracts to be created without a parent - select if users can add an incorporated, or child, Contract Profile without linking it to a root Contract Profile. A Missing Parent check box displays in the Contract Profile screen of an incorporated contract, and when selected, the Agreement Link field is hidden.
 - Forgot Password Email Address - Make a selection in the list to identify the person responsible for resetting user passwords. When a user selects the Forgot Your Password link in the Login screen, the person selected in this list receives an email message, advising them that this user's password needs to be reset.
 - eSignature sign in (for Adobe Sign users only) - click to identify the sender of the envelope when the eSignature Package Wizard is run and a document is sent for electronic signature using Adobe Sign:
 - Allow pop-ups in your browser during the eSignature Sign In procedure.
3. In the Login prompt, enter the credentials for the person whose name you want to appear as the sender of the envelope, and click Submit.
 4. When the Adobe Sign login screen displays in a new tab, enter the same credentials you entered in the Login prompt, and click Sign In.
 5. When a new browser tab opens with the EchoSign Auth Complete message as confirmation, close the tab.
 6. 3.Click Save.

Managing Email Settings

You need the System Settings Admin permission to standardize the information contained in the different types of email messages sent from Contracts. You can standardize each message type by providing the text for the message, identifying the program fields to be included in the message, and adding any disclaimers. A company logo can also be added to each message type to identify your company as the sender, rather than Contracts.

There are 11 types of system email messages that can be standardized: Tasks, Events, Messaging, Workflow, Request Created, Request Accepted, Request Declined, Request Reassigned, Scorecard, Flow, and Flow Notification that a step needs to be completed.

1. Click the Gear Icon in the Navigation Toolbar, and click the System Settings link in the menu.
2. In the System Settings screen, click the Email Settings tab.
3. In the Email Settings view of the screen, select the type of email message you want to standardize in the Email Type list. By default, Tasks is selected.
4. Clear the Selected check box for each program field you do not want to include in the email message. By default, all checkboxes are selected.
5. A program field is appended with Company, Contract, or Project if it is not located in the screen of the selected email type.
6. (Optional) Enter text in the Information field to provide a standard message, along with the data from the program fields included in the email message. Your text appears at the beginning of the message.
7. (Optional) Enter text in the Disclaimer field to provide a legal disclaimer for all email messages of this type.
8. (Optional) Click Select in the Custom Email Logo field and follow the onscreen prompts to add a custom logo to the message type. Logos that are 185 pixels (wide) by 40 pixels (tall) are recommended.
9. Click Save.

Managing Integration Settings for eSignatures

You need the System Settings Admin permission to integrate third party applications that work in conjunction with Contracts such as Salesforce, BidSync, DocuSign, and Adobe Sign. DocuSign and Adobe Sign are applications that allow electronic signatures (eSignatures) to be obtained on a contract document in a secure environment.

BidSync is a tool used by Public Agencies to organize, automate, and manage their procurement process. It is also used by suppliers to increase their efficiency in responding to Public Agency requests for bids and proposals.

1. Click the Gear Icon in the Navigation Toolbar, and click the System Settings link in the menu.
2. In the System Settings screen, click the Integration Settings tab.
3. In the Integration Settings screen, ensure the eSignature Settings tab, located along the left border of the screen, is selected.

 **Warning:**

If your system is not integrated with BidSync, there will be no tabs in this screen.

4. Set the defaults for DocuSign or Adobe Sign:
 - Use Template Only - Select to compel the use of a template in identifying the signatories (and any recipients) for a contract when running the eSignature Package Wizard.
 - Use this option if you want users to select only signatories and recipients whose email addresses are listed in the Address Book.
 - Allow Advanced Templates and Actions - Select to give users access to the advanced options and actions offered by DocuSign when running the eSignature Package Wizard.
 - Automatically Complete eSignature Packages - Select to automatically complete the document packages that are created when the eSignature Package Wizard is run and the contract documents have been electronically signed by all the signatories.
 - Retain Original Document Type - Select to ensure the document being sent for electronic signature retains its original document type when it is signed and then saved as the final document in the Contract Profile.
 - Default Document Type for Signed Documents - If the Retain Original Document Type check box is not selected, select the document type you want to be assigned to the signed contract document.
 - Suppress eSignature Complete Email - Select to stop the system emails that are generated after the eSignature process is complete and the document package or eSignature package is closed.
 - Close eSignature Package When Declined - Select if you want Conga Contracts to automatically:
 - Move a contract flow to the next step when the eSignature Package Wizard is an approval step in the flow and any signatory selects the Decline option when requested to provide their electronic signature.

- Close the eSignature package that is created when the eSignature Package Wizard is run, and any signatory selects the Decline option when requested to provide their electronic signature.
5. Click Save.

Managing Platform Settings for Salesforce

You need the the System Settings Admin permission to define the platform settings that integrate Conga Contracts with Salesforce, which is a customer relationship management (CRM) product. From Salesforce, your salespeople can submit contract requests directly to Conga Contracts for review and acceptance. Once a Salesforce request is approved in Conga Contracts, a Company Profile and/or Contract Profile is created and any documents included in the request are added to the Contract Profile where they can be negotiated, revised, and signed electronically to produce a legally binding contract. The final contract is then managed in Conga Contracts using event alerts for renewals, payments, and product updates, as well as performance and quality evaluations using scorecards, clause revisions using document packages, and other contract-related activities.

Migrating Data

You need the System Settings Admin permission to migrate data, which involves exporting data from a previous version of the software, and then importing the exported data into the most recent version of the software. This is necessary if your company is hosting the software on their server, instead of using the Contracts server. Your company's software should be synchronized with the current version of the software whenever Contracts makes a major upgrade, which is usually every 3-4 months.

Exporting and Importing System Data

- Contracts has a new and simplified user interface for exporting and importing data.
- You must export the data added to your instance of Contracts before synchronizing the software or data will be lost, such as additional forms, workflow templates, and list items. Once your company's software has been successfully upgraded to the new release, you must import the exported data.
- The Import and Export tools are accessible in System Settings under the Administration section of Conga Contracts.

Exporting Data

- Data export must be performed prior to the synchronization of your software with the software currently running on the URL for Contracts.

Importing Data

- The import of exported data is performed after the synchronization of your Conga Contracts software with the most recent version of Contracts.
- To import data into Contracts with the Import tool, click the Choose File button and select the file containing the data. Once selected, click the Import button to successfully import the data from the file.

Managing API Settings

The Application Programming Interface (API) settings allow the System Administrator to monitor the new companies, contracts, and projects that users enter in the Contracts system, as well as any updates they make to the Company, Contract, and Project Profiles. This monitoring occurs via individual web hooks, which Administrators can set up to automatically "call back" information that users attempt to save to the Contracts system, while informing users via system messages that their new or updated data has not been saved. Web hooks can be set up to monitor data that has been entered before or after a user adds or updates company, contract, or project data.

Navigation Toolbar	Click on the Gear Icon to display a menu, and select System Settings to display the System Settings screen. Note: If the System Settings link is not present, you do not have permission to change the system settings in Conga Contracts.
API Settings tab	Click on the tab to display the API Settings screen.
Default Media Type list	Select application/xml or application/json to identify your company's REST API.
Default Secret field	Enter the password for your REST API.
Default URL	Enter the URL for your REST API.

New button	Click to set up a new web hook record.
Hook Type list	Make a selection in the list to set up the first type of web hook you want to create. The options are Before/After Company Save, Before/After Contract Save, and Before/After Project Save.
URL field	Click in the field to enable it, and enter the URL for the web hook. This is typically the URL located on your company's intranet.
Media Type list	Select Use default if you want to use the media type you selected for the API (Step C). Otherwise, select application/xml or application/json to identify the media type for the web hook.
Secret field	Click in the field to enable it, and enter the password for the web hook. Repeat Steps F-J to add additional web hooks.
Delete icon	If you want to delete a web hook record, click on its X icon.
Save button	Click Save to save the API settings.

Managing Dashboard Settings

You need the the System Settings Admin permission to manage the default portlets that appear on the home page for new program users. The default portlets are the Recently Viewed Companies, Recently Viewed Contracts, and Active Workflow Items portlets.

1. Click the Gear Icon in the Navigation Toolbar, and click the System Settings link in the menu.
2. Click the Dashboard tab.
3. In the Dashboard screen:
 - Click +Add Portlet to add a portlet.
 - Click X to remove a portlet.
 - (Optional) Reposition and resize a portlet.
 - (Optional) Customize the fields that display in a portlet.
4. Exit the screen by clicking another tab in the System Settings screen, a link in the Navigation Toolbar, or the company logo to return to the Dashboard.

eSignature Integration

Conga Contracts integration options include Conga Sign, DocuSign, and Adobe Sign.

Managing Integration Settings for eSignature

There are integration settings used to control the third party applications that work in conjunction with Contracts such as Salesforce, BidSync, DocuSign, and Adobe Sign. DocuSign and Adobe Sign are applications that allow electronic signatures (eSignatures) to be obtained on a contract document in a secure environment.

BidSync is a tool used by Public Agencies to organize, automate, and manage their procurement process. It is also used by suppliers to increase their efficiency in responding to Public Agency requests for bids and proposals.

1. Click Admin in the Navigation Toolbar, and click the System Settings link.
2. In the System Settings screen, click the Integration Settings tab.
3. In the Integration Settings screen, ensure the eSignature Settings tab, located along the left border of the screen, is selected.

 **Important:**

If your system is not integrated with BidSync, there will be no tabs in this screen.

4. Set the defaults for DocuSign or Adobe Sign:
 - Use Template Only - Select to compel the use of a template in identifying the signatories (and any recipients) for a contract when running the eSignature Package Wizard.
 - Using a template restricts users to selecting signatories and recipients whose email addresses are listed in the Address Book.
 - Allow Advanced Templates and Actions - Select to give users access to the advanced options and actions offered by DocuSign when running the eSignature Package Wizard.
 - Automatically Complete eSignature Packages - Select to automatically complete the document packages that are created when the eSignature Package Wizard is run and the contract documents have been electronically signed by all the signatories.

- Retain Original Document Type - Select to ensure the document being sent for electronic signature retains its original document type when it is signed and then saved as the final document in the Contract Profile.
- Default Document Type for Signed Documents - If the Retain Original Document Type check box is not selected, select the document type you want to be assigned to the signed contract document.
- Suppress eSignature Complete Email - Select to stop the system emails that are generated after the eSignature process is complete, and the document package or eSignature package is closed.
- Close eSignature Package When Declined - Select if you want Contracts to automatically:
- Move a contract flow to the next step when the eSignature Package Wizard is a step in the flow and any signatory selects the Decline option when requested to provide their electronic signature.
- Close the eSignature package that is created when the eSignature Package Wizard is run, and any signatory selects the Decline option when requested to provide their electronic signature.

5. Click Save.

Conga Contracts eSignature Integration Video

For more information on how to integrate eSignature, click [here](#) to see a video.

Conga Sign Integration with Conga Contracts

Integrate Conga Sign with Conga Contracts to seamlessly send Contract documents for e-signature. This integration allows users to initiate and complete the e-signature process from Conga Contracts. All final signed documents are automatically stored in Conga Contracts without any additional configuration.

Conga Sign integration with Conga Contracts is a paid add-on. Contact your Customer Success Manager or Conga Support to enable the Conga Sign integration for your Conga Contracts instance.

Integrate and Send a Contract Document with Conga Sign

Follow the steps below to leverage Conga Sign's e-signature platform with a Contract document in Conga Contracts.

1. After Conga Sign is enabled for your Conga Contracts environment, navigate to a Contract record.
 - The Contract must have an associated Document record to utilize e-signature.
2. Click Wizard Tools and select eSignature Package Wizard.
3. Check the checkbox field next to the Contract document you are sending for e-signature.
 - (Optional) Pre-tag the Contract document with [Conga Sign tags](#) to automatically populate Conga Sign tags. This eliminates the need for Conga Contracts users to manually add and place tags in the tagging user interface. Pre-tagging is compatible with both Word documents and PDF files.
4. Add Recipients to the Conga Sign package.
 - Complete the Email, First Name, and Last Name fields to add a new Recipient.
 - Select a number value for the Order field to determine Recipient Signing Order.
 - If all Recipients have the same Order value, all Recipients receive the Conga Sign package request at the same time and can complete their assigned Conga Sign tags independently of the other Recipients.
 - If Recipients have different Order values, they receive the Conga Sign package request in sequential order. Recipients (aside from the first designated Recipient) are dependent on preceding Recipients completing their assigned Conga Sign tags before they receive the Conga Sign package and complete their assigned tags.
For Example: Recipient 2 does not receive the Conga Sign package until Recipient 1 completes all assigned tags. Once Recipient 1 completes the assigned tags, Recipient 2 receives the Conga Sign package and can complete all assigned tags.
 - Leverage Recipient Groups by setting multiple Recipients to the same Order value and setting other Recipients to have different Order values.
For Example: use Recipient Groups by assigning three Recipients an Order value of 1. Then assign all remaining Recipients an Order value of 2. All Recipients with an Order value of 1 receive the Conga Sign Transaction at the same time and can complete assigned tags independently of one another. Recipients with an Order value of 2 do not receive the Conga Sign package until all Recipients with an Order value of 1 complete their assigned tags.
- Select an Action for each Recipient.
 - The Sign action requires the Recipient to complete assigned tags
 - The Receive a Copy action sends a copy to the Recipient and does not assign any tags.

- (Optional) Click Add Recipient to add additional Recipients to the Conga Sign package.
5. Customize the Additional Administrator Selection fields.
 - The Package Name field auto-generates a Package Name although the name is editable.
 - Customize the Email Message field to include a customized email body message that Recipients initially receive with the Conga Sign package.
 - Customize the Package Description field to provide a description of the Contract document to Recipients before they begin signing.
 6. Click Save.
 7. Drag and drop Conga Sign tags in the tagging user interface to assign tags for each Recipient.
 - This is not required if the document is pre-tagged.
 - Write back tags are not available in Conga Sign for Conga Contracts.
 8. Click Send once the Contract document is ready for signature.

The Signing Experience with Conga Sign in Conga Contracts

Conga Sign for Conga Contracts provides a simple and intuitive signing experience for Recipients.

- Once a Conga Contracts user sends a Conga Sign package from Conga Contracts, they automatically return to the Contract record in Conga Contracts and Recipients receive an initial email prompting them to begin the e-signature process.
- Once the Recipient opens the Conga Sign email and clicks the Conga Sign link, they are directed to a Conga Contracts webpage prompting them to click Sign.
- Clicking the Sign button accesses the Conga Sign signing user interface. The Recipient then has the option to change their assigned Name and Initials, as well as the default signature style, before completing assigned Conga Sign tags.
- The Recipient clicks Agree and Start Signing to begin completing their assigned Conga Tags. Recipients simply click the tags to fill out their signature or initials. For other fields such as Title and custom text tags, recipients must click the tags and type in the relevant information. When all required tags are complete, the recipient completes and returns the document by clicking Complete Signing.
- Upon all signers completing the signature process, the Sender and Recipients are notified with an email containing the final Signed Contract document as a PDF file.

Audit Trail and Tracking the Signature Process

Conga Contracts users can easily track the status of the Conga Sign package on the Contract record by navigating to Document Packages under the Links section.

- Click the View Document Package Profile icon for more information such as assigned Users and Signers, Roles, Duration, and document size.
- In addition to the Document Package records, the Sender and Recipients can see a more detailed signature history of the document by accessing the Audit Trail from the final signed PDF file. The audit trail is easily accessed by clicking a completed signature or initial tag in the final PDF document.

DocuSign Overview

The eSignature Package Wizard links Contracts to the DocuSign application, and guides users through the process of obtaining eSignatures on a contract. In the Wizard, Users identify the documents to be signed, identify the signatories, and insert signature tags in the document to indicate where each signatory must provide their eSignature.

DocuSign is a company that provides a digital transaction management tool that allows users to send and electronically sign contract documents in a reliable and secure environment, producing a legally binding and enforceable document. Contracts has partnered with DocuSign in order to provide its customers with the ability to obtain electronic signatures (eSignatures) on a contract document directly from the Contracts system.

The DocuSign application in Contracts is accessed using the [eSignature Package Wizard](#). The wizard guides users through a simple 4-step process to obtain signatures on a contract document electronically:

1. Identify the documents for eSignature. The format of the documents that can be sent for eSignature include Microsoft Word, PDF, and other common document formats.
2. Identify the signatories and recipients. The names and email addresses of the signatories and recipients can be pulled from the Contracts Address Book or new email addresses and names can be added. The order in which signatories and recipients receive the email containing the document for eSignature (known as the envelope) can be staggered so that the second signatory receives the document after the first signatory has signed it, and any recipients receive the email containing the document after both signatories have provided their eSignatures. Administrators with a DocuSign login and password can create the templates that are used in the

eSignature Package Wizard. These templates define the number of signers and recipients needed in the electronic signing process.

3. Insert Signature tags and other tags. A simple drag-and-drop process is used to insert Signature tags, Initial tags, and Date tags into the contract document to indicate the locations where signatories need to sign, initial, and date the document. There are also several other tags, such as Name, Title, Email Address, and Attachment, to indicate places in the document where an individual needs to furnish their name (e.g., witness), provide their title, enter their email address, or upload an attachment.
4. Send the envelope. DocuSign sends an email to each signatory and recipient, which contains a link to the DocuSign cloud where signatories can sign the document and recipients can view the document. Signatories and recipients can also download and print a copy of the final executed document.

For more information, see the eSignature Process in the Contracts User Guide.

Administrators can control three of the settings associated with the DocuSign process. See [Managing Integration Settings for DocuSign](#).

DocuSign customers who want to disable the connection between DocuSign and Contracts must log in to their DocuSign account and revoke the OAuth token from there since the token cannot be revoked from Contracts.

DocuSign Self Service implementation

You can specify your own DocuSign endpoints.

You can switch your Contracts system instance between separate DocuSign instances. For example, you might have a production and a sandbox version of DocuSign running in your Contracts instance so you have the option to connect the sandbox to your Contracts instance to test DocuSign functionality before you switch to your production instance.

Self Service DocuSign settings management

You can manage your DocuSign integration settings like usernames, passwords and other security features in the Admin section of Contracts. Before you begin, you need your DocuSign API Username and Account ID. To obtain your DocuSign API Username and Account ID, take the following steps:

1. Log in to your DocuSign account.
2. Click on Profile
3. Admin.
4. Under Integration on the left, click on API and Keys.

5. Under My Account Information, you will need the API Username and the API Account ID.
6. Next, return to Contracts to complete the integration setup.
7. Go to Admin
8. System Settings
9. Integration > Settings.
10. Enter the API Account ID under DocuSign Account Id.
11. Enter the name of your DocuSign Account name under DocuSign Account Name.
12. Enter the API Username under DocuSign Username.
13. Enter your DocuSign password under DocuSign Password.
14. Click Update.

The values relate to the fields and with the exception of DocuSign Password, match the values in the UserCompany table in the Conga Contracts database.

Self Service DocuSign templates

You can use any company designated DocuSign templates. An administrator can select a template on the request type or in the New Contracts area. The template is validated with DocuSign to ensure configurations are correct. If the number of available signers on the document is not an exact match to the number of designated signers per contract profile then the automatic process stops.

Users are able to send Nondisclosure Agreements (NDA) through eSignature automation.

How it works

Conga Contracts requires a single Enterprise Admin DocuSign or user account to serve as the connection between Conga Contracts and the customer. This account needs to be a DocuSign Admin user, and dedicated specifically for Conga Contracts use because of the back-end API connection required to process packages.

It's strongly recommend to create a generic system user for this account, optimally with a shared internal email account (for example: legal@companyname.com) as its DocuSign username, and to use a generic first and last name (for example, First Name: Your Company Last Name: eSignature) when the account is created in DocuSign. As an administrator, you must have access to the shared mailbox to verify account creation with DocuSign.

Conga Contracts Full and Casual Users are given permission to set up eSignature packages within the system to send them out for eSignature. It does not matter who or how

many people are e-signing (signatories do not need to be Conga Contracts users), only one DocuSign license is required.

Salesforce Integrations

Select a topic for more information on the integration of Conga Contracts for Salesforce and Conga Contracts.

- [Overview](#)
- [Configuration](#)
- [Troubleshooting](#)

Overview

The Conga Suite section is a collection of topics related to the integration of Conga Contracts for Salesforce and Conga Contracts. The Suite section addresses the integration and configuration of these Conga products.

Overview of CLM Suite Architecture

Conga Suite technical overview.

The Conga Contracts Lifecycle Management Suite is a service-oriented architectural framework that allows Conga applications and services to communicate and integrate seamlessly with each other. A common set of services are available for applications to use across the suite, world-wide, with the highest levels of security.

Suite functionality for Conga Contracts for Salesforce and Conga Contracts

The current implementation of the Suite includes two Conga products; Conga Contracts for Salesforce and Conga Contracts.

The suite functionality currently has two key pieces: External File Repository and Data Synchronization

The Conga file repository allows files to be stored in the Conga Cloud and accessed by both the Suite and repository independently or in tandem with each other. The external repository can be used independently of data synchronization for Salesforce.

Data synchronization (data sync in Salesforce) allows for data records to be synced between Salesforce and Conga Contracts. Mapping data is configurable and the Contract

Request feature is built into the framework. Data sync cannot be used independently of the Conga file repository.

The suite uses an authorization service to connect systems together, with a user-specific connection. The authorization service works in both production and sandbox environments. In Salesforce Orgs, named API users are used during the OAuth flow. The connection initialed in Conga Contracts for Salesforce is authenticated and redeemed in Conga Contracts.

External File repository

Conga Contracts for Salesforce files like contracts are required without attachments. All user interaction mirrors Salesforce such as downloading files, uploading files, and all other access through the ContentDocument and ContentVersion objects. Again, the files can be stored in the Conga Cloud or off Suite and accessed by both systems.

New files being uploaded to the external repository are automatically synced when a file is uploaded to Salesforce and a flag is set on the Content Version Object (IsCongaFile__c) and the External Repo flag is set. Automatic synchronization is also possible when:

A flag is set by Conga Composer.

A file is uploaded to Conga Contracts for Salesforce and the field is manually updated.

A file is uploaded to Conga Contracts for Salesforce and the field is set through a trigger.

Conga Contracts functionality mirrors Contracts for Salesforce but files are stored and external repository if authorization services are configured. All Conga Contracts files linked to Contract Profile documents are stored in the external repository when authorized. For a file to be accessible from both systems, the document needs to be connected to a data record that is synced.

Data Synchronization

Data sync allows records to be used across platforms. Syncing data cannot be done independently from the external repository. Data synchronization is triggered when you create or update mapped fields in Conga Contracts or Contracts for Salesforce. The following values can be synced:

- Objects (Account to Company, Contract to Contract, Custom Object to Contracts)Fields (Name to Name, Status to Status)Values (Pending to Draft)Records (Acme to Acme Inc.)

What criteria need to be met to send data? If you want to prevent updates, there is an Opt Out (exclusion) functionality. The Opt Out logic creates a gate to prevent constant updates. For example: Contract Value > \$1,000,000 and Status is Approved, IF:

False = Data Pushes | Synced

True = Does not synced

What logic drives the creation of the Contract Request? Similar to exclusion logic, there is a boolean field that flags whether the synchronization needs approval. The field is implemented on the Contract Profile in Conga Contracts only. For example, IF:

No Approval = Creates Contract Profile

Needs Approval = Creates Contract Request and is stored in the Conga Contracts queue. Accounts and Companies Approvals do not exist.

Configuration

This section describes how to configuring the CLM Suite.

- [Audit field permissions and creating content versions](#)
- [Configuring Contracts for Salesforce and Conga Contracts](#)
- [Configuring Suite settings](#)
- [Set Up Conga Contracts with Conga Contracts Quickstart](#)
- [Conga Platform File Storage Options](#)
- [Installing and Configuring the Quickstart](#)
- [Contract Management Life Cycles after Execution \(Signature\)](#)

Audit field permissions and creating content versions

When the API user has the audit field permissions turned on, the fields will be maintained when creating content versions. Created Date and Created By are maintained when the Suite file is versioned, deleted and recreated.

To enable audit field permissions, take the following steps:

1. Navigate to Salesforce Home and then User Interface.
2. Select Enable the Salesforce Classic: 2010 User Instance Theme.
3. Navigate back to Salesforce Home and search for Permissions.
4. Select Permission Sets.
5. Under Enter permission set the following information:
 - Label: Allow API User To Set Audit Fields

- API Name: Allow_API_User_To_Set_Audit_Fields
- 6. Select Set Audit Fields upon Record Creation.
- 7. Select Update Records with Inactive Owners.
- 8. Go to Administer, then Manage Users.
- 9. Under Permissions Sets, select Allow API User To Set Audit Fields and enable all fields that apply.
- 10. Click Add Assignments and locate and add users who need permissions. Ensure users are Active by checking the Active column.
- 11. Go to Administer, then Manage Users.
- 12. Under Permissions Sets, go to Assign Users and select All Users to see users with permissions.

Configuring Contracts for Salesforce and Conga Contracts

You can enable the Conga Suite to integrate Conga Contracts for Salesforce (CCFS) and Conga Contracts. You must enable the suite common file storage system. You can create documents in Contracts for Salesforce and store the documents in Conga Contracts. Data is synched between systems. You must map objects and fields located in Conga Contracts for Salesforce to Conga Contracts objects. All fields, field values, the direction you want to sync data, and the primary system that wins conflicts.

Before you begin

Before you configure CCFS to communicate with Conga Contracts, you must enable the Conga Suite.

To ensure the suite is enabled

1. In Salesforce, locate a Managed User -
2. Profiles -
3. System Administrator -
4. Apex classes -
5. profiles -
6. Edit. Select and move all Apex classes related to Platform. Click Save.
7. Enable Visual Force page access. Select Edit - > All Apex classes.
8. Add Remote site settings. Go to Conga Platform -
9. Active Platform file service -
10. Active.

11. Add the Boolean field (for your customer, add customer fields). Add all Custom, Accounts and New Custom fields.
12. Go to Contracts Setup tab, Select Platform and refresh to see the buttons enabled.
13. Set up an external system. Go to Contracts Setup tab -
14. Platform -
15. Connect to Contracts. For example: quote-
16. opportunity-
17. opportunity name.

Enable the platform to store contract files

You must establish a connection between the platform, CCFS, and Conga Contracts.

To set up connections in Conga Contracts

1. Click Connection in the tree. This creates a flag on the file object that denotes which one is going to be integrated with a field name.
 - In Composer, you'd look for field name. The following instructions assume you are using Composer to create a document.
2. Go create a field. Name it IsCongafile and set the field to True. This integrates the field with Conga Contracts. If the field is set to False, it integrates it with CCFS.
3. Link the Content Custom field and field value you used in your Composer solution to create the document. Until the flag is set to True, nothing gets sent to the repository. Everything stays in Salesforce. Files cannot be in both locations.
4. Establish a connection between systems.
 - In Contracts for Salesforce, go to the Platforms
 - Connect to the platform. The authorization component establishes user access and authorizes all transactions between systems.
 - Click Connect to access your files and enable transactions between CCFS and Conga Contracts.
5. Give your system a new alias and Click Generate New Code. Copy the code to your clipboard. The code is redeemable for 48 hours only.
6. In Conga Contracts, go to Admin
7. System Setting
8. Conga Platform. In Conga Contracts, select an alias. You are calling the other system so use a unique name that dictates what system you want to use, for example: SFprod or SFDev.

The external file repository logic connects CCFS to Conga Contracts. The Suite syncs the data of mapped fields and objects.

To disable the connection, you must turn off all the connections so that files are not lost. You see an error that you cannot disable the connection unless you delete all the connections.

Best practices and recommendations:

- The friendly name is no more than 30 alphanumeric characters
- Copy code into the clipboards

Configuring Suite settings

You must configure Conga Contracts for Salesforce and Conga Contracts to communicate with each other.

Configuring the Conga Suite

Prerequisites

- Administrators must have permissions to all {{CCFS}} (CCFS) and Conga Suite required Apex classes and Visualforce pages.
- Ensure all CCFS and Conga Contracts Remote Sites are active.
- For this configuration, administrators must know what objects and custom objects and related fields are required for their client's configuration for both CCFS and Conga Contracts.
- The latest version of CCFS must be installed.
- Administrators must know what users need access to the Suite.
- Administrators need permissions to create new request types in Conga Contracts.

Required Conga Contracts fields:

- Legal Entity
- Agreement Type
- Term Type
- Contract Type
- Contract Group
- Contracts Status
- Account IDBefore you begin

1. Log into our CCFS org. Remember: You must on the latest version of CCFS.
2. Go to All tabs
3. Conga Contract Set Up

4. Connect with OAuth. In the Region section, select United States > Connect.
5. Send your 15 digit Salesforce Org ID to your Conga representative so they can enable the Suite in your Salesforce Org.
6. Administrators: Refresh your Org and verify that Suite appears in the left-side panel in CCFS.

Enable external file storage

Enable external file storage in Suite settings for the systems you want to communicate with each another.

1. In CCFS select Platform > General > Enable Use External File storage > Save.
2. Select Platform > Connections. Click connect and Allow on the Salesforce OAuth prompt. To verify your connection is successful, the following message appears: "Successfully identified you as Conga Contracts and your system is now linked to the platform. You can now close this window."
 - Give the UI a few seconds to fresh on the backend.
 - You are now connected to US production for the Suite ONLY. You can now have files sync to the Conga Platform but the files are NOT synced to an external repository until an external connection is established.
3. Go to Connections
4. New external connection. Give the connection a friendly name for the user's system. For example: Regina's Legal System. From System, select Conga Contracts.
5. Copy the authentication code.
6. Log into Conga Contracts. Select Admin > System Settings > Conga Platform Settings.
 - IMPORTANT: If the Conga Platform Settings tab does not exist in system settings, contact Joe Minik.
7. In Conga Contracts, select Click here to connect to the Conga Platform. Click Allow.
8. Go back to Conga Platform Settings and refresh your screen.
9. Give the system being connected to CCFS. In this case, give other system (Conga Contracts) a Friendly name. Friendly name example: Regina's Legal System. From System, select Salesforce.
10. Paste the copied code you received from the CCFS Connections tab. Click Connect and a success message appears.
11. Go back to CCFS Connections tab and click Connect. You now see connections in the table that have the friendly names you created.
12. You now see the Friendly name you created. For this example, select

Map Salesforce Fields to Conga Contracts fields

You need to ensure that objects and fields in Conga Contracts exist in Salesforce. All required fields and picklist values need to be created in Salesforce.

1. In CCFS, select Platform > Your Friendly Name > Object Mapping > Choose Object Mapping.
2. Select the Salesforce Object and the corresponding Conga Contracts objects. For example: Salesforce Account object maps to Conga Contracts Company object.
3. Select the necessary fields and the syncing direction. For example: In Salesforce, select Account name and in Conga Contracts, select Company name. Select a global direction and Primary field. Click Add field.
 - Defaults: Bi-directional sync and Conga Contracts.
 - If the global direction has a conflict, you must specify the global primary winner.
4. Continue to add fields until all required fields are added. Review all picklist value mappings settings.

EXCLUSIONS

Specify whether or not to exclude an account from syncing. If you want to EXCLUDE Salesforce from syncing data to Conga Contracts, you must select a Boolean field. For example, you want to enable Conga Platform Exclude because it is a checkbox. If you want to EXCLUDE Conga Contracts from syncing to Salesforce, select Conga Platform Exclude.

APPROVALS

You can only approve contracts in Conga Contracts. To assign approvals:

1. Go to Object Mapping at the top of the screen and select Enable Mapping > Save. Current Mappings now appear.
2. Create a second mapping. Map a Conga Contracts contract to a Salesforce Group object. Repeat the same mapping instructions as before.
3. Map the Salesforce lookup field which is called an Account ID. Map to Conga Contracts object called UUID. In the Account ID to Company UUID. Select Account Name in the Description Field.

If you're mapping the the Conga Contracts Contract Number, it must map to the CCFS Contract Number.

Approval is now enabled. If you want an Contract in Salesforce you must specify a Boolean field. For example: Require Approval. These fields do not need to be checked by the user.

VALIDATION

To validate that your Salesforce configuration works:

1. Navigate to Accounts in Salesforce.
2. Create New Mapped Account in Salesforce. For example: My Account. Company group and Status are required for Conga Contracts. Click Save.
3. Select a mapped account. Add all required fields and click Save.

4. Go to Account Layout
5. Visualforce page
6. Account sync Status. Drag the button to your layout. You see a "Synced" successful" message. In the Conga Contracts company profile, you should see the new account, for example: My Account
7. Create a New Contract and ensure the contract mappings works.

To validate that the Conga Contract request approvals process works:

1. In Conga Contracts, go to Admin
2. Contract request types
3. New request bundle types.
4. Create a New Request Type. To learn more, see [Contract Request Types](#).
5. Create a New Contract. Check the Boolean field on the approval section mapping and Save. You see "Pending Approval" in status widget.
6. Go to My approvals and see the request and continue the approval process as desired. To learn more, see [My Contract Approvals](#).


Set Up Conga Contracts with Conga Contracts Quickstart

Conga Contracts Quickstart

Conga Contracts Quickstart is an optional add-on to Contracts for Salesforce to enable subscribers to quickly set up an integration between Conga Contracts for Salesforce and Conga Contracts.

When installed, the following components are automatically created:

- A set of minimum required fields needed to sync Accounts and Contracts.
- A checkbox on the ContentVersion object to indicate if a Salesforce file should be stored on the Conga Contracts Suite.
- A custom content download handler Apex class for downloading Salesforce files stored on the Conga Contracts Suite.
- Conga Contracts Quickstart permission set to conveniently provide users access to the installed components.
- A Send Request custom button that delivers contract requests to Conga Contracts. The button must be added to the Contracts page layout.

 The Conga Contracts Quickstart is an unmanaged package. Components exist natively on the subscriber Org so that subscribers have full access to the components.

Follow the steps below to setup Contracts for Salesforce with Conga Contracts Quickstart.

Set Up Conga Contracts with Conga Contracts Quickstart

1. Install the Conga Contracts Quickstart installed package: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t50000000RcZaAAK>.
2. In Salesforce Setup, use the Quick Find search function to access Remote Site Settings.
 - In Remote Site Settings, click Edit on the listed Remote Sites below, check the Active checkbox field, and click Save.Conga_Platform_File_Service_NA and Conga_Platform_NA.
 - Ensure that you follow these instructions for the appropriate remote site that match your region. For example, if you are located in Ireland, ensure that the Conga_Platform_File_Service_EU is checked to Active.
3. In Salesforce Setup, use the Quick Find search function to navigate to Permission Sets.
 - Click the Conga Contracts QuickStart Permission Set.
 - Click Manage Assignments and add your Conga Contracts users by selecting them with the Add Assignments button.
 - Navigate back to Permissions Set and assign the Conga Redlining Permission Set to the appropriate users.
4. Navigate to the Conga Contracts Lightning App and click Conga Contracts Setup.
 - In Conga Contracts Setup, click General under the Platforms section.
 - Toggle the Use External File Storage button to checked and then click Save.
 - Under the Platform section of Conga Contracts Setup, click Connections.
 - Click New External Connection.
 - Fill out the Friendly Name field (the entered value names the connection to the Conga Contracts platform) and choose Conga Contracts for the System field.
 - Click Generate Code and copy the produced code.
5. In a different browser tab, login to your Conga Contracts instance.
 - Click the Admin gear wheel icon and select System Settings.
 - Click Conga Platform Settings and then click Click here to connect to the Conga Platform.
 - Click Allow in the browser tab that opens up and then close the browser after the connection is verified.
 - Refresh the browser and navigate back to Conga Platform Settings.
 - Enter in a Friendly Name and the access code from Salesforce, then click Connect.
6. Navigate back to Conga Contracts Setup in Salesforce.
 - Click Connections under the Platforms section and click Connect.
 - You will now see a successful connection in the External Connections section of Connections.

7. In the Conga Contracts Lightning App, click Conga Contracts Quickstart Setup.
 - Click Create Default Mappings.
8. Navigate to Conga Contracts Setup.
 - Under the Platform section, toggle open the name of your connection (it will appear as the friendly name entered in the previous step) and click Object Mapping.
 - Next to each object, click the dropdown arrow and select Edit.
 - Check the Enable Mapping checkbox and then click Save. Repeat this step for each object that will be mapped to the Conga Contracts platform. Additional Conga Contracts Setup

After completing the initial Conga Contracts Setup with Conga Contracts Quickstart, follow the steps below to complete the configuration for the Account and Contract objects.

Add the Sync Lightning Component

1. Navigate to an Account record in Lightning.
2. Click the Setup gear wheel and then select Edit Page.
3. On the left-hand side menu, navigate to the Custom - Managed section and drag over the Sync Status Lightning Component into the Lightning page layout.
4. Click Save.
5. Repeat the previous steps for the Contract object. Add required fields to the account page layout
6. Navigate to the Object Manager in Salesforce Setup and select the Account object.
7. Click Page Layouts and select the specific page layout that Conga Contracts users are assigned.
8. (optional) In the Fields section of page layout options, drag the Section item onto the page layout. This creates a new section to place Conga Contracts fields on the Account page layout.
 - Enter a value for the Section Name, such as Conga Contracts Fields, then click OK.
9. Drag and drop the following fields into the new section or elsewhere on the page layout
 - Conga Contracts Counterparty, Conga Contracts Counterparty Group, Conga Contracts Counterparty Status, Conga Platform Exclude
10. Click Save. Add required fields to the Contract page layout
11. Navigate to the Object Manager in Salesforce Setup and select the Contract object.
12. Click Page Layouts and select the specific page layout that Conga Contracts users are assigned.

13. (optional) In the Fields section of page layout options, drag the Section item onto the page layout. This creates a new section to place Conga Contracts fields on the Contract page layout.
14. Drag and drop the following fields into the new section or elsewhere on the page layout.
 - Conga Contracts Agreement Type, Conga Contracts Approval Required, Conga Contracts Group, Conga Contracts Legal Entity, Conga Contracts Status, Conga Contracts Term Type, Conga Contracts Type, Conga Platform Exclude.
15. Click Save.

Conga Platform File Storage Options

Conga Contracts for Salesforce offers the capability to store files exclusively to the Conga platform or both the Conga Platform and Salesforce. By default, files are stored exclusively in the Conga Platform. A 1-byte file is visible in Salesforce when files are stored exclusively in Platform.

Advantages of storing files exclusively in Conga platform

- Files do not count towards a Salesforce org's file limits, which saves storage and cost.
- Full compatibility with third-party applications while staying having the functionality to sync files between Salesforce and Conga Contracts.
- Many third-party applications are not compatible with files stored exclusively in Conga Platform. [How to Store Files in Both Salesforce and Conga Platform](#)

1. A Conga employee must log in to the customer's Salesforce org using [Conga Platform File Storage Options](#). The ensuing steps cannot be completed unless the user is logged in as the Conga subscriber.
 - The customer must [grant account login access](#) to AppExtremes, dba Conga Support in order to log in through Subscriber access.
 - If you do not have access to the Subscribers object in the Conga production org, [submit a Support Request](#).
2. Once you are logged in through Subscribers access, navigate to Salesforce Setup and type Custom Settings in the Global Search box.
3. Under the Custom Code section, click Custom Settings.
4. Click the Conga Integration Settings Custom Settings record
5. Click Manage.
6. Click New to create a new Custom Setting.
7. Enter the following information into the Custom Setting fields:

- Name: StoreFileInSalesforce_count
 - KEY: StoreFileInSalesforce_count
 - Value: 1
8. Click Save.
 9. Click the Back to List link to return back to the Conga Integration Settings.
 10. Click New to create the second Custom Settings
 11. Enter the following information into the Custom Setting fields:
 - Name: StoreFileInSalesforce_0
 - Key: StoreFileInSalesforce_0
 - Value: true

Moving forward, if isCongaFile__c field is checked, would be stored in Conga Platform and Salesforce. The full file size will then appear in Salesforce as opposed to the 1-byte file.

Installing and Configuring the Quickstart

The Conga Contracts Quickstart is an optional add on to the Contracts for Salesforce product to enable subscribers to quickly set up an integration between Conga Contracts for Salesforce and Conga Contracts.

You can install the Conga Contracts for Salesforce Quickstart unmanaged package to your Org. This allows you to connect the Conga Contracts Suite for external file storage and Conga Contracts to map Salesforce data to your Org. The connection between systems and contract request actions are active.

Requirements

- You must have a Conga Contracts Org.
- You must have a Conga Contracts Org that is not already connected to a Salesforce instance.

Step 1: Set up the connection in Contracts for Salesforce

To set up the connection in Contracts for Salesforce:

1. Turning on External File Storage. Go to Setup
2. Platforms
3. General.
4. Connect the Contracts Suite (Platform). Go to Setup
5. Platforms
6. Connection.
7. Create an External Connection. Go to Setup
8. Platforms
9. Connection.

Step 2: Install the Conga Contracts Quickstart package

To install the Quickstart, go to: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t50000000RcZaAAK>

Step 3: Assign a permission set

You must assign your user the Conga Contracts Quickstart permission set. You should see the Quickstart app. Go in to the Conga Contracts Quickstart app and follow the instructions in the setup tab.

Step 4: Enable mappings

Go to Conga Contracts for Salesforce Setup > Platforms > Connection and enable all the mappings. Edit or add mapped fields.

Recommendations and tips

- When you connect a Contracts for Salesforce and Conga Contracts Org, your connection should remain stable and consistent. Disconnecting the Conga Contracts Org or the Contracts for Salesforce Org causes errors and lack of functionality in the one or both Orgs.
- You must move the expiration date on the Contracts for Salesforce Org. Visit the Contracts for Salesforce partner community here: <https://partners.salesforce.com/>
- You MUST do the three steps mentioned above BEFORE you run the quick start configuration. Running the Quickstart configuration before or during those steps has not been tested and will most likely cause errors and set computers on fire.
- If you want a new connection from a GDO or SF developer org to a Conga Contracts org you need new a new version of both orgs set up for a fresh connection. DO NOT delete a connection assuming you can reuse orgs.

For more information see the [Conga Contracts Quickstart](#).

To start the integration between Conga Contracts and Contracts for Salesforce, you must enable the mappings in the Conga Contracts Setup page. See [Configuring Contracts for Salesforce and Conga Contracts](#) for more help.

Quickstart training notes for support and SEs

Prerequisites

You must have Contracts for Salesforce Version 1.76 or above.

You will be installing a separate unmanaged package.

The installation should be done by onboarding via Dev Opts

- Joe Minik and Marilyn can help and enable checkbox
What do you get from the unmanaged package?
Conga Contracts permission set
Custom fields
Custom button that sends requests (You have to add the button manually to the page layout)
APEX class to handle downloads
Setup page with a button that creates buttons for you
What do I need to do?

See step above.

For Contracts for Salesforce

1. Install the unmanaged package.
2. Assign permission set.
3. Add IsConaFile field to the Page Layout. Stop here to save the Salesforce file to Conga Contracts(CC).
4. If you want to add Conga Contracts and integrate -> Connect CC to the Platform. Go through the authorization as needed.
5. New External Connection
6. Give your connection a nickname. Go to CC, give Salesforce connection a nickname. In Contacts for Salesforce (CCFS) click Connect.
7. Create mappings for Account, CCFS
8. CC QS setup
9. Click Default Mappings. You must enable them. CC4SF setup
10. Enable the mappings.
11. For CCFS - Add (8) custom fields to Page Layout. CFS Setup
12. Account
13. Page Layout
14. Pull all needed fields to Page Layout. RECOMMEND: Put them in their own section to keep it clean.
15. Add Buttons to page layout.

If you want the status widget, you have to enable it in the custom layout in the Lightning app builder.

For Conga Contracts

Contracts: Create new contracts. Contracts tool > Legal entity. You have to enable the Conga Contracts Legal Entity.

1. Admin > Contract Request Types.
2. New Request Type. Add Bundle name and it should be the name linked to an NDA.
3. Add the status widget in the Lightning app builder.

4. Upload a file attached to a contract.
5. Add a file.

Future feature: Button to clear out errors? yes

Contract Management Life Cycles after Execution (Signature)

There are several different processes that occur during the Contract Management Lifecycle after a Signature execution. For more information on these processes, see the following topics:

- [Obligation Management](#)
- [Amendments](#)
- [Renewals](#)
- [Termination](#)

Obligation Management

Obligations can be anything committed to directly or inherently as a result of signing a contract. In some solutions, this may simply take the form of some configuration on the page layout of the agreement record which helps to drive dynamic clause selection, whereas in other contracting processes it can be less concrete than that. There are two methods of approaching obligation management in a CLM solution:

1. Users configure fields on the agreement (or parent) record such as a payment terms picklist (15, 30, 45-day options for example) or a checkbox (which when checked will drive Conga Orchestrate to add in an arbitration clause for example). These are pre-signature obligation management actions which can be reported on by reporting on these data elements on the agreement.
2. For a more robust obligation management strategy, an obligation object can be created with a few simple fields such as Obligation Type (picklist with options), Obligation Commitment (picklist with values depicting for how long an obligation is active. For example: lifetime of the contract, perpetuity, first six months of the contract, etc.), Obligation Expiration. Then, using Conga Orchestrate's drill-down operator capabilities, a definition with associated steps can be configured to evaluate the makeup of the managed clauses and in the presence of specific managed clauses, obligation records can be created and fields defined as a child of the agreement object. This results in a related list of obligations and their timelines for reportability.

⚠ For extra impact, a grid view can be added to the Contracts HUB. For more information on this process, see Conga Grid Quick Start Options.

Amendments

Amendment processes with Conga typically rely on a new record type for the agreement object called amendment, and a parent-child type relationship between this record type and the record type for which the amendment is being created. A quick action or flow button can be added to the parent record type to generate an amendment record.

Most Legal processes will not regenerate the contract in its entirety, but will only add the clause which is being amended. If the legal team wishes to always start from a standard version of the clause being amended, they can rely on the Select Clauses list button on the managed clause related list where they can select a few clauses to generate on the amendment. If they want to start from the custom language saved in the parent record's managed clause related list, the best route is to regenerate the entire contract and add a task to the record using Conga Orchestrate to notify legal team members to eliminate all language except for the clause(s) being amended.

⚠ Keep in mind that any amendment process should preserve the original agreement record as best as possible. This means that it is best to duplicate relevant fields and clauses at the amendment record level so that modifications can be tracked separately from the original agreement. This creates a highly reportable contract family where legal is able to see the terms originally agreed to as they relate to later modifications.

Renewals

Contract renewals are managed through a manual process which relies on the contract manager reviewing a report of upcoming expirations and manually reaching out to the third party for renewal, or through an automated process which generates a renewal record for the agreement and notifies the contract manager that it needs to be sent.

Termination

Like renewals, termination is managed through either an automated or manual process. For increased automation, a workflow, process builder, or batch job can be utilized to set the status of the contract to terminate when the expiration date = {TODAY}

Auto termination can be risky because unless a user intervenes, the agreement expires itself and could go unnoticed. A best practice is to build in any sort of manual check or possibly a monthly report so that contract managers do not ignore a contract that should be renewed.

Troubleshooting

Troubleshooting the CLM Suite.

Accounts not syncing from Conga Contracts to Salesforce when creating new company in approval process

Accounts are not syncing from Conga Contracts to Salesforce when creating a new company in an approval process.

A new Conga Contracts Company record does not sync to Salesforce. The "Nothing to Sync" error message displays in the new Company's status widget. If you finish processing the request after creating this new company, the new Contract does not sync over to Salesforce. You see an error because you linked the new Contract to an unmapped Account.

If you log into Conga Contracts that is connected to a Salesforce org, set up the object mapping as normal in the connected Salesforce org.

1. Go to Contracts
2. Requests
3. New Request.
4. Select a request type.
5. Type a value into the Company Name field that does not match an existing Company in Conga Contracts or an existing Account in Salesforce.
6. Submit the Request.
7. Go to Contracts
8. Approvals.
9. Select the + on the approval you created by submitting the request. The request approval process starts.
10. On the approval, select Create New Company.
11. Add all required fields and click Save.
12. View the status widget on the new company and navigate to the Salesforce instance and view all Accounts.

Creating this new Company in Conga Contracts should create a new Account in Salesforce. The status widget on the newly created company should say Synced.

Refreshing sandbox connections in the Contracts platform causes issues

If you reconnect your Salesforce instance to the Conga platform, your sandbox receives new credentials and all previous external connections and mappings configured in the sandbox are no longer accessible. For example, your Salesforce sandbox was configured to pair with a Conga Contracts sandbox. After testing was successful, you move on to a Production environment and pair your Salesforce production environment to the Conga Contracts production environment. If you refresh the sandbox, your credentials are no longer valid.

After a sandbox refresh, reestablish connections by clicking Reconnect in the Contracts for Salesforce user interface and then perform the steps to pair mappings in Conga Contracts.

If you require the previous mappings to be restored, please contact support.

Sync fails from Salesforce when fields on the table have the same name but different namespaces

Syncing documents and configurations fail in Contracts for Salesforce when fields on the internal table have the same name in a table in Conga Contracts but different namespaces.

If you encounter an error:

1. When you create fields on a contract, it should be called the Primary Document.
2. Create a field of the same name in Conga Contracts.
3. Set up contract mapping as usual. There is no need to map the Primary Document.
4. Create a new contract from Salesforce.

You might see that you get the "Nothing to Sync" message. The backend code results in an error for duplicate fields in the query. The code should account for same named fields by qualifying with namespaces in the query.

Salesforce automatically appends the namespace of the managed package to all custom fields in the dynamic query that has no namespace (such as custom fields).

Workaround

Change the name of the field. Name Conga Contracts for Salesforce fields with a prefix to make it less likely that customers have the same name.

Note that the duplicate field error is just one potential issue that could come from having same named fields with our customers' orgs. If we happened to just want to query the customer's field and not our field, we could be querying our field because of this automatic appending of the namespace that Salesforce does.

Unable to map the same field in Salesforce to different fields in Contracts

The client has a requirement to map the Opportunity name to 2 fields in Conga Contracts. The mapping UI allows this but integration throws an error.

- Ensure to test one Conga Contracts for Salesforce (CCFS) field to multiple Conga Contracts fields and 1 Conga Contracts field to multiple CCFS fields.
- When doing bidirectional syncing on one field mapped to multiple targets, note that the other direction would be tricky since there will be multiple field values being mapped to one. The sync logic will only use the value from the first field mapping that it processes.
- When the Primary is different for the different mappings, the sync logic will only use the setting from the first field mapping it processes.

Confirmed you can now map one field in CCFS and Conga Contracts to two fields in the opposite system. Test one way and bidirectional syncs where:

- CCFS was the winner in both field mappings
- Conga Contracts was the winner
- A combination of the two being the winners
- Test on the Account/Company objects and with Contracts requests.

SalesConnect

The SalesConnect integration links Conga Contracts and Salesforce, allowing Salesforce users to make contract requests in Salesforce and submit for approval in Conga Contracts whenever a prospective customer is ready to enter into a legally binding agreement.

Overview of SalesConnect

The SalesConnect feature provides a link between Contracts and Salesforce CRM (Customer Relationship Management). This link allows Salesforce users to request a contract when a deal has been reached with a new customer, or with an existing customer that is renewing a contract. Salesforce users make a contract request in Salesforce and then submit it to Conga Contracts for approval.

In Salesforce CRM, a potential deal (or prospect) is classified as an Opportunity, and a customer is classified as an Account. When a prospect or customer is interested in signing (or renewing) a contract, the salesperson creates a Contracts contract request in Salesforce and attaches a draft or final version of the contract to the request. The salesperson then submits the request to Conga Contracts for review and approval, while monitoring the status of the request in Salesforce.

In Contracts, the individual who approves a contract request is responsible for creating both the Company Profile (if the contract is for a new company) and the Contract Profile. After creating the Contract Profile, the document that was submitted with the contract request is automatically uploaded to the Documents section of the profile. The uploaded contract is not only available in Conga Contracts, but it is also available to salespeople in the Salesforce application.

The document submitted with a contract request may need to be negotiated using workflows or flows, or may be ready for eSignature. See the ContractsUser Guide for information on flows, workflows, and the eSignature process.

Prerequisites

The individual who is configuring the integration between Contracts and Salesforce must have Administrator permissions in both Conga Contracts and Salesforce. The Salesforce users who will be making Contracts contract requests must be granted permissions to Conga Contracts in the Salesforce application. However, depending on the package that is purchased, the Salesforce user may already have been granted Contracts permissions.

Installation and Integration Steps

There are several steps in installing and configuring SalesConnect in order to integrate Contracts and Salesforce:

- [Install SalesConnect](#)
- [Grant Conga Contracts permissions to Salesforce users](#) (optional)
- [Add a contract type in Salesforce](#)
- [Connect Conga Contracts to Salesforce](#)

- [Map Salesforce and Conga Contracts contract types](#)
- [Map Salesforce fields to Conga Contracts fields](#)

Custom Salesforce Page Layouts

Salesforce Administrators for Contracts can add fields and lists to the default page layouts in Salesforce to capture additional data needed for the contract request process.

Installing SalesConnect

SalesConnect can be installed in the Salesforce Customer Relationship Management (CRM) platform from the Salesforce AppExchange.

1. From <https://appexchange.salesforce.com>, enter Conga Contracts in the Apps field, and click.
2. In the search results, click, and then click More when the icon refreshes.
3. When the screen refreshes, click Get it Now.
4. When the screen refreshes, click Log in to the AppExchange.
5. In the Salesforce login screen, populate the Username and Password fields, and click Log In. Select the Remember me check box if you want Salesforce to remember your user name between sessions so that you only have to supply your password.
6. When the screen refreshes, click Install in production to begin using SalesConnect in your production environment.
7. Click Install in sandbox to test SalesConnect before going live. The word "test" will be included in the URL of the Salesforce program screens.
8. If you choose the Sandbox option, you will need to repeat Steps 1-5, and then select the Install in production option when testing is complete. You will also need to clear the Sandbox check box in the Conga Contracts Integration Settings screen for Salesforce.
9. When the screen refreshes, click the terms and conditions link and read the terms and conditions for using Conga Contracts and Salesforce. Click the I have read and agree to the terms and conditions check box.
10. Click Confirm and Install.
11. [Define the integration settings](#) for Salesforce in Conga Contracts.

Granting Conga Contracts SalesConnect Permissions to a Salesforce User

An Administrator can grant Conga Contracts permissions to SalesConnect so that a Salesforce user can make Conga Contracts contract requests.

 **Tip:**

Depending on the Salesforce package purchased, the permission to submit contract requests from Salesforce to Conga Contracts might not be included in the package.

1. Log in to Salesforce.
2. Click the Setup link, located at the top of the screen.
3. When the screen refreshes, type manage in the search field, located at the top of the left navigation pane.
4. Click the Users link under the Manage Users heading.
5. In the All Users screen, locate the user that needs the Conga Contracts permissions, and click on their name.
6. In the User screen, hover over the Permission Set Assignments link, located under the user's name. When the pop-up for the link displays, click Edit Assignments.
7. In the Permission Set Assignments screen, click Conga Contracts Permissions in the Available Permission Sets list box, and click Add.
8. When Conga Contracts Permissions is added to the Enabled Permission Sets list box, click Save.

Adding a Contract Type in Salesforce SalesConnect

The Salesforce Administrator for Conga Contracts must identify the types of contracts that will be requested by Salesforce users and submitted to Conga Contracts for approval, and then add a contract type in Salesforce that corresponds to an existing contract type and request type in Conga Contracts.

Once a Conga Contracts user approves a contract request submitted by a Salesforce user, a Company Profile and Contract Profile are created, and any documents attached to the contract request are uploaded to the Contract Profile. If the Approval Process in Salesforce is being administered, the contract request is first approved in Salesforce before being

submitted to Conga Contracts, where it is reviewed a second time and either approved or declined.

While the Approvals feature is available in the Enterprise, Unlimited, and Performance versions of Salesforce, the feature is not supported in the Professional version.

1. Log in to Salesforce.

⚠ Important:

Before adding a Conga Contracts Contract Type in Salesforce, ensure this type of request and its corresponding contract type exist in Conga Contracts since the Salesforce contract type must be mapped to the Conga Contracts request type and contract type.

2. In the App selection list, located in the upper right corner of the screen, change the default selection from Sales to Conga Contracts.
3. Click the Conga Contracts Types tab.
4. Click New.
 - In the ContractsContract Type Edit screen, provide the information for the new contract type:
 - In the ContractsContract Type Name field, enter a name that accurately reflects the type of contract the salesperson is requesting.
 - In the Minimum Opportunity Probability field, enter the minimum percentage an Opportunity needs to meet in order to submit a contract request for this contract type.
 - In the Document Options list, select the option for documents after the contract request is approved in Contracts, and the Company and Contract Profiles have been created:
 - No Documents - no new documents, or revisions to the original document, which have been added to the Contract Profile will be stored in Salesforce.
 - Copy Final Documents - only the final executed documents will be stored in Salesforce.
 - Copy All Documents - all versions of all negotiated documents, including the final documents, will be stored in Salesforce.
 - Link All Documents - a link is provided in Salesforce to all versions of all negotiated documents, including the final documents.
 - Link All Documents and Incorporated - a link is provided in Salesforce to all versions of all negotiated documents and the final documents, plus documents in the incorporated contracts of the parent contract that was created as a result of the contract request.

- In the Copy Documents list, select the option that reflects when additional documents for a contract request can be sent from Salesforce to Conga Contracts:
 - Until the Request is Accepted - documents can be sent prior to, or during, the review process.
 - With the Initial Request Only - documents can only be sent when the contract request is submitted from Salesforce to Conga Contracts.
 - Until the Contract is Active - documents can be sent until the status of the Contract Profile, which houses the document, is set to Active.
 - Always - documents for a contract request can be submitted at any time.
 - Never - documents can not be attached to this type of contract request.
 - The Status field is automatically assigned based on whether or not the Salesforce contract type is Pending or Synced with Conga Contracts.
5. Click Save.

Integrating Conga Contracts and Salesforce with SalesConnect

Once you have installed SalesConnect, you must integrate Contracts and Salesforce so that contract requests submitted from Salesforce can be reviewed in Contracts. During the integration process, it is recommended that you log in to Contracts in your browser, and then open a second tab in the browser and log in to Salesforce so that both programs are running simultaneously.

Prior to establishing the integration:

- Make sure all the needed Contracts request types have been created in Salesforce, and the names of the request types are similar enough to the corresponding Contracts contract request types so that they can easily be mapped to one another.
- Salesforce users have been granted permissions to Conga Contracts contract types.
- Document Type is defined for the attachments that are included with contract requests submitted from Salesforce to Contracts.

Once the integration is completed, you can add the contract request types that salespeople will use, and customize the program screens that capture contract request information and account data in Salesforce.

1. Click the Gear Icon in the Navigation Toolbar, and click the System Settings link.
2. In the System Settings screen, click the Integration Settings tab.
3. In the Integration Settings screen, click the Salesforce Settings tab.

⚠ Important:

If your Contracts environment is not integrated with DocuSign (or Adobe Sign) or BidSync, the Salesforce Settings screen will automatically display.

4. In the Salesforce Settings view, click New in the toolbar.
5. Provide the required information in the Salesforce Integration Settings section:
 - In the Integration Name field, enter a name for the integration.
 - In the Default Request Type list, select the Conga Contracts request type that should be used to create the contract document when a Salesforce contract request is approved.
 - In the Default Document Type list, select the document type that should be assigned to all documents attached to contract requests submitted from Salesforce.
 - (Optional) Select the Sandbox check box to establish a Salesforce test environment for Contracts. When you log in to Salesforce, the Login In button displays as Log In To Sandbox.
6. In the Salesforce Integration Status section, click.
7. After receiving the Configuration Complete message, which displays in a separate browser window, return to the Salesforce Setting screen.

Mapping Contract Types and Request Types

Initial mapping between Contracts and Salesforce involves mapping the Salesforce contract type to the Conga Contracts Request Type and Contract Type.

1. From the Map Salesforce Contract Types section of the Salesforce Settings screen:
 - Map the Salesforce contract type to the Contracts request type and contract type.
 - Click Add Mapping in the toolbar to display a blank mapping record.
 - In the Salesforce Contract Type list, select the Contracts contract type that was created in Salesforce, and needs to be mapped to a Contracts request type/contract type.
 - In the Contracts Request Type list, select the contract request type that corresponds to the selection made in the Salesforce Contract Type field.
 - In the Contracts Contract Type list, select the contract type that corresponds to the selection made in the Salesforce Contract Type field. Map the fields in the Salesforce program screen to fields in a Contracts program screen using the icon. Mapping is performed so that when a Salesforce user makes a contract request, and the request is

approved, the mapped information in the request is used to populate the fields in the Company and Contract Profiles that are created in Contracts.

2. (Optional) Add another mapping record if there is another Contracts Contract Type in Salesforce that can be mapped to the Default Request Type and Default Document Type identified in the Salesforce Integration Settings section.
3. Click Save.
4. (Optional) From Salesforce, verify the connection between the mapped contract types/request type.
5. In the Dashboard, change the view from Sales to Contracts
6. In the Dashboard, click the ContractsContract Types tab
7. In the Contracts Contract Types screen, locate the Contract Type and verify its Status field displays Synced

Mapping Salesforce and Conga Contracts Fields for SalesConnect

Once you have integrated Contracts and Salesforce, which includes mapping a Salesforce contract type to aContracts request type and contract type, you can map individual fields in the Salesforce Account, Opportunity, and Contract Type screens to fields in Contracts Company, Contract, and Location program screens so that information is transferred from a Salesforce contract request to a Contracts Company Profile or Contract Profile after the request is approved and the profiles are created.

Tip: You do not have to map the Salesforce Account Name, Billing Address, or any of the fields in the Contract Request Type page used to create the request since this information is automatically transferred from Salesforce to Conga Contracts once the request is approved.

1. Click the Gear Icon in the Navigation Toolbar, and click the System Settings link.
2. In the System Settings screen, click the Integration Settings tab.
3. In the Integration Settings screen, click the Salesforce Settings tab.If your Contracts environment is not integrated with DocuSign (or Adobe Sign) or BidSync, the Salesforce Settings screen will automatically display
4. In the Map Salesforce Contract Types. section of the screen, locate the contract type who fields you want to map, and click its icon. The Salesforce Account Name field is automatically mapped to the Conga Contracts Company Name field.
5. Use the Salesforce Field Mapping window to identify the Salesforce and Conga Contracts program screens:

- In the Salesforce list, select Account, Opportunity, or Conga Contracts Contract to identify the Salesforce program screen whose fields you want to map to a Conga Contracts field.
 - In the Conga Contracts list, select Company, Contract, or Location to identify the Conga Contracts Profile screen containing the field that needs to be mapped to the Salesforce field.
6. Use the Salesforce Field Mapping window to map individual fields:
- Click Add Mapping to add a blank mapping record.
 - In the Salesforce Fields list, locate the field you want to map, and click on it to select it.
 - In the Conga Contracts Fields list, locate the corresponding field, and click on it to select it.
 - Click Save.
 - (Optional) Add additional field mappings for the same program screen by repeating Step 6.
 - (Optional) Add field mappings for a different Salesforce program screen by repeating Steps 4-6, after clicking Add to close the Salesforce Field Mapping window, and clicking Save in the Salesforce Settings screen to save your recent mappings.
 - Click Add to save the mappings and close the window.
7. In the Salesforce Settings screen, click Save.

Customizing a Salesforce Page Layout for SalesConnect

The procedure for adding a field to a Salesforce page is a two-step process. First, you must add Conga Contracts as a related list, and then you can add one or more additional fields to the page. The Conga Contracts field you are adding to the screen must exist in Conga Contracts as a default field or list, or it can be an additional field or list that has been added to a Company or Contract Profile.

Once the field is added to the Salesforce page, you can map the new field to the Conga Contracts field.

The procedure below shows how to customize the Account Page Layout can also be applied to updating the Opportunity Page Layout by making the appropriate substitutions.

Adding the Conga Contracts Related List

The first step in customizing the Salesforce Account Page Layout is to add Conga Contracts as a related list in the page layout.

1. Log in to Salesforce.
2. Click the Setup link, located at the top of the screen.
3. When the screen refreshes, type page in the search field, located at the top of the left navigation pane.
4. In the Build Customize hierarchy, click the Page Layouts link for the Accounts category.
5. In the Account Page Layout screen, click the Edit link.
6. When the screen refreshes, locate Related Lists in the list on the left, and click on it to select it.
7. Once you are directed to the Related Lists section of the screen, locate the Conga Contracts related list in the list box on the right.
8. Drag-and-drop the Conga Contracts related list from the list box to the Related Lists section of the screen.
9. Click Save.
10. In the Overwrite Users Related List Customizations prompt, click Yes.

Adding a Field to the Page Layout

The next step in customizing the Salesforce Account Page Layout is to select the Conga Contracts fields you want to add to the Account page. Since the company name and address information are included in the default mapping between Salesforce and Conga Contracts, you do not need to add fields to capture this information.

1. From any location in Salesforce, click the Setup link, located at the top of the screen.
2. When the screen refreshes, type fields in the search field, located at the top of the left navigation pane.
3. In the Build Customize hierarchy, click the Fields link for the Accounts category.
4. In the Account Fields screen, scroll down to the Account Custom Fields and Relationships section, and click New.

In the steps below, an Account Type picklist is being added to the Account page. The Account Type field corresponds to the Company Type field in Conga Contracts, and the fields can be mapped to facilitate the transfer of information when a Salesforce contract request is approved in Conga Contracts.

1. When Step 1 of the New Custom Field wizard displays:

- Locate Picklist in the Data Type list, click inside its radio button, and click Next.
2. When Step 2 of the New Custom Field wizard displays:
 - In the Field Label field, enter the name of the field. Make sure the assigned name is descriptive enough so that the corresponding Conga Contracts field can be identified easily.
 - For the Values options:
 - Use global picklist value set - select to use a global picklist value set, and then make a selection in the Values list.
 - Enter values, with each value separated by a new line - select to provide the values for the list, making sure each value in the list has a matching list item in Conga Contracts.
 - In the Values list box, enter each value you want to add as an item in the list, and press ENTER on your keyboard.
 - (Optional) Select the Display values alphabetically, not in the order entered check box to alphabetize items in the Values list box or the global picklist.
 - (Optional) Select the Use first value as default value check box to auto-populate the field with the first item in the Values list box or the global picklist.
 - (Optional) Clear the Restrict picklist to the values defined in the value set to allow users to populate the field with a value not found in the Values list box or the global picklist.
 - (Optional) Populate the Description field to identify the new field and the type of data that needs to be captured.
 - (Optional) Populate the Help Text field to provide information that will assist the user in correctly populating the field.
 - (Optional) Select the Required check box to make the field required.
 - (Optional) Populate the Default Value field with a value that will override the value selected in the Values list box or the global picklist.
 - Click Next.
 3. When Step 3 of the New Custom Field wizard displays:
 - Select the Visible check boxes for all user types that can populate the new field.
 - Select the Read Only check boxes for all user types that can view, but cannot populate the new field.
 - Click Next.
 4. When Step 4 of the New Custom Field wizard displays:
 - (Optional) Verify the information for the custom field.
 - Click Save. Click Save & New to add another custom field.
 - (Optional) Verify the field has been added by adding a new account in Salesforce.

- (Optional) Map the new Salesforce field to the existing Conga Contracts field for all applicable contract types.

Disable Conga Contracts Integration Settings

Conga Contracts allows you to disable all of your current integrations. To disable integration settings within Conga Contracts, take the following steps.

1. Go to Admin
2. Click on System Settings
3. Click on Integration Settings
4. Select Disable All

Conga Contracts for Users

Select one of the following topics for more information:

- [Conga Contracts Basics for Users](#)
- [Conga Contracts Program Components](#)
- [Conga Contracts User Preferences](#)
- [Conga Contract Tools](#)
- [Search](#)
- [Companies](#)
- [Contracts](#)
- [Projects](#)
- [Documents](#)
- [Events](#)
- [Tasks](#)
- [Messaging](#)
- [Additional Forms](#)
- [Flows](#)
- [Workflows for Conga Contracts](#)
- [Scorecards for Conga Contracts](#)
- [Clause ID and Management for Conga Contracts](#)
- [SalesConnect for Conga Contracts](#)

Conga Contracts Basics for Users

System basics, including login and mobile devices, technical requirements, simultaneous editing, hierarchical relationships, and a glossary of terms used in Conga Contracts.

System basics, including login, technical requirements, simultaneous editing, mobile devices, and a glossary of terms used in Conga Contracts.

Getting Started with Conga Contracts for Users

Before using Conga Contracts, it is recommended that you perform start-up tasks and familiarize yourself with the Tools menu, Search and Report features, and the hierarchy used to store data.

Before using Conga Contracts, it is recommended that you:

- Become familiar with the [Conga Contracts Program Components](#), which include the [Navigation Toolbar](#), [Home page and Portlets](#), [Data and Input Screens](#), [Action Buttons](#), [Icons](#), [Address Book](#), [Email Distribution Lists](#), and [Phone Number Entry Window](#).
- Set up your [User Preferences](#), which include changing your password; entering your name, address, and contact information; selecting data formats and the UI theme; and determining the email notifications you receive when you are a member of a team.
- [Customize](#) and [filter](#) the data in your [All Companies browse screen](#), which includes managing the columns of data that display and the number of records that display in each screen.
- Review the components of a [Company Profile](#), which stores basic information on the company and contains a [Toolbar](#) and [Links](#) to company-related features.
- [Customize](#) and [filter](#) the data in your [All Contracts browse screen](#).
- Review the components of a [Contract Profile](#), which stores basic information on the contract and contains a [Toolbar](#) and [Links](#) to contract-related features.
- Add navigation, reminder, and charting [Portlets](#) to your Home page, which keep you updated on your upcoming responsibilities and provide quick links to the companies, contracts, and projects you work on frequently.

Once you have completed these startup tasks, it is recommended that you familiarize yourself with the following:

- [Tools](#) menu, which provides direct links to the information and tasks that directly impact you.
- [Hierarchical Relationships](#) between companies and contracts, which explains how data is stored and structured in Conga Contracts.
- [Search](#) feature, which allows you to search for any stored information, from the general to the specific, and run [Reports](#) on this information.

Logging in to Conga Contracts for Users

You can log in to Conga Contracts with a user name and password, from an email link, or from a mobile device.

Log in with a User Name and Password

1. Navigate to <https://appl.contracts.com/Contracts/> using any of the following browsers:
 - Internet Explorer 9.0, or higher
 - Firefox
 - Chrome

- Safari
2. At the login screen, type your Login Name and **Password**, and click Login.

- ✔ If you don't remember your password, click the Forgot Password link and follow the onscreen prompts. You will receive an email message with a temporary password once your password has been reset.

Log in From an Email Message

If your Administrator has added you as a Conga Contracts user and allowed the system to generate your password, you will receive an email message from Conga Contracts Login Information.

1. In the email message, write down your login name and temporary password.
2. Click the Login to Conga Contracts link.
3. At the <https://appl.contracts.com/Contracts/> screen, type your Login Name and **Password**, and click Login.

Log in Using a Mobile Device

If you have a login ID and password, you can access Conga Contracts at <https://appl.contracts.com/Contracts/> from any of the following **mobile devices**:

- iOS 4 or higher
- Blackberry OS 6.0 or higher
- Android 2.3 or higher

Home Page and Portlets for Conga Contracts

The screen that displays once you log in to Conga Contracts is your user Home page. The Dashboard contains a Navigation Toolbar with drop-down menus that link you to program functions and stored data, and also allow you to customize your user preferences.

The Home page is also used to house portlets, which are miniature browse screens that provide quick access to the Company, Contract, and Project Profiles that you frequently

visit, as well as the My Contracts portlet, which identifies the Contract Profiles that name you as a responsible person.

In addition to the Profile portlets, you can add other types of portlets to your Home page, which will remind you of upcoming events and tasks, display your recent messages, allow quick access to your contract requests, as well as any contract requests you can approve. Other portlets can be added to remind you when you have been assigned to complete a workflow or flow step, approve a supplier registration, or perform a task associated with a document package or an eSignature package during the electronic signing process.

If you frequently use Search Queries, you can add several Search portlets to the Home page to provide easy access to search results.

Technical Requirements for Users

The technical requirements for Conga Contracts are shown in the table below.

Using a current browser and most operating systems, you can access Conga Contracts from any computer or from your [Apple iOS 4+](#), [BlackBerry OS 6.0+](#), or [Android 2.3+ mobile device](#).

You have the option of using Conga Contracts as your Application Service Provider (ASP) or hosting the application on-premises on your own server.

Desktop Software and Hardware	Web Server Hardware and Software (ASP and On-Premises)
<p>Software (Supported Browsers)</p> <ul style="list-style-type: none"> • IE9 for Windows Vista SP2 • IE11 for Windows 7 SP1 and Windows 8.1 Update 	<p>ASP Secured Hosting by Conga Contracts</p> <ul style="list-style-type: none"> • No client hardware or software requirements
<p>Conga Contracts supports the browsers that are still supported by the vendor for:</p> <ul style="list-style-type: none"> • Mozilla FireFox • Apple Safari • Google Chrome* <p>*Chrome's support for the following platforms will end in April 2016: (1) Windows XP and Windows Vista (2) Mac OS X 10.6, 10-7, and 10.8, and (3) any 32-bit Linux, as well as Ubuntu 12.04 (Precise) and Debian 7 (Wheezy).</p>	

Desktop Software and Hardware	Web Server Hardware and Software (ASP and On-Premises)
<p>Hardware - Standard Users</p> <ul style="list-style-type: none"> • Workstation - 1 GHz 32-bit (x86) or 64-bit (x64) processor • 512 MB of system memory, or higher • Windows Vista or better - minimum screen resolution of 1366 x 768 is recommended 	<p>On-Premises Server Requirements</p> <ul style="list-style-type: none"> • If you choose to host the Application on your premises, Conga Contracts will work with you to configure the required hardware
<p>Hardware - Power Users</p> <ul style="list-style-type: none"> • 2 GHz 32-bit (x86) or 64-bit (x64) processor • 1 GB of system memory • Minimum screen resolution of 1366 x 768 is recommended 	

Hierarchical Relationships for Conga Contracts

A relational database is the core of Conga Contracts since all data relates to other data directly or through an extended connection. The major system components, Companies and Contracts, have a hierarchical relationship and you must first create a Company Profile and then add a Contract Profile to the Company Profile.

The following relationships are key in understanding how Conga Contracts deals with stored data and elements: Company and Contract Profiles, Contract Type and Agreement Type, Contract Family, Link Data (Contract and Company), and Contract Term Types.

Company and Contract Profiles

The basic system hierarchy begins with the Company Profile that links to the Contract Profile and other linked data. Root Contract Profiles (parent contracts) can be linked to Incorporated Contract Profiles (child contracts), as well as linked to data that relates to each Contract Profile.

Contract Type and Agreement Type

At its core, Conga Contracts is a contract management solution, and as such, two key data organizational fields are directly related to the categorization of contract data. These fields are the Contract Type and Agreement Type.

Contract type usually describes the purpose of the contract, such as a License, Lease, or Purchasing Agreement. Agreement type usually refers to the ability of the contract to stand on its own as a legal document. Root contracts, such as Master and Individual agreements, can legally bind all parties to their terms and conditions. Incorporated contracts, such as Schedules, Addendums, and Amendments, rely on Master or Individual contracts for their enforceability.

The Contract Type and Agreement Type fields are used to categorize, search, and report on contracts. Properly creating the hierarchical levels of the Contract Type field will provide smooth and seamless reporting and searching. The Contract Type field categorizes contracts by the type of transactions they represent.

Contract Family

Perhaps the most important of all the hierarchical relationships is the Contract Family. Using the Agreement Type field, Conga Contracts links all the member documents together in a familial relationship that represents their legal relationships to one another. When one document is subordinate to another, it is represented at the next hierarchical level, below its parent or root contract. Root contracts, or top level documents, can have Incorporated or lower-level documents linked to them, such as Schedules, Exhibits, and Addendums.

Linked Data

There are three major profiles in the Conga Contracts: Contract, Company, and Project. Each of these profiles contains links to program features that are available in the Company, Contract, and Project profiles.

Company Profile

The Company Profile contains links to its Contracts, People, Additional Names, Relationships, Locations, Tasks, Documents, Events, Messaging, Scorecards, Projects, Additional Forms, and History.

Contract Profile

The Contract Profile contains links to its Contract Family, Documents, Clauses, Events, Messaging, Tasks, Document Packages, Payments, People, Addresses, Products, Scorecards, Projects, Additional Forms, and History.

Project Profile

The Project Profile contains links to its Workflows, Documents, Tasks, Additional Forms, History, Scorecards, and Messaging.

Contract Term Types

When adding a contract to the Conga Contracts, it is important to select the right contract term type so that renewals are handled properly and are not overlooked. Currently, Conga Contracts has six classifications for contract term types:

- Auto-Renewal, Auto-Advance - An automatically-renewing contract where Conga Contracts advances the current contract expiration date to the next renewal date and sets up new event alerts.
- Auto-Renewal, Manual Advance - An automatically-renewing contract where a user must change the current contract expiration date to the next renewal date and set up new event alerts.
- Fixed, Auto-Inactivate - A fixed term contract that Conga Contracts automatically inactivates when the contract reaches its expiration date (i.e., the contract's status is changed from "Active" to "Inactive").
- Fixed, Manual Inactivate - A fixed term contract whose status must be manually changed from "Active" to "Inactive" by a user once the contract reaches its expiration date.
- Perpetual - A contract with an effective date, but no expiration date. Perpetual contracts are often Master agreements that contain legal terms, as well as schedules with term and renewal information.
- Cotermious - A term type used exclusively for the incorporated (child) contract of a root (parent) contract. When this term type is selected in an Incorporated Contract Profile, Conga Contracts automatically populates all the fields in the Term & Renewal section with the data captured for the root contract, including contract status.

Mobile Devices for Conga Contracts

The Slim Mobile Interface provides access to Conga Contracts using an Apple iOS 4+, BlackBerry OS 6.0+, or Android 2.3+ mobile device.

The Slim Mobile Interface allows program users to access Conga Contracts using their Apple iOS 4+, BlackBerry OS 6.0+, or Android 2.3+ mobile device. From a mobile device, you can view company and contract information, and perform tasks associated with the Contract and Company Profiles, such as downloading documents, closing events, completing tasks, and approving (or declining) Gateway steps in a workflow.

1. Navigate to <https://appl.novatuscontracts.com/Contracts/> using your mobile device.
2. Enter your Login Name and **Password**, and click Login.
3. From the Conga Contracts screen, click > to display an alphabetical listing of companies or contracts.
4. From the Companies or Contracts screen, enter the name of a company, or a contract number, in the Search field, and click the magnifying glass icon.
5. Click the Tasks, Events, Workflows, Documents, and Messaging links to perform program functions.
6. To download a document, click > to display its Document screen, and then click Download.

Simultaneous Editing for Conga Contracts

Simultaneous edits to the same Company, Contract, or Project Profile results in only the edits of the user who saves the profile last to be saved. To avoid this issue, the ability to perform simultaneous editing can be disabled in the System Settings screen.

Conga Contracts is a complex and dynamic contract management solution that offers a myriad of features to support the needs of its users and Administrators. While Conga Contracts can accommodate several users and Administrators performing different functions simultaneously, there have been instances where two or more Administrators performing edits to the same data at the same time will result in lost edits, and may even cause the browser to lock up or crash.

When the uncommon situation arises wherein Administrators are performing simultaneous edits to the same data, Conga Contracts will only recognize the edits that were saved last, and disregard the prior edits. An example is provided in the following scenario:

1. Administrator #1 and Administrator #2 open the same Contract Additional Form at the same time to make edits.

2. Administrator #1 adds a new field list (e.g., Delivery Method) to the form, and then saves the Contract Additional Form.
3. Meanwhile, Administrator #2 deletes a field list (e.g., Accuracy of Delivery) from the Contract Additional Form. Administrator #2 saves this edit to the Additional Form after Administrator #1 has already saved their edit.
4. Conga Contracts would recognize only the edit made by Administrator #2 (deletion of Accuracy of Delivery field list), and the edit made by Administrator #1 (addition of new Delivery Method field list) would not be saved.

If your System Administrator has disabled simultaneous editing, you will receive the following message when you attempt to edit a Company, Contract, or Project Profile that is currently being edited by another user: "Profile is being edited by another user. Try again later."

Glossary of Conga Contracts Terms

Key terms used in Conga Contracts.

TERM	Conga Contracts Definitions
Acquisition Wizard	A system-generated tool that steps a user through the process of having one company acquire another company. The wizard will assign all selected information to the acquiring company (e.g., contracts, events, people, etc.).
Active (Contract)	One of the statuses that can be assigned to the contract(s) stored in a Contract Profile. Generally, an Active status means that the contract has been executed and is enforceable, as opposed to being Inactive, Expired, or In Process.
Active (Company)	One of the statuses that can be assigned to the company represented by a Company Profile. Generally, an Active status means that the company is engaged in active business with one or more legal entities, as opposed to being Inactive, or not currently conducting business.
Additional Fields	Administrator-defined fields that can be added to the default Company, Contract, or Project profile screen.

TERM	Conga Contracts Definitions
Additional Forms	Administrator-defined forms used to capture additional information for a company, contract, or project using two or more fields or lists. An additional form is captured (added) and stored in a Company, Contract, or Project Profile.
Address Book (People)	Defines the "form" of the contract (e.g., Master, Individual, Schedule, Purchase Order, Statement of Work, Amendment). Master and Individual agreements are standalone documents since they are enforceable on their own and do not require any supporting documents. Standalone agreements usually start with the words "This Agreement . . ." and do not include any incorporated agreements, such as Schedules, Purchase Orders, or Statements of Work. Incorporated agreements are ones that cannot stand on their own and must be attached to a Master or Individual agreement. For example, an incorporated agreement might start with the words "This Schedule is incorporated into and is a part of Master Agreement."
Administrator	Process by which Administrators can archive Company Profiles and Contract Profiles into a secure storage area.
Agreement Type	Identifies a contract as a root (parent) contract, which can stand on its own as a legal document, or an incorporated (child) contract, which must be attached to another document to be legally binding. Root agreements are displayed in bold text, such as Master or Individual, and incorporated agreements, such as Schedules and Statements of Work are displayed in regular text.
Auto-Renewal, Auto-Advance	An automatically-renewing contract where the Conga Contracts system advances the current contract expiration date to the next renewal date and sets up new event alerts.
Auto-Renewal, Manual Advance	An automatically-renewing contract where a user must change the current contract expiration date to the next renewal date and set up new event alerts.
Audit Trail	A recorded history of changes made to the basic information in a Contract, Company, or Project Profile screen, as well as changes made to the data stored in the profile (e.g., people, addresses, and additional forms).

TERM	Conga Contracts Definitions
Automated Triggers	Changes in the system data that trigger action/notices from Conga Contracts (e.g., volume triggers send a notice when a dollar threshold has been reached).
Browse Screen	Program screen that displays a list of data records, such as a list of the companies or contracts stored in Conga Contracts. Users can control the number of records that display by filtering the records by status or some other criteria. Users can also filter the display by adding/removing columns of data so that only relevant fields are displayed in the browse screen.
Bulk Data Upload Tool	Program feature that allows you to bulk upload company, contract, and additional form data to Conga Contracts using an Excel template.
Clause Library	Repository for alternative contract language clauses, which is available to all users from their Contracts menu.
Company	Typically, a company is the "other party" in your company's contractual agreements in Conga Contracts. The other party to a contract can be a vendor (buy-side contract) or a customer (sell-side contract). A company also refers to your company's legal entities for organizations that enter into inter-company contracts (i.e., legal entities sign contracts with or among internal divisions or subsidiaries).
Company Locations	Linked section in a Company Profile used to add additional company locations. Location information includes not only the address, but the location type, such as a Regional Office or Storage Facility.
Company Group	Field in a Company Profile that is used to limit access to all companies in that group for security reasons. Company groups are defined first, and then users are given permissions to the data and documents in specific company groups. If a user does not have access to a company group, they will not be able to access any Company Profiles in that group or any of the company's contracts. Access to company groups is assigned to individual users via their roles in Conga Contracts.

TERM	Conga Contracts Definitions
Company Profile	Primary data screen used to capture key company information, which includes both default fields and Administrator-defined additional fields. The Profile also contains links to additional company information, including Contracts, People, Additional Names, Relationships, Locations, Tasks, Documents, Events, Messaging, Scorecards, Projects, Additional Forms, and History.
Contract	A document that legally binds at least two legal entities. A contract can include purchase orders, schedules, exhibits, attachments, and other documents.
Contract Addresses	Linked section in a Contract Profile that allows users to add additional address for a contract and specify them by type. Address types can include a notice address, billing address, and shipping address.
Contract Family	A group of incorporated and/or related contracts stored in a Company Profile.
Contract Family Tree	An expandable/collapsible hierarchy of a contract family viewable in a Contract Profile.
Contract Group	Field in a Contract Profile that is used to limit access to all contracts in that group for security reasons. Contract groups are defined first, and then users are given permissions to the data and documents in specific contract groups. If a user does not have access to a contract group, they will not be able to view any of the contracts in that group from the Company Profile. Access to contract groups is assigned to individual users via their roles in Conga Contracts.
Contract Profile	Primary data screen used to capture key contract information, which includes both default fields and Administrator-defined additional fields. The Profile also contains links to additional information for the contract, including Contract Family, Documents, Events, Messaging, Tasks, Document Packages, Payments, People, Addresses, Products, Scorecards, Projects, Additional Forms, and History.

TERM	Conga Contracts Definitions
Contract Responsibilities	Contract feature that allows people to be assigned to duties relating to the negotiation, management, or enforcement of a contract. A contract responsibility can be associated with one or more user functions, as well as one or more user types (i.e., Program User, Company Contact, External Participant, or Legal Entity Person). The functions that people are able to perform in Conga Contracts are defined in their User Profile.
Contract Creation Templates	The MS Word documents that Administrators format and then map to Conga Contracts program fields in order to create the templates that are used to create contracts in Conga Contract.
Contract Term Type	A category that identifies both the timeframe during which a contract is active and enforceable, and the method used to renew or inactivate the contract in Conga Contracts. See Auto Renewal - Auto Advance, Auto Renewal - Manual Advance, Fixed - Auto Inactivate, Fixed - Manual Inactivate, Perpetual, and Cotermious.
Contract Type	Field in a Contract Profile that defines the type of deal being transacted (e.g., License). Frequently, the agreement will identify the contract type in the body of the document (e.g., "This Master Software License Agreement" where "Master" is the Agreement Type and "Software License" is the Contract Type). Conga Contracts supports a five-level hierarchy, so a Software License Agreement might be divided into Level 1 - Software, and Level 2 could be Desktop, Server, Mainframe, etc.
Cotermious	A term type used exclusively for the incorporated (child) contract of a root (parent) contract. When this term type is selected in an Incorporated Contract Profile, the Conga Contracts system automatically populates all the fields in the Term & Renewal section with the data captured for the root contract, including contract status.
Direct Editing	Feature that allows a MS Word document to be edited in Conga Contracts and automatically saved as the next document revision.

TERM	Conga Contracts Definitions
Document Assembly	Program feature that allows you to run the Conga Contracts Clause Library inside Microsoft Word so that clauses can be dragged and dropped from the Library directly into an open Word document.
Document Package	One or more documents that are shared and edited by the members of a document package team, which is formed for the express purpose of performing a specific contract-related task, such as negotiating a contract.
Documents	Electronic files that are uploaded and stored in the Documents section of a Company, Contract, or Project Profile. Documents can include files of any document type, including Microsoft Word documents, PDF files, and Excel spreadsheets.
DocuSign	An external application that works in conjunction with Conga Contracts to facilitate the electronic signing of documents. Documents are prepared for electronic signature using the eSignature Package Wizard in Conga Contracts, electronically signed in the DocuSign cloud, and then managed in Conga Contracts.
Dynamic Forms	See Additional Forms.
Envelope	The email message that is sent to signatories and recipients when the eSignature Package Wizard is run. The email contains the contract document(s) that must be signed electronically in the body of the message, as well as any instructions provided by the user who initiated the eSignature process using the Wizard.
Event	A happening that occurs during the course of a business relationship, which is usually tied to an event alert (email message) notifying interested parties about the upcoming event. Events mark keys dates in the life of a contract, such as its expiration date, renewal date, and notice date. Events can also be important dates for a company, such as the renewal of certifications or a merger with another company.

TERM	Conga Contracts Definitions
Event Alert	<p>Email reminder that is sent to all interested parties, notifying them of an upcoming date for a contract or company event. An event alert can also be created for a contract's original expiration date. Event alerts are sent out prior to the event, and the number of days prior to the alert is defined by the user.</p> <ul style="list-style-type: none"> • Notification Date = Event Date - Number of Warn Days • Warn Days (user-defined) = number of days prior to the event date that email notification is sent. • Reminder Date = Notification Date + Number of Reminder Days • Reminder Days (user-defined) = number of days after the Notification Date that a reminder email alert is sent if the event has not been completed.
Event Alert Date	<p>Date on which Conga Contracts schedules delivery of an event alert (email message), notifying recipients of a contract or company event that was created by a program user. Event Alert Date = Notification Date - Event Creation Date.</p>
Event Alert Status	<p>The status of an event alert is determined by Conga Contracts; it is completely automated and controlled on the back end. The possible statuses of an event alert are:</p> <ul style="list-style-type: none"> • Scheduled - Event Alert Date has not yet reached the Notification Date (Event Date - Number of Warn Days); therefore the event alert (email message) for the event has not yet been sent out. • Due - Event Alert Date has reached the Notification Date, and therefore, the event alert (email message) for the event has been sent out. However, the Event Date has not yet been reached. • Escalated - Both the Event Alert Date and the Reminder Date (Event Date - Number of Reminder Days) have passed, but the Event Date has not been reached. • Past Due - Event Date has passed without any action having been taken on the Event Alert. • Closed - Event has been completed (individual event) or closed (event series) by the Event Owner, and it is no longer active.

TERM	Conga Contracts Definitions
Event Date	Date by which action must be taken for an event, such as the expiration date of a contract or the date on which notice must be given to renew or terminate a contract. Users are notified about event dates via email messages (event alerts) sent from Conga Contract.
Event Series	A happening that occurs during the course of a business relationship and is repeated on a regular basis (e.g., daily, weekly, monthly, quarterly, or yearly). Every event in the series is usually tied to an alert and a reminder for the recurring event.
External Participant	Individuals that access Conga Contracts through the Portal or a third-party application. A list of external participants can be viewed from in the Address Book.
Fixed Term Contract	A contract that is in effect for a specified length of time. A fixed-term contract is set in advance and ends when a specific task is completed or a specific event takes place.
Fixed, Auto-Inactivate	A fixed term contract that the Conga Contracts system automatically inactivates when the contract reaches its expiration date (i.e., the contract's status is changed from "Active" to "Inactive").
Fixed, Manual Inactivate	A fixed term contract whose status must be manually changed from "Active" to "Inactive" by a user once the contract reaches its expiration date.
Flows	Administrator-defined templates that guide users in performing the steps that must be accomplished to complete a task for a company, contract, or project. Flows include color-coded stages, as well as steps with action buttons, and are displayed at the top of a Company, Contract, or Project Profile.
Forms Library	The additional forms that appear in the Additional Forms screen, which is linked to a Company, Contract, or Project Profile. Administrators create additional forms and then link them to specific Company, Contract, and Project Profile types so that users can capture the information required by the form.

TERM	Conga Contracts Definitions
Functions	User designations that reflect the titles the user holds, or the jobs they can perform in Conga Contracts.
Gateway Step	A step in a workflow that requires the approval of more than one person. Those who can approve a workflow step must hold one or more user functions, as defined in a Routing Table.
Help System	Information about Conga Contracts fields, functions, and usage.
Help Tips (Quick Tips)	Superscript windows that pop-up with definitions or instructions when a user hovers over a field in a program screen.
History File	A system-captured audit trail of all changes made to data fields in a Company, Contract, or Project Profile.
Home Page	Home Page of Conga Contracts, which can be used to display linked data through portlets.
Inactive Status	<ul style="list-style-type: none"> • One of the values in the Status field in a Contract Profile. This generally means that the contract is no longer in force, as opposed to "Active" or "In Process." The contract has either expired or been canceled. • One of the values in the Status field in a Company Profile. This generally means that the company is no longer "Active" or "On Hold," either having gone out of business or been acquired. Acquired companies are automatically given this status when the Acquisition Wizard is run.
Incorporated Contract	Contract that is integrated with other documents into a single legal document. Incorporated contracts have a parent/child relationship, which Conga Contracts displays as a tree structure.

TERM	Conga Contracts Definitions
In Process Status	<ul style="list-style-type: none"> • One of the values in the Status field in a Contract Profile. This generally means that the contract is in draft form and has not yet been executed. • One of the values in the Status field in a Company Profile. This generally means that the company is in the process of being accepted as a supplier or customer.
Legal Entity	Any entity that will be separately named during the contracting process. In Conga Contracts, companies that are separately named in a contract are marked as legal entities from their Company Profile. Individual contracts stored in Company Profiles are then associated with legal entities so reports can be run to locate contracts for a legal entity.
Location Name	Administrator-defined name for a specific type of company location, such as Regional Office.
Manual Advance	For an auto-renewing contract, one of the options for moving the contract forward to the next expiration date. Manual advance is used to move the contract to an "expired" status, which requires a user to manually process the renewal info and review the event alerts.
Messaging	Email feature that stores all communications sent and received from both Contract and Company Profiles.
Mobile Notifications	Automated notices that are sent from Conga Contracts to users who have hand-held devices, enabling them to take action.
Mobile Slim Interface	A language and message format offered by Conga Contracts that allows users to access the application via a mobile device.
Multi-Party	Contracts that have more than two (2) parties bound to the terms, and all parties have signed the contract.
My Calendar	Calendar for individual users, which is launched from the Tools menu, displays on the user's Dashboard, and shows event and/or notice dates.

TERM	Conga Contracts Definitions
Notice Date	For Fixed - Auto Inactivate and Fixed - Manual Inactivate contract term types, it is the date by which action must be taken so that a contract does not expire. For Auto Renewal - Auto Advance and Auto Renewal - Manual Advance term types, it is the new expiration (i.e., old expiration date has been extended). A Notice Date can exist even if an event alert is not created.
Notice Period	Number of days prior to the end of a contract's current term that your company is required to provide notice of intent to renew or terminate the contract.
notification date	Date on which Conga Contracts send an event alert (email notification) to selected recipients, notifying them about an upcoming contract or company event. In the Event Profile, the Notification Date = Event Date - Number of Warn Days.
Notifications/ Notice	A notice, reminder, or communication that is sent out from Conga Contracts via email and is tied to an event or standalone action.
One Click Report	A Comprehensive Contract or Company Summary Report that includes key data for a company or contract.
One Step Search	Search across Conga Contracts for user-defined company, contract, and project data. Users can search for a single keyword or a phrase.
Parent Contract	A contract that is integrated with other contracts into a single legal document. A parent (or root) contract has a parent/child relationship with incorporated contracts, and this relationship is displayed as a tree structure in the Contract Profile.
Payment Stream	Incoming or outgoing payments recorded in the Payments section of a Contract Profile to reflect the amounts received/ paid in accordance with the terms of a contract. Forecasts can also be run to calculate future amounts paid/received for a payment stream.

TERM	Conga Contracts Definitions
People Profile	Data input screen used to capture personal/contact information for program users, company contacts, and external participants who use Conga Contracts.
Perpetual Contract Term	A contract with an effective date, but no expiration date. Perpetual contracts are often Master agreements that contain legal terms, as well as schedules with term and renewal information.
Portlet	Window that can be added to the Dashboard to provide a user with quick access to the companies, contracts, and projects they recently visited. Portlets can also be added to quickly access a user's saved search queries, their recent messages, assigned events, tasks, workflow and flow steps, document package tasks, contract requests, contract approvals, and supplier registrations. A charting portlet can be added to display a graphic representation of data using a pie chart, bar chart, or time line.
Person Function	A designation that a person holds in relation to a company or contract (e.g., Contract Manager, Attorney, Sales Rep, etc.).
Profile	The "main page" that houses basic information for a company, contract, or project. A profile page also exists for most of the linked company, contact, and project data, including a Person, Document, Task, Event, Product, Document Package, Location, and Additional Form Profile.
Project	A feature that allows new data, documents, tasks, additional forms, and workflows to be captured and stored to accomplish a goal or provide reference data. A project can also include legacy data by incorporating existing Company and Contract Profiles.
Reminder Date	Date on which another event alert (email message) is sent by Conga Contracts, reminding recipients that an open event is still not completed/closed. The Reminder Event Alert Date = Event Date - Number of Reminder Days (number of days entered into the Reminder Days field for the event).

TERM	Conga Contracts Definitions
Renewal Wizard	A system-generated tool that steps a user through the process of renewing a contract by requiring a new expiration date, renewal interval, notice date, and notice interval. In the wizard, users can also update the warn date, which is the number of days prior to the new expiration date that an email notification (event alert) is sent out.
Reports	Data extracts configured using the Report Wizard or the Advanced Reporting feature. Reports can be viewed in the Conga Contracts Report Viewer, downloaded as a PDF file, or exported as an Excel spreadsheet.
Roles	A security measure that controls individual user access to program features and stored data.
Routing Table	An Administrator-defined list that identifies the user function(s) that can approve the Simple Gateway and Gateway steps in a company, contract, or project workflow.
Salesforce	An external application that works in conjunction with Conga Contracts to facilitate the creation of contracts. Contract requests are sent from Salesforce, reviewed and processed in Conga Contracts, and information is shared throughout the contract creation process.
Scorecards	Feature that allows users to rate companies, contracts, and projects based on criteria established by Administrators.
Security Group	A field in a Company or Contract Profile that is used to control access to the profiles in this group. Each user role grants access to one or more company and contract groups, and individual users are then granted access to one or more user roles, which can allow access to several different security groups.
Self-Service Contract	A contract request that does not have to be approved.
Simple Gateway Step	A step in a workflow that requires the approval of a single person who holds one or more user functions, as defined in a Routing Table.

TERM	Conga Contracts Definitions
Single Use Form	An Additional Form that can only be captured once. When the form is added to a Company, Contract, or Project Profile, it cannot be captured again and it cannot be copied.
Sub-Contract	An incorporated contract.
System Fields	Standard Conga Contracts fields that cannot be modified or re-named.
Templates	Administrator-defined forms that can be used to create contracts and events alerts, run flows and workflows, and capture additional information for Company, Contract, and Project Profiles.
Wizard	A system-generated tool that walks a user through the steps needed to perform a company-related or a contract-related task.
Workflows	Administrator-defined set of steps for a process or procedure (workflow template) that is accomplished by a specific group of users (workflow team), and linked to individual Company, Contract, or Project Profile types and groups. If approval is needed for a workflow step, Administrators also create a routing table to identify the user functions that can approve the step.

Conga Contracts Email Attachment Limit

Conga Contracts with Amazon Web Services (AWS) supports emails that include attachments of up to 10MB.

Email Attachment Limit

Conga Contracts with Amazon Web Services (AWS) supports the following attachment limits and delivery methods:

- For attachments up to 10MB, the file is attached to the email.
- For attachments between 10MB and 20MB, the email is delivered with a link that allows you to download your file(s).

- Attachments over 20MB are unsupported, and you receive an email message stating that your attachment is too large.

Accessing Conga Contracts System Information

To access Conga Contracts System Information, take the following steps:

1. From the Administrator Navigation Toolbar, click on the ? icon.
2. A System Information popup appears with the following information: Audit UUID, Base System URL, Database Name, eSignature Provider, Login Name, OCR Provider, SSO Enabled, System Company Name, Company UUID and Version.

Conga Contracts Program Components

Program components include the Dashboard, Navigation Toolbar, Portlets, Address Book, Search, Email Distribution Lists, Icons, and the Help System.

New Contract Profile User Interface Updates

The screenshot displays the Conga Contracts user interface for a specific contract profile. The top navigation bar includes the Conga logo, a search bar, and menu items for Home, Companies, Contracts, Documents, and Tools. The main content area is divided into several sections:

- Contract Header:** Shows the contract ID 'ABC-12345', company 'Acme Inc', status 'In Process', and contract purpose. It also displays the effective date (01/02/2020) and expiration date (01/02/2021).
- LINKS:** A sidebar menu with various options like Contract Details, Responsibilities, Contract Family, Documents, Managed Clauses, Events, Messaging, Tasks, Document Packages, Payments, People, Addresses, Products, Scorecards, Projects, Additional Forms, History, and Additional Parties.
- Contract Details:** The main section, currently showing 'Basic Information'. It includes fields for Contract Number (ABC-12345), Contract Group (Primary), Agreement Type (Individual), Contract Type (Lease > Lease Equipment > IT > IT Hardware & Peripherals), and Contract Purpose (Contract Purpose which can be about a sentence or so long).
- Company Information:** A section on the right showing company details for 'Acme Inc', including Company Number (XYZ 098-45298-03), Company Status (Active), and Company Category (Category of Companies).
- Recent Documents:** A list of recent documents, all titled 'ABC-1234-ContractFilename.doc', with a status of 'Executed Contract' and a timestamp of 'April 01, 2020 9:48am'.

⚠ The new Contract Profile user interface is now available for beta testing in sandbox accounts only by request. If you'd like to enable the new Contract Profile in your sandbox, contact your Customer Success Manager. This is a beta preview and does not yet contain all the features and functionalities of the current interface.

Conga Contracts now has an updated Contract Profile user interface for a more streamlined and enhanced user experience. Updates include the following:

Top Header

The top header now displays the most critical and frequently viewed information about your contract so that these details are always easily available as you navigate through your Contract Details. Fields available here are: Contract ID, Status, Contract Purpose, Effective Date, and Expire Date.

Conga Contracts		Home Companies ▾ Contracts ▾ Documents ▾ Tools ▾		⚙ ? 👤	
ABC-12345	Company Acme Inc	Status In Process	Contract Purpose Contract Purpose which can be about a sentence or so long. Here's an example that... ⓘ	Effective Date 01/02/2020	Expiration Date 01/02/2021

✓ Tip:

Click the ... next to each of these elements to expand them for more information.

Company Information Panel

The new Company Information panel on the right panel displays a view of high level company information so that you don't need to navigate away to the Company Profile to access these details. This panel displays the Company Logo, Company Name, Company Number, Company Status, Company Category, and a link to View Company Profile.

Company Information

Company
 **Acme Inc**

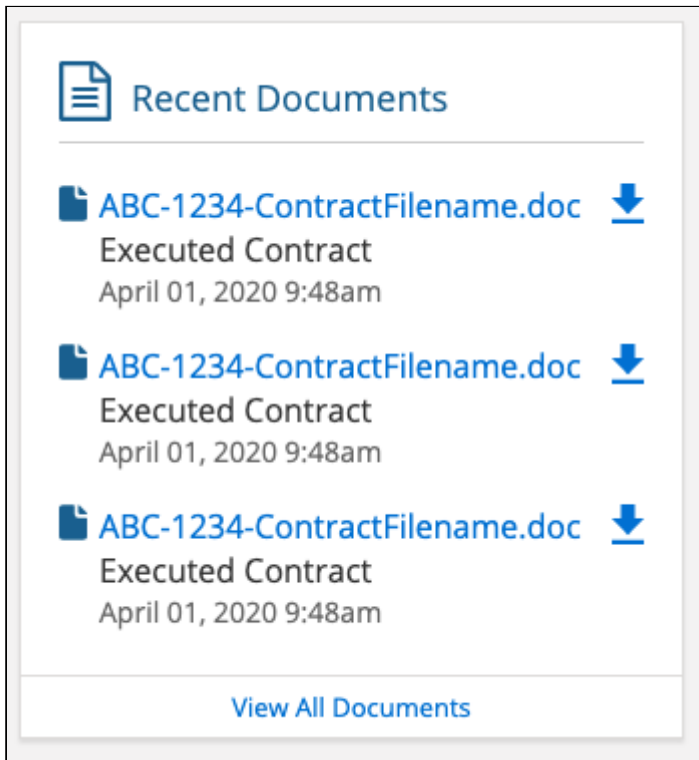
Company Number	Company Status
XYZ 098-45298-03	Active

Company Category
Category of Companies

[View Company Profile](#)

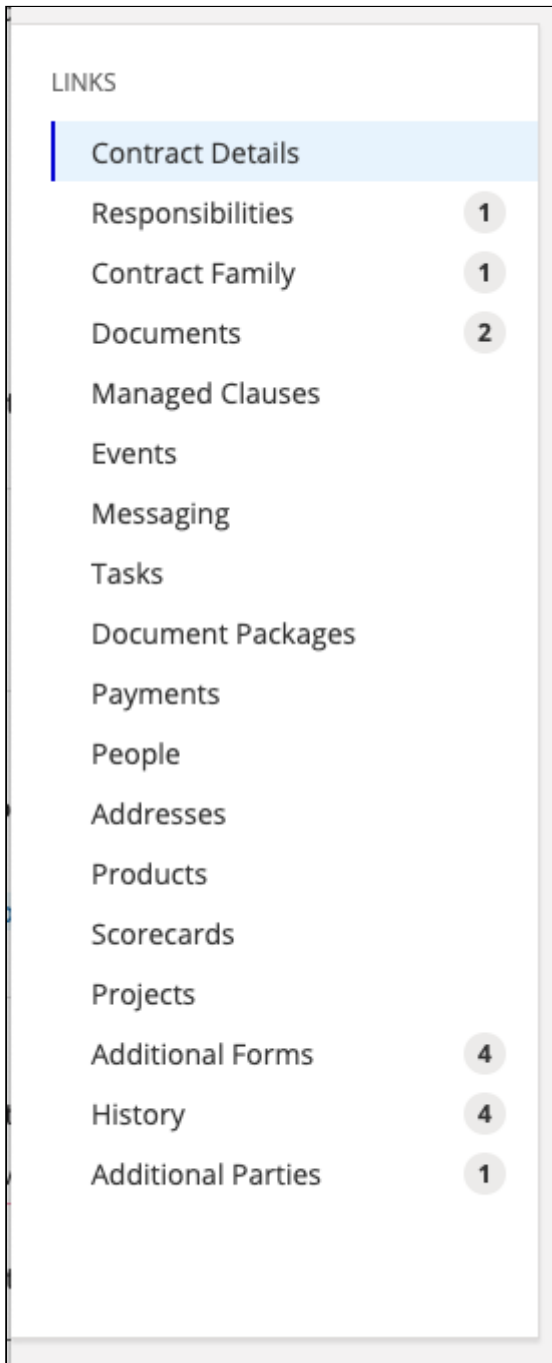
Recent Documents

The new Recent Documents panel on the right panel displays recently updated or accessed documents so that you have a reference readily available to view. This panel displays a list of recent documents with the option to click on the name of a document to view it, download the document by clicking the downward arrow icon, view the date the document was last opened, and a link to View All Documents.



Left Panel

The new left panel contains navigation links or a related list so that you can quickly access information related to your contract, such as Documents. For example, navigation links in this panel display the following: Contract Details, Responsibilities, Contract Family, Documents, Managed Clauses, Events, Messaging, Tasks, Document Packages, Payments, People, Addresses, Products, Scorecards, Projects, Additional Forms, History, and Additional Parties.








Contract Details

The new middle Contract Details panel was organized to streamline your contract information so that it's easier to navigate and locate what you need. The navigation links display your actionable options: Edit, Copy, Add Incorporated, Archive, and More (Wizard

Tools, Creation Wizard, Workflows, Start Flow, One Click Report, Report, Browse Contracts). Your contract details are divided onto three sections:

- Basic Information - this is where you'll find basic contracts details such as the name of your contracts, agreement type, contract type, group type, Contract Purpose, Contract Description, Value, and Company details.
- Term and Renewals - this is where you'll find term and renewals related details such as Status, Renewal, Term Type, Notice Period, Effective Date, Expiration dates, and Notice Date.
- Additional Fields - this is where you'll find your additional fields listed.

Contract Details

 Edit  Copy  Add Incorporated  Archive  More 

Basic Information

Contract

Contract Number
ABC-12345

Contract Group
Primary

Agreement Type
Individual

Contract Type
Lease > Lease Equipment > IT > IT Hardware & Peripherals

Contract Purpose
Contract Purpose which can be about a sentence or so long.

Contract Description

Company

Legal Entity
Company Name
Original Company
Company Name

Value
Contract Value
12,345.67
Proposed Value
12,345.67

External ID
External ID

Currency
USD

Term and Renewal

Status
In Process

Effective Date
01/02/2018

Renewal Interval (months)
12

Original Expiration Date
01/02/2019

Term Type
Fixed - Manual Inactivate

Current Expiration Date
01/02/2021

Notice Period
Notice Period

Notice Date
12/02/2020

Additional Fields

Additional Field One
Fixed - Manual Inactivate

Additional Field Two
01/02/2018

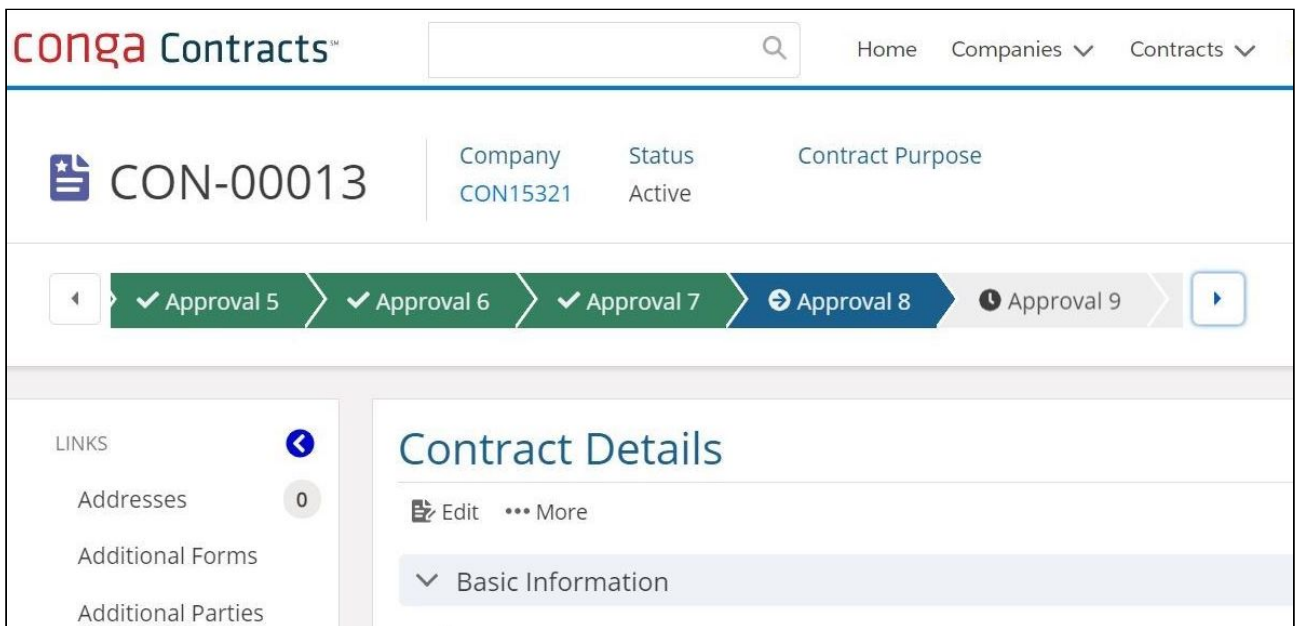
Additional Field Four
01/02/2021

Additional Field Three
01/02/2019

Flow Stages

Flow Steps are available as part of your header panel so that you view Flow Stages and follow up on approvals or actions.

- Current stages are colored blue and have an arrow icon to indicate further stages.
- Completed stages are colored green and have a checkmark icon.
- Pending stages are colored gray and have a clock icon.



Navigation Toolbar

The Navigation Toolbar displays along the top of every screen and includes five drop-down menus: Home, Companies, Contracts, Documents, and Tools. The Search bar is on the left hand side of these menus. There are also Admin, Help, and Person buttons on the upper right. Each menu includes options that link you to program data and/or allow you to perform a task.

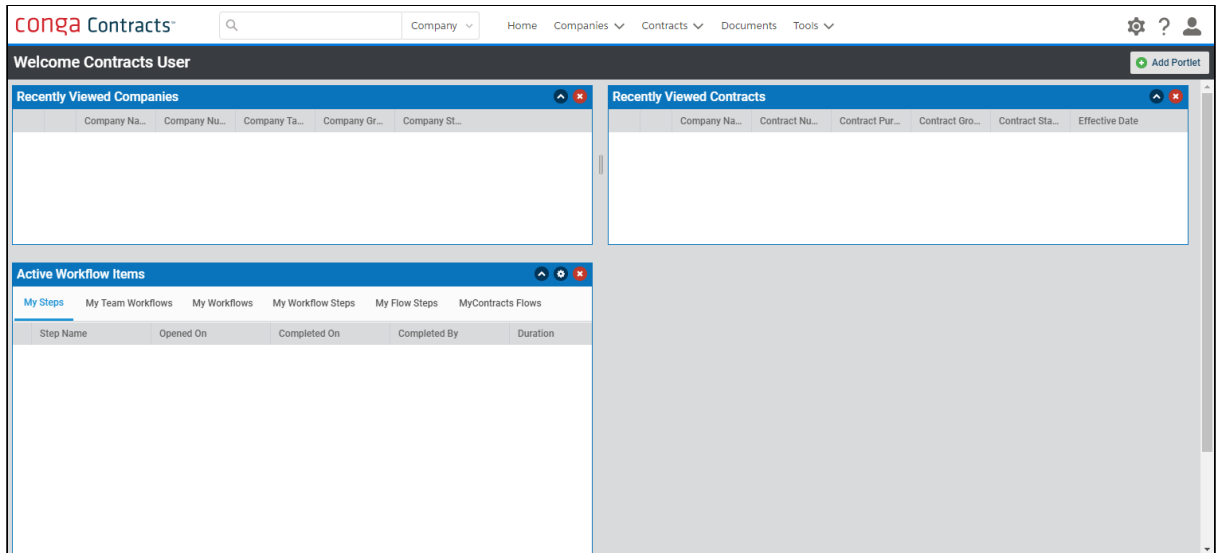
Conga Contracts Navigation Toolbar Updates and New Interface

An overview of the Conga Contracts Navigation Toolbar updates and new interface.

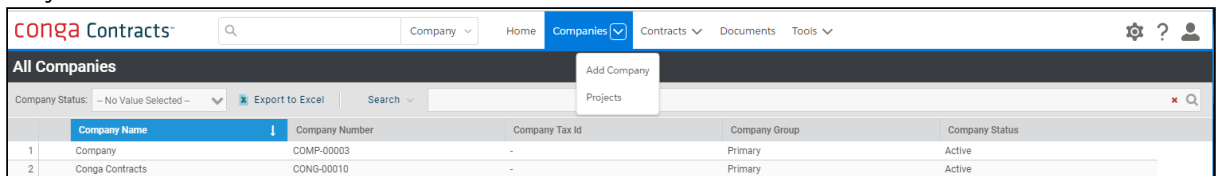
The Conga Contracts toolbar is updated with a new look and interface! Several sections were moved to give you a streamlined experience.

Key changes include:

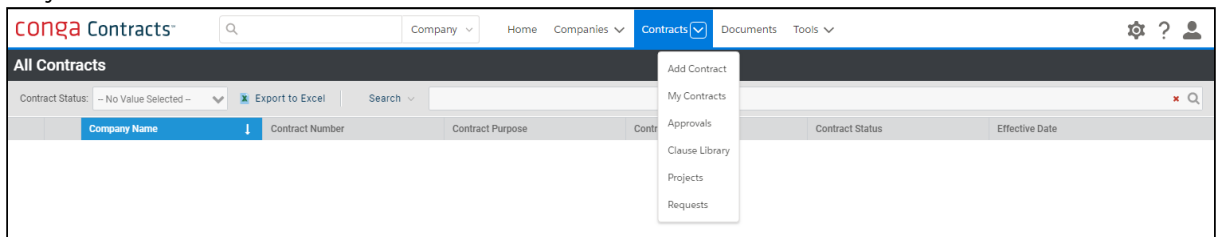
- The toolbar's color theme is updated from a dark blue background to white.
- The search bar is now located on the left.
- There is a new Home menu option. Click on it to return to your dashboard.



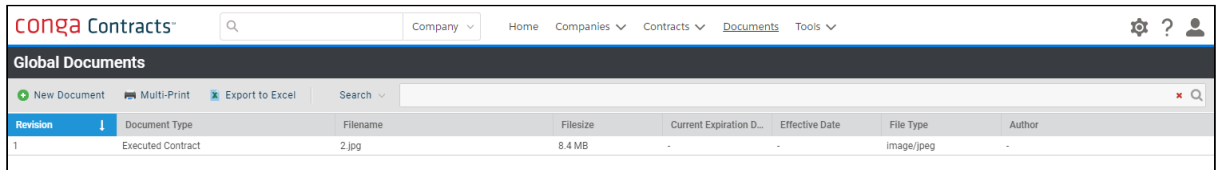
- The Companies menu option now takes you to the All Companies page, and the dropdown has the following options:
- Add Company
- Projects



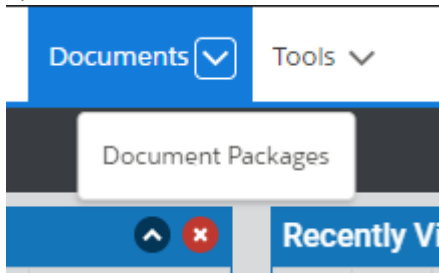
- The Contracts menu option takes you to the All Contracts page. Requests, Approvals, and Clauses are now located under this dropdown menu, including:
- Add Contact
- My Contracts
- Projects



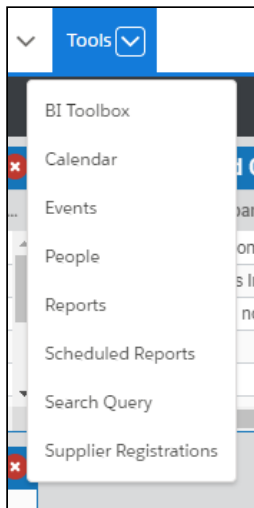
- The new Documents option takes you to the Global Documents page.



- If you've purchased the Documents Packages add-on, it is available as a dropdown option.

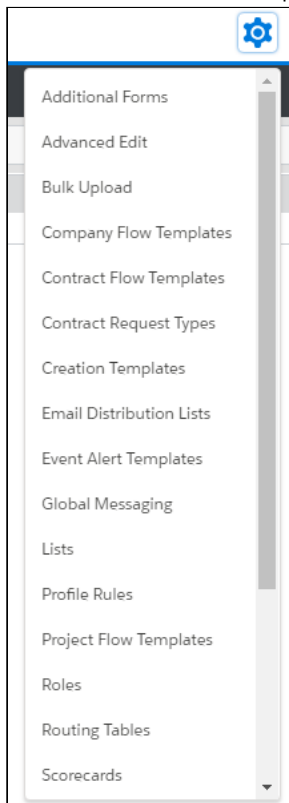


- The new Tools option replaces MyPlace. Reports is now located under this dropdown menu, including:
 - Calendar
 - Events
 - People
 - Search Query
 - BI Toolbox and Supplier Registrations are listed here if you've purchased these add-ons.

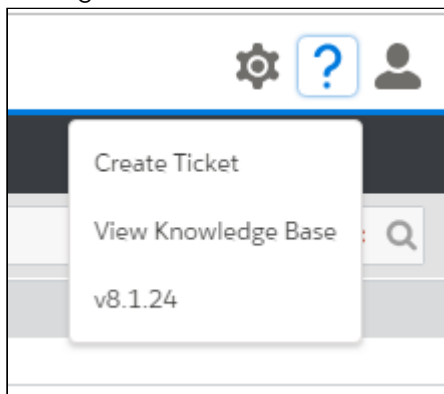


- There are three new icons on the right side of the toolbar that give you the following options:
 - Gear Icon

- The Admin section options are now all consolidated here.

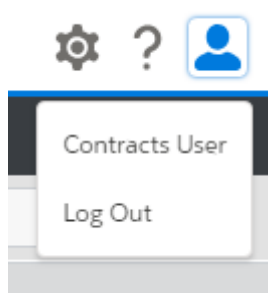


- Question Mark Icon
 - Create a ticket
This option is only available for System Admins.
 - View Knowledge Base
 - View your Contracts version number



- Person Icon
 - Click on your name to access User Preferences

- Log Out



Learn more about Conga Contracts and User options in the [Conga Contracts User Guide](#).

Program Components - Home Page and Portlets

The Home page is the screen that displays once you login to the Conga Contracts system. From the Home page, you can add portlets, which are miniature navigation windows that allow you to quickly link to the companies, contracts, projects, and other stored data that you regularly access.

The Home page is the screen that displays once you log in to Conga Contracts. You can return to the Home page at any time by clicking the Conga Contracts (or other) logo, located in the top left corner of every program screen.

You can add portlets to the Home page, which are miniature navigation windows that allow you to quickly link to the companies, contracts, projects, and other stored data that you regularly access.

From the Home page you can use the Navigation Toolbar to access the browse and input screens for the companies, contracts, and projects stored in Conga Contracts. From the Tools menu, you can run searches, generate reports on stored data, and access the tasks and information that directly affect you.

Additional portlet components include icons that are used to perform tasks from the portlet and the Search option that is used to locate specific data in the portlet.

<p>Home page</p>	<p>The Welcome screen displays in the Home page when you log in to Conga Contracts.</p> <p>To return to the Home page from any program screen, click the logo in the upper left corner of any screen.</p>
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<p>Portlet</p>	<p>The default portlets that display in your Home page are determined by your System Settings Admin. The default portlets are Recently Viewed Companies, Recently Viewed Contracts, and Active Workflow Items.</p>
<p>Add Portlet button</p>	<p>Click to add a portlet to your Home page.</p>
<p>Remove icon</p>	<p>Click x to remove a portlet from the Home page.</p>
<p>Column display</p>	<p>To customize the information in a portlet, hover over a column heading until the v icon displays, and click it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>Click on a column heading to change the sort order of the data.</p> <p>You cannot sort the data in any of the Recently Viewed portlets.</p>
<p>Resize and Reorder Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Click and drag the border to the desired width. • To move a column to a different location in the portlet, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Properties icon	<p>Click the cog icon to display a prompt or window and modify the properties for the portlet:</p> <ul style="list-style-type: none"> • Active Workflow Items - displays a Configure Tabs prompt to control which tabs display in the portlet. • Upcoming Events - displays a Time Span prompt to control the number of days prior to the current date when displaying events that are due for completion. • Search Query - displays a Query Selection prompt to load an existing search and run it in the portlet. • Charting - displays a Chart Design window to select the type of chart and the search filter to use when displaying the chart in the portlet.
Collapse icon	<p>Click v to collapse a portlet so that only the header displays. Click ^ to redisplay the entire portlet.</p>
Tabs	<p>If present, click on a tab to display a different view of the data.</p>
Jump to Page option	<p>To view a specific page of records, enter a value in the Page field and press the ENTER key on your keyboard.</p>
Paging option	<ul style="list-style-type: none"> • To move forward or back one page, use the < and > icons. • To display the first or last page, use the << and >> icons.
Refresh option	<p>To return the portlet to the default view after a running a search or making changes to the display, click the refresh icon.</p>
Resize Portlet icon	<p>Hover over the symbol between two portlets until the resize icon displays. Then, click on the icon and drag it to the right to increase the width of the portlet on the left, or drag it to the left to increase the width of the portlet on the right.</p>

Search - Browse Screen


The Search option that is available from most browse screens allows you to locate one or more data records stored in the screen.

The Search option that is available from most browse screens allows you to locate one or more data records stored in the screen, such as a specific company or contract listed in the All Companies or All Contracts screen. The browse screens linked to Company and Contract Profiles also contain the Search option, allowing you to quickly locate Documents, Document Packages, People, and Projects.

The Tools menu contains links to several browse screens that include the Search feature, such as Contract Requests and Approvals, as well as the Person, Global Documents, and Clause browse screens.

The Search option that is available from the Navigation Toolbar allows you to run a search on all data stored in Conga Contracts.

Browse screen	Almost all browse screens include the Search option, including the browse screens in your My Place menu, the All Companies and All Contracts screens, and some of the browse screens linked to Company, Contract, and Project Profiles.
Search field	<p>Enter your search criteria in the field using the first few characters or values and press the ENTER key on your keyboard, or click the magnifying glass icon.</p> <ul style="list-style-type: none"> • Use a leading wild card, denoted by an asterisk (*) if you do not know the first few characters or values. • Use a trailing wild card, denoted by an asterisk (*), to return all records that begin with the criteria you enter. For example, entering MAS* returns all contracts with a Master Agreement Type.
Search filter	Enter the criteria you want to filter in the black filter field, and click the filter icon.
Search results	Review the search records that match your criteria. Click on the Company, Contract, or Document tab to view results.

 **Important:**

Search results are returned only if you enter the first name, word, or value, or the beginning word in a text string, used in any of the searchable fields for a data record. For example, if you are searching for a company whose name is Pearson Wallace & Blake, results will be returned if you enter Pearson or Pearson Wallace in the Search field, but no results will be returned if you enter Wallace or Blake.

Profile Toolbars

The toolbars of all program screens contain action buttons for performing tasks. The Company Profile and Contract Profile screens, which are at the top two levels of the Conga Contracts hierarchy, contain both action buttons and wizards.

The toolbars of the Company Profile, Contract Profile, and Document Profile contain action buttons that access program features and perform tasks. Other program screens also contain toolbars with action buttons that are specific to the feature/task.

Company Profile Toolbar

The buttons in the [Company Profile](#) Toolbar allow you to:

- Edit Company information
- Add a Contract Profile (root or incorporated) to the Company Profile
- Use Admin Tools (Merger/Acquisition wizard, Change Name wizard, Archive feature, and Mark as Entity feature)
- Create Workflows using a wizard
- Start Flow on a legacy Company Profile
- Generate a One-Click Report
- Run any of the Reports you have created
- Display the Browse Companies screen
- Print the contents of the Profile screen
- Access the online Help system

Contract Profile Toolbar

The buttons in the [Contract Profile](#) toolbar allow you to:

- Edit Contract information
- Copy a Contract
- Add Incorporated contract
- Archive a contract
- Use Wizard Tools (Renew Contract wizard, Document Package wizard, eSignature Package wizard, and Assign Contract wizard)
- Run Creation Wizard
- Create Workflows using a wizard
- Start Flow on a legacy Contract Profile
- Generate a One Click Report
- Run any of the Reports you have created

- Display the Browse Contracts screen
- Print the contents of the Profile screen
- Access the online Help system





Document Profile Toolbar

















The buttons in the [Document Profile](#) toolbar allow you to:















- Add a New Document
- Edit Document Information
- Open in Word to perform direct edits in Conga Contracts
- Download Document
- Upload New Revision of a document
- Compare Revisions of a document
- Preview the document in a secondary window where you can manipulate, print, and download the document
- Delete Document
- Move Document to another Profile
- Convert to Word/PDF to convert a DOC file to a PDF file, and vice versa

















Conga Contracts Icon Legend






Conga Contracts uses icons to denote key items, dates, events, and links to program task screens. The table below provides a list of the program icons and a brief description of each.

Icon	Description
	Add Item, Begin Processing, Manage Users & Add Document (Document Package)
	Edit item, Continue Processing Contract Request, Reopen Contract Request, Reassign Workflow Step
	Delete item
	Display Calendar

Icon	Description
	Run Report, Run One-Click Report, Preview Report, View Document List (Search Results), Run Document Package Report
	Copy, Copy to Clipboard
	Display Multi-Parties
	Launch Workflows, View History
	View Global (document, report), View Document Package Invitation
	Export to Excel
	Launch PDF
	Print, Multi-Print, Multi-Party
	Mouse-over Tip, Help
	Launch Wizard
	Schedule Event
	Schedule Event for Contract Original Expiration Date
	Display Flow Properties and Options
	Complete/Re-open Task, Complete Document Package, Submit Contract Request, Approve Workflow Step
	Download Document
	Check In Document (Document Package)

Icon	Description
	Check Out Document (Document Package)
	Undo Check Out Document (Document Package), Cancel Submission (Contract Request)
	Lock Document (Document Package)
	Unlock Document (Document Package)
	View User Email Settings (Document Package)
	Review Envelope, Reassign Contract Request
	Submit Document Package (Envelope) for Electronic Signature
	View Document Package Profile
	Sign Document (Document Package)
	View History, View Revision History (Document Package)
	Jump to Contract Profile, Go to Scorecard
	Jump to Company Profile
	Add Contact Number
	Complete Workflow, Reopen Task

Icon	Description
	Approve Workflow Step
	Payment Forecast (View, Create, Edit, Delete)
	View Help
	Search
	Clear search
	Filter
	Refresh the data in Browse screen
	Resize field or column (width)
	Resize field or column (width)
	Resize section, window, portal
	Move item up in list
	Move item down in list
	Expand / Collapse
	Expand / Collapse Hierarchy
	Mark as Entity
	Configure Portlet Properties or Profile Links

Icon	Description
	Delete Portlet, Close Window, Exit Contract Profile Event Alert pop-up window
	Expand/Collapse Additional Parties, Portlet, Contract Approval
	Expand/Collapse Links Navigation Frame
	Maximize/Minimize Links Frame in Profile Screen
	View History

Conga Contracts Address Book

The Address Book stores the names and email addresses for the four Conga Contracts user types: program users, company contacts, legal entity people, and external participants. Distribution lists are also stored in the Address Book, which is used in several program features, including Messaging & Distribution Lists, Events, Scheduled Reports, Workflows, Scorecards, and Project Teams.

The Address Book is a compilation of the names and contact information for all Conga Contracts user types:

- Users - Program users who are added to Conga Contracts by your Administrator.
- Company People (Contacts) - Individuals without Conga Contracts credentials who are Points of Contact (POCs) for a company, and are added to the Company Profile using the Add Person button in the People browse screen.
- The browse screen is accessed by selecting the People link in the Company Profile. Once a company person is added, a Person Profile is created for that person.
- Legal Entity Person - similar to a company person except that the POC is added to a Company Profile that has been marked as a legal entity.
- External People - Individuals without Conga Contracts credentials whose email addresses have been added to the Conga Contracts system so that they can take

part in specialized program features, such as Document Packages, the eSignature process, and Supplier Registrations.

The Address Book contains key information for each individual, such as their email address, work number, and the roles they play in Conga Contracts. The Address Book also stores any email distribution lists that have been created by users with the Email Distribution List permission, and is automatically available for use in many of the Conga Contracts program features, including Messaging, Events, Scheduled Reports, Workflows, Scorecards, and Project Teams. However, distribution lists are not available for use with the Document Package and eSignature Package wizards. A distribution list allow users to quickly and easily communicate with several people without having to select each person individually.

People category list	Change the default view from All People to Users, Company People, or External People to filter the list. Tip: The default view includes email distribution lists.
Search option	To quickly locate a person or distribution list, enter the first few letters of the person's first or last name, or the name of the distribution list, in the Search field and click the magnifying glass . Click x to clear the search results.
Search filter	Click the filter icon to the right of the Search field to display a pop-up window with a list of available fields that can be searched. De-select the check boxes for the fields you do not want to search to filter the results that are returned when you perform a search.
Navigation icons and Page field	<ul style="list-style-type: none"> • Click < and > to move back or forward one page in the Address Book. • Click << to jump to the first page, and >> to jump to the last page. • Enter a number in the Page field, and press ENTER on your keyboard to advance to a specific page.
Show Items list	Change the default from 25 to 5, 10, 50, or 100 to change the number of data records that display on each page.
Refresh screen	Click the refresh icon to return the screen to the default view after a running a search or making changes to the display.

Sort option	Click on any column heading to change the sort order of the data in the column.
Column Display option	Hover over a column heading until the column sort icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Person or Distribution List record	Click on a person's name, or the name of a distribution list, to add the individual / list to the Addresses list box.
Addresses list box	Verify the names of the individuals / distribution lists selected. Click X to remove an individual / distribution list.
Submit button	Click to add all the selected people and/or distribution lists to the event, task, message, workflow, report, project team, or scorecard.

Conga Contracts Email Distribution Lists

The ability to manage email distribution lists is an Administrator-granted permission. If you are able to create, modify, and delete email distributions lists, the Admin menu will display in your Navigation Toolbar and contain the Email Distribution Lists link.

The ability to create and manage email distribution lists is an Administrator-granted permission. If you have this permission, the Admin menu will display in your Navigation Toolbar and contain the Email Distribution Lists link.

Email distribution lists are primarily used with the Messaging feature, which is available from a Company, Contract, or Project Profile. Distribution lists are also available for any of the other program features that use the Address Book, including scheduled reports, events, event alerts for contract expiration dates, scorecards, messaging,

and Project Teams. However, distribution lists are not available for use with the Document Package or eSignature Package wizards.

The following tasks are associated with creating and managing email distribution lists:

- Locate an Email Distribution List
- Search an Email Distribution List
- Add an Email Distribution List
- Edit an Email Distribution List
- Delete an Email Distribution List

Phone Number Entry Window

The Phone Number Entry window ensures that the phone numbers you enter into Conga Contracts are properly formatted so that the correct information is available for reports and general use.

The Phone Number Entry window ensures that the phone numbers you enter into Conga Contracts are properly formatted so that the correct information is available for reports and general use. The window automatically displays if you do not provide a phone number using the correct format, which for US phone numbers, is the area code followed by the phone number. The Phone Number Entry window also accommodates an extension for an office number, and the country code for international phone numbers.

 **Tip:**

The window is available in several program screens, including Contact Information Managing Your Contact Information in your user preferences, Company Profile, Location Profile, Person Profile, and Contract Addresses.

Conga Contracts Online Portal

The Portal is an online forum that your customers and vendors can access to share information, exchange documents, negotiate contracts, and sign documents using electronic signatures. The Portal is also used to register the suppliers who want to do business with your company. The URL for the Portal is either accessed from a link in an email message, or a link to the Portal is provided to a customer, supplier, or vendor by an Administrator.

Conga Contracts includes a secure module known as the Portal, which is an online forum that your customers and clients can access to share information, exchange documents, negotiate contracts, and sign documents using electronic signatures. The Portal is also

used to register the suppliers (or vendors) who want to do business with your company. The URL for the Portal is either accessed from a link in an email message, or the link is provided to a supplier or vendor by an Administrator.

The three Conga Contracts modules that use the Portal are:

- Document Packages - external users participate as members of the document package team in negotiating a contract.
- eSignature Process - external participants sign documents electronically
- Supplier Registrations - suppliers and vendors provide information on their company to Conga Contracts users, who approve or decline the registrations.

Conga Contracts Help System

Conga Contracts provides an online help system, which directly links you to the Conga Contracts support site where you can access the topics in both the User Guide and Administrator Guide. The User Guide contains basic program information and step-by-step instructions for the several tasks that can be accomplished in Conga Contracts.

Conga Contracts provides an online help system, which directly links you to the Conga Contracts support site where you can access the topics in both the User Guide and Administrator Guide. The User Guide contains basic program information and step-by-step instructions for the several tasks that can be accomplished in Conga Contracts. The Administrator Guide contains security-related tasks and program configurations that must be performed before Conga Contracts is ready for use.

Context-sensitive help is also provided for the Company Profile and Contract Profile, and the screens linked to each Profile.

1. Click on your name in the Navigation Toolbar to display a drop-down menu.
2. From the Dashboard, click ? to be directed to the Conga Contracts support site, which contains links to all the help topics in both the User Guide and Administrator Guide.
3. Click Help in the toolbar of a Company or Contract Profile to display a menu with options that directly link you to the help topics for the option selected. Context-sensitive help is available for:
 - Company Profile
 - Click on a menu option to access the help topics for the screens linked to the Profile: Documents, Tasks, Events, Messaging, People, Locations, History, and Additional Forms.
 - Contract Profile

- Click on a menu option to access the help topics for the screens linked to the Profile: Contract Family, Documents, Tasks, Events, Payments, Messaging, People, Addresses, History, and Additional Forms.

My Home page Portlets

The Conga Contracts Dashboard can display up to 15 portlets, which are miniature browse screens that contain quick links to the company, contract, and project data that is essential to users.

Adding a Home page Portlet

The Home page is the screen that displays once you login to Conga Contracts. You can add several portlets, or miniature browse windows, to the Home page to quickly link to the companies, contracts, documents, and other information you regularly use in Conga Contracts.

The Home page is the screen that displays once you log in to Conga Contracts. You can add several portlets, or miniature browse windows, to the Home page to quickly link to the companies, contracts, documents, and other information you regularly use in Conga Contracts.

You can return to the Home page at any time by clicking on Home at the top of the Navigation Toolbar.

Currently, there are 16 portlets that can be added to your Home page: Recently Viewed Companies, Recently Viewed Contracts, Recently Viewed Projects, Upcoming Events, Upcoming Tasks, My Contracts, My Contract Requests, My Approvals, Recent Messages, Search Query, Document Packages, eSignature Packages, Supplier Registrations, Active Workflow Items/Contract Flows/Flow Steps, BI Toolbox, and Charting.

1. On the Home page, click Add Portlet.
2. In the Add Portlet window, locate the portlet you want to add, and click its +Add button.
3. (Optional) Manage the fields that display in the portlet.
4. (Optional) Reposition and resize the portlet.

Some portlets contain multiple tabs to provide different views based on status, icons to perform tasks, and the ability to search for specific data. The tabs that display in the Active Workflow Items portlet can be managed by clicking the gear icon in the header, and selecting/clearing check boxes in the Configure Tabs prompt. The gear icon in the Upcoming Events portlet is used to change the time span for the events that display. In the BI Toolbox portlet, the icon is used to select the Analytics Report displayed in the portlet.

Portlet Display and Functionality

The fields that display in a portlet can be managed to display only the information that is most relevant to you. Some portlets contain multiple tabs to provide alternative views of stored data, or icons that allow you to perform tasks from the portlet. Other portlets contain a Properties icon that allows you to customize the type of information displayed in the portlet.

The fields that display in a portlet can be managed to display only the information that is most relevant to you. Some portlets contain multiple tabs to provide alternative views of stored data, or icons that allow you to perform tasks from the portlet. Other portlets contain a Properties icon that allows you to customize the type of information displayed in the portlet.

Column display	To customize the information in a portlet, hover over a column heading until the V icon displays, and click it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	Click on a column heading to change the sort order of the data. Tip: You cannot sort the data in any of the Recently Viewed portlets.
Resize and Reorder Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the double bar resize icon appears. Click and drag the border to the desired width. • To move a column to a different location in the portlet, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Search option	Enter a keyword or value in the Search field.
Status multi-select list	If present, filter the records that display by selecting one or more statuses.

Tabs	If present, click on a tab to display a different view of the data.
Icons	If present, click on an icon to perform a task.
Properties icon	<p>Click the gear icon to display a prompt or window and modify the properties for the portlet:</p> <ul style="list-style-type: none"> • Active Workflow Items - displays a Configure Tabs prompt to control which tabs display in the portlet. • Upcoming Events - displays a Time Span prompt to control the number of days prior to the current date when displaying events that are due for completion. • Search Query - displays a Query Selection prompt to load an existing search and run it in the portlet. • Charting - displays a Chart Design window to select the type of chart and the search filter to use when displaying the chart in the portlet.
Collapse icon	Click ^ to collapse a portlet so that only the header displays. Click V to redisplay the entire portlet.
Remove icon	Click X to remove a portlet from the Dashboard.
Resize icon	Hover over the triple bar symbol between two portlets until the resize icon displays. Then, click on the icon and drag it to the right to increase the width of the portlet on the left, or drag it to the left to increase the width of the portlet on the right.
Show Items list	To change the number of data records that display on each screen, change the default selection.
Jump to Page option	To view a specific page of records, enter a value in the Page field and press the ENTER key on your keyboard.
Paging option	<ul style="list-style-type: none"> • To move forward or back one page, use the < and > icons. • To display the first or last page, use the << and >> icons.

Refresh option	To return the portlet to the default view after a running a search or making changes to the display, click refresh.
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Repositioning and Resizing Portlets

You can easily change the location of portlets in your Dashboard, as well as resize a portlet, and collapse portlets to increase your viewing area.

Repositioning a Portlet

1. In the Dashboard, mouse over the header of the portlet until the four directional arrow icon displays.
2. Click on the header, and then drag-and-drop the portlet to the desired location.

Resizing a Portlet

To change the width of a portlet:

1. In the Dashboard, hover the cursor between two portlets until the resize icon displays.
2. Click the icon and drag it to the right to increase the width of the portlet on the left, or drag it to the left to increase the width of the portlet on the right.

To change the height of a portlet:

3. In the Dashboard, hover over the bottom border of the portlet until the resize icon displays.
4. Click the icon and drag the border downwards to increase the height of the portlet, or drag it upwards to decrease the height.

Collapsing/Expanding a Portlet

5. In the Dashboard, click the ^ icon for a portlet to collapse it so that only the header remains.
6. Click the V icon to redisplay the entire portlet.

Removing a Portlet

1. To remove a portlet from the Dashboard, click the X icon.

Adding a Search Query Portlet

The Search Query portlet allows you to run any of the searches that you have already created and saved from the Dashboard. Once you run the query, the search results remain

in the Search Query portlet until you run another query. However, you can run and store multiple search queries in the Dashboard by opening additional Search Query portlets.

The Search Query portlet allows you to run any of the searches that you have already created and saved using the Search Query function from the Dashboard. Once you run the query, the search results remain in the Search Query portlet until you run another query. However, you can run and store multiple search queries in the Dashboard by opening additional Search Query portlets.

1. In the Dashboard, click Add Portlet.
2. In the Add Portlet window, scroll down to Search Query, and click on it.
3. Populate the portlet by running a saved Search Query.
 - In the Search Query header, click the cog icon.
 - In the Query Selection window, locate the search query you want to run in the portlet, and click on it to select it.
 - Click OK.
4. (Optional) Manage the fields that display in the portlet.
5. (Optional) Reposition and resize the portlet.

Adding a BI Toolbox Portlet

You need the BI Tool permission to add the BI Toolbox portlet to your Dashboard. A BI Tool Admin can display the visual analyses that have been shared with them, as well as those they created. A visual analysis can be a table or a chart (pie, bar, line, scatter, or donut) that represents the relationship between data in one or more fields in a program screen, additional form, or clause. The relationship expressed in the table or chart can also track one or more fields over time to communicate trends.

You can add several Toolbox portlets to your Dashboard to accommodate every analysis you want to monitor. Data in the portlet is updated between logins, but you can refresh the portlet during a session to ensure you always have the most up-to-date information.

1. In the Dashboard, click Add Portlet.
2. In the Add Portlet window, scroll down to BI Toolbox, and click its +Add button.
3. Populate the portlet by selecting a shared BI Dashboard:
 - In the BI Toolbox header, click the gear icon .
 - In the Configure BI Toolbox portlet prompt, make a selection in the Choose BI Toolbox Dashboard list.
 - Click Submit.
4. Hover over a bar in the chart to display a pop-up with additional information.
5. (Optional) Hover over the top right border of a bar chart until the zoom icon displays, and click it to display the Explorer.

- Zoom in on a specific section of the chart by hovering over it until the magnifying glass icon displays. Click the icon and drag it upwards or downwards to shade the desired section, and then release your mouse.
 - Click the circling arrows icon to undo the action.
 - Click the drill icon to enable drill mode.
 - Click the icon of an image with a downward pointing arrow to export the current display of the chart as an image.
Tip: The zoom option is not available for circle charts, such as pie and donut charts. None of the options (zoom, drill, or export) are available for table charts.
6. (Optional) Reposition and resize the portlet.
 7. (Optional) Refresh the portlet by clicking the Conga Contracts (or other) logo, located in the top left corner of every screen.

Displaying a Circle Chart

One of the features of the Explorer in the BI Toolbox portlet is to display data in a circle chart, such as a pie or donut chart, instead of a bar chart.

1. Repeat Steps 1-3 above to display the circle chart in the portlet.
2. Hover over a section of the chart to display a pop-up with additional information.
3. (Optional) Hover over the top right border of the circle chart until the drill icon displays, and click it to display the Explorer.
 - Click on a section to display a Drill to prompt, which allows you to change the filters used to create the chart.
 - To remove any filter changes, close the portlet, add a new BI Tool portlet, and re-select the dashboard visualization.
 - Click the icon of an image with a downward pointing arrow to export the current display of the chart as an image.

Using the Charting Portlet

Charting is a special portlet that allows you to generate a color-coded illustration, representing one or more elements of the contract, company, or project data stored in Conga Contracts. You must first create a search query and apply filters so that only the desired data is displayed, and then select the type of chart that best represents the filtered data.

Charting is a special portlet that allows you to generate a color-coded illustration, representing one or more elements of the contract, company, or project data stored in

Conga Contracts. You must first create a search query and apply filters so that only the desired data is displayed, and then select the type of chart that best represents the filtered data.

There are three options for displaying information in the Charting portlet: Pie Chart, Bar Chart, and Time Line.

Generating a Pie Chart

A pie chart can be used when you want to visually represent data as a percentage or proportion. The data in a pie chart is determined by the field(s) you select to be represented in the chart, which is then filtered by a saved search query that you created, or a global search shared by another user.

A pie chart is created to show the breakdown of companies by company type. An existing search query of companies, filtered by customers, suppliers, and distributors, is used to provide data for the chart.

1. In the Dashboard, click Add Portlet.
2. In the Add Portlet window, scroll down to Charting, and click its +Add button.
3. Populate the portlet:
 - In the Charting header, click the gear icon.
 - In the Chart Design window:
 - Enter a name for the chart in the Chart Name field.
 - Select Pie Chart in the Chart Type list.
 - Locate the saved search you want to use in the Search Query Filter list, and click it to select it.
 - Click the downward arrow in the field to display the list.
 - Click in the X-Axis or Group By Field list to display a hierarchy of fields.
 - Drill down to locate the field whose data you want represented in the chart, and click it to select it.
 - (Optional) Click in the Y-Axis Field list to display a hierarchy of fields. Drill down to locate the field whose data you also want represented in the chart, and click it to select it
 - Click OK
4. (Optional) Reposition and resize the portlet.
5. (Optional) Use the ^ and v toggle icons to collapse and expand the portlet, and the X icon to remove the portlet from the Dashboard.



Tip:

If you use only one variable in your pie chart, the call-out sections of the pie will show the calculated total for each section of the pie based on the variable you selected in the X-Axis or Group By Field. If you use more than one variable by making a selection in the Y-Axis Field and then selecting the Aggregate option, the call-out sections of the pie will display only the calculation for the Y-Axis Field.

Generating a Bar Chart

A bar chart is a common way to visually display comparisons between categories of data. The data in the bar chart is determined by the fields you select to be represented in the chart, which is then filtered by a saved search query that you created, or a global search shared by another user.

A bar chart is created to show contract values by their status. An existing search query of contracts, filtered by status (Active, Inactive, or In Process) is used to provide data for the chart. A second filter is applied to the query to ensure the Contract Value field is populated, thereby excluding any Non-Disclosure Agreements or other contracts that have no assigned value.

1. In the Dashboard, click Add Portlet.
2. In the Add Portlet window, scroll down to Charting, and click its + Add button.
3. Populate the portlet:
4. In the Charting header, click the gear icon.
5. In the Chart Design window:
6. Enter a name for the chart in the Chart Name field.
7. Select Bar Chart in the Chart Type list.
8. Locate the saved search in the Search Query Filter list, and click it to select it.
9. Click the downward arrow in the field to display the list.
10. Click in the X-Axis or Group By Field to display a hierarchy of fields.
11. Drill down to locate the field whose data you want represented along the horizontal axis of the chart, and click it to select it.
12. Click in the Y-Axis to display a hierarchy of fields.
13. Drill down to locate the field whose data you want represented along the vertical axis of the chart, and click it to select it.
14. Select an Aggregate Option for the bar chart:
15. Select the Sum or Average radio button to display data as a total or an average of the total.
16. Select the Min or Max radio button to display only the high end and low end of the data.

17. Click OK.
18. (Optional) Reposition and resize the portlet.
19. (Optional) Use the ^ and v toggle icons to collapse and expand the portlet, and the X icon to remove the portlet from the Dashboard.

Generating a Time Line

A time line is a chart that tracks data or resources over a specific time period. The data in the time line is determined by the fields you select to be represented in the chart, which is then filtered by a saved search query that you created, or a global search shared by another user.

A time line chart is created to show the monthly valuation of contracts that are expiring in the current year. An existing search query of contracts, filtered by those with an Active status and a value that is greater than zero, is used to provide data for the chart.

1. In the Dashboard, click Add Portlet.
2. In the Add Portlet window, scroll down to Charting, and click its +Add button.
3. Populate the portlet:
 - In the Charting header, click the gear icon.
 - In the Chart Design window:
 - Enter a name for the chart in the Chart Name field.
 - Select Time Line Chart in the Chart Type list.
 - Locate the saved search in the Search Query Filter list, and click it to select it.
 - Click the downward arrow in the field to display the list.
 - Click in the X-Axis or Group By Field to display a hierarchy of fields.
 - Drill down to locate the field whose data you want represented along the horizontal axis of the chart, and click it to select it.
 - Click in the Y-Axis to display a hierarchy of fields.
 - Drill down to locate the field whose data you want represented along the vertical axis of the chart, and click it to select it.
 - Set the Date Options for the time line:
 - Click the calendar icon in the Start field and select the beginning date.
 - Click the calendar icon in the End field and select the ending date.
 - Select the Day, Month, or Year radio button in Date Group Options to set the timeframe used to group the data.
 - Select an Aggregate Option for the time line:
 - Select the Sum or Average radio button to display data as a total or an average of the total.

- Select the Min or Max radio button to display only the high end and low end of the data.
 - Select the None radio button to exclude aggregation. This option is available only if Day is selected as the Date Group Option.
 - Click OK.
4. (Optional) Reposition and resize the portlet.
 5. (Optional) Use the ^ and v toggle icons to collapse and expand the portlet, and the X icon to remove the portlet from the Dashboard.

Conga Contracts User Preferences

User preferences include password updates, customizing system settings, and controlling email notifications.

Overview of Conga Contracts User Preferences

The User Preference options allow you to customize the display of data in your Conga Contracts program screens, manage your contact information, change your password, control the email notifications you receive for the program tasks that you are responsible for completing, and manage the applications linked to Conga Contracts that are available to you.

The User Preference options allow you to customize the display of data in your Conga Contracts program screens, manage your contact information, change your password, control the email notifications you receive for the program tasks that you are responsible for completing, and manage the applications linked to Conga Contracts that are available to you.

You can manage the following user preferences by clicking on the person icon on the left hand side of the Navigation Toolbar, and selecting your name:

 **Tip:**

If you do not have permission to edit your name, physical address, and contact information, the fields in the Name, Address, and Contact tabs will be grayed-out. However, you can access the Email Signature field in the Contact tab:

- [Name and Title](#) changes
- [Address](#) changes

- [Contact updates](#), including your contact phone numbers, email address to be used for system email messages, and the signature block to be used when you send an email from Conga Contracts
- [Password updates](#)
- [System](#), which controls the language used in program screens, the format of dates and numbers in program screens, and the time zone used in sending email messages for event alerts and other time-sensitive tasks, as well as calculating the duration of open tasks, flow steps, and workflow steps
- [Portal](#), which controls the number and type of email messages you receive when you are a member of a document package, participant in the eSignature process, or reviewer for a supplier registration
- [OAuth](#), which lists applications that have been linked to Conga Contracts and are available to you

Managing Your Name & Title

User preferences allow you to manage your name/title as a Conga Contracts program user. However, if the fields are not accessible, you do not have permission to provide or edit your name and title.

1. Click on the person icon in the Navigation Toolbar, and then click on your name.
2. In the User Preferences window, click the Name tab.
3. Make any changes to the current information.
4. Click Submit.

You can click between all the tabs and make changes without losing the data entered on each tab. Simply click the Submit button on any tab when you have finished making your changes.

Managing Your Address

User preferences allow you to manage the physical address you want to use in Conga Contracts. However, if the fields are not accessible, you do not have permission to provide or edit your physical address.

1. Click on the person icon in the Navigation Toolbar, and then click on your name.
2. In the User Preferences window, click the Address tab.
3. Make any changes to the current information.
4. Click Submit.

You can click between all the tabs and make changes without losing the data entered on each tab. Simply click the Submit button on any tab when you have finished making your changes.

Managing Your Contact Information

User preferences allow you to manage your contact information, including phone numbers and the email address you use for messages received from Conga Contracts. However, if the fields are not accessible, you do not have permission to provide or edit your contact information, but you will still be able to edit the Email Signature field.

1. Click on the person icon in the Navigation Toolbar, and then click on your name.
2. In the User Preferences window, click on Contact tab.
3. Provide your contact information.
4. Edit the Email Address field if you want to change the email address you want to use for the messages you receive from Conga Contracts.
The Email Signature text box is used to capture the signature block that will be used when you send an email message from Conga Contracts.
5. Click Submit.

You can click between all the tabs and make changes without losing the data entered on each tab. Simply click the Submit button on any tab when you have finished making your changes.

Changing Your Password

User preferences allow you to change your Conga Contracts password, as needed.

1. Click on the person icon in the Navigation Toolbar, and then click on your name.
2. In the User Preferences window, click the Password tab.
3. Enter your old password.
4. Using the instructions for creating a new password, enter your new password, and then confirm it.
5. Click Submit.

You can click between all the tabs and make changes without losing the data entered on each tab. Simply click the Submit button on any tab when you have finished making your changes.

Customizing Your System Settings

User preferences allow you to customize Conga Contracts so that system information is displayed in accordance with your specifications.

1. Click on the person icon in the Navigation Toolbar, and then click on your name.
2. In the User Preferences window, click the System tab.
3. Make any changes to the default settings:
 - Date Format - select Day/Month/Year (14/07/2018) or Year-Month-Day (2018-07-14).
 - Number Format - select International Format [0.000,00] to change a price from the dollar format (\$1,234,567.89) to the Euro format (€1.234.567,89).
 - Language Format - select from the available list of languages: French, German, Spanish, Dutch, Portuguese (Brazil), or Simplified Chinese.
4. Make a selection in the Time Zonelist to set the time zone used in Conga Contracts.

 **Tip:**

The time zone is used to calculate the sending of event alerts, due dates for tasks and projects, the amount of time it takes for flow and workflow steps to be completed, the elapsed time between submission and approval of contract requests, and the amount of time it takes for a document submitted for electronic signature to be signed.

5. Select the Prevent Filter Save check box to have Search and Status filters cleared when exiting browse screens.
Currently, the only option in the Theme list is Modern.
6. Click Clear State if you want to clear any changes you make to screen settings and return them to the system defaults upon exiting, including Dashboard portlets and the fields displayed in browse screens.
This option is useful in correcting display issues, such as missing icons or improperly aligned columns of data.
7. Click Submit.

You can click between all the tabs and make changes without losing the data entered on each tab. Simply click the Submit button on any tab when you have finished making your changes.

Setting Your Portal Notifications

User preferences allow you to select the types of email notifications you receive when you are a member of a document package, a participant in the electronic signing process, or a reviewer for a Supplier Registration.

1. Click on the person icon in the Navigation Toolbar, and then click on your name.
2. In the User Preferences window, click the Portal tab.
3. Select the Send Check-in Notifications check box if you want to receive a system email notifying you when a document from a document package has been checked back in to Conga Contracts.
4. Select the Send Check-out Notifications check box if you want to receive a system email notifying you when a document from a document package has been checked out of Conga Contracts.
5. Select the Send Document Completed Notifications check box if you want to receive a system email notifying you when a document package completed.
6. Click Submit.

You can click between all the tabs and make changes without losing the data entered on each tab. Simply click the Submit button on any tab when you have finished making your changes.

Managing Your Linked Applications

User preferences allow you to manage the applications that can be used in conjunction with Conga Contracts, such as Salesforce or the MS Word plug-in for the Document Assembly feature.

1. Click on the person icon in the Navigation Toolbar, and then click on your name.
2. In the User Preferences window, click the OAuth tab.
3. View the applications that are available for use with Conga Contracts. For example, the Conga Contracts client represents the MS Word plug-in that is used in the Document Assembly feature.
4. (Optional) Click - to remove the application from your Conga Contracts program.
5. Click Submit.

Updating Your Theme

Those who are currently using the Classic theme in Conga Contracts automatically updates to the Modern theme with the 8.1 Release in February 2018.

1. Click on the person icon in the Navigation Toolbar, and then click on your name. .
2. In the User Preferences window, click the System tab.
3. In the Theme list, select Modern.
4. Click Submit.

There are some primary differences Classic users will encounter when they switch to the Modern theme: Navigation, User Links, Portlets, Browse Screens, Profile Screens, and Wizards.

Navigation

The Navigation Panel, which is located on the left side of every program screen, has been replaced with a Navigation Toolbar, which displays along the top of every screen. Clicking on any link in the Navigation Toolbar displays a drop-down menu with links to a browse screen or a program feature.

User Links

The Preferences, Help, Dashboard, and Logout links are now accessible from a menu that is launched by clicking on your name, instead of clicking on individual links.

 **Tip:**

In the Modern theme, you can also click on the Conga Contracts logo (or your company logo), located in the top left corner of every screen to return to the Dashboard.

Portlets

The Add Portlet window provides a brief description of each portlet, instead of just listing the available portlets. The window is accessed by clicking the Add Portlet button in the Dashboard in both interfaces.

Browse Screens

Browse screens in the Modern theme have a higher color contrast, more pronounced headings, updated icons, and enhanced organization, which all promote usability.

Profile Screens

Profile screens in the Modern theme, such as the Contract Profile screen, use a new layout that enhances readability. The headings that separate sections of information, such as Term and Renewal, Additional Fields, and Links have been enhanced to promote identification. Links are also easier to access due to increased spacing between the links.

Wizards

Wizards in the Modern theme, such as the Report Wizard, have a higher color contrast, more pronounced section headings, and are easier to use.

Conga Contract Tools

The Tools menu provides each user with links to customized screens of data that are specific to the information they need and the tasks they are required to perform.

Getting Started with Tools

The Tools menu is accessed from the Navigation Toolbar and provides each user with links to customized screens containing the data they need and the tasks they are required to perform.

Tools Menu

The Tools menu in the Navigation Toolbar provides links to customized views of data and tasks that are specifically related to you, as well as the global documents that are available to all program users

To access the Tools Menu, click on Tools in the Navigation Toolbar.

You can view information and perform tasks from the Tools menu:


- [View My Calendar](#)
- [View My Events](#)
- [View My Reports](#)
- [Manage People](#)
- [Manage My Supplier Registrations](#)

My Calendar

The My Calendar screen displays a monthly calendar showing all events and tasks assigned to you by other users, as well as those you assigned to yourself. You can also view past months and years, and adjust the view so that events and tasks are hidden.

The My Calendar screen displays a monthly calendar showing all events and tasks assigned to you by other users, as well as those you assigned to yourself. You can also view past months and years, and adjust the view so that events and tasks are hidden.

Navigation Toolbar	Click Tools to display the menu, and then click the Calendar link.
Calendar Month	Click the calendar icon to change the calendar month and year. The default is today's calendar month.
Today button	Click Today to select today's date.
Current Calendar	View the current month's events and tasks. Tip: The calendar view always contains additional days, showing either part of the last week of the previous month or part of the first week for the next month (or both).
Calendar Navigator	<ul style="list-style-type: none"> • Click > to navigate to future calendar months and their events and tasks. • Click < to navigate to previous calendar months and their events and tasks.
Task links (green background)	Click on a link to jump to the Company, Contract, or Project Profile screen where you can view information for the task. To return to your calendar, click on your browser's Back button. Tip: If you mouse over the link, a pop-up displays with the full name of the task, along with the date.

<p>Event links (tan background)</p>	<p>Click on a link to jump to the Company or Contract Profile screen where you can view information for the event. To return to your calendar, click on your browser's Back button.</p> <div style="border: 1px solid green; padding: 5px; margin-top: 10px;"> <p> Tip:</p> <p>If you mouse over the link, a pop-up displays with the full name of the event, along with the date.</p> </div>
<p>Hide/Show toggle buttons</p>	<p>Click to hide/show your events and tasks in the calendar.</p> <ul style="list-style-type: none"> • Hide/Show My Events - controls the display of events assigned to you during the selected time frame. • Hide/Show My Tasks - controls the display of tasks assigned to you during the selected time frame. • Hide/Show Other Events - controls the display of events assigned to you, as well as those you assigned to yourself during the selected time frame.

My Events

The My Events screen displays a list of all events for which you are the owner. As an event owner, you are responsible for ensuring the task(s) associated with the event are completed. You can assign yourself the role of owner when you create an event, or another user can create an event and designate you as the owner.

The My Events browse screen displays a list of all events for which you are the owner. As an event owner, you are responsible for ensuring the task(s) associated with the event are completed. You can assign yourself the role of owner when you create an event, or another user can create an event and designate you as the owner.

The upcoming events for which you have some measure of responsibility are listed in the Upcoming Events portlet in your Dashboard.

<p>Navigation Toolbar</p>	<p>Click Tools to display the menu, and then click the Events link.</p>
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Event records	View a summary of the events for which you are the owner. <ul style="list-style-type: none"> To display additional information for an event, click on the event record to display the Event Profile. From the profile, you can edit the event, delete it, mark it as complete, or subscribe to the event.
Search list	Hover over the Search label until it turns blue, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.
Search field	Locate a specific event by typing the first few letters of the event name in the Search field, and clicking the magnifying glass. To clear the filter, click x.
Event records display	Manage the display of information in the screen: <ul style="list-style-type: none"> Update the columns that display using the Sort/Column menu. Reorder and resize the columns to manage the display of information in the browse screen. Sort the data in a column by clicking (toggling) on a column heading.

My People

My People Overview

The My People link in the Tools menu displays a screen listing the program users, company people, legal entity people, and external people whose names and email addresses they can use in Conga Contracts.

You can quickly access a list of the people who you can message and are available to be assigned to program tasks and events. This list is your Address Book, and it is made up of Conga Contracts program users, company people (those who have a Person Profile in a Company Profile), legal entity people (those who have a Person Profile in a Company Profile that has been marked as a legal entity), and external people (those who engage in Conga Contracts activities via the Portal, the DocuSign cloud, or the Adobe Sign cloud). The Address Book also contains any email distribution lists that have been created.

The Address Book is used in many program functions, including sending email messages from a Company, Contract, or Project Profile, scheduling reports, assigning tasks, and requiring flow/workflow steps and scorecards to be completed. The Address Book is also used to invite individuals and distribution lists to become members of a document package or add them to the eSignature process.


You can perform the following tasks related to your Address Book:


- [Locate a person](#)
- [Add a company person](#)
- [Add an external person](#)
- [Edit information for a company or external person](#)
- [Delete a company or external person](#)

My People Browse Screen

The Person Browse screen is your personal Address Book, and lists all the people whose information you can view, including program users, company people, legal entity people, and the external people who access Conga Contracts via the Portal, the DocuSign cloud, or the Adobe Sign cloud.

The entries in the Address Book are managed from the Person Browse screen and the Mail Distribution List Browse screen.

Navigation Toolbar	Click Tools to display the menu, and then click the People link.
People category list	Change the default view from All People to Company People, External People, or Users to filter the list.
Person records	<p>View summary information for each person. To display additional information for a person, click on their record to display their Person Profile.</p> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>If a user, company person, or external person has been disabled, their record is displayed in gray text.</p> </div>

Search list	Hover over the Search label until it turns blue, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.
Search field	<p>Locate a person by typing the first few letters of their first or last name in the Search field, and clicking the magnifying glass. To clear the filter, click x.</p> <div data-bbox="671 551 1426 891" style="border: 1px solid #c8e6c9; padding: 10px;"> <p> Tip:</p> <p>You can also search for a person using any of the other fields in the Search list. For example, if you wanted to search for all people with a Conga Contracts email address, you would ensure Email is selected in the Search list, and using a wild card (*), enter *@Conga Contracts in the Search field.</p> </div>
History icon	Click the clock icon to display a history screen showing the date the person was added to Conga Contracts and any changes made to their Person Profile.
Add External Person button	Click to add an external person to the Address Book.
Add Company Person	Click if you want to add a company person to a Company Profile.
Person records display	<p>Manage the display of information in the screen:</p> <ul style="list-style-type: none"> • Update the columns that display using the Sort/Column menu. • Reorder and resize the columns to manage the display of information in the browse screen. • Sort the data in a column by clicking (toggling) on a column heading.

Locating a Person

The people you can search for include other program users, company people (contacts at the companies stored in Conga Contracts), and external people (people who are not program users or company contacts, but participate in Conga Contracts tasks and events using the Portal or eSignature cloud, such as lawyers). Your Address Book is comprised of

the program users, company people, and external people that you can message, and assign to tasks and events.

1. Click Tools in the Navigation Toolbar to display the menu, and then click the People link.
2. (Optional) In the Person Browse screen, filter the category list by changing the default view from All People to Company People, External People, or Users.
3. (Optional) Hover over the Search label until it turns blue, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.
4. In the Search field, enter the first few letters of the person's first or last name, and click the magnifying glass. To clear the filter, click x.

 **Tip:**

You can also search for a person using any of the other fields in the Search list.

5. (Optional) Click on the person's icon to to display a history screen showing the date the person was added to Conga Contracts and any changes made to their Person Profile.
6. Click on the person's record to display their Person Profile.
7. (Optional) Manage the display of information in the screen:
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

Adding an External Person

You can easily add external people to your Address Book so you can send them email messages whenever they need to be kept informed, or their input is needed, during the contract creation, negotiation, management, renewal, or archival processes.

An External Person is a Person Type representing an individual NOT associated with a specific Company (the way a Company Contact is). This feature allows an individual to be associated with one or more specific contracts via Contract Responsibility as well as to receive Messages and Scheduled Reports from the system and participate in document/esignature packages and supplier registrations using the Portal, and the eSignature cloud when their electronic signature is required on documents. Examples of External

People use may be for Person Functions and/or Contract Responsibilities such as "Outside Counsel" or "Auditor."

You can easily add external people to your Address Book (which is accessed as a popup in the "To" fields in Messages, Event Alert Notifications, and Scheduled Reporting) and Tools>People.

Tip: Before adding an external person, ensure that the person has not already been added to Conga Contracts by running a search under Tools > People. If you want to link an external person to a company, add the person as a company person.

1. Click Tools in the Navigation Toolbar to display the menu, and then click the People link.
2. In the Person Browse screen, click Add External Person in the toolbar.

 **Warning:**

if it is your intention to link a person to a Company, use "Add Company Person" instead. An external person CANNOT be linked to a Company; the External Person record must first be deleted, which may require "unlinking" Contract Responsibilities and other areas where that External Person was referenced, and then added as a NEW Company Person record, then re-linked to Contract Responsibilities, if necessary.

3. Populate the required fields: First Name, Last Name, and Email Address.
4. In the Functions list, click on each every function that the external person can have in Conga Contract.

 **Tip:**

To deselect a function, click on the highlighted function.

5. (Optional) Populate the remaining fields for the external person.
6. Click Save.

Adding a Company Person

A company person is an individual who is a point of contact (POC) for a company stored in Conga Contracts. A legal entity person is a POC for a company that has been marked as a legal entity. You can add a company person from your Person Browse screen or from the Company Profile.

You can send email messages to a company person from Conga Contracts, and they can respond to the messages, which are stored as threads. Although a company person cannot access Conga Contracts directly, they can participate in document/esignature packages

and supplier registrations using the Portal, and provide their electronic signature on documents in theSignature cloud.

 **Tip:**

Before adding a company person, ensure that the person has not already been added to Conga Contracts by running a search. If you want to add a person, but not link them to a particular company, add the person as an external person.

1. Click Tools in the Navigation Toolbar to display the menu, and then click the People link.
2. In the Person Browse screen, click Add Company Person in the toolbar.
3. In the New Company Person dialog box:

 **Tip:**

You can also search for a company using any of the other fields in the Search list.

- Click in the Company Name field if the company already has a Company Profile.
 - In the Search field, enter the first few letters of the company name, and click the magnifying glass.
 - Click on the company name record to select it, and populate the field.
 - Click Submit.
 - When the Company Profile displays, scroll down to the People screen.
 - Provide the required information for the company person, and the known optional information.
 - Click Save.
4. Click the New Company link to enter a company person for a new company.
 5. In the New Company Entry screen, provide the required information for the new company, and the known optional information.
 6. Click Save.
 7. When the Company Profile displays, click the People link at the bottom of the screen.
 8. Click Add Person in the toolbar.
 9. Provide the required information for the company person, and the known optional information.
 10. Click Save.

Editing Information for a Company or External Person

The information for a company person or an external person is edited from their Person Profile.

 **Tip:**

The Person Profile for a company person can also be edited from the Company Profile by clicking the People link in the profile, and then clicking on the person's record in the People browse screen. A User Profile is edited by an Administrator with the User Admin permission.

1. Click Tools in the Navigation Toolbar to display the menu, and then click the People link.
2. In the Person Browse screen, locate the person whose information you want to edit, and click on their person record.
3. In the Person Profile screen, click Edit Person in the toolbar.
4. When the screen refreshes, update the person's information.
5. Click Save.

Deleting a Company or External Person

A company person or an external person is deleted from their Person Profile.

 **Tip:**

The Person Profile for a company person can also be deleted from the Company Profile by clicking the People link in the profile, and then clicking on the person's record in the People browse screen. A User Profile is disabled or archived by an Administrator with the User Admin permission.

1. Click Tools in the Navigation Toolbar to display the menu, and then click the People link.
2. In the Person Browse screen, locate the person you want to delete, and click on their person record.
3. In the Person Profile screen, click Delete Person in the toolbar.
4. In the Delete Person prompt, click Yes.

My Supplier Registrations

Supplier Registrations is a feature that allows representatives of companies who wish to do business with your company to login to the Conga Contracts Portal and register as a supplier. If you have the permission to accept/decline supplier registrations, the Supplier Registrations link appears in your Tools menu.

My Supplier Registrations Overview

Supplier Registrations is a feature that allows representatives of companies who wish to do business with your company to login to the Conga Contracts Portal and register as a supplier. If you have been assigned the tasks of processing supplier registrations, the Supplier Registrations link appears in your Tools Menu.


You can perform the following tasks related to your supplier registrations:

- [Review the supplier registrations you can process](#)
- [Locate a supplier registration](#)
- [Process a supplier registration](#)
- [Process a resubmitted supplier registration](#)
- [Review the history of a supplier registration](#)
- [Generate a Supplier Registration Report](#)

My Supplier Registrations Browser Screen

The Supplier Registration Browse screen displays a list of the supplier registrations that you have the authority to review, and then accept/decline. The supplier registrations that display in your browse screen can be filtered by status and you can search for a specific registration by supplier name or other identifier.

Navigation Toolbar	Click My Place to display the menu, and then click the Supplier Registrations link.
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<p>Supplier Registration records</p>	<div style="border: 1px solid #c8e6c9; padding: 10px; margin-bottom: 10px;"> <p> Tip:</p> <p>Tip: The registrations that are awaiting approval have a status of Submitted; those with a status of Pending have not yet been submitted for approval by the supplier.</p> </div> <ul style="list-style-type: none"> • To access a supplier registration, click on a registration record to display the Supplier Registration Profile with additional information for this supplier. From the Profile, you can accept (or decline) the registration, and view a history of all the revisions made during the supplier registration process. You can also view, download, and review the changes made to any documents provided by the supplier.
<p>Status multi-select list</p>	<p>Select Submitted to view only the supplier registrations that are awaiting approval. The default view, All Registrations, also includes supplier registrations with a status of Pending, Submitted, Accepted, and Declined.</p>
<p>Search list</p>	<p>Hover over the Search label until it turns blue, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.</p>
<p>Search field</p>	<p>Locate a registration by typing the first few letters of the company name or registration type in the Search field, and clicking the magnifying glass. To clear the filter, click X.</p>
<p>Supplier Registration Report button</p>	<p>Click to run a report on your supplier registrations</p>
<p>Supplier Registration records display</p>	<p>Manage the display of information in the screen:</p> <ul style="list-style-type: none"> • Update the columns that display using the Sort/Column menu. • Reorder and resize the columns to manage the display of information in the browse screen. • Sort the data in a column by clicking (toggling) on a column heading.

Locating a Supplier Registration

Supplier registrations are accessible from the Supplier Registrations portlet in your Dashboard, and from the Supplier Registrations link in your Tools menu. An easy way to locate a supplier registration is to search by the name of the supplier.

Supplier Registration Portlet

1. In the Dashboard, locate (or add) the Supplier Registration Browse portlet.
2. In the portlet, locate the supplier registration using the available options:
 - Search for a registration by entering the company name or the registration type into the Search field, and pressing the ENTER key on your keyboard.
 - Filter registrations by status using the Status multi-select list.
 - Select Submitted to view only the supplier registrations that are awaiting review.
 - Scroll through the list.
3. (Optional) Manage the display of information in the portlet:
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

Tools Menu

1. Click Tools in the Navigation Toolbar to display the menu, and then click the Supplier Registrations link.
2. In the Supplier Registration Browse screen, locate the registration using the available options:
 - Search for a supplier registration by entering the company name or the registration type into the Search field, and pressing the ENTER key on your keyboard.
 - Filter registrations by status using the Status multi-select list.
 - Select Submitted to view only the supplier registrations that are awaiting review.
 - Scroll through the list.
3. (Optional) Manage the display of information in the screen:
 - Update the columns that display using the Sort/Column menu.

- Reorder and resize the columns to manage the display of information in the browse screen.
- Sort the data in a column by clicking (toggling) on a column heading.

Processing a Supplier Registration

A supplier registration is designed to capture the type of information your company needs to assess a prospective supplier. As an approver, your job is to review the supplier's information, including any attached documents, for completeness and correctness, and then accept/decline their bid to do business with your company. Once you approve or decline a registration, Conga Contracts generates an email message to the supplier, apprising them of the disposition of their request.

1. Locate the supplier registration you want to process, and click on the supplier registration record.
2. In the Supplier Registration Profile screen:
 - Review the information provided by the supplier and ensure all fields were populated.
 - Use the scroll bar to view hidden information.
 - In the Documents section, click the download icon to download a copy of any document attached to the registration.
 - (Optional) Click the clock icon to view a history of all the revisions made to the document.
3. Process the registration by selecting one of the options:
 - Click Decline in the toolbar to decline the registration.
 - In the Decline Registration dialog box:
 - Enter the reason(s) for declining the supplier registration in the Notes field.
 - Click Submit.
 - Click Accept in the toolbar to approve the registration.
 - In the Approve Registration dialog box:
 - If the supplier does not have a Company Profile in Conga Contracts, click the New Company radio button, and click Submit.
 - In the Company Profile screen, populate the required fields for the new company, and click Save.
 - When the screen refreshes, click Go To Supplier in the toolbar to return to the Company Profile screen, or click Back to Browse to return to the Supplier Registration Browse screen.
 - If the supplier has a Company Profile in Conga Contracts, click in the Existing Company field to display a company list.

- Locate the company using the Search option or by scrolling through the alphabetized list.
- Click on the company name to select it, and click Submit.
- When the screen refreshes, the inaccessible (grayed-out) fields display so that you can update the supplier information.
- (Optional) Edit the information in any field, or populate any blank field.
- (Optional) Clear the check box for a field if the information is correct, and does not need to be updated.
- Click Accept in the toolbar.

Processing a Resubmitted Supplier Registration

A supplier can resubmit a registration from the Conga Contracts Portal after a Conga Contracts user has already approved their original registration request. When the approver receives email notification that the supplier has resubmitted their registration, the approver must compare the information in the resubmitted registration to the original information, and decide whether or not to update the information in the Company Profile.

1. From the email message, click the Go To Supplier Registration link.
2. Log in to Conga Contracts to be directed to the Supplier Registration Profile screen.
3. Review the updates made to the supplier registration: In the Documents section of the screen, locate any new documents added to the registration.
4. Click the download icon to download a copy of a document for review.
5. Click View Changes in the toolbar.
6. When the screen refreshes, review the fields that have been updated.
7. To accept a change, leave the field's check box selected.
8. To reject a change, clear the field's check box.
9. New information is displayed in a field with a red outline and a selected check box.
10. Process the resubmitted supplier registration:
 - Click Accept in the toolbar to accept the supplier's changes, including any new documents.
 - Click Cancel to decline the changes made by the supplier.
 - When the Supplier Registration Profile screen redisplay, click Decline.
11. In the Decline Registration prompt:
 - Enter the reason(s) for declining the supplier registration in the Notes field.
12. Click Submit.

Reviewing a Supplier Registration's History

You can track the history of a supplier registration once it is submitted, during the review process, and after acceptance if the supplier resubmits the registration with additional information.

1. Locate the supplier registration whose history you want to review, and click on the supplier registration record.
2. In the Supplier Registration Profile screen:
 - (Optional) Click the clock icon in the Documents section of the screen to view a history of all the revisions made to a document attached to the registration.
 - Click the History tab to view the History screen for the supplier registration.
 - Review the history records for the supplier registration.
3. Click Back to Browse in the toolbar to return to Supplier Registration Browse screen.
4. If the supplier registration has been accepted, the Go To Supplier button displays. Click the button to display the Company Profile for the supplier.

Generating a Supplier Registration Report

You can generate a report on the supplier registrations that are displayed in your Supplier Registrations Browse screen. The Supplier Registration Report provides a chronology of each registration, including contact information for the supplier, the dates on which the registration's status changed as it moved through the review process, as well as notes that identify each step in the process.

1. Click Tools in the Navigation Toolbar to display the menu, and then click the Supplier Registrations link.
2. In the Supplier Registration Browse screen, click Supplier Registration Report in the toolbar.
3. In the Supplier Registration Report Options prompt:
 - Make a selection in the Report Format list:
 - XLS - displays report in Excel Spreadsheet
 - PDF - displays report as Portable Document Format file
 - HTML - displays report in a system-formatted Report Preview window
4. Click OK.

The report below is the HTML version of the report, which displays in the Report Preview window. The report is grouped by Registration Types, depicted by a top-level gray header, such as General Supplier Registration. Below the top-level header is a Company name and the Status of the supplier registration for this company. Below the Company name are lower-level gray headers that group the information for the supplier by category, such as

Supplier Address and Registration History. Below the lower-level gray headers are fields with the captured information for the supplier company.

Conga Contracts Reports

Conga Contracts provides Basic Reporting (Report Wizard), One-Click Reports, Scheduled Reporting, Advanced Reporting, and Analytics Reports.

Conga Contracts Reports Overview

Conga Contracts provides four types of reporting: Basic Reporting that includes One-Click Reports and reports generated using a Report Wizard, Scheduled Reporting that automatically emails reports to a distribution list, Advanced Reporting that provides customized formatting options and allows report data to be narrowly defined, and Analytics Reporting that analyze data at the field level and display patterns discovered in the data.

Overview of Conga Contracts Reporting

Conga Contracts provides three general areas of reporting: Basic Reporting that uses a Report Wizard, Scheduled Reporting that automatically emails reports to a distribution list, and Advanced Reporting that provides several customized formatting options and allows report data to be narrowly defined. There is also a One-Click Report that displays key data stored in a Company or Contract Profile, and an Analytics Report that analyzes data at the field level and displays patten

Conga Contracts allows you to create customized reports on the data that you have added to the program. There are four general areas of reporting:

- [Basic Reporting](#) includes the Company One-Click, Contract One-Click, and Document Package One Click reports, which display a summary of the key data stored in a Company Profile, Contract Profile, and Document Package.
 - The next level of basic reporting employs a Report Wizard that steps you through the process of creating a standard report.
 - Once a report is created using the wizard, you can preview the report, edit it, make a copy, share it with other users, update a report filter, and delete it.
 - You can also locate the reports that you created and customize the display of reports in the Report Browse screen.
- [Advanced Reporting](#) involves creating a report using different data sets and applying customized formatting to the report layout. You can also associate an advanced

report with a search query to narrowly define the information that is displayed in the report. Once an advanced report is created, it is labeled as an Advanced Report in your list of reports, where you can preview it and edit it, as needed.

- Analytics Reporting involves analyzing the data stored in Conga Contracts and communicating patterns discovered in the data. Analytics Reports extract data at the field level, and then display the data linearly and/or graphically using a color-coded chart or a report summary.
- [Scheduled Reporting](#) involves programming Conga Contracts to email reports to a distribution list on a regularly scheduled basis, such as daily, weekly, monthly, or yearly. You can also schedule a report to be delivered only once. Once a report is scheduled for delivery, you can edit the delivery schedule, or cancel delivery of the report. The standard and advanced reports that you have scheduled are viewed in a central location. Similarly, analytics reports can also be scheduled for delivery, and viewed from the Scheduled Analytics Reports screen.





Report Browse Screen

The default organization of reports in the Report Browse screen is by report group: Basic, Advanced, Analytics, and Global (Shared).

The Report Browse screen stores and provides access to all the reports you have created, as well as the global reports that have been shared with you. From the Browse screen, you can preview, generate, share, and make a copy of any report, except an Analytics Report.

<p>Report Group</p>	<p>Identify the groups used to organize reports:</p> <ul style="list-style-type: none"> • Standard reports created using the Report Wizard are categorized as Report Group: Company, Report Group: Contract, Report Group: Project, and Report Group: Request . • If a Secondary category was selected in the Wizard, the grouping will display both the primary and secondary categories, such as Report Group: Contract and Events. • Advanced Reports are displayed under Report Group: Advanced Report, and the group name will be appended by Company, Project, or Request, depending on the primary (and any secondary) reporting data selected. • For example, if you created an advanced report showing key contract data for a company, the report would be displayed as Report Group: Advanced Report: Company → Contract. • Analytics Reports are displayed under Report Group: Analytics Report. • Global Reports are displayed under Report Group: Global Reports and identify the reports that were created by another user and shared with all other program users.
<p>Report record</p>	<ul style="list-style-type: none"> • Identify the reports that you have created, and those that have been shared with you, using the report's name, description, and creation date. • Preview or generate a standard or advanced report using the icons described in E-G below. • Double-click on a standard or advanced report to edit it. • Launch an analytics report by clicking its Report icon to both generate and edit the report.

<p>Search option</p>	<ul style="list-style-type: none"> • Click the Search List icon to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Enter a beginning keyword or value in the Search field, and click the magnifying glass icon. For example, entering the word Customer and selecting the Report Name check box will display accurate search results for all customer reports. • Click X to clear the filter.
<p>Copy icon</p>	<p>Click the document icon to make a copy of the report.</p>
<p>Preview icon</p>	<p>Click Preview to preview the report in a Preview Report window.</p>
<p>Adobe icon</p>	<p>Click the Adobe Acrobat icon to generate the report as a PDF file.</p>
<p>Excel icon</p>	<p>Click the Microsoft Excel to generate the report as an Excel spreadsheet.</p>
<p>Share icon</p>	<p>Click the Share link icon to share the report with other users.</p> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip: You can only share the reports that you create</p> </div>
<p>Show in Groups check box</p>	<p>Clear if you do not want reports to be grouped in the browse screen, which will remove the group headings and display reports alphabetically by report name.</p>
<p>Group By This Field option</p>	<p>Change the default grouping option:</p> <ul style="list-style-type: none"> • Click on the column heading you want to group by: Report Name, Description, or Created On. • Click on the column heading's icon, and click Group by this field in the Sort/Column/Group menu. <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip: If the group option was previously disabled, ensure the Report Group check box is selected in the Sort/Column/Group menu.</p> </div>

<p>Column display</p>	<p>To customize the information in the screen, hover over a column heading until the  icon displays, and click on it to open the Sort/Column/Group menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the  icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
<p>User Reports list</p>	<p>Select another user to display a list of their reports.</p> <div data-bbox="660 936 1426 1160" style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>The default display is your reports, including those you created and those that have been shared with you by other users.</p> </div>
<p>New Report Types list</p>	<p>Click to create a new basic report using the Report Wizard, an Advanced Report, or an Analytics Report.</p> <div data-bbox="660 1413 1426 1637" style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>If you are not running Analytics, New Report and Advanced Report buttons display instead of the list.</p> </div>
<p>Edit Report button</p>	<p>Click to edit a Standard, Advanced, or Analytics report, after clicking on the report in the browse screen.</p>
<p>Edit Report Filters button</p>	<p>Click to edit the filter for a Standard report.</p>

Delete Report button	Click to delete the Standard report. Analytics reports are deleted from the report.
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Analytics Compared

Conga Contracts provides Basic Reporting and the BI Toolbox. The following matrix is a guide to help you understand what is included in each type of report.

Features	Basic Reports	BI Toolbox
Create Reports	✓	✓
Clone Reports	✓	✓
Export Reports	✓	✓
Global Reports	✓	✓
Schedule Reports	✓	✓
Group/Categorize Reports	✓	✓
Searching Reports	✓	✓
Data Sorting	✓	✓
Export as PDF/XLSX, or CSV	✓	✓
Modern UI		✓
Drag and Drop Interface		✓
Advanced Styling		✓
Customized Times for Scheduling Reports		✓
Customized Portlets		✓

Features	Basic Reports	BI Toolbox
Sharing Reports		✓
Sharing Dashboards		✓
Adding Text Fields		✓
Advanced Headers & Footers		✓
Numbering Pages		✓
Adding Horizontal Rules		✓
Pre-Built Sample Reports		✓
Conditional Formatting		✓
Formula Fields		✓
Aggregate Data		✓
Formatting Fields		✓
Hide/Show and Resize/Move		✓
KPI Charts		✓
Easy Charting		✓
Export Charts as JPG or PNG		✓

Scheduled Reports Screen

The Scheduled Reports screen provides access to all the basic and advanced reports that have you have scheduled, as well as those reports whose distribution you can edit or delete. The Scheduled Analytics Reports section displays only if you are running the Analytics module, and lists the analytics reports that you have scheduled for distribution, as well as those you can delete or whose distribution information you can edit.

The Scheduled Reports screen provides access to all the basic and advanced reports that have you have scheduled, as well as those reports whose distribution you can edit or delete. The Scheduled Analytics Reports section displays only if you are running the Analytics module, and lists the analytics reports that you have scheduled for distribution, as well as those you can delete or whose distribution information you can edit.

A user must have the Scheduled Reporting permission to access the Scheduled Reports screen.

Scheduled Report record	Click on a link for a report record to display its Scheduled Report Edit screen where you can make updates to the scheduled standard or advanced report.
Scheduled Analytic Report record	Click on a link for a report record to display its Scheduled Analytics Report Edit screen where you can make updates to the scheduled analytics report.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column display	To customize the information in the screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the the green checkmark icon displays, you are successfully moving the column.
New Scheduled Report button	Click to schedule a standard or advanced report.
New Scheduled Analytics Report button	Click to schedule an analytics report.

Basic Reporting

Basic Reporting includes the Company One-Click and the Contract One-Click reports, which display a summary of the key data stored in a Company Profile and a Contract Profile. The next level of basic reporting employs a Report Wizard that steps users through the process of creating a report by selecting fields, grouping data, and adding filters.

Basic Reporting Overview

Basic reports include the one-click reports that the Conga Contracts system auto-generates when you simply click on a button in a Contract or Company Profile. A more detailed version of the one-click report can be generated using the Report Wizard, which allows you to select the fields that display in your report, as well as group and filter the data in your report. There is also limited formatting in controlling the names of the columns in your report and the width of the columns.

You can perform the following tasks related to basic reporting:

- [Run a Company One-Click Report](#)
- [Run a Contract One-Click Report](#)
- [Locate a report](#)
- [Create a report](#)
- [Generate and preview reports](#)
- [Edit a report](#)
- [Update a report filter](#)
- [Copy a report](#)
- [Share a report](#)
- [Group & Ungroup reports](#)
- [Delete a report](#)

Running a Company One-Click Report

The Company One-Click Report provides a summary of the key data stored in a Company Profile, including the company address, website, phone numbers, and DUNS/TIN numbers. The report also displays information for stored Locations, Documents, Tasks, Events, and any Additional Forms attached to the Company Profile.

1. Open a Company Profile.
2. In the Company Profile screen, click One Click Report in the toolbar.
3. Review the report, which displays in a new browser window.

4. (Optional) Click the Download As Excel button, and open the downloaded report in an Excel spreadsheet.

Running a Contract One-Click Report

The Contract One-Click Report provides a summary of the key data in a Contract Profile, including basic information stored in both the Company and Contract Profiles. The report also displays information for stored Documents, Tasks, Events, Locations, Additional Parties, and Payments, as well as any Additional Forms captured in the Contract Profile.

1. Open a Contract Profile.
2. In the Contract Profile screen, click One Click Report in the toolbar.
3. Review the report, which displays in a new browser window.
4. (Optional) Click the Download As Excel button, and open the downloaded report in an Excel spreadsheet.

Locating a Report

Reports are stored and accessed from the Report Browse screen, which displays a list of your reports, in groups, based on the way in which the report was created. Reports created using the Report Wizard display under the Report Group: Company/Contract, Project, or Request header. An Advanced Report displays under the Report Group: Advanced Report header, followed by the name of the report. Any global reports that were shared with you display under the Report Group: Global Reports header.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. (Optional) In the Report Browse screen, make a selection in the User Reports list to search only the reports for a different user. By default, your name is selected and only your reports display, which include the global reports that were shared with you.
3. In the Report Browse screen, enter the report name (or part of the name) in the Search field and press the ENTER key on your keyboard.
 - You can also search for a standard or advanced report using the headers that identify the report group, such as Report Group: Company Contract (standard report) or Report Group: Advanced Report: CompanyContract (advanced report) and then scroll through the list. Expand/collapse a report group using the ^ and V icons.
4. When the list of possible matches displays, locate the report, and double-click it to select it.
5. (Optional) Perform any of the following tasks for the report:
 - Edit the report by double-clicking on the report record to launch the Report Wizard if it is a standard report, or the Advanced Reporting screen if it is an advanced report.

- Edit the report by clicking the report's + report icon if it is an Analytics Report. Analytics reports are previewed and printed from the Analytics Report Builder.
- Click the Preview icon to preview the report in a Preview Report window.
- Click the Adobe Acrobat icon to generate the report as a PDF file.
- Click the Microsoft Excel to generate the report as an Excel spreadsheet.
- Click the document icon to make a copy of the report.
- Click the Share link icon to share the report with all other users.

Creating a Standard Report (Report Wizard)

You need the Reporting permission to run the Report Wizard, which creates a comprehensive report using both primary and secondary data sets. Using the Wizard, you can group data by a field, such as company name or contract number, to avoid repetitive information. You can also customize the display of the report, and print it as either a PDF file or an Excel spreadsheet.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, click New Report in the toolbar.
3. In the Report Wizard, click Next in the Welcome step.

The steps below show how to create a report showing contracts with more than two parties. The report includes basic information for the contract, such as the contract number, contract type and agreement type, term type, effective and expiration dates, as well as the company name and the additional company name(s). The report is filtered by contract status and is also linked to an additional form, which provides information on any attorney fees associated with negotiating and finalizing the contract.

1. In the Select Report Type step, select Contract in the Primary list, and Additional Parties in the Secondary list.

 **Tip:**

The Secondary list is used to create a narrow report since the selections in this list correspond to system fields, additional fields, and linked items in a Contract or Company Profile, such as Documents, Events, and Tasks. Clauses is a secondary option that reports on the clauses stored in your Clause Library, including the clause text, type, and revision number, as well as whether or not the clause reflects the standard contract language and whether or not it is the latest version of the clause.

2. Enter a name for the report in the Report Name field, and click Next.
3. (Optional) Provide a concise description of the report in the Description field.
4. In the Report Field Selection step, add fields to the report by double-clicking on a field in the Field Selection section to add it to the Fields Selected section. Click Next.
5. To change the order of the columns in the report, click on the field you want to move until the prompt displays, and then drag and drop the field up or down in the list.

 **Tip:**

Fields are grouped into categories, such as Company Fields and Contract Fields. The list of available fields includes (1) the fields in the default Profile screen of the Primary entity and any additional fields added the Profile (2) the fields in the default Profile screen for the Secondary entity and any additional fields added the Profile, and (3) the fields in the single-use additional forms for the Primary entity.

6. In the Report Grouping step, locate the field that you want "grouped" on the report, such as Company Name, and double-click on it. Click Next.
7. (Optional) In the Report Record Ordering step, change the order of the columns in the report, and click Next.
8. Double-click on a field in the Order Selection list to add it to the Order Selected list, adding the fields in the order you want them displayed in the report.
9. (Optional) In the Report Column Editor step, adjust the width of the columns to accommodate the data in your report by clicking in a Report Column Width field and typing over the existing value. Click Next.
10. If you used the grouping option (Step 8), the field you chose to group by has no value since it displays as a header in the report.
11. (Optional) In the Report Aggregate step:
12. Select a check box for a numeric field whose value you want to aggregate or perform a calculation. The options for each numeric field are:
13. Sum - calculates a total of all values in the field.
14. Avg. - calculates the average of the values for the field.
15. Min. - displays field values in ascending order.
16. Max. - displays field values in descending order.
17. Select a check box for the Record Count to perform an aggregation on the total number of records in the report, and click Next.
18. (Optional) In the Report Filters step, click the Show All Records check box to display all report results, or click Add Filter to filter report results. In this example, we are filtering by contracts with a status of Active, In Process, or Negotiation.
19. Select Contract > Status in the Field list.
20. Select Is in the Condition list.
21. Select Active, In Process, and Negotiation in the Value list.

22. Click Next.

23. If the filter for a report is a date, the options are:

- Before - select a date in the Value field to filter items prior to a specific date.
- On - select a date in the Value field to filter items on a specific date.
- After - select a date in the Value field to filter items after a specific date.
- Is Null - filters by items whose date field is not populated.
- Not Null - filters by items whose date field is populated with any date.
- Greater than today + (x) days - filters by a flexible future date. For example, if today is March 31, 2017 and you want to filter by dates from April 1, 2017 – June 30, 2017, you would enter 91 in the Value field since there are 91 days in those three months, and the date greater than today is April 1, which is a day included in the 91-day timeframe.
- Less than today + (x) days - filters by a flexible past date. For example, if today is January 1, 2017 and you want to filter by dates for the previous year, you would enter 365 in the Value field since there are 365 days in a year, and the date less than today is December 31, which is a day included in the previous year.

24. In the Save Report step, click Finish.

After exiting the Report Wizard, you can preview the report, generate the report as a PDF file or an Excel spreadsheet, copy the report, and share the report with other users from your Report Browse screen.

Copying a Report

You can make a copy of any standard report or advanced report listed in your Report Browse screen. This feature is useful if you want to create a new report that is similar to an existing report since it is quicker and easier than creating a new one.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the report you want to copy.
3. Click the report's copy icon.
4. In the Report Copy prompt:
 - a. Edit the name of the original report in the Report Name field.
 - b. (Optional) Edit or provide a description for the report in the Report Description field.
 - c. (Optional) Change the selection in the Report Group list to move the new report under a different grouping in the Report Browse screen.
 - d. Click Submit.

Editing a Standard Report (Report Wizard)

A report that was created using the Report Wizard is also edited using the wizard.

 **Tip:**

An Advanced Report is edited manually from the Report Layout screen. An Analytics Report is edited by updating the fields, sections, filters, charts, and any additional functionality, including calculations and analysis styles.

1. Locate the standard report you want to edit.
2. In the Report Browse screen, double-click on the report record.
3. In the Report Wizard, step through the windows, making the appropriate changes.

 **Warning:**

If the Report Wizard does not display, you are attempting to edit an Advanced Report.

Updating a Report Filter

You need the Reporting permission to use the Update Filter option, which immediately directs you to the Filter step in the Report Wizard. This time-saving option is essential when the same report is being run with several different filters.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the report whose filter you want to update.
3. Click the report record to select it, and then click Edit Report Filters in the toolbar.
Tip: If the button is not active, the report is not a standard report that was created using the Report Wizard.
4. In the Report Filters step of the wizard, update or remove the filter. Click Next.
 - See [Creating a Standard Report](#) for more information.
5. In the Save Report step, click Finish.

Generating and Previewing Reports

The reports that you can preview and generate are in your default Report Browse screen, and include the standard reports you created using the Report Wizard, as well as any global reports shared with you. If you have both the Reporting and Advanced Reporting permissions, your Report Browse screen will include the advanced reports you can preview and generate, which include those you created and the global advanced reports shared with you. From the Browse screen, you can also preview and generate the standard

(and advanced) reports created by other users by changing the default selection in the User Reports list.

If your company is running Analytics, you can preview and generate a YF Analytics Report from the Report Browse screen. If your company is running BI Toolbox Analytics, you can preview and generate a BI Analytics Report from its report screen.

Standard and Advanced Reports

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the report you want to preview and generate.
Tip: Change the selection in the User Reports list to display the reports for a different user.
3. Preview the report by clicking its Preview icon.
4. Generate the report by clicking its:
 - Adobe Acrobat icon to download a PDF version of the report.
 - Microsoft Excel icon to download an Excel version of the report.
5. When the report downloads, click the:
 - PDF link to display the report in a new browser window.
 - Excel link to display the report in an editable spreadsheet.

Analytics Reports

The following steps apply to the YF Analytics module. BI Analytics reports are printed by clicking the Download as PDF link in the report screen.

1. Locate the report you want to preview and generate.
2. In the Report Browse screen, click the report's + report icon.
3. In the Output view of the report, generate the report as a PDF, XLSX, CSV, or TXT file by clicking the upward arrow in the toolbar.

Sharing a (Global) Report

All of the standard and advanced reports you create are capable of being shared with other program users. When you share a report, it is categorized as a global report. Sharing reports not only saves time and resources, but also ensures that the reports generated by your department or organization are standardized.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the report you want to share.
3. Click the report's Share link icon.
4. In the confirmation prompt, click Yes.

Deleting a Report

The reports that you can delete are in your default Report Browse screen, and include the standard reports you created using the Report Wizard, as well as any global reports shared with you. If you have both the Reporting and Advanced Reporting permissions, your Report Browse screen will include the advanced reports you can delete, including those you created and the global advanced reports shared with you. While you can delete a global report that has been shared with you, you cannot delete the original report, which is accessed by selecting the author's name in the User Reports list in the Report Browse screen.

If your company is running Analytics, you can access a YF Analytics Report from the Report Browse screen and then delete it from its Data screen. If your company is running BI Toolbox Analytics, you can delete a BI Analytics Report from the Home screen.

Standard and Advanced Reports

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the report you want to delete.
3. Click the report record to select it.
4. Click Delete Report in the toolbar.
5. In the Delete Report prompt, click Yes.

BI Analytics Reports

The following steps apply to BI Analytics reports. YF Analytics Reports are deleted from the Data screen.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the My Items link to display the reports you have created and duplicated.
3. Locate the Analytics Report you want to delete, and click its trash icon.
4. Click OK in the confirmation prompt.

Grouping and Ungrouping Reports

You can display a listing of all your reports, rather than having them grouped. You can also group your reports by Creation Date or Description, rather than by Report Group / Report Name.

Displaying Reports Individually

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, hover over a column heading until the column icon displays, and click on the icon to open the Sort/Column menu.
3. In the menu, clear the Show in Groups check box.
4. (Optional) In the menu, click on Columns and select the Report Group check box to add the report group to the Browse screen.
5. Optional) Click (toggle) on the Report Name, Description, or Created On column heading to change the sort order of the reports.

Displaying Reports in Groups

The system default is to display reports by group, such as standard reports by Company, Contract, Project, or Request type, as well as Advanced Reports and Analytics Reports. You can also group reports by their name, creation date, or description.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the field you want to group by, hover over its column heading until the column icon displays, and click on the icon to open the Sort/Column menu.
3. In the menu, click Group by this field.

 **Tip:**

If you want to group by Report Group and the field is not displayed in the screen, click on Columns in the Sort/Column menu, and select the Report Group check box.

Scheduled Reporting

Scheduled Reporting is used to email reports to a distribution list on a regularly scheduled basis (i.e., daily, weekly, monthly, or yearly). Reports that can be scheduled for delivery include those generated by the Report Wizard, Advanced Reports, and Analytics Reports.

Scheduled Reporting Overview

You can schedule a report to be distributed once, or you can schedule the report so that it is distributed every day, every week, every month, or once a year. You can also cancel the delivery of the scheduled report at any time. The types of reports that can be scheduled for

delivery include those created by the Report Wizard, Advanced Reports, and Analytics Reports.

You can perform the following tasks related to scheduled reporting:

- [Review existing scheduled reports](#)
- [Locate a scheduled report](#)
- [Schedule a report for distribution](#)
- [Edit a scheduled report](#)
- [Cancel the scheduled distribution of a report](#)

Locating a Scheduled Report

Reports that are scheduled for regular distribution are stored and accessed from the Scheduled Reports screen. The screen is divided into two sections: Scheduled Reports, which displays a list of both standard and advanced reports scheduled for distribution, and Scheduled Analytics Reports, which displays only analytics reports that have been scheduled for distribution.

A user must have the Scheduled Reporting permission to access the Scheduled Reports screen.

1. Click Reports in the Navigation Toolbar, and click the Scheduled Reports link in the menu.
2. In the Scheduled Reports screen:
3. Locate a scheduled standard or advanced report in the top half of the screen by scrolling through the list, or clicking on a report header to change the sort order of information in a column.

 **Tip:**

The Scheduled Analytics Reports section displays only if you are running the Analytics module.

- For example, to locate a report that was recently scheduled, click on the Created On heading to sort creation dates in descending order.
 - Locate a scheduled analytics report in the Scheduled Analytics Reports section of the screen by scrolling through the list, or clicking on a report header to change the sort order of information in a column.
4. (Optional) Click on a scheduled report to display its Scheduled Report Edit (or Scheduled Analytics Report Edit) screen to review and edit the distribution of the report.

Scheduling a Report

A user with the Scheduled Reporting permission can set up a delivery schedule for a report so that it is automatically emailed to a list of recipients or to an entire distribution list. The scheduled report can be tailored to include specific information when being sent to external recipients, or a comprehensive report can be generated for Conga Contracts users and administrators. A scheduled report can be delivered once, or delivered on a daily, weekly, monthly, or yearly basis.

1. Click Reports in the Navigation Toolbar, and click the Scheduled Reports link in the menu.
2. In the Scheduled Reports screen, click the appropriate button:
 - New Scheduled Report to schedule a standard or advanced report.
 - New Scheduled Analytics Report to schedule an analytics report.
 - The Scheduled Analytics Reports section displays only if you are running the Analytics module.
3. In the Scheduled Report Edit screen, populate the fields and lists:
 - User - select the user whose role(s) will be used to generate the report.
 - The amount and type of data in the report that is sent to recipients is based on the permissions of the role(s) the user has with respect to document types, company, contract, and project groups, and secure additional forms
 - To schedule a report entitled Contracts Expiring in 90 Days, select a user who holds a role with access to all contract groups in order to generate a complete report of all expiring contracts, minus any that are removed by a filter defined in the report. To schedule a report entitled Vendor Contracts Expiring in 90 Days, select a user who holds a role with access to only the Vendor contract group to generate (and deliver) a report showing only expiring vendor contracts, minus any that were filtered out.
 - Report Name - select the report you want to schedule in the list, which includes the reports you have created and copied, as well as the global reports that other users have shared with you.
 - Scheduled Start Date - enter the first date you want the report emailed, or click the calendar icon and use the calendar to select the date.
 - (Optional) Scheduled End Date - enter the last date you want the report emailed, or click the calendar icon and use the calendar to select the date.
 - Leave the field blank for a report that is delivered once, or to schedule delivery of the report for an indefinite period of time.
 - Scheduled Frequency - select how often you want the report emailed: Single, Daily, Weekly, Monthly, or Yearly.

- Selecting the Daily option displays the individual days of the week (Sun-Sat), allowing specific days to be selected. The Frequency > Interval field does not display when you select Daily or Single.
 - Frequency Interval - Enter the number of times you want the report to be emailed when you select Weekly, Monthly, or Yearly in the Scheduled Frequency list.
 - To deliver a report every week, select Weekly in the Scheduled Frequency list, and enter 1 in the Scheduled Frequency field. To deliver the report every two weeks, enter 2 in the field.
 - Export Type - select the format for the report: PDF or XLS (Excel).
 - Notification List - click v to display the Address Book.
 - Click on the names of those you want to receive the report and/or click on an email distribution list.
 - To quickly locate a person or a distribution list, type the first few letters of the person's first or last name, or the name of the distribution list, in the Search field, and click the magnifying glass . To clear the filter, click x.
4. Click Submit.
 5. (Optional) Instructions - enter instructions or information for using the report.
 6. Do Not Send Empty Report - select the check box to cancel delivery of the report whenever the report is empty (contains no data).
 7. Click Save.

Editing a Scheduled Report

A user with the Scheduled Reporting permission can update the delivery schedule and notification list for a scheduled report, as well as the permissions used to generate the report.

Tip:

The procedure is the same for editing a scheduled analytics report.

1. Locate the scheduled report you want to edit, and click on it to select it.
2. In the Scheduled Report Edit screen, update the information in the fields, lists, and check box, as needed.
3. Click Save.

Deleting a Scheduled Report

A user with the Scheduled Reporting permission can cancel the delivery of a scheduled report so that recipients no longer receive the report by email.

**Tip:**

The procedure is the same for deleting a scheduled analytics report.

1. Locate the scheduled report you want to delete, and click on it to select it.
2. In the Scheduled Report Edit screen, click Delete in the toolbar.
3. In the confirmation prompt, click Yes.

Advanced Reporting

Advanced Reporting is used to create a report with multiple data sets, which can be grouped to effectively display report data. An advanced report can be associated with a search query to narrowly define the data, and the report display can be customized to ensure a professional-looking report.

Advanced Reporting Overview

The Advanced Reporting feature is used to create a report with multiple data sets, which can be grouped to effectively communicate stored data. An advanced report can be associated with a search query to narrowly define the information provided by the report. To ensure a professional-looking report, the font size, type, and color of the text can be defined in report fields, column headings, headers, and footers. For multi-page reports, page numbers and summary text can be added.

You can perform the following tasks related to Advanced Reporting:

- [Create an advanced report](#)
- [Format report fields](#)
- [Group report data](#)
- [Add a text field](#)
- [Add a header or footer](#)
- [Number report pages](#)
- [Insert a line divider](#)
- [Sort report data](#)
- [Associate a search query with a report](#)
- [Print an advanced report](#)
- [Edit an advanced report](#)
- [Delete an advanced report](#)

Creating an Advanced Report

A user with the Advanced Reporting Admin permission can create an advanced report, which incorporates multiple data sets to provide a comprehensive report. In addition to the primary data fields for a company and contract, a sub-report can be included to show additional data fields, such as those relevant to the documents associated with a contract.

Several formatting options are available in Advanced Reporting, including different font sizes and styles, headers and footers, page numbering, and grouping data to maximize readability. An advanced report can be associated with a search query so that the data in the report is filtered by the criteria established in the query.

The Advanced Report created below contains a list of all contracts, grouped by company name. A sub-group is added to identify the documents stored in each Contract Profile and a text field is inserted to identify the subgroup. A Landscape orientation is chosen as the page setting since several fields will be included in the report.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, click Advanced Report in the toolbar.
3. In the Create Advance Report wizard:
 - Click in the Entity field, and set up the Company→Contract hierarchy.
 - Click the > icon to the left of the Company folder.
 - Scroll down past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
 - Enter a name for the report in the Report Name field.
 - (Optional) Enter a summary of the information contained in the report in the Description field.
 - (Optional) Edit the settings for the report in the Page Layout section:
 - Select a different option in the Page Size and Orientation lists.
 - Select the Custom radio button to enable the Width and Height fields, and enter the custom size (in pixels) for the pages of the report.
 - Click Next.

Tip: When editing the report, the information in the Create Advance Report step cannot be edited. Therefore, ensure the correct information is provided when setting the report hierarchy, entering the name and description, and selecting the page settings.
4. When the screen refreshes, select the Primary (company) and Secondary (contract) fields to include in the report:
 - In the Tables section, click Primary to display the available fields in the Fields section.

- In the Fields section, scroll through the list and click a field to add it to Column Header and Detail sections of report layout.
 - (Optional) Click the Column heading to change the sort order of the fields.
 - (Optional) Remove a field by right-clicking on it to display a Delete button.
 - Repeat the above steps for the Secondary table to select the fields for the second data set.
 - Ensure the fields in both sections display in the same order since the fields in the Column Header section represent the column headings in the report, and the fields in the Detail section represent the report data.
 - (Optional) Click a field in the Column Header or Detail section to display the field's properties in the Properties table, located in the top right of the screen. Use the Value field in the table to format the text for the report heading or report data, or change the field's size and location in the report. You can also resize and move fields using icons. Move a field by hovering over its label until the arrow icon displays. Click the icon, and then drag-and-drop the field to the desired location. Resize the length of a field by hovering over its right or left border until the arrow icon displays. Click the icon, and then drag-and-drop the border to the desired length. Resize the height of a field by hovering over its right or left border until the arrow icon displays. Click the icon, and then drag-and-drop the border to the desired height.
5. Group the report data by company name:
- In the Tables section, click Primary to display the company fields in the Fields section.
 - In the Fields section, locate the Company Name field, and right-click on it to display the Group By button.
 - Click the button to add a Group By Company Name Header section to the report layout containing the Company Name field.
 - In the Detail section of the screen, right-click on the Company Name field to display the Delete button.
 - Click the button to remove the field from the report data so that the field is not repeated for every line item.
6. Create a sub-report showing contract documents:
- In the Tables section, right-click on the Secondary table to display the Add Sub Report button, and click the button.
 - In the Sub Report Table prompt:
 - Click in the list to display a hierarchy of features linked to Contracts, as well as any contract additional fields.
 - Scroll down and click the Document folder.
 - Click OK.

- When the pink rectangular field displays in the Details section of the report layout:
 - Double-click on it to activate it and display the SR: Document heading for the sub-report.
 - Hover over the heading until the icon navigation appears, click the icon, and then drag and drop the sub-report to the location in the Detail section where you want this information displayed.
 - Hover over the borders of the heading and use the arrow icons to resize the sub-report.
 - To resize a section in the report canvas, hover over the bottom of the section until the arrow icon displays. Click the icon and drag it upwards or downwards to resize the section.
 - In the Tables section, click SR: Document to display the available fields in the Fields section.
 - In the Fields section, scroll through the list and click on a field to add it to the pink section of the sub-report.
7. Add a text field to provide a sub-title for the sub-report:
 - Click Add Text Field in the toolbar to display a blank field in the Detail section of the screen.
 - Hover over the field until the arrow icon displays. Click the icon, and then drag-and-drop the field above the SR: Document sub-report header.
 - Click the field to select it and display its properties in the Properties section.
 - Scroll down to Field Value in the Name column, click in its Value field, and enter the name for the sub-title.
 - (Optional) Use the other properties to format the display of text for the sub-title.
 - (Optional) Hover over the borders of the text field and use the arrow icons to resize the field.
 8. Format the title of the report:
 - Click the field in the Title section of the report canvas.
 - Resize the field by hovering over its borders and using the arrow icons.
 - Using the fields in the Properties section, click in a Value field to change the default selection.
 - Click in the Foreground field to display a color palette, and select a color for the report title text.
 9. Click Save.
 10. (Optional) Add formatting to the report fields.
 11. (Optional) Associate the report with a search query to filter the data that displays in the report.
 12. (Optional) Generate the report.

Formatting Fields in an Advanced Report

You need the Advanced Reporting permission to format the fields in an Advanced Report. Formatting includes controlling the location of a field in a section of the report, as well as the color, size, and style of the text used in any section of the report. Advanced formatting includes adding a text field, including a page header and/or footer, inserting a horizontal line divider to separate data, and numbering the pages of the report.

There are also options for managing report data, which include sorting data alphabetically so that information can easily be located and grouping data so that the same information is not repeated. Report data can also be filtered by associating it with a search query so that only relevant information is included in the report.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report whose fields need to be formatted, and double-click the report record.
Tip: An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.
3. In the report layout screen:
 - Hover over a field in any section until the arrow icon displays.
 - Click the icon to display the field's properties in the Properties section of the screen.
4. In the Properties section, apply formatting by clicking in the Value field and entering/editing the value or text for any of the following items:
 - Left - moves the field from its current position, calculated from the left-most position in the section. Increase the value to move the field to the right, and decrease the value to move it to the left. As an alternative to changing its Left value, drag-and-drop the field: Hover over the field until the arrow icon displays. Click the icon, and then drag-and-drop the field to a new location.
The Left option is used to ensure a column heading lines up with its corresponding data in the report. For example, if the Agreement Type field in the Column Header section had a value of 97, then the Agreement Type field in the Detail section should also be assigned a value of 97.
 - Top - moves the field from its current position, calculated from the top-most position in the section. Increase the value to move the field down, and decrease the value to move it up. The Top option can be used to control the spacing between a column heading and its corresponding data. For example, if the Contract Number field in the Column Header section had a value of 0, then the Contract Number field in the Detail section could be assigned a value of 5 to add spacing between the column heading and each data record.

- Cell Width - controls the width of the field in the section. Use the the arrows to make incremental changes.
- Cell Height - controls the height of the field in the section. As an alternative to changing the cell width and height values, hover over the left/right border or the top/bottom border of a field until the arrow icon displays. Click the icon and drag the border of the field to the desired length/height.
- Foreground - controls the color of the text for the field.
- Background - controls the background color for a field. Click the Value field for both the Foreground and Background options to display a color palette, and then click a color to select it.
- Align Text - controls how text is aligned within the field (left, right, or center).
- Font - displays text in the field in Serif or Sans Serif font.
- Font Size - controls the size of the text in the field. Use the the arrows to change the font size.
- Bold - displays text in the field as bold when set to true.
- Italic - displays text in the field in italics when set to true.
- Underline - underlines the text in the field when set to true.
- Strike Through - displays text in the field with the strikethrough option when set to true.
- Field Value - controls the label for a field in the Title, Column Header, Group By, Column Footer, or Summary section.
- Expression - system-controlled field that displays the variable used for the field in the Detail, Page Header, and Page Footer sections.
- Display Name - controls the label for a field in the Detail, Page Header, or Page Footer section, which is assigned a system-defined Expression.
- Section - identifies the section where the field is located in the report layout. The Section list is also used to quickly move a text field or system field from one location to another. To move a field, simply select a different option in this list.

1. Click Save.
2. (Optional) Generate the report.

Grouping Data in an Advanced Report

You need the Advanced Reporting permission to group the data in an Advanced Report so that the same information does not display on multiple line items, such as the name of a company with with several contracts. The Group By option avoids repetition and streamlines the report.

The steps below show how to group data by Company Name in an Advanced Report that uses the fields in the Company Profile as the Primary data set.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.

2. In the Report Browserscreen, locate the Advanced Report whose data you want to group, and double-click the report record.

 **Tip:**

An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. In the Tables section of the report layout screen:
 - In the Tables section, click Primary to display the company fields in the Fields section.
 - In the Fields section, locate the Company Name field, and right-click on it to display the + Add Group By button.
 - Click the button to add a Group By Company Name Header section to the report layout containing the Company Name field.
 - In the Detail section of the screen, right-click on the Company Name field to display the Delete button.
 - Click the button to remove the field from the report data so the field is not repeated for every line item.
4. Click Save.
5. (Optional) Generate the report.

 **Tip:**

Remove the grouping option by clicking the x icon in the Group By section, and then select Yes in the Delete Group prompt.

Adding a Text Field to an Advanced Report

You need the Advanced Reporting permission to add a blank text field to any section in the report layout. Since the text field is automatically inserted into the Detail section of the report, you must move the field to the desired location in your report by changing the field's section. A common use of the text field is to provide a title to a sub-report added to the advanced report.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report that needs the text field, and double-click the report record.

 **Tip:**

An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. In the report layout screen, click Add Text Field in the toolbar to display a blank field in the Detail (data) section of the screen.
4. Click the blank field to display its properties in the Properties section:
 - Scroll down to Field Value in the Name column, click in its Value field, and enter the name for the field.
 - (Optional) Use the other properties to format the display of text for the field
5. (Optional) Hover over the field until the arrow icon displays. Click the icon, and then drag-and-drop the field to a different location in the section.
6. (Optional) Hover over the borders of the text field and use the arrow icons to resize the field.
7. Click Save.
8. (Optional) Generate the report.

 **Tip:**

Remove a text field by right-clicking the field to display the Delete button, and then click the button. Remove a Group By section or a sub-group from the report layout by clicking its x icon.

Adding Headers and Footers to an Advanced Report

You need the Advanced Reporting permission to add a header and/or footer to an Advanced Report to increase its usability and enhance its professionalism. A header or footer is added to a report by adding a text field, entering the header/footer information into the blank text field, and then changing the section where the text field will display in the report layout.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report that needs the header or footer, and double-click the report record.

 **Tip:**

An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. In the report layout screen, click Add Text Field in the toolbar to display a blank field in the Detail (data) section of the screen.
4. Click the blank field to display its properties in the Properties section:

- Scroll down to the Section field in the Name column, click in its Value field, and change the selection from Detail to Page Header (or Page Footer) in the list.
 - Locate the Field Value field, click in its Value field, and enter the text you want displayed in the header (or footer).
 - (Optional) Use the other properties to format the display of text for the header (or footer).
5. (Optional) Hover over the borders of the text field in the Page Header (or Page Footer) section and use the arrow icons to resize the field.
 6. (Optional) Hover over the field until the arrow icon displays. Click the icon, and then drag-and-drop the field to a different location in the section.
 7. Click Save.
 8. (Optional) Generate the report.

 **Tip:**

Remove a text field by right-clicking the field to display the Delete button, and then click the button. Remove a Group By section or a sub-group from the report layout by clicking its x icon.

Numbering Pages in an Advanced Report

You need the Advanced Reporting permission to number the pages in an Advanced Report if the report is lengthy.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report that needs the page numbers, and double-click the report record.

 **Tip:**

An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. In the report layout screen, click Add Page Number in the toolbar to display a blank field in the Page Footer section of the screen.
4. Click the blank field to display its properties in the Properties section:
 - Scroll down to Expression in the Name column, and verify there is a `#{Page_Number}` variable in its Value field.
 - (Optional) Use the other properties to format the display of the page number field.

- (Optional) Move the numbering to the report header by selecting Page Header in the Value list for the Section field.
5. (Optional) Hover over the borders of the text field and use the arrow icons to resize the field.
 6. (Optional) Hover over the field until the arrow icon displays. Click the icon, and then drag-and-drop the field to a different location in the section.
Tip: Click in the Expression field and enter Page in front of the $\$V\{Page_Number\}$ variable to add the word Page to the numbering.
 7. Click Save.
 8. (Optional) Generate the report.

 **Tip:**

Remove a page numbering field by right-clicking the field to display the Delete button, and then click the button. Remove a Group By section or a sub-group from the report layout by clicking its x icon.

Inserting a Divider Line in an Advanced Report

You need the Advanced Reporting permission to add one or more horizontal lines to an Advanced Report to separate the data. However, horizontal lines can only be inserted into the Detail (data) section of the report; they cannot be used in any of the headers or footers.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report that needs the divider line, and double-click the report record.

 **Tip:**


An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. In the report layout screen, click Add Horizontal Line in the toolbar to add a horizontal divider line in the Detail section of the screen.
4. Click the divider line to select it, and then drag-and-drop the line to the desired location in the section.
 - Remove a line by right-clicking it to display the Delete button, and then click the button. Remove a Group By section or a sub-group from the report layout by clicking its x icon.
5. Click Save.
6. (Optional) Generate the report.

Sorting Data in an Advanced Report

You need the Advanced Reporting permission to apply sorting to an Advanced Report if you want the data in one or more fields displayed in alphabetical or numerical order to enhance the report's usability.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report whose data you want to sort, and double-click the report record.

 **Tip:**

An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. In the report layout screen, click Configure Sorting in the toolbar to display a Configure Sorting window.
4. In the Configure Sorting window:
 - Click Main Report in the Report Section to display a list of the fields in the main report that can be sorted.
 - Click a field in the list in the Add Fields section to add it to the Order Fields section.
 - Click Delete to remove a field from the sort order.
 - (Optional) Use the arrows to change the sort priority for the fields selected.
 - (Optional) Click a sub-report in the Report Section to display a list of sub-report fields that can be sorted, and repeat the steps above.
 - Click x to close the window.
5. Click Save.
6. (Optional) Generate the report.

Associating an Advanced Report with a Query

You need the Advanced Reporting permission to link a saved Search Query to an advanced report if you want to filter the information that displays in the report.

The Search Query used should include all the fields in the advanced report or the report will have blank data fields.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report you want to filter, and double-click the report record.

 **Tip:**

An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. In the report layout screen, click Change Query in the toolbar to display a Query Selection window.
4. In the Query Selection window:
 - Locate the search query you want to use to filter the data in the report.
 - Click the search record to select it, and click OK.
5. Click Save.
6. (Optional) Generate the report.

Editing an Advanced Report

You need the Advanced Reporting Admin permission to edit an advanced report by updating the data included in the report and making formatting changes.

Data Updates

You can change the type and amount of data in your report by adding and/or removing report fields, sorting the report data, and associating the report with a new or different search query.

1. Click Reports in the Navigation Toolbar, and click the Reports link in the menu.
2. In the Report Browse screen, locate the Advanced Report you want to edit, and double-click the report record.

 **Tip:**

An advanced report is displayed under a Report Group: Advanced Report header. Expand/collapse a report group using the ^ and v icons.

3. Click Save.
4. In the report layout screen, perform any of the following edits to the data:
5. Add a field:
 - In the Tables section, click the folder icon for any table to display its available fields in the Fields section.
 - In the Fields section, scroll through the list and click a field to add it to Column Header and Detail sections of report layout.
6. Delete a field:
 - In the Detail section of the screen, right-click on the field to display the Delete button.

- Click the button to remove the field from the report.
 - In the Column Header section of the screen, repeat the steps above to remove the label for the data field from the report.
7. Add a sub-report:
 - In the Tables section, right-click the folder for a Primary or Secondary table to display the +Add Sub Report button, and click the button.
 - In the Sub Report Table prompt:
 8. Click in the list to display a hierarchy of features and additional fields linked to the table.
 9. Click a folder to select it, and then click OK.
 10. When the pink rectangular field displays in the Details section of the report layout:
 - Double-click on it to activate it and display the SR heading for the sub-report.
 - Hover over the heading until the icon navigation appears, click the icon, and then drag and drop the sub-report to the location in the Detail section where you want this information displayed.
 11. In the Tables section, click the folder icon for the sub-report to display its available fields in the Fields section.
 12. In the Fields section, scroll through the list and click on a field to add it to the pink section of the sub-report.
 13. Delete a sub-report:
 - Double-click in the pink section of the sub-report to display its header.
 - Click x and select Yes in the Delete Sub-Report prompt.
 - Sort the report data.
 - Filter or update the report filter.
 14. (Optional) Generate the report.

Formatting Changes

You can perform the following formatting changes to a report:

- [Format a field using its Properties table](#)
- [Group and ungroup data](#)
- [Add and remove text fields](#)
- [Add and remove a header or footer](#)
- [Add or remove numbering from a report](#)
- [Add or remove a divider line from a report](#)

Business Intelligence (BI) Toolbox

Business Intelligence (BI) Toolbox creates Analytics Reports and Dashboards using analyses and visual analyses of key data stored in Conga Contracts. Reports can be shared with users and scheduled for distribution. BI Dashboards are shared with other users through the BI Toolbox portlet in the Conga Contracts Dashboard.

Business Intelligence Toolbox Overview

Users with the BI Tool permission create the Analyses and Visual Analyses that provide the data and charts used to build the Analytics Reports that are shared with other users, as well as the Dashboards that are shared and displayed in the BI Toolbox portlet in the Conga Contracts Dashboard.

BI Toolbox Overview

The Business Intelligence (BI) Toolbox uses five components that work together to analyze and visually display the data stored in Conga Contracts to identify current trends and communicate patterns over time: Analysis, Visual Analysis, Analytics Report, BI Dashboard, and BI Toolbox Portlet. Two of the components, Analysis and Visual Analysis, both analyze the data captured at the field level in Conga Contracts program screens. They can both be used to create a chart or table that visually displays the relationship between two or more key fields. Although both components analyze captured data and visually display the relationship, the Analysis component should be used to create spreadsheet-based data that will be used in an Analytics Report, while the Visual Analysis should be used in a BI Dashboard when a chart or table is the primary method of communicating trends or the relationship between data fields.

Both an analysis and a visual analysis serve as the building blocks in creating Analytics Reports and BI Dashboards. These components are stored in the Visual Gallery, which is a repository that can be accessed when authoring reports and setting up dashboards. In creating an Analytics Report, an analysis is dragged from the Gallery and dropped into the report screen, populating the report with data. An Analytics Report can then be shared with other users and/or scheduled for distribution.

In creating a BI Dashboard, one or more visual analyses can be dragged from the Gallery and dropped into the Dashboard, which uses the chart or table portion of the analysis to quickly communicate trends and monitor changes in real time. Dashboards can be created for individual use or shared with other users through the BI Toolbox Portlet, which is added to the Conga Contracts dashboard.

The following BI Toolbox screens should be reviewed prior to creating an Analysis, Visual Analysis, Analytics Report, or Dashboard:

- [Welcome screen](#)
- [Home screen](#)
- [Analysis screen](#)
- [Visual Analysis \(Discovery\) screen](#)
- [Dashboard screen](#)
- [Report screen](#)

BI Toolbox Welcome Screen

When you first login to the Business Intelligence (BI) Toolbox, you are greeted by a Welcome screen that provides an overview of what you can accomplish with the Analytics tool.

BI Toolbox link	Click Reports in the Navigation Toolbar, and click BI Toolbox in the menu.
BI Toolbox Summary	Review the summary of what you can accomplished with the Business Intelligence (BI) Toolbox.
Navigation icons	<ul style="list-style-type: none"> • Click the magnifying glass report icon to create a Visual Analysis or click the report with a + icon to create an analysis. • When at least one Analysis or Visual Analysis is created, click the Dashboard icon to create a Dashboard or click the Report icon to create an Analytics Report. • Click Home to display the Home screen where you can access your analyses, visual analyses, Dashboards, and Analytics Reports.

BI Toolbox Home Screen

The Home screen in the BI Toolbox provides links to the items you have created, which include Analyzes, Visual Analyzes, Analytics Reports, and Dashboards. The screen also provides links to the items that other users have shared with you, as well as several canned visual analyzes provided by Conga Contracts. Visual analyzes can be duplicated or copied, and then edited to meet your specific needs. Both analyzes and visual analyzes are the building blocks used in creating Analytics Reports and BI Dashboards.

From the Home screen, you can share your Analyzes, Visual Analyzes, Analytics Reports, and Dashboards with other users, and also schedule reports for distribution. The Home screen is divided into two sections to distinguish between created and shared items: Shared with Me and My Items.

To access the BI Toolbox Home screen, click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.

BI Toolbox Visual Analyzes - Discovery Screen

The Discovery screen in the BI Toolbox is used to create and manage a visual analysis, which is the building block that is typically used to set up a BI Dashboard. A visual analysis can also be used to create an Analytics Report that is shared with other users and scheduled for distribution.


A visual analysis consists of two components: (1) user-selected hierarchy of data sets, including key fields in Conga Contracts program screens to be analyzed, and (2) table that displays the data stored in the selected fields. A chart is typically added to the analysis to emphasize a trend in a data set over time or with respect to a monetary value. A chart can also be used to visually display the relationship between two or more elements of a data set.

The Discovery screen is divided into two sections: Data Analysis lists where Conga Contracts data sets and fields are selected for analysis and Query Builder where charts (or tables) are created to highlight and communicate trends and relationships.



To access the Discovery screen, click Reports in the Navigation Toolbar and select the BI Toolbox link in the menu.

Data Analysis Lists View

Visual Analysis icon	Click on the Calendar icon to display the Discovery screen.
Select Data lists	Use the lists to identify the data sets you want to include in your visual analysis, taking into account it can be used as a building block for creating a BI Dashboard or an Analytics Report.

<p>Field check boxes</p>	<ul style="list-style-type: none"> • Clear the All check box for a data set to clear all the selected check boxes, unless you want to make all the fields available for the visual analysis. • Select only the check boxes for the fields that should be included in the visual analysis. <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip: Tip: You will be able to apply filters to any of the selected fields.</p> </div>
<p>OK button</p>	<p>Click the OK button to run the data analysis and display the selected fields in the Query Builder.</p>
<p>Collapse Data Section button</p>	<p>Click the x icon to collapse the data section of the screen, and fully display the Query Builder.</p>

Query Builder View

<p>Visual Analysis fields</p>	<p>Verify the selected fields for the analysis contain data.</p> <ul style="list-style-type: none"> • To increase the viewing area of the fields, hover over the separator bar until the resize icon displays, and then click it and drag it upwards. <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip: If no data displays, the visual analysis is not valid and you need to change the categories, the order in which the categories are selected, or the fields selected in a category.</p> </div>
<p>Text field</p>	<p>Identify the fields that contain text, indicated by a blue tick mark in the top left corner of the field header.</p> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip: Tip: A check box is indicated by a purple tick mark.</p> </div>
<p>Date fields</p>	<p>Identify the fields that contain a date, indicated by a gold tick mark in the top left corner of the field header.</p>

Value field	Identify the fields that contain a value, indicated by a green tick mark in the top left corner of the field header.
Table icon	Click on the three horizontal bars to display a Table Menu with options for the fields in the analysis.
Add New Column option	Click to add a blank column where a calculation can be added, such as calculating the number of days until a contract's expiration date.
Show/Hide Columns option	Click to display a window where fields can be hidden/ shown, allowing the focus to be placed on the fields that need to be filtered and those needed for the chart.
CSV Export	Click to export the fields and data displayed in the screen to an Excel spreadsheet.
Sort icons	Use the arrows to sort the data in a column in ascending/ descending order.
Filter icon	Identify the fields that have a filter applied to them, indicated by the presence of the filter icon.
Field Properties icon	Click the gear icon for a program field to display its Properties window.
Field Properties window	Use the options provided to filter the data in a field, add a calculation, group data in a field, format the display of data in a field, or apply colors to the chart created using the field.
Filters button	Click the Filters button to display a FILTERS window with a list of filters applied to the fields in the visualization. Click x to remove a filter. Edit a filter by hovering over the filter until the directional arrow displays, and then click the icon to display a prompt with the filter operator and value.
Data icon	Click the stacked circles icon to display the fields used in the visualization. Warning: If you add or remove any of the original fields used in the visualization, any chart created in the Query Builder will be removed.

Visual Analysis Chart

<p>Chart fields</p>	<ul style="list-style-type: none"> • Select the field(s) for the chart using one of the following methods: • Individual Field: Click on the field name, and then drag-and-drop it into the Drop Columns or Connect them to Build Visualizations section. <ul style="list-style-type: none"> • To add a second field, click on it, and then drag-and-drop it into the gray area (Y-axis) that displays along the left side of the chart. • Connected Fields: Click on the first field name, and drag your cursor to the second field, creating a blue arc, and then release your mouse. The first field selected will display along the vertical (Y) axis, and the connected field will display along the horizontal (X) axis.
<p>Chart field customizations</p>	<p>Click the gear icon for a chart field to customize its display in the chart, including adding a filter, formatting, and color.</p>
<p>Chart field sorting</p>	<p>Use the arrow icons to sort the data in a chart field in ascending/descending order.</p>
<p>Zoom option</p>	<p>Zoom in on a specific section of the chart:</p> <ul style="list-style-type: none"> • Hover over a section until the resize icon displays. • Click the icon and drag it upwards or downwards to shade the desired section, and then release your mouse. • Click the circling arrows icon to undo the action.


Explorer options	<p>Click the magnifying glass icon to display the EXPLORER with other viewing options for the chart:</p> <ul style="list-style-type: none"> • Click the arrow icon to enable selection mode, where you can hover over a section, click the + icon when it displays, and drag it upwards or downwards to call out a section of the chart while graying-out the rest of the chart. • Click the drill icon to enable drill mode. • Click on a data section of the chart, such as a bar or pie section, to display a Drill-to prompt. • Click a field in the list to redisplay the chart using the data for the selected field. • Click the link that displays under the chart name to return to the default view of the chart. • Click the image icon to export the current display of the chart as an image.
Chart icon	<p>Click the chart icon to display other chart types for your data analysis:</p> <ul style="list-style-type: none"> • Click on a category, such as Tables, Circles, Bars, Lines, or Scatter. • Click the expand icon to see the display options for tables and circle/bar/line charts.
Legend icon	<p>Click the legend icon to display the Visualizations Settings prompt that allows you to select the location of the legend in the chart or remove the legend.</p>
Trash icon	<p>Click the trash icon to delete the chart from the Query Builder.</p>
Add To Gallery button	<p>Click to add the visualization to the Visual Gallery.</p>
Add Columns icon	<p>Click the downward arrow icon to display the Crosstab and Timeline options for a chart or table.</p> <ul style="list-style-type: none"> • Click on a field not used in the chart/table, and then drag-and-drop it into the gray area below the CROSSTAB or TIMELINE heading.
Save button	<p>Click to save the visualization to your Home page.</p>



BI Toolbox Analysis Screen

The Analysis screen in the BI Toolbox is used to create and manage an analysis, which is the building block primarily used to create an Analytics Report that is shared with other users and scheduled for distribution. An analysis can also be used to create a BI Dashboard. An analysis consists of two components: (1) user-selected hierarchy of data sets, including key fields in Conga Contracts program screens to be analyzed, and (2) table that displays the data stored in the selected fields. A chart can also be added to the analysis to emphasize a trend in a data set over time or with respect to a monetary value, or the relationship between two or more elements of a data set.


The Analysis screen contains two primary components: Data lists where Conga Contracts data sets and fields are selected for analysis and the Table display where data for the selected fields can be filtered, sorted, grouped, aggregated, and formatted.

To access the Analysis screen, click Reports in the Navigation Toolbar and select the BI Toolbox link in the menu.

Analysis icon	Click the Analytics icon to display the Untitled Analysis screen.
Select Data lists	Use the lists to identify the data sets you want to include in your analysis, taking into account it can be used as a building block for creating a BI Analytics Report or Dashboard.
Field check boxes	<ul style="list-style-type: none"> • Clear the All check box for a data set to clear all the selected check boxes, unless you want to make all the fields available for analysis. • Select only the check boxes for the fields that should be included in the analysis. <div style="border: 1px solid #4CAF50; padding: 10px; margin-top: 10px;"> <p> Tip: You will be able to apply filters to any of the selected fields.</p> </div>
OK button	Click OK to run the data analysis and display the selected fields in the Table section of the screen.

<p>Properties icon</p>	<p>Click the gear icon and select Rename in the menu to assign a name to the analysis.</p> <ul style="list-style-type: none"> • In the prompt, type over the existing text in the Name field, and click Save. <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>You do not have to rename an analysis for it to be saved in your Home screen. It will retain the name Untitled Analysis and you can continue making edits before deciding on a name. However, it is recommended that you rename it before saving it to the Visual Gallery.</p> </div>
<p>Table fields</p>	<p>Review the data displayed for the selected fields in the Table section of the screen.</p> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>Each field in a data set has the same color displayed along the top border of its header. For example, the first data set has a blue border and the second data set has a red border.</p> </div>
<p>Properties icon</p>	<p>Click the gear icon in the Table section to display the properties for the columns in the table.</p>
<p>Column Hide/Show check boxes</p>	<p>Clear a check box to remove the field from the Table section, or select a check box to add it.</p>
<p>Column function links</p>	<ul style="list-style-type: none"> • Click the Sort, Group, or Aggregate link to display fields to perform these functions for a column of data. • Click the Paging link to change the default display of multi-page data.


<p>Column functions menu</p>	<ul style="list-style-type: none"> • Click on a column heading to display a menu with the same functions that display when the gear icon is clicked in the Table section. • In addition to these functions, data in a column can be formatted to change its display, a chart can be added, or a cross-tab table can be added to the analysis.
<p>Move Column option</p>	<p>Hover over the column name until the column icon displays, and then hover over this icon until the move icon displays. Click the move icon and drag-and-drop the column to the desired location in the table.</p>
<p>Resize Column option</p>	<p>Hover over the column name until the column icon displays, and then hover over this icon until the resize icon displays. Click the resize icon and drag the border of the column to resize it.</p>
<p>Add to Visual Gallery icon</p>	<p>Click Add to Visual Gallery icon to add the table to the Visual Gallery.</p>
<p>Export Table icon</p>	<p>Click Export to display a menu with options to export the data in the table to an Excel spreadsheet, PDF file, or a CSV file.</p>
<p>Data toggle link</p>	<p>Click to hide/show the Select Data lists, but retain the Table section of the screen in both views.</p>
<p>Formula link</p>	<p>Click to display fields used to add a new column to the Table section of the screen, and then build a formula in the column to perform a calculation using any of the fields in the table.</p>
<p>Filter link</p>	<p>Click to display fields used to create a filter for any field in the Table section of the screen.</p>
<p>Add Chart link</p>	<p>Click to display fields used to create a chart to highlight the relationship between two fields in the Table section of the screen, or display the change in one or more fields over time or in relation to a monetary value.</p>


Add Crosstab link	<p>Click to display fields used to create a cross-tabulation table using two or three fields in the Table section of the screen.</p> <div data-bbox="671 387 1426 607" style="border: 1px solid #c8e6c9; padding: 10px;"> <p> Tip: The cross-tab table can be added to the Visual Gallery and/or exported as a PDF, CSV, or Excel file.</p> </div>
Expand icon	If present, click + to view any charts or crosstab tables added to the analysis.
Undo/Redo icons	Click Redo to undo or redo an action.

BI Toolbox Dashboard Screen


The Dashboard screen in the BI Toolbox is used to create the dashboards that are shared with other users through the BI Toolbox portlet in their Conga Contracts Dashboard. A BI Dashboard can contain one or more analyses or visual analyses, displayed as data tables and charts, which are designed to communicate the changing relationship between components of contract and/or company data.



To access the Dashboard screen, click Reports in the Navigation Toolbar and select the BI Toolbox link in the menu.

Author Dashboard icon	Click Dashboard icon to display the Visual Gallery in the Untitled Dashboard screen.
Visual Gallery	<p>Review the analyses and visual analyses that are available for the Dashboard.</p> <div data-bbox="724 1496 1426 1756" style="border: 1px solid #c8e6c9; padding: 10px;"> <p> Tip: An analysis is typically displayed as a table and used for Analytics Reports, while a visual analysis is typically displayed as a chart and used for Dashboards.</p> </div>
Visual Gallery filters	<ul style="list-style-type: none"> • Enter a keyword or phrase in the Find field to filter the analyses. • In the Sort By list, select a different option to sort alphabetically or by the oldest analyses.

Analyses and Visual Analyses	<p>Locate the analysis or visual analysis you want to add to the Dashboard, and click its Add to Visual Gallery button.</p> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>Both an analysis and a visual analysis can consist of a table or a chart.</p> </div>
Done button	Click Done after adding all analyses and/or visual analyses to the Dashboard.
Delete From List button	Click Delete to remove an analysis or visual analysis from the Gallery.
Close icon	Click Close to close the Visual Gallery.

Once the analysis or visual analysis is added to the first tab in the Dashboard, a named can be assigned to the Dashboard and the default tab, and customizations can be made.

Dashboard Name	<p>Click the gear icon and select Rename in the menu to provide/edit the Dashboard name.</p> <ul style="list-style-type: none"> • In the prompt, type over the existing text, and click Save. <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>Select Duplicate in the menu to make a copy of the Dashboard.</p> </div>
Tables and Charts	Review the charts and/or tables added to the first tab in the Dashboard.


<p>Table and Chart options</p>	<p>Click gear icon for a table or a chart to display a menu, and select:</p> <p>Edit - edits the properties for the analysis table.</p> <ul style="list-style-type: none"> • Edit Visualization displays for a visual analysis. • Filter - adds a filter to the analysis or visual analysis. • Rename - displays the chart or table name in edit mode. • Remove - removes the chart or table after clicking OK in a confirmation prompt.
<p>EXPLORER options</p>	<p>Hover over the area under the the gear icon for a visual analysis chart to display the zoom icon, and then click on it to display the EXPLORER.</p> <ul style="list-style-type: none"> • Click the drill icon to enable drill mode. • Click the image icon to export the current display of the chart as an image. <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>The only option for an analysis chart is the Get Image prompt that displays when you hover over the area under the chart's  icon. Click the prompt to export the chart as an image.</p> </div>
<p>Tab options</p>	<p>Click the gear icon for a tab to display a menu, and select:</p> <ul style="list-style-type: none"> • Add from Visual Gallery - redisplay the Gallery so an additional analysis or visual analysis can be added to the Dashboard. • Add Global Filters - displays a Global Filter prompt to apply a filter to all the analyses and visual analyses in the Dashboard. • Change Layout - displays a Tab Layout prompt to change the default layout of the number of analyses or visual analyses that display in a single row in the Dashboard. • Rename Tab - displays the name of the tab in edit mode.
<p>Add Tab icon</p>	<p>Click the new tab icon to add a new tab to provide additional views when the Dashboard is displayed in the BI Toolbox portlet or as a standalone dashboard.</p>

Undo/Redo icons	Use the Redo/Undo icons to undo a previous action or redo the canceled action.
Resize option	Hover over the right border of a chart or table until the resize icon displays, click on it, and then drag the border of the chart/table to the left or right to resize it.
Reposition option	Hover over the area to the right of the title for a chart or table until the move icon displays, click on it, and then drag-and-drop the chart/table to a new location in the Dashboard.

BI Toolbox Report Screen


The Report screen in the BI Toolbox is used to create the Analytics Reports that are shared with other users and scheduled for distribution. An Analytics Report can contain one or more analyses or visual analyses, displayed as tables of data and/or charts, which are designed to communicate the changing relationship between components of contract and/or company data.

To access the Report screen, click Reports in the Navigation Toolbar and select the BI Toolbox link in the menu.


Author Report icon	Click the report to display the Untitled Report screen.
New Visual field	Click Insert and drag-and-drop the icon into the blank canvas to display the Visual Gallery.
Visual Gallery	<p>Review the analyses and visual analyses that are available for the report.</p> <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>An analysis is typically displayed as a table and used for Analytics Reports, while a visual analysis is typically displayed as a chart and used for Dashboards.</p> </div>
Visual Gallery filters	<ul style="list-style-type: none"> • Enter a keyword or phrase in the Find field to filter the analyses. • In the Sort By list, select a different option to sort alphabetically or by the oldest analyses.

Analyses and Visual Analyses	Locate the analysis or visual analysis you want to use for the report, and click its Add a Visual Gallery button. Tip: Both an analysis and a visual analysis can consist of a table or a chart.
Delete From List button	Click Delete to remove an analysis or visual analysis from the Gallery.
Close icon	Click Close to close the Visual Gallery.

Once the analysis or visual analysis is added to Report screen, you can edit the analysis/visual analysis from the report, as well as add formatting to produce a professional report.

Design tab	Ensure the tab is selected to edit an analysis/visual analysis or add formatting.
Tables and Charts	Review the charts and/or tables added to the report.
Reposition option	Hover over the move icon for a chart or table until the reposition icon displays, click on it, and then drag-and-drop the chart/table to a new location in the report.
Report Name	Click the gear icon and select Rename in the menu to provide/edit the report name. <ul style="list-style-type: none"> • In the prompt, type over the existing text, and click Save. <div style="border: 1px solid green; padding: 10px; margin-top: 10px;"> <p> Tip: Select Duplicate in the menu to make a copy of the report.</p> </div>
Edit icon	Click Edit for a chart or table to display the analysis or visual analysis in edit mode so that changes can be made. <ul style="list-style-type: none"> • Click Update to view the changes in the report. • Click the Design tab to return to formatting the report.
Settings icon	Click the gear icon for a table or a chart to display a Settings window to add/edit formatting for the chart/table title.

<p>Settings window</p>	<p>Format the title for the chart or table:</p> <ul style="list-style-type: none"> • Use the toolbar to bold, italicize, and align it. • Use the field containing the name of the chart/table to edit its name. • Append the title with a date and/or time stamp. • Make a selection in the Insert a Formula list, and click Insert. • Use the Font Size list to change the size of the title. • Click Color in the Font Color field to change the color of the title: • Display the Color Picker prompt and click on a colored square to select it. • Click Close to close the prompt. • Use the Border Settings section to add a border to the title: • Make a selection in the Thickness list. • Click Color in the Color field to change the color of the border. • Click an icon that reflects where you want the border to appear in relation to the title. For example, the border icon encloses the title in a border. • Click Set. <p>Tip: To remove color from the title or border, click inside the field and backspace over the characters.</p>
<p>Remove icon</p>	<p>Click x to remove a table or chart from the report.</p>
<p>Chart segments</p>	<p>Hover over a segment of a chart to display a pop-up that clearly defines the data being represented.</p>

<p>EXPLORER options</p>	<p>Hover over the area under the the gear icon for a visual analysis chart to display the zoom icon, and then click on it to display the EXPLORER.</p> <ul style="list-style-type: none"> • Click the drill icon to enable drill mode. • Click the image icon to export the current display of the chart as an image. <div style="border: 1px solid #c8e6c9; padding: 10px; margin-top: 10px;"> <p> Tip:</p> <p>The only option for an analysis chart is the Get Image prompt that displays when you hover over the area under the chart's the gear icon icon. Click the prompt to export the chart as an image.</p> </div>
<p>New Split Row field</p>	<p>Hover over the field until the move icon displays, click on it, and then drag-and-drop the report field into the place in the report where you want to add a two-column row.</p> <ul style="list-style-type: none"> • Drag another field into each column in the row to add New Text, or a New Image, New Link, or New PDF link. • Use the New Split Row icons to move, split, and delete the split row: • Click the move icon, and then drag-and-drop the row to a new location. • Click the split icon to split a column into two additional columns. • Click x to remove a column/split row.

<p>Add Space field</p>	<p>Hover over the field until the move icon displays, click on it, and then drag-and-drop the field into the place in the report where you want to add space.</p> <ul style="list-style-type: none"> • Use the Add Space prompt to add up to 30 lines of space to the report and create a border around the added line(s): • Make a selection in the Number of Lines list. • Use the Border Settings section to add a border around the space(s): <ul style="list-style-type: none"> • Make a selection in the Thickness list. • Click Color in the Color field to change the color of the border. • Click an icon that reflects where you want the border to appear in relation to the space. For example, the border icon puts a border along the top of the space. • Click Set. • Use the Add Space icons to edit, move, and delete the space: • Click the duplicate icon to display the Add Space prompt and update the spacing/border options. • Click the move icon, and then drag-and-drop the space to a new location. • Click x to remove space from the report.
<p>New Visual field</p>	<p>Hover over the field until the the move icon icon displays, click on it, and then drag-and-drop the field into the place in the report where you want to add another chart or table.</p> <ul style="list-style-type: none"> • Use the Visual Gallery to add an analysis or visual analysis.

New Text field	<p>Hover over the field until the move icon displays, click on it, and then drag-and-drop the field into the place in the report where you want to add text.</p> <ul style="list-style-type: none">• When the Settings window displays, use the fields to add the text, format it, and create a border around the text. See Step G above.• Use the New Text icons to edit, move, and delete the text:• Click the duplicate icon to display the Settings window and update the text/border options.• Click the move icon, and then drag-and-drop the text to a new location.• Click x to remove the text.
New Image field	<p>Hover over the field until the move icon displays, click on it, and then drag-and-drop the field into the place in the report where you want to add an image.</p> <ul style="list-style-type: none">• When the Settings window (Step P) displays, use the fields to add the image and control its display.• Use the New Image icons to edit, move, and delete the image:• Click the duplicate icon to display the Settings window and update the image/border options.• Click the move icon, and then drag-and-drop the image to a new location.• Click x to remove the image.

<p>Image Settings window</p>	<p>Select the image, define its size and alignment, and add a border:</p> <ul style="list-style-type: none"> • Change the Original Size default by selecting the Fit to Size radio button to resize the image in the report. • Use the Image Alignment icons to center, right align, or left align the image. • Select an option to add the image to the report: • Upload the image: <ul style="list-style-type: none"> • Select the Upload image radio button. • Click Choose File. • In the Open window, navigate to the image, click on it to select it, and click Open. • Provide the URL when the image is located: <ul style="list-style-type: none"> • Select the Image URL radio button. • Enter the image's URL in the blank field. • Use a previously uploaded image: <ul style="list-style-type: none"> • Select the Choose uploaded radio button. • When the uploaded images display, click on an image to select it. • Use the Border Settings section to add a border to the image. See Step G above. • Click Set.
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New Link field	<p>Hover over the field until the the move icon displays, click on it, and then drag-and-drop the field into the place in the report where you want to add a hyperlink.</p> <ul style="list-style-type: none">• When the Settings window displays:• Enter the text you want displayed as the name of the link in the blank field. For example, enter Click Here so this text displays rather than the link's URL.• Use the toolbar to bold, italicize, and align the name of the link.• Use the Font Size list to change the size of the link's name.• Click the color icon in the Font Color field to change the color of the link's name:<ul style="list-style-type: none">• Display the Color Picker prompt and click on a colored square to select it.• Click x to close the prompt.• Enter the URL for the link in the URL field.• Change the default in the Target list from New Browser Tab to Same Browser Tab to display the link in the same browser window as the report.• Use the Border Settings section to add a border to the link:<ul style="list-style-type: none">• Make a selection in the Thickness list.• Click the color icon in the Color field to change the color of the border.• Click an icon that reflects where you want the border to appear in relation to the link. For example, the border icon encloses the link in a border.• Use the New Link icons to edit, move, and and delete the link:<ul style="list-style-type: none">• Click the duplicate icon to display the Settings window and update the link/border options.• Click the move icon, and then drag-and-drop the link to a new location.• Click x to remove the link.
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<p>New PDF Link field</p>	<p>Hover over the field until the the move icon icon displays, click on it, and then drag-and-drop the field into the place in the report where you want to add a PDF link that allows users to download the report as a PDF file.</p> <ul style="list-style-type: none"> • When the Settings window displays: • Type over the Download as PDF text to change the text that displays in the report. • Use the Font Size list to change the size of the text. • Click the color icon in the Font Color field to change the color of the text. • Change the default in the Page Size list from Portrait to Landscape to change the orientation of the report when it is downloaded as a PDF. • Change the default in the Java Autofit list from True to False to display the report without adjusting the width of columns so that all report data fits on the selected page size. • Use the Border Settings section to add a border to the PDF link. • Use the New PDF Link icons to edit, move, and and delete the link: • Click the duplicate icon to display the Settings window and update the PDF link/border options. • Click the move icon, and then drag-and-drop the PDF link to a new location. • Click x to remove the PDF link.
<p>View tab</p>	<p>Click to view the formatted report.</p>

BI Toolbox Best Practices and Tips

The BI Toolbox is used to create robust Reports and Dashboards that detail information pulled from the Company, Contracts, and Requests objects.

Materialized View

When referencing data from these three objects, the data is typically materialized and is automatically refreshed on a daily basis. It is recommended to use Company, Contract, or Request as the primary data source when creating an Analysis or Visual Analysis.

Visual Analysis vs. Analysis

A Visual Analysis is recommended for generating rich graphical representations such as charts and graphs. An Analysis is useful for providing core information and better suited for creating spreadsheets or tables.

After creating a Visual Analysis or Analysis, the component needs to be added to the Visual Gallery. An Analysis is added to a Visual Gallery by using the Add to Visual Gallery button, while a Visual Analysis is added the Visual Gallery with the Add to Gallery button.

✓ **Tip:**

Adding a Visual Analysis to the Visual Gallery is a different process than adding an Analysis to the Visual Gallery. Please see the hyperlinked articles above for more detail.

At this point, the Visual Analysis or Analysis is ready to correspond to a Report or Dashboard. You can run reports or schedule them to run at a specific time, whereas Dashboards are living representations of the data. Dashboards live on the homepage through a Portlet.

Formulas

The BI Toolbox also provides Formulas functions to assist with calculating data. The resulting calculation of formulas is then accessible in Reports and Dashboard. Included below are a few examples of working formulas in the BI Toolbox.

- Days apart formula - useful for calculating the total number of days between two dates
- Formula template: `date_part('day', date - date)`
- Working example: `date_part('day',now()) - [mv_contract.Current Exp Date]`
- Replace string formula - useful for replacing existing data values with new values in Reports and Dashboards
- Formula template: `replace(string1,string_to_replace,[replacement_string])`
- Working example: `replace([mv_contract.Contract Created By],'SYSTEM, ACCOUNT','-')`
- Case Statement - useful for presenting values based on IF/THEN logic. For example, while using the Analysis grid, you can use statements to find null values. The below working example is used to find any contract profiles that do not have any documents on them.
- Formula template: `Case When Expression Then True else False End`
- Working example: `CASE WHEN [document.Document UUID] IS null THEN True ELSE False END`

BI Toolbox Contract Flow Stage Duration Best Practices

The BI Toolbox provides Formulas functions to assist with calculating data. The resulting calculation of formulas is then accessible in Reports and Dashboard.

Formulas for Contracts Flow Stage Data

The following formula allows you to access Contract Flow Stage duration data.

Main Query

This formula returns the sum total number of seconds between when a stage started, when it ended, and if it hasn't ended then it will return information from when it started to the current date. It transforms the query to the total number seconds between an action, and ignores time zone and daylight savings time. There are additional queries available to change seconds into days, hours, and minutes.

These formulas are only for analysis grids.

```
case when [stageflowactivity.Stage Flow Activity Completed On] IS null then
EXTRACT(EPOCH FROM Now()) - EXTRACT(EPOCH FROM [stageflowactivity.Stage Flow
Activity Started On]) else EXTRACT(EPOCH FROM to_timestamp([stageflowactivity.Stage
Flow Activity Completed On], 'MM/dd/yyyy HH24:MI:ss')::timestamp without time zone) -
EXTRACT(EPOCH FROM [stageflowactivity.Stage Flow Activity Started On]) end
```

The variables in brackets, such as such as [stageflowactivity.Stage Flow Activity Completed On], are referring to a field that must be in the data returned in an analysis grid. You can change the field types between Flow Step Data, Flow Stage Date, and Overall Flow Data as shown in the following examples:

Overall Flow

```
case when[overallflowactivity.Overall Flow Activity Completed On] IS null then
EXTRACT(EPOCH FROM Now()) - EXTRACT(EPOCH FROM [overallflowactivity.Overall Flow
Activity Started On]) else EXTRACT(EPOCH FROM
to_timestamp([overallflowactivity.Overall Flow Activity Completed On], 'MM/dd/yyyy
HH24:MI:ss')::timestamp without time zone) - EXTRACT(EPOCH FROM
[overallflowactivity.Overall Flow Activity Started On]) end
```

Flow Stage

```
case when [stageflowactivity.Stage Flow Activity Completed On] IS null then
EXTRACT(EPOCH FROM Now()) - EXTRACT(EPOCH FROM [stageflowactivity.Stage Flow
Activity Started On]) else EXTRACT(EPOCH FROM to_timestamp([stageflowactivity.Stage
```

Flow Activity Completed On], 'MM/dd/yyyy HH24:MI:ss')::timestamp without time zone) -
EXTRACT(EPOCH FROM [stageflowactivity.Stage Flow Activity Started On]) end

Flow Step

case when [stepflowactivity.Step Flow Activity Completed On] IS null then
EXTRACT(EPOCH FROM Now()) - EXTRACT(EPOCH FROM [stepflowactivity.Step Flow
Activity Started On]) else EXTRACT(EPOCH FROM to_timestamp([stepflowactivity.Step
Flow Activity Completed On], 'MM/dd/yyyy HH24:MI:ss')::timestamp without time zone) -
EXTRACT(EPOCH FROM [stepflowactivity.Step Flow Activity Started On]) end

Additional Queries

You can use these queries to transform the results of the main query into days, hours, or minutes.

[Seconds Duration] is the name of the main query referenced above. These formulas refer to a total number of units, so if you have 1 day for Number of Days, you'll have 24 hours for Number of Hours.

Days Duration

$\text{floor}([\text{Seconds Duration}] / (24 * 3600))$

Number of Hours

$\text{floor}([\text{Seconds Duration}] / 3600)$

Number of Minutes

$\text{floor}([\text{Seconds Duration}] / 60)$

BI Visual Analyses

A BI Visual Analysis extracts information for a data set and allows all fields to be displayed in a table format, with related fields displayed in a chart to communicate data patterns or trends. A BI Visual Analysis is recommended as the building block for a BI Dashboard.

Visual Analysis Overview

A visual analysis extracts the data stored in Conga Contracts to communicate patterns and trends using data tables and charts. A visual analysis can also identify the relationship between two data fields, as well as patterns in a single data field over time or in relation to a value. The chart portion of a visual analysis can reveal additional information by using the Drill option, which redisplay the chart when related fields are

selected for analysis. When more than two fields are needed to analyze information, a cross-tabulation chart or table can be created to highlight the interaction of data. The fields in a visual analysis can be exported for review, editing, and printing as a CSV (Comma Separated Value) file.

A visual analysis is the building block used to create both an Analytics Report and a BI Dashboard. An Analytics Report can be shared with other users and scheduled for distribution. A BI Dashboard can be shared with other users and is available from the Conga Contracts Dashboard using the BI Toolbox portlet.

A visual analysis lends itself well to creating a Dashboard due to the flexibility and variety of charts offered, while an analysis lends itself well to creating an Analytics Report since it generates spreadsheet-based data.

The following tasks can be performed for a visual analysis:

- [Create a BI Visual Analysis](#)
- [Create a Cross-Tab Visual Analysis](#)
- [Copy a Canned or Shared Visual Analysis](#)
- [Drill Down in a Visual Analysis](#)
- [Export a Visual Analysis](#)
- [Edit a Visual Analysis](#)
- [Share a Visual Analysis](#)
- [Delete a Visual Analysis](#)
- [Add/Delete a Visual Analysis in the Gallery](#)

Locating a Visual Analysis

The Visual Analyzers that are available to you include those you have created, those that have been shared with you by other program users and Conga Contracts, and those shared visual analyzers you have copied and edited to meet your needs.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Homes screen, locate the visual analysis:

 **Tip:**

If the My Items folder contains subfolders, click on a subfolder to display its contents.

- Click the My Items link to display the analyzers you have created and duplicated.
- Visual analyzers you created include the Visual Analysis icon and the shared analyzers you duplicated include the Share a Visual Analysis icon.

- Click a visual analysis link to select it.
- Click the Shared with Me link to display the analyzers that have been shared with you.
- A shared Visual Analysis includes the share a Visual Analysis icon.
- Click a visual analysis link to select it.

Creating a BI Visual Analysis

A visual analysis is typically created by selecting two or more data sets, which are joined to produce a single data set using individual fields. The fields selected in each data set are available for use in creating a table or a chart that visually represents the relationship between key data. During the creation process, both a chart and table showing the same data can be saved to the Visual Gallery for use in creating an Analytics Report or a BI Dashboard.

You need the BI Tool permission to create a visual analysis of the data stored in Conga Contracts. A visual analysis is typically created by selecting two or more data sets, which are joined to produce a single data set using individual fields. The fields selected in each data set are available for use in creating a table or a chart that visually represents the relationship between key data. During the creation process, both a chart and table showing the same data can be saved to the Visual Gallery for use in creating an Analytics Report or a BI Dashboard.

While the data fields you select to create a chart are limited, the chart can be drilled to show alternative views of the data. Similarly, a standard table displays data for two related fields while a cross-tabulation table allows data for three related fields to be displayed and analyzed.

A visual analysis is created showing the number of contracts that have a value of \$500, grouped by contract type, in a bar chart. A line chart showing the same data is also provided.

1. Click Tools in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click Visual Analysis, located in the upper left of the screen.
3. In the Discovery screen, select the data sets to be analyzed:
 - Select Company in the first Select Data list to include all companies in the analysis.
 - When the data fields display, clear the All check box to clear all the fields, and then click the Company Name check box since this is the only field in the Company Profile screen needed to identify the company who is a party to the contract.
 - Select Company - Contract in the second Select Data list to include all contracts.

- Clear the All check box to clear all the fields, and then click the Contract Value and Contract Type check boxes to identify the fields in the Contract Profile screen needed for the visual analysis. Click the following check boxes to add supporting contract data: Agreement Type, Contract Number, Original Expiration Date, and Current Expiration Date.
4. Click OK.
 5. Click x to collapse the data portion of the screen.
 - Click the icon of stacked circles to redisplay the data fields.
 6. In the Query Builder section of the screen, identify the four types of fields used in a visual analysis, which are differentiated by a color-coded tick located in the top left corner of the field header:

 **Tip:**

A visual analysis that uses two fields typically contains one of the following combinations: (1) text field and date field (2) text field and value field, or (3) date field and value field.

- Text - Blue tick
 - Date - Gold tick
 - Value - Green tick
 - Check Box - Purple tick
7. Apply a filter to the Contract Value field to establish the \$500 criteria:
 - Click the gear icon in the Contract Value field.
 - In the Contract Value window, click + New Filter.
 - In the Contract Value prompt:
 - Select Greater or equals in the list.
 - Enter 500 in the field.
 - Click Apply.
 - Click x to close the Filters window.
 8. (Optional) Hide fields so that it is easier to connect the fields needed for the chart or table. Click the the tree horizontal bars , located under the Filters button, and select Show/Hide Columns in the menu. In the Show/Hide Columns window, click on a field to hide it, or click on a hidden (grayed-out) field to show it. Click x to close the window.
 9. Connect two fields to create a visual analysis, taking into account the first field you select will have its information displayed along the Y-axis (vertical) and the second field will have its information displayed along the X-axis (horizontal):

- Click on the Contract Value header, and holding down your mouse, drag the cursor to the Contract Type header, and release. A blue arc displays between the fields, indicating they are connected.
 - To use only one field in the analysis, click on the field's header, and then drag-and-drop it into the area labeled Drop Columns or Connect them to Build Visualizations.
 - Review the recommended display of your data analysis in the Visualization section.
10. (Optional) Click the chart icon to display other chart types for the visual analysis:
 - Click on a category, such as Tables, Circles, Bars, Lines, Scatter or Custom.
 - Click the expand icon to see the options in a chart category.
 - Click on a chart type to update the visual display.
 11. Click Add to Gallery to save the visual analysis in the Visual Gallery.
 - In the Add Panel prompt:
 - Edit the name of the visual analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Add Panel.
 12. Click Save.
 - When the prompt displays:
 - Provide a name for the visual analysis in the Name field.
 - Click Save.

Creating a Cross-Tab Visual Analysis

A cross-tab analysis is one that uses more than two data fields to communicate a trend or analyze the relationship of key company/contract data stored in Conga Contracts.

You need the BI Tool permission to create a cross-tabulation visual analysis. A cross-tab analysis is one that uses more than two data fields to communicate a trend or analyze the relationship of key company/contract data stored in Conga Contracts. Typically, a cross-tabulation includes a text field and two value fields, but you can use any combination of text, date, and value fields. A cross-tab visual analysis can be created as a chart or table, and during the creation process both the chart and table can be saved to the Visual Gallery for use in creating an Analytics Report or a BI Dashboard.

A cross-tab visual analysis is created showing pending contract events, the frequency of the events, and their due dates. The analysis is first displayed as a chart that is saved to the Visual Gallery, and then saved as a cross-tab table that is also saved to the Gallery, making both a chart and a table available to represent the data.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the gear icon, located in the upper left of the screen.

3. In the Discovery screen, select the data sets to be analyzed:
 - Select Contract in the first Select Data list to include all contracts.
 - Clear the All check box to clear all the fields, and then click the check boxes for only the fields you want available for the analysis, such as Contract Number, Contract Value, Contract Type, Agreement Type, Term Type, Status, Current Expiration Date and Original Expiration Date.
 - Select Contract > - Event in the second Select Data list to include only contract events.
 - Clear the check boxes for the event fields not needed, such as the fields that store the text that displays in the email messages sent for the event.
 - Select Contract - Company in the third Select Data list to include company information for the contract events.
 - Clear the All check box to clear all the fields, and then click the check boxes for only the fields you want available for the analysis, such as Company Name, Company Number, Company Status, and Company Type.
4. Click OK.
5. Click x to collapse the data portion of the screen.
 - Click the stacked three circled icon to redisplay the data fields.
6. (Optional) Hide fields so that it is easier to connect the fields needed for the chart or table. Click the three horizontal bars icon, located under the Filters button, and select Show/Hide Columns in the menu. In the Show/Hide Columns window, click on a field to hide it, or click on a hidden (grayed-out) field to show it. Click x to close the window.
7. Apply a filter to the Event Date field to display only upcoming events:
 - Click the the gear icon icon in the Event Date field.
 - In the Event Date window, click + New Filter.
 - In the Event Date prompt:
 - Select Greater or equals in the list.
 - Click the calendar icon to display a calendar with the current date selected.
 - Click Today so that the analysis always displays data in relation to the current date.
 - Remove the Hour, Minute, and Second fields to display only the date.
 - Click Close to close the calendar.
 - Click Apply.
 - Click x to close the Filters window.
8. Connect two fields to create the visual analysis, taking into account the first field you select will have its information displayed along the Y-axis (vertical) and the second field will have its information displayed along the X-axis (horizontal):

- Click on the Event Date header, and holding down your mouse, drag the cursor to the Contract Number header, and release. A blue arc displays between the fields, indicating they are connected.
 - To use only one field in the analysis, click on the field's header, and then drag-and-drop it into the area labeled Drop Columns or Connect them to Build Visualizations.
9. Click the downward arrow to display the Crosstab and Timeline options for a chart or table.
 10. Add a third field to create a cross-tab visual analysis:
 - Click on the Event Frequency header, and holding down your mouse, drag the cursor to the gray area under the CROSSTAB heading, and release.

 **Tip:**

You can manage the display of new data in the legend by hiding a category of information. For example, clicking Monthly in the screen shown above will display only events with an Event Frequency of Single.

11. (Optional) Format the display of the labels for the X-Axis and Y-Axis.
12. (Optional) Click Add to Gallery to add the chart to the Visual Gallery where it will be available for use in conjunction with the cross-tab table.
13. (Optional) Click the chart icon to display other chart types for the visual analysis:
 - Click the expand icon for the Tables category.
 - Click Crosstab Table to update the visual display.
14. (Optional) Click Add to Gallery to add the table to the Visual Gallery where it will be available for use in conjunction with the cross-tab chart.
15. Click Save.
 - When the prompt displays:
 - Provide a name for the cross-tab visual analysis in the Name field.
 - Click Save.

Copying a Canned/Shared Visual Analysis

You need the BI Tool permission to make a copy of a CANNED or shared visual analysis that is stored in the Shared with Me section of the Home screen. A CANNED visual analysis is provided by Conga Contracts and a shared analysis is provided by another user with the BI Tool permission. Once you copy a visual analysis, it can be edited, renamed, and saved in the Visual Gallery where it is available for use in creating an Analytics Report and a BI Dashboard.

Copying a Canned/Shared Visual Analysis

You need the BI Tool permission to make a copy of a CANNED or shared visual analysis that is stored in the Shared with Me section of the Homescreen. A CANNED visual analysis is provided by Conga Contracts and a shared analysis is provided by another user with the BI Tool permission. Once you copy a visual analysis, it can be edited, renamed, and saved in the Visual Gallery where it is available for use in creating an Analytics Report and a BI Dashboard.

✓ **Tip:**

When a visual analysis is copied, the original CANNED or shared analysis remains in the Shared with Me section of the Home screen. An alternative to copying a visual analysis is to edit the original version and save it as a new analysis, which automatically stores it in the My Items section of the screen.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the Shared with Me link.
3. In the list of items, locate the visual analysis you want to copy:
 - A visual analysis provided by Conga Contracts is preceded by the word CANNED and contains the share icon.
 - A visual analysis shared by another user also contains the share icon.
4. Click the 6 dot move icon for the CANNED or shared analysis and then drag-and-drop it into your My Items folder, or a subfolder.
5. Click the My Items folder to expand it, and verify the analysis was copied to the correct location.
6. (Optional) Rename the visual analysis:
 - Click the copied visual analysis link to display the Discovery screen.
 - Click Save.
 - When the prompt displays:
 - Edit the text in the Name field.
 - Click Save As New.
7. (Optional) Add the visual analysis to the Visual Gallery:
 - Click the copied visual analysis link to display the Discovery screen.
 - Click Add to Gallery.
 - In the Add Panel prompt:
 - Edit the name of the visual analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Add Panel.

Drilling in a Visual Analysis

The BI Analytics Toolbox has a Drill To mode that allows you to reveal additional information for individual data segments in a chart. When you drill to another component of a data segment, the chart refreshes and displays the data for the selected component.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis you want to drill, and click its link.
3. In the Discovery screen, ensure the chart section of the screen is displayed.
 - Click x to collapse the data section of the screen.
4. Click the magnifying glass icon to display the EXPLORER, and then click the drill icon to enable drill mode.
5. (Optional) Hover over a data segment of the chart to display a pop-up with information to ensure you are drilling into the correct segment. If the data segment needs to be enlarged, click the drill icon to redisplay the EXPLORER, and then click the magnifying glass to enable zoom mode. Hover over the segment until the resize icon of six horizontal dots displays. Click the icon and drag it upwards or downwards to shade the desired segment, and then release your mouse. Click the drill icon to return to drill mode.
6. Click on a data segment, such as a bar in the chart, to display a Drill-to prompt.
7. Click a field in the list to redisplay the chart using the data for the selected field.
 - Click the expand arrow for a date field and select Years, Quarters, Months, Weeks, or Days to display the data in the desired timeframe. The original field used to display the chart displays as a link under its title, and the drill to field is also listed. To return to the default view of the chart, click the link for the original field.
8. (Optional) Drill down a second level:
 - Click on a data section of the chart.
 - In the Drill-to prompt:
 - Enter the first few letters of a field name in the Filter by name field.
 - Click a field in the filtered list.
9. Click Save.

Exporting a Visual Analysis

The data in the table section of a Visual Analysis can be exported to a CSV (Comma Separated Value) file so that you can review, edit, and print the information.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis you want to export, and click its link.
3. In the Discovery screen, click the three horizontal bars, located under the filters button.

4. In the Table Menu, click CSV Export.
5. Open, save, or download the file using the browser's options:

The instructions below pertain to the Firefox browser. The procedure will differ if you are using IE, Chrome, or another browser.

1. In the prompt, click OK to launch Excel and display the data in a spreadsheet.
2. Select the Save File radio button and then click OK to save the file to your computer.
3. Locate the file in your Downloads folder. The file name will begin with csvExport and be followed by a system-generated number.

Editing a Visual Analysis

You can edit any of the visual analysis you create and copy. You can also edit any of the visual analysis shared by another user, as well as the CANNED analyzes provided by Conga Contracts. However, once a CANNED or shared visual analysis is edited, it must be saved under a different name.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis you want to edit, and click its link.
 - In the Discovery screen, you can make several edits to a visual analysis:
 - Change the data fields used in the analysis:
 - Click the icon of a magnifying glass over a report to display the data fields if they are not visible.
 - Select and/or clear check boxes to update the fields.
 - Click OK .
 - Change a chart to a table:
 - Click the chart icon to display the visualization categories.
 - Expand the Tables category, and click Table to redisplay data in a table format.
 - Change the type of chart:
 - Click the chart icon to display the visualization categories.
 - Expand a category, and click on a chart type to redisplay data in the new chart.
 - Update the fields used in the chart:
 - Click the trash icon to remove the chart or table.
 - Locate two new fields in the bottom section of the screen.
 - To use only one field, click on the field's header, and then drag-and-drop it into the dotted area.

- Connect the two fields, taking into account the first field you click on will have its information displayed along the Y-axis (vertical) and the connected field will have its information displayed along the X-axis (horizontal).
 - Click on the header of the first field, and holding down your mouse, drag the cursor to the header of the second field, and release. A blue arc displays between the fields, indicating they are connected.
 - When the chart displays, review the recommended chart to display your data.
 - Add a data field to the X-Axis or Y-Axis of a chart:
 - Click on the header for a field located below the chart, and then drag your cursor into the gray area along the left border of the chart (Y-Axis), or the gray area under the chart (X-axis), and release.
 - Use the Drill option to display information for the added field.
 - Display data as a Crosstab or Timeline chart/table:
 - Click Crosstab.
 - Click on the header for a field located below the chart or table, and then drag your cursor into the gray area under the CROSSTAB or TIMELINE text, and release.
 - Use the Drill option to display information for the added field.
 - Update the title of the visual analysis:
 - Click the pencil icon, located to the right of the title to enable the field.
 - Type over the existing text, and click the checkmark.
 - Add a filter to a field by clicking its gear icon and selecting + New Filter, or edit all filter(s) by clicking the filter icon.
 - Add or edit a calculation for a field by clicking its gear icon and selecting + New Calculation.
 - Group or regroup the data in the analysis.
 - Format the analysis, including changing the type of chart used and/or the fields that display.
 - Format a date or value field in the analysis.
3. Add the analysis to the Visual Gallery:
- Click Add to Gallery.
 - In the Add Panel prompt:
 - Edit the name of the visual analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Add Panel.
 - Remove the analysis from the Visual Gallery:
 - Click the Author Dashboard icon, located in the upper left of any screen.
 - When the Visual Gallery displays in the Untitled Dashboard screen, locate the visual analysis you want to delete using the Find field, Sort By list, or by scrolling through the Gallery.

- Click Delete from List for a visualization to remove it from the Gallery.
 - Click OK in the confirmation prompt.
4. Click Save.

If you are saving a CANNED or shared visual analysis after making edits, a prompt displays. Edit the name for the visual analysis in the Name field, and click Save as New.

Sharing a Visual Analysis

When you share a visual analysis you create with other users, they can access it from their BI Home screen. A shared visual analysis can be copied, edited, and added to the user's Visual Gallery where it can be used to create a BI Dashboard and/or an Analytics Report.

Tip:

A visual analysis is typically used to create a Dashboard, while an analysis is normally used to create an Analytics Report.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the My Items link to display your visual analyses, analyses, reports, and dashboards. If the My Items folder contains subfolders, click on a subfolder to display its contents.
3. Locate the visual analysis you want to share, and click its Share icon.
4. In the Share [Visual Analysis Name] window, select the people who can share the visual analysis:
 - Enter the first few letters of a person's first or last name in the Find field.
 - In the filtered list, locate the person and click their Share icon to add them to the Shared With section of the window.
 - Click Close.
5. (Optional) Verify the visual analysis has been shared, indicated by the Shared icon.

Deleting a Visual Analysis

You need the BI Tool permission to delete a visual analysis. However, you can only delete the visual analyses that you create, and not those that have been shared with you, unless you made a copy of the shared analysis, which places a copy in your My Items folder.

When you delete a visual analysis that has been stored in the Visual Gallery, it is not automatically deleted from the Gallery. You must manually remove it from the Visual Gallery.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.

2. In the Home screen, click the My Items link to display the visual analyses you have created and copied. Visual analyses you created include the Visual Analysis icon and the shared analyses you copied include the Share icon.
3. Locate the visual analysis you want to delete, and click its trash icon.
4. Click OK in the confirmation prompt.

Adding/Deleting a Visual Analysis in the Gallery

A CANNED visual analysis that has been provided by Conga Contracts or one that has been shared by another program user, can be added to your Visual Gallery so that it is available when you create an Analytics Report or set up a BI Dashboard.

Adding/Deleting a Visual Analysis in the Gallery

A CANNED visual analysis that has been provided by Conga Contracts or one that has been shared by another program user, can be added to your Visual Gallery so that it is available when you create an Analytics Report or set up a BI Dashboard. A visual analysis that you create can be added to the Gallery during the creation process, or any time after it is created. Any visual analysis that you add to the Gallery can be deleted.

Adding a Canned or Shared Visual Analysis to the Gallery

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis you want to add to the Gallery, and click on it to select it.

Tip:

To edit a CANNED/shared visual analysis before saving it to your Visual Gallery, make a copy of the analysis, and save it under a different name so that it displays in the My Items section of your Home screen. Open the visual analysis from the My Items section, edit it, and then add the revised analysis to the Visual Gallery.

3. In the Discovery screen, click Add to Gallery.
4. In the Add Panel prompt:
 - Edit the name of the visual analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Add Panel.
5. (Optional) Verify the visual analysis has been added to the Gallery by clicking the dashboard to display the Visual Gallery in the Untitled Dashboard screen.
 - a. Locate the analysis using the Find field, Sort By list, or by scrolling through the Gallery.
 - b. Click x to close the Visual Gallery.

Deleting a Visual Analysis from the Gallery

When you delete a visual analysis from the Visual Gallery that you have used to create an Analytics Report or a Dashboard, the visual analysis is not deleted from the report or dashboard.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click dashboard icon, located in the upper left of the screen.
3. When the Visual Gallery displays in the Untitled Dashboard screen, locate the visual analysis you want to delete using the Find field, Sort By list, or by scrolling through the Gallery.
4. Click Delete from List for a visual analysis to remove it from the Gallery.
5. Click OK in the confirmation prompt.

BI Visual Analysis Customizations

A BI Visual Analysis is customized by filtering the data so that only the desired information displays in the chart or table, and the data that does display is properly formatted and aggregated. Color is used to highlight differences in data and in-cell graphics effectively communicate trends. Calculations can be added to analyze the data using one or more fields.

BI Visual Analysis Customization Overview

Customizations for fields in a visual analysis include filtering data, formatting the display of information, adding color to a chart, grouping similar data items, building a calculation, and replacing values in a field with in-cell graphics that represent the values.

A visual analysis of the data stored in Conga Contracts can be customized so that the chart or table used in the analysis effectively communicates the desired information. Customizations include filtering data in a field so that only the desired information is represented, formatting data so that date and value fields are displayed at the desired level of specificity, applying colors to a chart to highlight data types and ranges, and grouping similar data items. After adding a column to the fields in the visual analysis, the column is used to build a calculation using a single field and a standard value or date, or a formula using a function and two or more fields. Value fields in a visual analysis can be replaced with in-cell graphics that represent the values using bars or icons.

The following customizations can be made to a visual analysis:

- [Add a Field Filter](#)
- [Format a Visual Analysis](#)
- [Format a Visual Analysis Field](#)

- [Apply Color](#)
- [Group Data](#)
- [Add a Calculation](#)
- [Replace a Value with an In-Cell Graphic](#)

Adding a Filter in a Visual Analysis

A filter can be added to a text, date, or value field in a visual analysis to manage the type or amount of data that is available when the analysis is used to create an Analytics Report or set up a Dashboard. Adding a filter changes the data records to be analyzed, and can limit the data available when generating a chart or table for the analysis. For example, a date field can be filtered by defining a time frame; a value field can be filtered by setting a ceiling or basement value; and a text field can be filtered by requiring the field to include specific words or characters.

Filtering a Text Field

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis whose field you want to filter, and click its link.
3. In the Discovery screen, locate the text field you want to filter, and click its gear icon. A filter can be applied to a text field used in the chart section of the screen, or the data section, located directly below the chart. A text field contains a blue tick in the top left corner of the field header.
4. In the prompt named for the text field, click + New Filter.
5. When the prompt refreshes, displaying fields for the filter and the Filters window:
 - Make a selection in the list to define the operator, such as Equals, Not Equal, Contains, Is Not Null, Is Not Blank, or Starts With.
 - Enter the restriction in the value field to filter the data using this restriction.
 - Click Apply to close the prompt.
 - In the Filters window:
 - (Optional) Click AND to change the operator to OR to increase the number of data records.
 - (Optional) Update the filter by hovering over the filter name until the move displays, and then click the icon to redisplay the prompt.
 - Click x to close the window.
6. (Optional) When the screen refreshes, review the changes to the chart or table.
7. (Optional) Click Add To Gallery to add the analysis to the Visual Gallery.
8. Click Save to update an existing visual analysis, or select Save As New to create a new visual analysis.

Filtering a Date Field

1. Repeat Steps 1-2 in Filtering a Text Field.
2. In the Discovery screen, locate the date field you want to filter, and click its gear icon.
Tip: A filter can be applied to a date field used in the chart section of the screen, or the data section, located directly below the chart. A date field contains a gold tick in the top left corner of the field header.
3. In the prompt named for the date field, click + New Filter.
4. When the prompt refreshes, displaying fields for the filter and the Filters window:
 - Make a selection in the list to define the operator, such as Equals, Not Equal, Between, Greater Than, Less Than, Greater or Equals, or Less or Equals.
 - Click calendar to use the pop-up calendar to select a date, or the date/time.
 - (Optional) Click Today to quickly select today's date.
 - (Optional) Click Time to display hour, minute, and second fields and populate the fields to set the time of day used for the filter.
 - Click Apply to close the prompt.
 - In the Filters window:
 - (Optional) Click AND to change the operator to OR to increase the number of data records.
 - (Optional) Update the filter by hovering over the filter name until the move displays, and then click the icon to redisplay the prompt.
 - Click x to close the window.
5. (Optional) Review the changes in the chart and the filtered information displayed below the chart.
6. (Optional) Click Add To Gallery to add the analysis to the Visual Gallery.
7. Click Save to update an existing visual analysis, or select Save As New to create a new visual analysis.

Filtering a Value Field

8. Repeat Steps 1-2 in Filtering a Text Field.
9. In the Discovery screen, locate the value field you want to filter, and click its gear icon. A filter can be applied to a value field used in the chart section of the screen, or the data section, located directly below the chart. A value field contains a green tick in the top left corner of the field header.
10. In the prompt named for the value field, click + New Filter.
11. When the prompt refreshes, displaying fields for the filter and the Filters window:
 - Make a selection in the list to define the operator, such as Equals, Not Equal, Between, Greater Than, Less Than, Greater or Equals, or Less or Equals.
 - Enter a value in the blank field.
 - Click Apply to close the prompt.
 - In the Filters window:

- (Optional) Click the AND toggle button to change the operator to OR to increase the number of data records.
 - (Optional) Update the filter by hovering over the filter name until the move displays, and then click the icon to redisplay the prompt.
 - Click x to close the window.
12. (Optional) When the screen refreshes, review the changes to the chart or table.
 13. (Optional) Click Add To Gallery to add the visual analysis to the Visual Gallery.
 14. Click Save to update an existing visual analysis, or select Save As New to create a new visual analysis.

Formatting a Visual Analysis

Formatting a visual analysis includes experimenting with different types of charts to best communicate the relationship between data fields, highlight changes in a single field over time, or show a trend using a field's value over time. Although the Analytics feature automatically generates a chart or table when fields are added to a visual analysis, other types of charts and tables can be used to communicate data relationships and trends.

Other ways to format a visual analysis include managing the data fields that display in the analysis, removing/changing the placement of the chart's legend, and applying color to the chart.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis whose field you want to format, and click its link.
3. In the Discovery screen, click the chart icon to display other chart categories:
 - Click on a category, such as Tables, Circles, Bars, Lines (shown below), Scatter or Custom.
 - Click the expand icon to see the options in a category.
 - Click on a chart type to update the visual display.
4. Remove or relocate the legend for the chart:
 - Click the gear icon, located to the right of the chart title.
 - In the Visualization Settings window:
 - Click the Right (Vertical) radio button to move the legend to the right of the chart.
 - Click the checkbox to remove the legend.
5. Manage the display of fields in the data section of the screen:
 - Click the three horizontal bars icon, located under the filter button to display a Table Menu.
 - Click Show/Hide Columns.
 - In the Show/Hide Columns window:

- Click on a column header to remove it, or click on a grayed-out column header to restore it.
 - Use the Sort list to locate columns alphabetically, by type, or display only hidden columns.
 - Click x to close the window.
6. Click Save.
 7. When the prompt displays, save the visual analysis using one of the following options:
 - Click Save to update the existing visual analysis.
 - Create a new visual analysis:
 - Update the name of the analysis in the Name field.
 - Click Save As.

Formatting a Field in a Visual Analysis

Custom formatting can be applied to a date or value field in a visual analysis. A date field can be displayed with a date/timestamp, or a custom format can be applied. A value field can be displayed as a number, percentage, currency, or a custom format can be applied. Date, value, and text fields can all be formatted by adding color to highlight differences in values, time periods, and text-based data.

Formatting a Date Field

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis whose field you want to format, and click its link.
3. In the Discovery screen, locate the date field you want to format, and click its gear icon. Formatting can be applied to a date field used in the chart section of the screen, or the data section, located directly below the chart. A date field contains a gold tick in the top left corner of the field header.
4. In the prompt named for the date field, click Formatting.
5. When the formatting fields display, use the default format or select one of the following options:
 - In the Display as list, change the default to Custom, and click ? in the Format String field to display a Formatting Data page in a new browser window, providing other options for displaying the date.
 - In the Show Full Date as list, select a different format to display the date.
 - (Optional) Click the Show Time as check box to add a timestamp to the date.
 - When the list displays, select the format for the timestamp.
 - Click Apply.

- Click x to close the prompt.

Formatting a Value Field

1. Repeat Steps 1-2 in Formatting a Date Field.
2. In the Discovery screen, locate the value field you want to filter, and click its gear icon. A filter can be applied to a value field used in the chart section of the screen, or the data section, located directly below the chart. A value field contains a green tick in the top left corner of the field header.
3. In the prompt named for the value field, click Formatting.
4. When the formatting fields display, use the default format or select one of the following options:
 - In the Display as list, change the default from Custom with a g in the Format String field, which is the General number format syntax that displays the value as a whole number. Click ? to display a Formatting Data page in a new browser window, providing other options for displaying the value.
 - Select Currency in the list to display the value as a monetary value.
 - Use the Decimal Places field to set the number of decimal places for the monetary value. Use the Thousands Separator check box to add a comma to the monetary value, such as 10,000. Use the Metric Prefix check box and list to add a monetary symbol to the value and choose the symbol, such as \$ for U.S. dollars.
 - Select Numeric in the list to format the value using the Decimal Places field and the Thousands Separator check box.
 - Select Percentage in the list to append the percentage symbol (%) to the value and apply additional formatting using the Decimal Places field and the Thousands Separator check box.
 - Click Apply.
 - Ensure the Formatting option is enabled, as indicated by the green checkmark icon.
 - Click x to close the prompt.

Applying Color in a Visual Analysis

Color can be used to highlight data in any field type used in a visual analysis, including a text, date, or value field, as well as any field that uses a check box to enable/disable an option, such as the Reminder check box for an event. Color can be applied to a data series in a chart in the analysis, or background color can be added to the individual cells in any data field that displays below the chart. Currently, background color cannot be applied to a cell in a table in the visualization (top) section of the screen.

Color-coding is automatically applied to the data series in a chart when more than two fields are used in the visual analysis (cross-tabular analysis).

Applying Color to a Chart

A visual analysis that identifies contracts that were created during the years 2014-2018, by agreement type, is shown below. To easily distinguish each time timeframe, a separate color is assigned to each year.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis with the chart that needs color-coding, and click its link.
3. In the Discovery screen, locate the text, date, or value field in the X-Axis, and click its gear icon.
4. In the prompt named for the field:
 - Click Colors.
 - When the field expands, make a selection in the list, such as Contains.
 - Enter a value or text string in the blank field, such as 2014.
 - Click the red icon to display a 4-color palette, and click a color to assign it to any data series that meets your criteria.
 - Click the Show More link to display additional colors.
 - Enter a hex code in the Enter Custom field to assign your own color. For example, entering #FF1493 will automatically assign the color pink to the field.
 - Click OR to add another criteria set and assign it a color.
 - Click Apply.
 - Click Save to save the changes to the visual analysis.

Applying Color to a Data Field

Background color can be applied to the data fields in a visual analysis to identify trends, which can assist you in selecting the fields to be used in creating the charts that will highlight the company or contract information you want to display visually. A visual analysis that identifies upcoming contract event alerts is shown below. Background color is applied to the three types of event frequencies identified in the analysis: Single, Monthly, and Yearly.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis that needs color-coding, and click its link.
3. In the Discovery screen, scroll down to the fields used in the analysis.

✓ **Tip:**

Text fields have a blue tick mark in the upper left corner of their header. Date fields have a gold tick mark, Value fields have a green tick mark, and a Check Box has a purple tick mark.

4. Locate the text, date, or value field that needs background color, and click its gear icon.
 - If the field is not listed, click the three horizontal bars and select Show/Hide Columns to display a list of both hidden and visible fields. Click a grayed-out field to redisplay it.
5. In the prompt named for the field:
 - Click Colors.
 - When the field expands, make a selection in the list, such as Equals.
 - Enter a value or text string in the blank field, such as Single.
 - Click the red icon to display a 4-color palette, and click a color to assign it to any cell that meets your criteria.
 - Click the Show More link to display additional colors.
 - Enter a hex code in the Enter Custom field to assign your own color. For example, entering #FFA500 will automatically assign the color orange to the field.
 - Click OR to add another criteria set and assign it a color.
 - Click Apply.
6. Click Save to save the changes to the visual analysis.

Generating a Color-Coded Chart Using a Tabular Analysis

The Analytics feature automatically adds color to a cross-tabular chart in a visual analysis. A cross-tab chart uses more than two fields to communicate information, which can reflect a trend or pattern.

A visual analysis chart that identifies contracts with upcoming events using the Contract Number and Event Date fields is shown below. Adding a third field, Event Frequency, automatically generates color-coding and adds a color legend to the chart.

Grouping Data in a Visual Analysis

Grouping can be used to combine the same data in any field used in a visual analysis, including a text, date, or value field, as well as any field that uses a check box to enable/disable an option.

When you group the data in a field, a separate group is created for each distinct, or unique, data item in the field. The Distinct Count function is then applied to the information in the

group's other data fields by replacing the text, date, or value in each field with a number that reflects the total number of distinct items in the field. Grouping data in a value or date field is automatically performed by the Analytics feature. However, you can change the way dates and values are grouped.

Grouping Data in a Text Field

A visual analysis of contract value by agreement type is shown below. The contract Term Type field is grouped, which creates a separate group for each term type included in the analysis. After the text field is grouped, a numeric value is automatically assigned to the other data fields for each term type group to reflect the number of distinct values in the field.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis that contains the field you want to group, and click its link.
3. In the Discovery screen, scroll down to the list of fields used in the analysis.
 - To increase the viewing area of the fields, hover over the separator bar until the resize icon displays, and then click it and drag it upwards.
4. Locate the text field you want to group, and click its gear icon. A text field contains a blue tick mark in the upper left corner of the header.
5. In the prompt named for the field, enable grouping:
 - Locate the Grouping option.
 - Click its toggle Inactive icon so that it now displays as checked.
 - Click x to close the prompt.
 - In the data fields for the analysis, identify the distinct number of items in each field for a given group. For example, in the screen above, the Fixed - Manual Inactivate term type is used by 147 contracts with a combined value of approximately \$129M.

Grouping Data in a Date Field

A visual analysis of contract value by agreement type is shown below. The contract Current Exp Date field is grouped by year, which creates a separate group for each year a contract that has been included in analysis expires. After the date field is grouped, a numeric value is automatically assigned to the other data fields for each contract expiration year to reflect the number of distinct values in the field.

1. Repeat Steps 1-3 in Grouping Data in a Text Field.
2. Locate the date field you want to group, and click its gear icon. A date field contains a gold tick mark in the upper left corner of the header.
3. In the prompt named for the field:

- Click Grouping.
- When the field expands, change the default selection in the list from Automatic to Date Units.
- Select Number of Groups to define the number of date categories used in the group. For example, if you want to display all the years that have contract expirations, guesstimate the number, enter it in the Approximate # of Groups field, and click Apply. If the results show data that is grouped by quarters or months, enter a lower number into the field.
- When the field expands, select Years in the # of list, and enter 1 in the blank field to ensure each year is created as a separate group.
- Select another option in the # of list to group by quarters, months, days, or a timeframe.
- Enter a number greater than 1 to create a date range. For example, entering a 2 will create a group with a 2-year time span for expiration dates and the data in the corresponding fields will display a count distinct number for the combined years.
- Click Apply.
- In the data fields for the analysis, identify the distinct number of items in each field for a given group. For example, in the screen above, the 2018 expiration date applies to 93 contracts with a combined value of approximately \$81M.

Grouping Data in a Value Field

A visual analysis of contract value by agreement type is shown below. The Contract Value field is grouped using the default number of groups (20) suggested by the Analytics feature, which actually generates only 12 groupings based on the values of the individual contracts in analysis. After the value field is grouped, a numeric value is automatically assigned to the other data fields for each value range to reflect the number of distinct values in the field.

1. Repeat Steps 1-3 in Grouping Data in a Text Field.
2. Locate the value field you want to group, and click its gear icon. A value field contains a green tick mark in the upper left corner of the header.
3. In the prompt named for the field:
 - Click Grouping.
 - When the field expands, change the default selection in the list from Automatic to Number of Groups.
 - Select Width of Groups to define the value range for each group. For example, if you want to group the values in increments of \$50K, enter 50000 in the Width field, and click Apply. If the results show too many value groups, increase the value in the Width field, but if there are not enough groups, decrease the value.

- When the field expands, leave the default selection in the Approximate # of Groups field.
 - Click Apply.
4. In the data fields for the analysis, identify the distinct number of items in each field for a given group. For example, in the screen above, the \$0-\$1,000,000 contract value range applies to 218 contracts.

Adding a Calculation to a Visual Analysis

Several different types of calculations can be added to a visual analysis, including math, date, text, logic, and conversion calculations. Prior to adding a calculation, a new column must be added to the data fields in the visual analysis and assigned a name to identify the type of calculation being added.

A calculation is created to determine the original term of each contract to identify whether long-term or short-term contracts are being written. Prior to adding the calculation, a visual analysis must be built to ensure the needed fields are included (Effective Date and Original Exp Date), as well as fields that provide supporting data for the calculation, such as contract number, value, and type. For simplicity, the visual analysis built in Creating a BI Visual Analysis will be used.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis that needs the calculation, and click its link.
3. In the Discovery screen, scroll to the area below the chart or table.
4. Click the three vertical bars, located below the filters button, to display a Table Menu, and select + Add New Column.
5. (Optional) When the Calculation window displays, re-name the calculation by clicking in the Calculation field and typing over the existing text.
6. Build a formula that calculates the term of a contract using the effective date and original expiration date:
 - Click the Date tab to reveal the date functions, and click DATEDIFF to add this function to the formula window.
 - Hover over the function to display the correct syntax for the function and a brief description.
 - Enter 'Month' to the formula to calculate the time in months.
 - Enter 'Day' or 'Year' to calculate the term in days or years.
 - Add a comma after the text encased in single parenthesis. A comma MUST be appended to each component of the formula, except the last component, which must be appended by a closing parenthesis. User-provided components, such as 'Month' appear in red text.

- Click the Columns tab to reveal the columns available for the DATEDIFF function.
 - Click Effective Date to add the field to the formula.
 - Add a comma after the field.
 - Click Original Exp Date to add the field to the formula.
 - Add a comma after the field, and then add a closing parenthesis.
 - Click TEST to validate the calculation: DATEDIFF('Month',[Effective Date],[Original Exp Date])
 - Click Add to add the calculation to the new column.
 - Click x to close the Calculation window.
7. Click Save.
 8. When the prompt displays:
 - Click Save to update the visual analysis.
 - Create a copy of the visual analysis with the calculated field:
 - Update the name of the visual analysis in the Name field.
 - Click Save as New.
 9. (Optional) Click the gear icon in the header of the calculated field to display a prompt that allows you to edit the calculation, apply formatting, group the calculated results, replace the values with graphics, and apply color.

Replacing Values with In-Cell Graphics

A value field in a visual analysis can be replaced with an in-cell graphic to quickly communicate the value associated with an individual field, or identify a pattern of values. You have the option of using an icon or bar graph to replace the value in each field in a column of information in an analysis. When you select an icon, you can choose one of three different symbols, and the Analytics feature determines the color of the icon based on its value. When you select a bar graph to replace a value, you can also set the baseline, or starting comparison point, and the Analytics feature will assign the appropriate color based on difference between the baseline and the cell value.

A visual analysis that identifies the value of expiring contracts over a three year period is used in the example below. The analysis includes one value field, Contract Value, whose individual values will be replaced with an icon or bar graph.

Replacing a Value Field with an Icon

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the visual analysis with the field that needs the in-cell graphic, and click its link.
3. In the Discovery screen, scroll down to the list of fields used in the analysis.

- To increase the viewing area of the fields, hover over the separator bar until the resize icon displays, and then click it and drag it upwards.
4. Locate the value field you want to replace with a graphic, and click its gear icon. A value field contains a green tick mark in the upper left corner of the header.
 5. In the prompt named for the field (Contract Value):
 - Click In-Cell Graphics.
 - When the field expands, click the Icon radio button.
 - (Optional) Change the default icon from circle to square or arrow.
 - Click the toggle the inactive icon to apply the in-cell graphic, which now displays as checked.
 - Click x to close the prompt.
 6. In the data fields in the analysis, locate the value field with the in-cell icons:
 - Identify the records that contain a red icon, signifying that the value is below the system-defined median value for the field.
 - Identify the records that contain a green icon, signifying that the value is above the median value.
 - Identify the records that contain a yellow icon, signifying that the value is equal to the median value.
 7. (Optional) Use the sort icons in the field header to sort the icons in ascending or descending order.
 8. Click Save to save the changes to the visual analysis.

Replacing a Value Field with a Bar Graph

1. Repeat Steps 1-4 in Replacing Values with In-Cell Graphics.
2. In the prompt named for the value field:
 - a. Click In-Cell Graphics.
 - b. When the field expands, click the Bar radio button.
 - c. (Optional) Click the indicator icon on the Baseline bar and drag it to the left or right to adjust the default comparison value against which values in other cells are measured.

Tip: The values displayed under the Baseline bar indicate the low (17,500) and high (500,000) values for the field. While the default option is typically the median value, the baseline selected in the screen above is approximately 100,000.
 - d. Click the toggle inactive icon to apply the in-cell graphic, which now displays as checked.
 - e. Click x to close the prompt.
3. In the data fields in the analysis, locate the value field with the in-cell bar graphs:
 - a. Identify the baseline, which displays as a black tick mark | in the field.

- b. Identify the records that contain a red bar to the left of the tick mark, signifying that the value is below the baseline value set for the field.
 - c. Identify the records that contain a green bar to the right of the tick mark, signifying that the value is above the baseline value.
Tip: The shorter the bar, the closer the value is to the baseline.
4. (Optional) Use the sort icons in the field header to sort the bar graph values in ascending or descending order.
 5. Click Save to save the changes to the visual analysis.

BI Analyses

A BI Analysis extracts information for a data set and displays it in a table format that can include several related fields. A visual display, such as a bar/pie chart, can be added to effectively communicate relationships and trends in the extracted data. A BI Analysis is recommended as the building block for an Analytics Report.

Analysis Overview

An analysis extracts the data stored in Conga Contracts to a table that can accommodate several related data fields. A visual display, such as a bar/pie chart, can be added to identify the relationship between two or more data fields, as well as patterns in a single data field over time or in relation to a value. When more than two fields are needed to analyze information, a cross-tabulation table can be created to highlight the interaction of data. The Table section of an analysis can be exported as an Excel spreadsheet, PDF file, or a CSV (Comma Separated Value) file.

An analysis is the building block used to create both an Analytics Report and a BI Dashboard. An Analytics Report can be shared with other users and scheduled for distribution. A BI Dashboard can be shared with other users and is available from the Conga Contracts Dashboard using the BI Toolbox portlet.

An analysis lends itself well to creating an Analytics Report since it generates spreadsheet-based data, while a visual analysis lends itself well to creating a Dashboard due to the flexibility and variety of charts offered.

The following tasks can be performed for a BI Analysis:

- [Locate an Analysis](#)
- [Create a BI Analysis](#)
- [Add a Chart to a BI Analysis](#)
- [Add a Formula to a BI Analysis](#)
- [Create a Cross-Tab BI Analysis](#)
- [Export a BI Analysis](#)

- [Copy a Shared Analysis](#)
- [Edit a BI Analysis](#)
- [Share a BI Analysis](#)
- [Delete a BI Analysis](#)
- [Add/Delete an Analysis in the Visual Gallery](#)

Locating an Analysis

The Analyses that are available to you include those you have created, those that have been shared with you by other program users and Conga Contracts and those shared analyses you have copied and edited to meet your needs.

The Analyzers that are available to you include those you have created, those that have been shared with you by other program users and Conga Contracts, and those shared analyzers you have copied and edited to meet your needs.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis.
3. Click the My Items link to display the analyzers you have created and duplicated.
4. Analyzers you created include the Analysis icon and the shared analyzers you duplicated include the Shared Analysis icon.
5. Click an analysis link to select it. If the My Items folder contains subfolders, click on a subfolder to display its contents.
6. Click the Shared with Me link to display the analyzers that have been shared with you.
7. A shared Analysis includes the Shared Analysis icon.
8. Click an analysis link to select it.

Creating a BI Analysis

An analysis is typically created by selecting two or more data sets, which are joined to produce a single data set using individual fields from program screens.

You need the BI Tool permission to create an analysis of the data stored in Conga Contracts. You can then save the analysis in the Visual Gallery where it is available for use in authoring an Analytics Report and/or a Dashboard. An analysis is typically created by selecting two or more data sets, which are joined to produce a single data set using individual fields from program screens. The fields selected in each data set are displayed in a table that is populated with the data stored in Conga Contracts. You can add a chart to the analysis to effectively display the relationship between key fields or communicate

trends in your stored data. You can also create a cross-tabulation table that allows data for three related fields to be displayed and analyzed.

An analysis of the contract events scheduled in 2018 and 2019 is shown below.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the Analysis icon, located in the upper left of the screen.
3. In the (Untitled) Analysis screen, select the data sets to be analyzed:
 - Select Event in the first Select Data list to include all events in the analysis.
 - When the data fields display, clear the check boxes for the fields that do not need to be analyzed, such as the Reminder Text and Notification Text fields.
 - Select Event - Contract in the second Select Data list to filter by contracts with events.
 - Clear the All check box to clear all the fields, and then click the Contract Number check box to identify the Contract Profile where the event is stored. Click the following check boxes to add supporting contract data: Agreement Type, Contract Type, Contract Value, Effective Date, and Current Expiration Date.
 - Select Contract - Company in the third Select Data list to include company information for each contract with an event.
 - Clear the All check box to clear all the fields, and then click the Company Name check box since this is the only field in the Company Profile screen needed to identify a contract that has an event.
4. Click OK.
5. When the Table section displays, review the data that meets the criteria.
6. Use the navigation icons to view multi-page results. To collapse the Select data for analysis section, click the Data toggle link directly above the section. To collapse the Table section of the screen, click its gear icon.
7. Apply a filter to the Event Date field to display only the events in the 2018-2019 time frame:
 - Click the Event Date column header and select Filter in the menu.
 - When the Filter Rows by Cell Values section displays:
 - Ensure Event Date is selected in the Filter Column list.
 - Select Date Range in the Comparison list.
 - In the first Specific Date field, enter the bottom of the date range: 1/1/2018
 - Click Calendar to use the Calendar to select the date.
 - Click Time Picker to add hours and minutes to the date range.
 - In the second Specific Date field, enter the top of the date range: 12/31/2019.
 - Click Add.
8. (Optional) Add a chart to the analysis to provide a visual display of key data.

9. (Optional) In the Table section:

- Sort the data in a column by clicking its column header, and selecting Sort A-Z or Sort Z-A in the menu.
- Hide fields so that it is easier to view all fields without scrolling:
- Click the column header for the field you want to hide, and select Hide Column in the menu.
- To redisplay a hidden field, click the gear icon in the Table section to display the Hide and Show Columns check boxes. Select the field's check box, and click OK.
- Click Add to Visual Gallery to save the analysis to the Visual Gallery where it is available for creating an Analytics Report and/or Dashboard.
- In the Add to Visual Gallery prompt:
 - Edit the name of the analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Done.

10. Provide a name for the analysis:

11. Click the -, located to the right of the screen name, Untitled Analysis.

12. Select Rename in the menu.

13. In the prompt, type over the existing text in the Name field, and click Save.

Adding a Chart to a BI Analysis

A chart can be added to an analysis to provide a visual representation of the relationship between key fields or to effectively communicate trends in data over time or with respect to a value.

A line chart showing Event Dates by Contract Number is generated after applying a filter that shows only the events for the year 2018, which are displayed quarterly (Q1-Q4). A third data set (event frequency) is added to the chart, and is displayed as stacked information that is color-coded.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis that needs the chart.
3. Click the analysis link to select it, and display the screen named for the analysis.
4. (Optional) Add a filter to manage the amount of data shown in the chart.
5. Add a chart to provide a visual display of key data:
 - Click Add Chart in the toolbar at the top of the screen.
 - When the screen refreshes, select Event Date in the Label Column list, and select Quarter in the by list to display events by the quarter in which they are due to be completed.

- The Label Column displays the label for a text, date, or value field along the X-axis (horizontal axis) of the chart.
 - Select Contract Number in the Data Column list, and select Count since each Contract Profile is already a distinct number.
 - The Count option generates a total of all items in a data field, while Distinct Count runs a total of distinctly different items.
 - (Optional) Make a selection in the Additional Column list to add a third data set to the chart.
 - The data can be added adjacent to the bar representing the data field selected in the Data Column list, or stacked on top of the bar with a contrast in color to show the delineation.
 - (Optional) Change the default orientation of the bar from Horizontal to Vertical to change the bar chart to a column chart.
 - Click OK.
6. (Optional) Click Add to Visual Gallery, located to the right of the chart name, to add the chart to the Visual Gallery.
 - In the Add To Visual Gallery prompt:
 - Edit the name of the analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Done.
 7. (Optional) Click -, located to the right of the chart name, to collapse the chart portion of the screen.

Adding a Formula to a BI Analysis

A formula is added to an analysis by inserting a calculated column into the Table section, and then building the formula using program fields, date and value functions, and math operators. Help in creating the formula is available in the application, which includes definitions and descriptions of functions and math operators.

A formula is created to determine the difference between the proposed value of a contract and its actual value, as recorded in the Contract Profile screen. Prior to adding the calculation, an analysis is needed that includes the Contract data set with both the Proposed Value and Contract Value fields selected, as well as fields that provide supporting data for the formula, such as contract number, status, type, agreement type, effective and expiration dates, and company name. A filter should also be applied to both the Proposed Value and Contract Value fields so that the value in these fields is greater than 0.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis that needs the calculation, and click its link.

3. In the Analysis screen, click Formula in the toolbar at the top of the screen.
Tip: For help in creating a formula, click Formula Help to display a Self-Service Analytics file in a new browser tab.
4. When the Add a new column from a formula section displays, provide a name for the formula and build it:
 - In the Name field, enter a name for the column that will be appended to the Table and used to display the calculation.
 - Using the fields in the Insert a column list and math operators (+ - * /), build the formula in the Formula list box:
 - Select Contract Value in the list and click Insert to display [contract.Contract Value] in the list box.
 - Add the - (minus) operator, making sure there is a space before and after the operator.
 - Select Proposed Value in the list and click Insert to display [contract.Proposed Value] in the list box.
 - In the Data Type list, select Number since we are calculating the difference between two values.
 - In the Display Format list, select \$#,###.00 (currency format) since we want the difference displayed in dollars and cents.
 - Click Add .
 - Remove a formula by clicking its Remove button.
 - Replace a formula by updating any of the fields and/or correcting the formula and clicking the Replace button.
5. Review the results of the calculation for each record in the new column, which appears as the last column in the Table section of the screen.
6. (Optional) Click Formula in the toolbar to hide the formula section.

Creating a Cross-Tab BI Analysis

A cross-tab analysis is one that uses more than two data fields to communicate trends or analyze the relationship of the company/contract data stored in Conga Contracts. You can use any combination of text, date, and value fields to create the cross-tabulation.

You need the BI Tool permission to create a cross-tabulation analysis. A cross-tab analysis is one that uses three data fields to communicate a trend or analyze the relationship of key company/contract data stored in Conga Contracts. You can use any combination of text, date, and value fields to create the cross-tabulation. A cross-tab analysis is created as a separate table after the main table is created using one or more data sets. During the creation process, both tables can be saved to the Visual Gallery for use in creating an Analytics Report or a BI Dashboard.

After a BI Analysis is created showing the final contract documents that were added to Conga Contracts from 1/1/2015 to the present day, a cross-tabulation is added to show how many revisions were needed to arrive at the final document by Contract Number and Year. Three filters were needed for the analyses: (1) Document Type Group field must contain the word Contracts, (2) Document Type field must contain the word Executed to identify the final document, and (3) the Document Created On field must fall in the date range of 1/1/2015 - Today (Current Date).

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click Analysis, located in the upper left of the screen.
3. In the (Untitled) Analysis screen, select the data sets to be analyzed:
 - Select Company in the first Select Data list to include all companies in the analysis.
 - When the data fields display, clear the All check box to clear all the fields, and then click the Company Name check box since this is the only field in the Company Profile screen needed to identify a contract document.
 - Select Company - Contract in the second Select Data list to include all contracts in the analysis.
 - Clear the All check box to clear all the fields, and then click the Contract Number check box to identify the Contract Profile where the document is stored. Click the following check boxes to add supporting contract data: Agreement Type, Contract Type, Contract Value, Term Type, Effective Date, and Current Expiration Date.
 - Select Contract - Document in the third Select Data list to include information for each contract with a stored document.
 - Clear the check boxes for the fields that do not need to be analyzed, such as the Document UUID and Document File Size.
4. Click OK.
5. When the Table section displays, review the data that meets the criteria.
6. Use the Page field and navigation icons to view multi-page results. To collapse the Select data for analysis section, click the Data toggle link directly above the section. To collapse the Table section of the screen, click its - icon.
7. Set the filters for the analysis by clicking the Filter link to display a Filter Rows by Cell Values section:
 - Filter by Document Type Group so only contract documents are analyzed:
 - In the Filter Column list, select Document Type Group.
 - In the Comparison list, select Contains.
 - In the Value field, enter Contract.
 - Click Add.
 - Filter by Document Type so only final contracts are analyzed:
 - Change the selection in the Filter Column list to Document Type.

- Leave Contains as the selection in the Comparison list.
 - Enter Executed in the Value field.
 - Click Add.
 - Filter by Document Created On to establish a date range for the analysis:
 - Change the selection in the Filter Column list to Document Created On.
 - Change the selection in the Comparison list to Date Range.
 - Select Specific Date in the first list, and click Calendar to use the calendar to select the 1/1/2015 start date.
 - Click the Time Picker to set a specific time of day for the start date.
 - Select Sliding Date in the second list, and then select Today in the third list so that whenever the analysis is used, it will be up-to-date.
 - Click Add.
 - Click the gear icon, located to the right of the Filter Rows by Cell Values section to collapse the filters.
8. Click the Add Crosstab link.
 9. When the cross-tab fields display, set up a cross-tabulation showing the number of document revisions for each final contract document by contract number and year:
 - In the Header Values Column list, select Document Created On, and then select Years in the by list to display dates horizontally, as column headers.
 - In the Label Values Column list, select Contract Number to display contract numbers vertically, in a list in the left-most column of each row.
 - In the Aggregate Values Column list, select Document Revision Number to display the aggregated numbers as the contents for the rest of the table cells.
 - In the Aggregate Function list, select Distinct Count so that only the unique revision numbers for a document are included.
 - (Optional) In the Summary Function list, select Sum to add a column to the cross-tabulation that calculates totals by year and by contract number.
 - (Optional) Select the Compare Label Columns check box and select a red/green option to use color to highlight the difference between column values.
 - Change the default selection in the Reverse Compare Colors list to Red to Green if you want an increase between column values displayed in green, instead of red.
 - Click OK.
 - If the Page field and navigation arrows display, use them to display additional data.
 10. (Optional) Click Add to a Visual Gallery, located to the right of the Cross-Tab title, to save the cross-tabulation to the Visual Gallery where it is available for creating an Analytics Report and/or Dashboard. Click Add to a Visual Gallery in the Table section to save the analysis to the Visual Gallery.

11. Provide a name for the cross-tab analysis:
 - a. Click the gear icon, located to the right of the screen name, Untitled Analysis. Select Rename in the menu.
 - b. In the prompt, type over the existing text in the Name field, and click Save.

Exporting a BI Analysis

The data in the Table section of a BI Analysis can be exported to the following file formats so that you can review, edit, and print the information:

- Excel - data is exported into an .xlsx or .xls spreadsheet as raw data. The file can be viewed in Excel or saved to your computer.
 - CSV (Comma Separated Value) file - data is exported into a .csv file as raw data. The file can be viewed in Notepad (or other text editor) and Excel, or saved to your computer.
 - PDF (Portable Document Format) file - an image of the table is exported into a temporary .pdf file that can be viewed in your browser using the Adobe Acrobat plug-in, a similar plug-in, or native browser technology. The browser usually allows you to save the export as a file or print it.
1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
 2. In the Home screen, locate the analysis you want to export, and click its link.
 3. In the Analysis screen, click the Export icon in the Table section of the screen, and select Excel, CSV, or PDF.
 4. Download, open, or save the file using the browser's options:

The instructions below pertain to the Google Chrome browser. The procedure will differ if you are using IE, Firefox, or another browser.

1. For Excel and CSV files, click on the file name that displays in the browser window.
2. For a PDF file, use the download Download icon.

Copying a Shared Analysis

You need the BI Tool permission to make a copy of a shared analysis, which contains report fields with program data and any charts that were added to highlight key information. Once the analysis is copied, you can edit and rename it, and save it in the Visual Gallery where it is available for use in creating an Analytics Report and a BI Dashboard.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the Shared with Me link.
3. In the list of shared items, locate the analysis you want to copy.
4. Click the move icon for the shared analysis and then drag-and-drop it into your My Items folder, or a subfolder.

5. Click the My Items folder (or subfolder) to open it and verify the analysis was copied to the correct location.
6. (Optional) Rename the analysis:
 - Click the copied analysis link to display the Analysis screen.
 - Click gear icon , located to the right of the screen name, and select Rename in the menu.
 - When the prompt displays:
 - Edit the text in the Name field.
 - Click Save.
7. (Optional) Edit the analysis to customize it for an Analytics Report or BI Dashboard.
8. (Optional) Add the analysis to the Visual Gallery:
 - Click the copied analysis link to display the Analysis screen.
 - In the Table section of the screen, click Add to Visual Gallery .
 - In the Add Panel prompt:
 - Edit the name of the analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Add Panel.

Editing a BI Analysis

You can edit any of the analyzes you create and copy. You can also edit any of the analyzes that have been shared by another user, as well as the CANNED analyzes provided by Conga Contracts. However, once a CANNED or shared analysis is edited, it must be saved under a different name.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis you want to edit, and click its link.
3. In the Analysis screen, you can make several edits:
4. Change the data fields used in the analysis:
5. Click the Data link at the top of the screen to display the data fields.
6. Select and/or clear check boxes to update the fields.
7. Click OK.
8. In the Table section of the screen, click a field header to display a menu to perform the following tasks for the field:
9. Filter, Group, and Aggregate data.
10. Format text, date, and value fields.
11. Hide columns of data.
12. Sort data in a column.
13. Resize and move a column of data.
14. Manage the number of records that display.

15. Click the Formula link at the top of the screen to add/edit a formula.
16. Click the Filter link to manage the filters in the analysis.
17. Click the Add Chart link to add a chart.
18. Click the Add Cross tab link to add a cross-tab analysis.

You do not need to save the file to retain the edits you make.

Sharing a BI Analysis

When you share an analysis you create with other users, they can access it from their BI Home screen. A shared analysis can be copied, edited, and added to the user's Visual Gallery where it can be used to create a BI Dashboard and/or an Analytics Report.

Tip:

An analysis is typically used to create an Analytics Report, while a visual analysis is normally used to create a BI Dashboard.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the My Items link to display a list of your analyses, visual analyses, reports, and dashboards. If the My Items folder contains subfolders, click on a subfolder to display its contents.
3. Locate the analysis you want to share, and click its share icon.
4. In the Share [Analysis Name] window, select the people who can share the analysis:
 - Enter the first few letters of a person's first or last name in the Find field.
 - In the filtered list, locate the person and click their share icon to add them to the Shared With section of the window.
 - Click Close.
5. (Optional) Verify the analysis has been shared, indicated by the shared icon.

Deleting a BI Analysis

You need the BI Tool permission to delete an analysis. However, you can only delete the analyses that you create, and not those that have been shared with you, unless you made a copy of the shared analysis, which places a copy in your My Items folder.

When you delete an analysis that has been stored in the Visual Gallery, it is not automatically deleted from the Gallery. You must manually remove it from the Visual Gallery.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.

2. In the Home screen, click the My Items link to display the analyses you have created and copied. Analyses you created include the Analysis icon and the shared analyses you copied include the Shared Analysis icon.
3. Locate the analysis you want to delete, and click its trash icon.
4. Click OK in the confirmation prompt.

Adding/Deleting an Analysis in the Visual Gallery

An analysis that has been shared by another program user can be added to your Visual Gallery so that it is available when you create an Analytics Report or set up a BI Dashboard. An analysis that you create can be added to the Visual Gallery during the creation process, or any time after it is created. Any analysis that you add to the Visual Gallery can be deleted.

User Adding/Deleting an Analysis in the Visual Gallery

An analysis that has been shared by another program user can be added to your Visual Gallery so that it is available when you create an Analytics Report or set up a BI Dashboard. An analysis that you create can be added to the Visual Gallery during the creation process, or any time after it is created. Any analysis that you add to the Visual Gallery can be deleted.

Adding an Analysis to the Gallery

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis you want to add to the Gallery, and click on it to select it. To edit a shared analysis before saving it to your Visual Gallery, make a copy of the analysis, and save it under a different name so that it displays in the My Items section of your Home screen. Open the analysis from the My Items section, edit it, and then add the revised analysis to the Visual Gallery.
3. Add the chart and/or table to the Gallery by clicking the Add to Visual Gallery icon in the chart section of the screen and/or the Table section of the screen:
 - In the Add to Visual Gallery prompt:
 - Edit the name of the analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Done.
4. (Optional) Verify the analysis has been added to the Gallery by clicking dashboard icon, located in the top left of every screen, to display the Visual Gallery in the Untitled Dashboard screen.
 - a. Locate the analysis using the Find field, Sort By list, or by scrolling through the Gallery.
 - b. Click x to close the Visual Gallery.

Deleting an Analysis from the Gallery

When you delete an analysis from the Visual Gallery that you have used to create an Analytics Report or a Dashboard, the analysis is not deleted from the report or dashboard.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click dashboard, located in the top left of the screen.
3. When the Visual Gallery displays in the Untitled Dashboard screen, locate the analysis you want to delete using the Find field, Sort By list, or by scrolling through the Gallery.
4. Click Delete from List for an analysis to remove it from the Gallery.
5. Click OK in the confirmation prompt.

BI Analysis Customizations

A BI Analysis is customized by filtering the data so that only the desired information displays in the table, and the data that does display is properly formatted and aggregated. Formulas can be added to analyze the data using one or more fields.

BI Analysis Customization Overview

An analysis of the data stored in Conga Contracts can be customized so that the table and any accompanying chart used in the analysis effectively communicates the desired information. Customizations include filtering data in a field so that only the desired information is represented, formatting data so that date and value fields are displayed at the desired level of specificity, sorting data in ascending or descending order, and grouping similar data items. Data can also be aggregated to show a sum or average value, a minimum or maximum value, or a count/discount count of data items. A formula can be added to perform a calculation using one or more fields and/or a constant to provide additional information. The information in a calculated field can be displayed as a value, date, or percent. Color-coding and in-cell bar graphs can also be used to highlight information in a calculated field.

The following customizations can be made to an analysis:

- [Filter data](#)
- [Format date and text fields](#)
- [Format a value field](#)
- [Group data](#)
- [Sort data](#)
- [Hide data](#)
- [Aggregate data](#)
- [Resize and move data](#)

- [Set page display](#)

Adding a Filter in an Analysis

A filter can be added to a text, date, or value field in an analysis to manage the type or amount of data that is available when the analysis is used to create an Analytics Report or set up a Dashboard. Adding a filter changes the data records to be analyzed, and can limit the data available when generating a table or adding a chart to the analysis. For example, a date field can be filtered by defining a time frame; a value field can be filtered by setting a ceiling or basement value; and a text field can be filtered by requiring the field to include specific words or characters.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis whose field you want to filter, and click its link.
3. In the Analysis screen, click Filter in the toolbar at the top of the screen.
4. When the Filter rows by cell values section displays, apply a filter to a text, date, or value field:
 - Select a field that is populated with text or a value in the Filter Column list.
 - Select an operand in the Comparison list.
 - Enter the text you want to filter by in the Value field.
 - Click Add .
 - Remove a filter by clicking its Remove button.
 - Select a field that is populated with a date in the Filter Column list.
 - Select an operand in the Comparison list.
 - In the Value field, select Specific Date or Sliding Date.
 - For a specific date, enter the date in the blank field, or click the calendar icon to use the calendar to select the day, month, and year. Click the Time Picker to set the hour, minute, and second.
 - Select Sliding Date to calculate the date relative to a specific date or time frame, such as Today or Next Fiscal Quarter Start. Make a selection in the corresponding list to select the date or time frame.
 - Click Add .
 - Replace a filter by making a different selection in the Filter Column list and clicking the filter's Replace button.
5. (Optional) Use the the gear icon toggle icon to hide/display the Filters section.

You do not need to save the file to retain the changes you make by filtering data.

Aggregating Data in an Analysis

The Aggregate option is used to calculate a total, average, or standard deviation for a column of data in an analysis. An aggregate can also be set to display the minimum or maximum value in a column of data, count the number of items, or count the number of distinct (unique) items.

The analysis in the screen shot below identifies upcoming contract event. The Event Date field is aggregated using the Count Distinct function, and the Contract Value field is aggregated using the Average function.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis whose field(s) you want to aggregate, and click its link.
3. In the Analysis screen, click the gear icon, located to the right of the Table header.
4. When the screen refreshes, click the Aggregate tab.
Tip: You can also aggregate the data in a column by clicking on its column header, selecting Aggregate in the drop-down menu, and then making a selection in the second menu.
5. When the Calculate totals, averages and such for the top and grouped levels section displays:
 - Select a date, value, or text field in the Data Column list.
 - Select an available aggregation for the selected field in the Aggregate Function list.
 - Click Add.
 - Remove an aggregate grouping by clicking its Remove button.
 - Replace an aggregation by making a different selection in the Data Column list and clicking the aggregate's Replace button.
 - (Optional) Change the display of the aggregate using the Layout options:
 - Changes the selection in the Results Positioning list to Bottom to display the aggregation at the bottom of the column.
 - Select the Hide Function Names check box to display only the numeric value for the aggregation. For example, Distinct Count: 8 will display as 8.
6. (Optional) Use the Table header's the gear icon toggle icon to hide/display the aggregate section.

You do not need to save the analysis to retain the changes you make by aggregating data.

Grouping Data in an Analysis

The Group option is used to combine the same data in any field used in an analysis, including a text, date, or value field. When you group the data in a field, a separate group

is created for each unique data item in the field and that item is displayed as a heading in the Table section of the screen. More than one field may be grouped to efficiently display data with repeating entries, such as company name and contract number.

When you group the data in a field, a separate group is created for each distinct, or unique data item in the field and that item is displayed as a heading in the Table section of the Analysis screen. More than one field may be grouped to efficiently display data with repeating entries, such as company name and contract number.

1. Click Tools in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis that contains the field you want to group, and click its link.
3. In the Analysis screen, click the Table Properties icon located to the right of the Table header.
4. When the screen refreshes, click the Group tab. You can also group the data in a column by clicking on its column header and selecting Group in the drop-down menu.
5. When the Organize rows with grouping and sub-grouping section displays:
 - Select a field in the Grouping Column list to identify the primary level of grouping.
 - (Optional) Select the Exclude Detail Rows checkbox to hide rows that have been grouped, which will collapse each group into a single row in the table.
 - Click Add.
 - Remove a grouping by clicking its Remove button.
 - Replace a grouping by making a different selection in the Grouping Column list and clicking the group's Replace button.
 - (Optional) Add a sub-grouping by replacing the selection in the Grouping Column list and clicking Add.
6. (Optional) Use the Table header's gear icon toggle to hide/display the grouping section.

You do not need to save the file to retain the changes you make by grouping data.

Formatting Date and Text Fields in an Analysis

Formatting can be applied to the three primary field types used in an analysis: date, text, and value. All field types can be formatted by changing the default alignment of the data in a field, and applying expanded spaces to auto-size the width of the field to accommodate the data.

Formatting a Date Field

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.

2. In the Home screen, locate the analysis whose field you want to format, and click its link.
3. In the Analysis screen, locate the field in the Table section of the screen.
4. Click on the field header, and click Format in the menu to display a secondary menu.
5. Format the field by clicking an option specific to dates:
 - yyyy/MM/dd - displays April 15, 2018 as 2018/04/15.
 - yyyy/MM/dd hh:mm:ss - displays date and time (4:38 PM and 22 seconds) as 2018/04/15 04:38:22.
 - MM/dd/yyyy - displays date as 04/15/2018.
 - MM/dd/yyyy hh:mm:ss - displays date and time as 04/15/2018 04:38:22.
 - Click No Format to return the field to the default format. Click an Align option to control the position of the date in a field, and click Expanded Spaces to resize the field to accommodate the date format.
 - You do not need to save the file to retain the changes you make by formatting data.

Formatting a Text Field

1. Repeat Steps 1-4 in Formatting a Date Field.
2. Format the field by clicking an option specific to text:
 - Align Left, Align Center, or Align Right - arranges the data in the field so it is flush left, centered, or flush right.
 - Expanded Spaces changes the width of the field so the data displays in a single line, instead of the data being wrapped to accommodate the width of the field.
 - Click No Format to return the field to the default format. Click an Align option to control the position of text in a field, and click Expanded Spaces to resize the field to accommodate the text.

Formatting a Value Field in an Analysis

Formatting can be applied to the three primary field types used in an analysis: value, date, and text. All field types can be formatted by changing the default alignment of the data in the field, and applying expanded spaces to auto-size the width of the field to accommodate the data.

A value field has several other formatting options, including being displayed as currency, a number with decimals, or a percentage. A True/False option can be applied where a zero value displays as False and any other value displays as True. A value field can also be color-coded to identify similar values using an adjustable red-green scale. In-cell bar gauges can be substituted for field values to effectively communicate differences among values.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.

2. In the Home screen, locate the analysis whose field you want to format, and click its link.
3. In the Analysis screen, locate the value field in the Table section of the screen.
4. Click on the field header, and click Format in the menu to display a secondary menu.
5. Format the field by clicking an option specific to values:
 - ###,###,##0.00 - displays 250M as 250,000,000.00 (with a thousands separator and two decimal places).
 - \$###,###,##0.00 - displays the value as \$250,000,000 (with a currency sign, a thousands separator, and two decimal places).
 - Percent - displays the value multiplied by 100 and appended with a percent sign (%).
 - True/False - replaces a zero (0) value in a field with False, and any other value with True.
 - Bar Gauges - replaces the value with a horizontal bar gauge. Hover over the graph to display a tooltip with the value.
 - Cell Colors - adds a system-generated background color to the field so that fields with the same value have the same color. Control the color range by dragging the Cell Color Slider in the column header.
 - Click No Format to return the field to the default format. Click an Align option to control the position of the value in a field, and click Expanded Spaces to resize the field to accommodate the value.

You do not need to save the file to retain the changes you make by formatting data.

Hiding and Showing Data in an Analysis

The fields that display in the Table section of an analysis are those that were selected when the analysis was created. However, any of the fields can be hidden so that only key fields, and none of the supporting fields display. Removing fields also reduces horizontal scrolling. Hidden fields can be redisplayed at any time, if needed.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis that contains the field(s) you want to hide, and click its link.
3. In the Analysis screen, click the gear icon, located to the right of the Table header.
4. When the screen refreshes, click the Columns tab.

Tip: You can also hide a column by clicking on its column header and selecting Hide Column in the drop-down menu.
5. When the Hide and show columns section displays:
 - Clear the check box for each field you want to hide in the Table section of the screen.

- Select a check box to re-display the field.
- Click .

6. (Optional) Use the Table header's toggle icon to hide/display the columns section.

You do not need to save the file to retain the changes you make by hiding/showing data.

Sorting Data in an Analysis

The Sort option is used to toggle information in a data column in an analysis in ascending or descending order. You can sort text alphabetically, numbers in increasing or decreasing value, and dates in order of occurrence.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis that contains the field you want to sort, and click its link.
3. In the Analysis screen, click the gear icon, located to the right of the Table header.
4. When the screen refreshes, click the Sort tab.

Tip: You can also sort the data in a column by clicking on its column header and selecting Sort A-Z or Sort Z-A in the drop-down menu.

5. When the Order rows by cell value section displays:
 - Select the field you want to sort in the Data Column list.
 - Select Ascending or Descending in the Order Direction list.
 - Click Add.
 - Remove sorting by clicking the Remove button.
 - Replace the column being sorted by making a different selection in the Data Column list and clicking the group's Replace button.
 - (Optional) Change the sort order by making a different selection in the Order Direction list.
6. (Optional) Use the Table header's toggle icon to hide/display the sort section.

You do not need to save the file to retain the changes you make by sorting data.

Resizing and Moving Data in an Analysis

The fields that display in the Table section of an analysis can be resized to accommodate the data in the field. The fields can also be moved so that related information can be displayed side-by-side.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis that contains the field(s) you want to resize or move, and click its link.
3. In the Analysis screen, scroll down to the Table section of the screen.
4. Move a column of data:

- Hover over the column name until the move icon displays:
 - Hover over this icon until the arrow icon displays.
 - Click the arrow icon, and then drag-and-drop the field to the desired location in the table.
5. Resize a column of data:
 - a. Hover over the column name until the 6 dot resize icon displays.
 - b. Hover over this icon until the + icon displays.
 - c. Click the double barred arrow icon and drag the border of the column to resize it.

You do not need to save the file to retain the changes you make by moving and/or resizing columns of data.

Setting the Page Display for an Analysis

The default number of records that display in the Table section of an analysis can be customized to meet your needs.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the analysis whose page display you want to set, and click its link.
3. In the Analysis screen, click the gear icon, located to the right of the Table header.
4. When the screen refreshes, click the Paging tab.
5. When the Set the number of rows displayed per page section displays:
 - Change the default value (20) in the Rows per Page field, or select the Show all rows check box to display all rows in a single page.
 - Click OK .
 - If the Table has several pages of records, selecting the Show All Rows check box is not recommended since this option will require a great deal of scrolling.
6. (Optional) Use the Table header's the gear icon toggle icon to hide/display the paging section.

You do not need to save the file to retain the changes you make to the page display.

BI Analytics Reports

The Analytics Reports created using the BI tool can include any of the fields in Conga Contracts program screens, as well as a visual display of report data over time.

BI Analytics Report Overview

An analysis or visual analysis must be created before an Analytics Report can be authored since the analysis provides the data for the report, which can be represented in a table or a chart. Once an analysis or visual analysis is created, it is stored in the Visual Gallery where it is available for use in authoring the report. An Analytics Report can be formatted through the addition of text, spacing, borders, images, links, and other customizations.

Conga Contracts has provided several CANNED visual analyses, which can be copied and used as is, or edited to meet specific reporting needs.

The following tasks can be performed for an Analytics Report:

- [Locate an Analytics Report](#)
- [Create a BI Analytics Report](#)
- [Create an Analytics Report Using a Canned/Shared Analysis](#)
- [Edit a BI Analytics Report](#)
- [Duplicate a BI Analytics Report](#)
- [Share a BI Analytics Report](#)
- [Schedule a BI Analytics Report](#)
- [Print a BI Analytics Report](#)
- [Delete a BI Analytics Report](#)

Locating an Analytics Report

The BI Analytics Reports that are available to you include those you have created, those that have been shared with you by other program users, and those shared reports you have copied and edited to meet your needs.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the Analytics Report:
3. Click the My Items link to display the reports you have created and duplicated.
 - Reports you created include the Report icon and the shared reports you duplicated include the Shared Report icon.
4. Click a report link to select it. If the My Items folder contains subfolders, click on a subfolder to display its contents.
5. Click the Shared with Me link to display the reports that have been shared with you.
6. A shared Analytics Report includes the Shared Report icon.
7. Click a report link to select it.

Creating a BI Analytics Report

A BI Analytics Report is created using one or more analyses or visual analyses stored in your Visual Gallery. An analysis or visual analysis added to the report typically includes both program fields populated with data and a chart that represents the relationship between two or more key fields, or a trend in one or more fields over time. Once you import an analysis/visual analysis into the report, you can apply formatting to add an image, text, and/or spacing to produce a professional report.

Users with the BI Tool permission can create a BI Analytics Report using three different methods:

- Copy a CANNED or shared analysis or visual analysis, edit it to meet your reporting needs, save it in your Visual Gallery, and then create a report by importing the analysis/visual analysis and applying custom formatting. See [Creating a BI Analytics Report Using a Canned/Shared Analysis](#).
- Edit an analysis or visual analysis that has been shared with you, save it as a new analysis, add it to your Visual Gallery, and then create a report by importing the analysis and applying custom formatting.
- Create an analysis or visual analysis, add it to your Visual Gallery, and then create a report by importing the analysis and applying custom formatting.

The report created includes two visual analyses: Contract Value by Expiration Date and Contract Value by Agreement Type. A logo was added to the report, a link at the bottom of the report, and spacing was inserted between the analyses.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. Ensure each analysis or visual analysis to be used in the report has been added to the Visual Gallery. An Analysis or Visual Analysis is added to Gallery after you create it, or after you make a copy of a canned/shared analysis/visual analysis.
3. Click the Report icon, located in the upper left of any BI Toolbox screen.
4. In the (Untitled) Report screen, ensure the Design tab is selected.
5. Hover over the field in the New Visual field until the move icon displays, click on it, and then drag-and-drop the reports icon into the blank canvas.
6. When the Visual Gallery displays, locate the analysis or visual analysis you want to add to the report, and click its Add button.

Locate an analysis by entering its name in the Find field, by selecting an option in the Sort list, or scrolling through the list.

Tip: An analysis is typically a table that is used in an Analytics Report while a visual analysis is typically a chart used in a Dashboard.

7. (Optional) Add another chart or table to the canvas to create a report with multiple analyses.

8. Click x to close the Visual Gallery.
9. When the screen refreshes, provide a name for the report:
 - Click the gear icon, located to the right of Untitled Report, and select Rename in the menu.
 - In the prompt, provide a name for the report, and click Save.
10. (Optional) Click the pencil icon for an analysis to display it in edit mode, and make updates to the analysis or visual analysis.

Click the data fields icon to display the data fields.

If you edit the data fields by adding/removing any of the original fields, the chart or table will automatically be removed.

Click x to display the chart/table.
11. (Optional) Click the gear icon for an analysis to display a Settings window and format its title:
 - Edit the default text size, color, and alignment of the title.
 - Update the selection in the Insert a Formula field to select the time/date stamp to be appended to the title whenever the report is generated, and click Insert.
 - Use the selections in the Border Settings section to add a border to the title.
 - Click Set.
12. Use the remaining design options to format the report by clicking an option, and then dragging and dropping it to the desired location in the canvas:
 - New Split Row - adds a two-column row to the report, allowing you to drag-and-drop another design option (text, link, or image) into each column in the row.
 - Click the split icon to split a column into two additional columns, or click x to remove a column/split row.
 - Add Space - displays an Add Space prompt where you can add 1-30 lines to the report, as well as create a border around the added line(s).
 - Click the gear icon to update the spacing/border options, or click x to remove them. Use the same icons for the text, image, and link design options below.
 - New Text - displays a Settings window where you can add text, format it, insert a time/date stamp, and/or add a border around the text.
 - New Image - displays a Settings window where you can import an image, position it, size it, and/or add a border around the image.
 - New Link - displays a Settings window where you can enter a URL and select whether the web page displays in a new browser tab or the same tab. You can add text so that the text is the clickable link, and also format the display of the linked text.
 - New PDF Link - displays a Settings window where you can provide users with the option to download the report as a PDF file. You can select the page size and orientation of the PDF report, as well as the font size and color of the text in the report.

Important: The New PDF Link must be added to the report, or users will not be able to print the report.

13. Click the View tab to display the formatted analysis in the report.
14. (Optional) Click Home to return to the Home screen, click the My Items link, and verify the Analytics Report has been added. From the Home page, you can share the report, or schedule it for distribution.

Creating an Analytics Report Using a Canned/Shared Analysis

You need the BI Tool permission to create an Analytics Report using a CANNED or shared analysis, or visual analysis.

Creating an Analytics Report Using a Canned/Shared Analysis

You need the BI Tool permission to create an Analytics Report using a CANNED or shared analysis, or a visual analysis. A CANNED analysis/visual analysis is one provided by Conga Contracts, while a shared analysis/visual analysis is one that is created by another program user and shared with you.

After identifying the analysis for the report, you can make a copy of the analysis or visual analysis, edit it, and then add it to your Visual Gallery where it can be dragged-and-dropped into a report format. Alternatively, you can edit a CANNED or shared analysis or visual analysis, save it as a new visualization, and then add it to your Visual Gallery.

Important: If your edits to a CANNED or shared analysis/visual analysis include adding or removing any of the original fields, any chart or table will automatically be removed.

Therefore, it is recommended you use the chart or table in the original analysis as a model to create a new chart or table for your report.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the Shared with Me link to display the analyzes and visual analyzes that were shared with you.
 - An analysis includes the Analysis icon and a visual analysis includes the Share icon.
 - Click an analysis or visual analysis link to select it.
3. In the Analysis or Discovery screen, rename the analysis or visual analysis:
 - Click Save in the chart section of the screen.
 - When the prompt displays:
 - Edit the text in the Name field.
 - Click Save As New.
4. When the screen refreshes, edit the analysis or visual analysis.
5. Add the analysis/visual analysis to the Visual Gallery:

- Click Add to Gallery.
 - In the Add Panel prompt:
 - Edit the name of the visual analysis, if needed, in the Panel Title field.
 - Provide a description in the Panel Description field.
 - Click Add Panel.
6. Click the Author Report icon, located in the upper left of any BI Toolbox screen.
 7. Create the report by adding the analysis/visual analysis to the report and formatting the report using text, images, and spacing.

Duplicating a BI Analytics Report

You need the BI Tool permission to duplicate an Analytics Report, whether it is a report you created or one that was shared with you. Duplicating an Analytics Report allows you to quickly create a new report that has many of the same elements as an existing report, and then edit it to meet your specific needs.

Important:

If your edits to the duplicated report include adding/removing any of the original fields in the report's analysis or visual analysis, any chart or table will automatically be removed. Therefore, it is recommended you use the chart or table in the original report as a model to create a new chart/table for your duplicated report.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the Analytics Report you want to duplicate, and click its link.
3. In the screen named for the report, click gear icon, located to the right of the report name, and click Duplicate in the menu.
4. Click OK in the Duplicate prompt, and then click OK in the Done prompt.
5. Click Home to return to the Home screen, and then click the My Items link.
6. Locate the duplicated report, which displays as a link at the top of the list with the name: Copy of [Report Name] and contains the report icon.
7. (Optional) Click on the report link to display it, and then edit the report to customize it.

Editing a BI Analytics Report

You can edit an Analytics Reports that you create, as well as a report that has been shared with you after duplicating the shared report. An Analytics Report can be edited by changing the analysis or visual analysis used in the report, updating the existing analysis or visual analysis, or reformatting the report.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the Analytics Report you want to edit, and click its link.
3. When the screen refreshes, click the Design tab.
4. Click the pencil icon for a table or chart to edit the visual analysis. In the Design view, you can make several edits. Editing a report created using an analysis differs from one created using a visual analysis in that the data fields and chart type cannot be edited. Click the gear icon for a table or a chart to display a Settings window to add/edit formatting for the chart/table title.
5. Click the insert icon and then drag-and-drop the icon into the report canvas to add a new chart or table.
6. Click x to remove a table or chart.
7. Add formatting to the report by clicking Add Space, New Split Row, New Text, New Image, New Link, and New PDF Link.
8. Edit a formatting option by clicking its the gear icon icon to display a prompt or a Settings window.
9. Move a formatting option by clicking its move icon, and then dragging-and-dropping it to a new location.
10. Delete a formatting option by clicking its x icon.
11. Click the View tab to display the edited report.

Sharing a BI Analytics Report

You can share an Analytics Report that you create with other users. When you share a report with one or more other users, it displays in the Shared with Me section of their Home screen. The user can edit the shared report, rename it, share it with other users, and schedule it for distribution.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the report you want to share, and click its share icon.
3. In the Share [Report Name] window, select the people who can share the report:
 - Enter the first few letters of a person's first or last name in the Find field.
 - In the filtered list, locate the person and click their shared icon to add them to the Shared With section of the window.
 - Click Close.
4. (Optional) Verify the report has been shared, indicated by the share icon.

Scheduling a BI Analytics Report

You need the BI Tool permission to schedule the Analytics Reports that you create for distribution. A report can be scheduled for distribution once, or on a daily, weekly, or

monthly basis. A BI Analytics report can even be scheduled for delivery on an hourly basis, or every "x" number of minutes.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the My Items link.
3. Locate the report you want to you want to schedule, and click its schedule icon.If the My Items folder contains subfolders, click a subfolder to display its contents.
4. In the Schedule window, populate the fields. The user who schedules the report determines the amount and type of data contained in the report based on their user role(s), which dictate the permissions the user has to document types, company, contract, and project groups, and secure additional forms.
 - To field: Enter the first few letters of a person's first or last name to display a list of possible matches.
 - Click on a name to add the person to the distribution list.
 - Click a person's x icon to remove them from the distribution list.
 - Subject - enter a subject for the scheduled report.
 - (Optional) Message Body - enter any message you want to accompany the scheduled report.
 - (Optional) Format - change the default from PDF to Excel to send the report as an editable spreadsheet.
 - Schedule - make a selection in the list to indicate how often the report should be delivered: Once, Minutes, Hourly, Daily, Weekly, or Monthly.
 - (Optional) Start Time - click the schedule icon and use the Time Picker to change the default delivery time.
 - Start > Date - click the schedule icon and use the calendar to select the start date.
 - Every - change the default value to indicate the frequency for delivering the report. This field is not present for the Once and Monthly options.
 - For example, if you select Weekly, the days of the week will appear. Select the check box for the day(s) of the week you want the report emailed, and enter a 1 in the Every field to deliver the report every week on the day(s) specified, enter 2 to deliver the report every two weeks, etc.
 - (Optional) End Date - click the schedule and use the calendar to select the last date the report will be delivered.
 - Click Done.
5. (Optional) Verify the report has been scheduled, as indicated by the presence of the schedule icon in the Home screen.

Printing a BI Analytics Report

You need the BI Tool permission to download and print an Analytics Report. The user who created the report must also have added the option to download the report as a PDF file so that it can be printed.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the My Items link to display the reports you have created and duplicated. Reports you created include the report icon and the shared reports you duplicated include the share icon.
3. Locate the Analytics Report you want to print, and click it to display its report screen.
4. Click the Download as PDF link, located at the top left of the screen.

If the link is not present and you are the author of the report, click the Design tab, and add the New PDF Link to the report by dragging and dropping it to the top of the report. Using the Settings window, which auto-displays when you add the link, define the display options when the report is downloaded as a PDF file and printed.

Deleting a BI Analytics Report

You need the BI Tool permission to delete an Analytics Report. However, you can only delete the reports that you create, and not those that have been shared with you, unless you made a duplicate of the shared report, which places a copy in your My Items folder.

When you delete an Analytics Report, the analysis or visual analysis used in the report is not deleted unless you remove it from the Visual Gallery.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the My Items link to display the reports you have created and duplicated. Reports you created include the report icon and the shared reports you duplicated include the share icon.
3. Locate the Analytics Report you want to delete, and click its trash icon.
4. Click OK in the confirmation prompt.

BI Dashboards

The Dashboards created using the BI tool include one or more of the visualizations stored in the Visual Gallery.

BI Dashboard Overview

A Dashboard is configured to display a single analysis or visual analysis or a group of analyses to communicate information related to the data stored in Conga Contracts, revealing patterns over time. An analysis or visual analysis can be displayed in the Dashboard as a table, or a bar, circle, line, or scatter chart.

A Dashboard can contain one view of a single data set, or multiple tabs can be added to provide different views of the same or related data. With each view or tab, up to four charts and/or tables can be displayed side-by-side for comparison. A Dashboard can be created for the sole use of its author, or it can be shared with other program users through the Home screen in their BI Toolbox or the BI Toolbox portlet in their Conga Contracts Dashboard.

The following tasks can be performed for a Dashboard:

- [Locate a Dashboard](#)
- [Create a Dashboard](#)
- [Customize the Dashboard Layout](#)
- [Filter Data in a Dashboard](#)
- [Duplicate a Shared Dashboard](#)
- [Share a Dashboard](#)
- [Edit a Dashboard](#)
- [Delete a Dashboard](#)

Locating a BI Dashboard

The BI Dashboards that are available to you include those you have created, those that have been shared with you by other program users and been added to your BI Toolbox portlet, and those shared reports you have copied and edited to meet your needs.

Accessing a Dashboard from the Home Screen

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the Dashboard:
 - Click the My Items link to display the dashboards you have created and duplicated.
 - Dashboards you created include the dashboard icon and the shared dashboards you duplicated include the share icon.
 - Click a Dashboard link to select it. If the My Items folder contains subfolders, click on a subfolder to display its contents.
 - Click the Shared with Me link to display the dashboards that have been shared with you.

- A shared Dashboard includes the share icon.
- Click a Dashboard link to select it.

Accessing a Dashboard from the BI Toolbox Portlet

1. From the Dashboard, click the Add Portlet icon.
2. In the Add Portlet window, scroll down to BI Toolbox, and click its Add Portlet button.
3. Populate the portlet by selecting a shared BI Dashboard:
 - a. In the BI Toolbox header, click the gear icon .
 - b. In the Configure BI Toolbox portlet prompt, make a selection in the Choose BI Toolbox Dashboard list.
 - c. Click Submit.

Creating a BI Dashboard

You need the BI Tool permission to create a Dashboard, which can include one or more of the analyses and visual analyses stored in the Visual Gallery. You can create a Dashboard for your own use, or share it with other users, who can view it from their Home screen in the BI Toolbox or from their BI Toolbox portlet in the Conga Contracts Dashboard.

A Dashboard can be created with one view of a single analysis/visual analysis, or additional tabs can be added to create multiple views of the same or related data. For each tab in the Dashboard, the layout can be customized to accommodate the number of analyses/visual analyses to be displayed in a single row, allowing for side-by-side comparisons.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, click the dashboard icon, located in the upper left of the screen.
 - Click Add for each visualization you want to add to the first tab of the Dashboard.
 - Click x to close the Visual Gallery. When the Visual Gallery displays in the (Untitled) Dashboard screen.
 - Click Add more than once to add additional occurrences of the same visualization to the Dashboard.
3. When the screen refreshes with the selected visualizations, provide a name for the Dashboard:
 - Click the gear icon, located to the right of Untitled Dashboard, and select Rename in the menu.
 - In the prompt, type over the existing text, and click Save.
4. Rename the first tab:

- Click the gear icon, located to the right of the New Tab, and select Rename Tab in the menu.
 - When New Tab becomes an editable field, type over the existing text, and depress the ENTER key on your keyboard.
5. (Optional) Change the default number of visualizations that can be displayed, side-by-side, in a single row in a tab:
 - Click the gear icon, located to the right of the New Tab, and select Change Layout in the menu.
 - In the Table Layout prompt, change the default value (3) in the Number of Panel Columns list, and click Done.
 6. (Optional) Add a second tab by clicking +.
 - Click the gear icon, located to the right of the New Tab, and select Add from Visual Gallery in the menu.
 - In the Visual Galley, locate the visualization(s) you want to add to this tab, and click Add.
 - Click x to close the Visual Gallery.
 - Repeat Steps 5-6 for the new tab.
 - The active tab is displayed in bold text.
 7. (Optional) Apply a global filter to all visualizations, or set up an individual filter for a specific visualization.
 8. (Optional) Move and resize the visualizations in the Dashboard:
 - Hover over the area to the right of the visualization's name until the move icon displays. Click on it, and then drag-and-drop the visualization to the desired location.
 - Change the width of a visualization by hovering over the right border until the horizontal bar icon displays. Click on it, and then drag the border to the desired width.
 - Change the height of a visualization by hovering over resize, located at the bottom of the chart or table, until the vertical arrow icon displays. Click on it, and then drag the border to the desired height.
 9. (Optional) Click Home to return to the Home screen, click the My Items link, and verify the Dashboard has been added. From the Home page, you can share the dashboard with other program users.

Customizing the Dashboard Layout

The Dashboard screen in the BI Toolbox can be configured to display between one and four charts and/or tables per row. The default display is three (3) per row, but the default can be changed for each tab, or view, in the Dashboard.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.

2. In the Home screen, locate the dashboard you want to customize, and click its link.
3. In the screen named for the dashboard:
 - Click on the tab whose layout you want to change to activate it. The active tab displays the gear icon.
 - Click the tab's gear icon icon, and select Change Layout in the menu.
 - In the Tab Layout prompt, change the default option in the Number of Panel Columns list, and click Done.

Filtering Data in a BI Dashboard

An analysis or visual analysis that is added to a BI Dashboard can be filtered to focus on specific information contained in the chart or table. When a Dashboard contains more than one analysis or visual analysis, a global filter can be applied to all analyses/visual analyses.

A filtered analysis or visual analysis that has been shared with a user is available from their BI Toolbox portlet in the Conga Contracts Dashboard. From the portlet, the user has tools to zoom in and drill down on the filtered data in the chart.

Filtering a Visualization

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the dashboard that needs the filter, and click its link. To add a filter to a shared dashboard, duplicate the dashboard and then edit the duplicate.
3. In the screen named for the dashboard:
 - Locate the chart or table you want to filter, and click its gear icon.
 - In the menu, select Filter.
4. In the Edit dialog box, define the filter:
 - a. Filter Column - select the field to filter, such as Contract Value. The field selected as the filter must be one of the fields used in the analysis or visual analysis. To check the fields used in a visual analysis, select Edit Visualization in the menu in Step 3. The Edit Visualization option is not available for an analysis.
 - b. Comparison - select the operator for the filter, such as greater than or equal to (=).
 - Click Add.
 - Click x to close the dialog box. Value - enter the value for the filter, such as 10000 [dollars].
 - To remove or update a filter, click its filter icon, located under the name of the analysis or visual analysis. In the Edit dialog box, click Remove to

remove the filter, or update the Filter Column, Comparison, and/or Value fields, and click Replace.

5. (Optional) Rename the chart or table based on the filter applied:
 - Click gear icon, located to the right of the screen name, and select Rename in the menu.
 - In the prompt, type over the existing text, and click Save.

Setting a Global Filter

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the dashboard that needs the global filter, and click its link. To add a filter to a shared dashboard, duplicate the dashboard and then edit the duplicate.
3. In the screen named for the dashboard:
 - Locate the tab containing the chart or table you want to filter, and click its gear icon.
 - In the menu, select Add Global Filters.
4. In the Global Filter dialog box, define the filter:
 - Filter Column - select the field to filter, such as Company Name. The field selected as the filter must be one of the fields used in every analysis and visual analysis in the Dashboard. To check the fields used in a visual analysis, select Edit Visualization in the menu that displays when you click its the gear icon, located in the top right-hand corner of the chart. The Edit Visualization option is not available for an analysis.
 - Comparison - select the operator for the filter, such as Contains.
 - Click Add.
 - Click x to close the dialog box. Value - enter the value for the filter, such as XYZ [Corporation].
 - To remove or update a global filter, click filter, located under the name of the tab. In the Global Filter dialog box, click Remove to remove the filter, or update the Filter Column, Comparison, and/or Value fields, and click Replace.
5. (Optional) Rename the analysis/visual analysis based on the global filter applied:
 - Click gear icon, located to the right of the screen name, and select Rename in the menu.
 - In the prompt, type over the existing text, and click Save.

Sharing a BI Dashboard

You can share a BI Dashboard that you create with other users. When you share a BI Dashboard with one or more other users, it displays in the Shared with Me section of their Home screen and is also available from the BI Toolbox portlet in their Conga

Contracts Dashboard. The user can edit the shared dashboard, rename it, and share the edited dashboard with other users.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the dashboard you want to share, and click its Share icon.
3. In the Share [Dashboard Name] window, select the people who can share the dashboard:
 - Enter the first few letters of a person's first or last name in the Find field.
 - In the filtered list, locate the person and click their Share icon to add them to the Shared With section of the window.
 - Click Close.
4. (Optional) Verify the dashboard has been shared, indicated by the Share icon.

Duplicating a Shared Dashboard

You need the BI Tool permission to duplicate a dashboard, whether it is a dashboard you created or one that was shared with you. Duplicating a dashboard allows you to quickly create a new dashboard that has many of the same elements as an existing dashboard, and then edit it to meet your specific needs.

Important:

If your edits to the duplicated dashboard include adding/removing any of the original fields in the dashboard's analysis or visual analysis, any chart or table will automatically be removed. Therefore, it is recommended you use the chart or table in the original dashboard as a model to create a new chart/table for your duplicated dashboard.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the Dashboard you want to duplicate, and click its link.
3. In the screen named for the dashboard, click the duplicate icon, located to the right of the dashboard name, and click Duplicate.
4. Click OK in the confirmation prompt, and then click OK in the Done prompt.
5. Click Home to return to the Home screen, and click the My Items links.
6. Locate the duplicated dashboard, which displays as a link at the top of the list with the name: Copy of [Dashboard Name] and contains a dashboard icon.
7. (Optional) Click on the dashboard link to display it, and then edit the dashboard to customize it.

Editing a BI Dashboard

You can edit any of the dashboards you create and duplicate. You can also edit any of the dashboards that have been shared by another user.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.
2. In the Home screen, locate the dashboard you want to edit, and click its link.
3. When the screen refreshes, you can perform the following edits:
 - Click the the gear icon icon for an analysis to display a menu to edit, filter, rename, or remove it.
 - Click the the gear icon icon for a visual analysis to display a menu to filter, rename, remove, or edit the visualization.
 - Click the the gear icon icon for a tab to display a menu to:
 - Add an analyses or visual analyses from the Visual Gallery.
 - Add a global filter to the analyses in the dashboard.
 - Change the layout of the dashboard.
 - Select Change Layout in the menu.
 - In the Table Layout prompt, change the default value (3) in the Number of Panel Columns list.
 - Click Done.
 - Rename the tab.
4. Click the the gear icon icon to the right of the dashboard's name, and select Rename to rename the dashboard.
5. Click + to add another tab to the report where you can add more analyses and visual analyses from the Gallery.
6. Resize a chart or table in the dashboard by hovering over its right border until the horizontal bar icon displays, click on it, and then drag the border of the chart/table to the left or right to resize it.
7. Reposition a chart or table by hovering over the area to the right of its title until the move icon displays, click on it, and then drag-and-drop the chart/table to a new location in the dashboard.

Deleting a BI Dashboard

You need the BI Tool permission to delete a BI Dashboard. However, you can only delete the dashboards that you create, and not those that have been shared with you, unless you made a duplicate of the shared dashboard, which places a copy in your My Items folder.

When you delete a dashboard, the analysis or visual analysis used in the dashboard is not deleted unless you remove it from the Visual Gallery.

1. Click Reports in the Navigation Toolbar, and select the BI Toolbox link in the menu.

2. In the Home screen, click the My Items link to display the dashboards you have created and duplicated. Dashboards you created include the dashboard icon and the shared dashboards you duplicated include the shared icon.
3. Locate the dashboard you want to delete, and click its trash icon.
4. Click OK in the confirmation prompt.

Search

Conga Contracts provides three types of searches: Basic Search, Search Query, and Documents Search. A Basic Search locates a keyword or phrase that appears in the data stored in Company, Contract, and Document Profiles. A Search Query uses a set of criteria to locate specific information stored in Profiles, and a Documents Search locates documents stored in Profiles.

Search Overview

Conga Contracts provides three types of searches: Basic Search, Search Query, and Documents Search. A Basic Search locates a keyword or phrase that appears in the data stored in Company, Contract, and Document Profiles. A Search Query uses a set of criteria to locate specific information stored in Profiles, and a Documents Search locates documents stored in Profiles.

Conga Contracts allows you to perform three types of searches from the Navigation Toolbar using the Search option:

- Basic Search to perform a quick search for text or a value. There are two versions of a basic search, and the version you have depends on a selection made by your System Administrator:
- Classic Search - Names, keywords, values, and text strings are located in the fields of Contract and Company Profiles, as well as in the name of the Profile, and then results are displayed in a screen with Company Search and Contract Search sections. A separate Document Search is used to locate names, keywords, values, and text strings in the fields of Document Profiles, as well in the body of the document itself, which is uploaded to the Profile.
- Elastic Search - The search can be filtered by companies, contracts, or documents using a Search list in the Navigation Toolbar. The list also contains an All option to display all search results. Boolean operators can be used to eliminate or include specific names, keywords, values, or text strings in the search.

- Company search results are displayed in the All Companies screen, while contract results are displayed in the All Contracts screen. Both document search results and all search results are displayed in a screen with a format that is similar to Internet search engine results.
- Search Query to perform a search using multiple criteria. Once a search query is saved, you can perform the following tasks:
- Running a Saved Search Query Running a Saved Search Query to obtain results, which can then be exported to an existing Advanced Report, which has been formatted to your specifications. Search results can also be exported to an Excel spreadsheet, which you can also format to your specifications.
- Sharing a Saved (Global) Search Query with other program users by making it a global search query.
- Updating a Search Query to edit the criteria and descriptors for the saved search query.
- Deleting a Search Query if it is no longer relevant.

You can also perform:

Document Search to search for one or more documents stored in Conga Contracts. The Document Search is not available as a separate option if your company is using the Elastic Search feature, which displays results found in Document Profiles, as well as Company and Contract Profiles.

- Popular search, which locates and identifies all the documents stored in the Contract and/or Company Profiles for a specific company (or several companies) by running a profile documents search and then bulk downloading the documents.

Conga Contracts New Search Functionality

New Search Overview

The Conga Contracts new search feature is available for Casual and Full Conga Contracts users. This feature replaces the Documents page search feature, and is now a one stop search bar located in your navigation toolbar. You can search for companies, contracts, documents, set up search views, filter your results using keywords, and easily export your search results to Excel.

How do I search?

The search function works based off keywords. The keyword can be the name of the file you're searching for, or any of the text contained within the file.

Tip: You can use the * and ? characters to enhance your search in the following ways:

- The * character expands your search. For example, if you are searching for the word Agreement, you can enter Agree* into the search bar and get all matching results.
- The ? character replaces characters. For example, if you are searching for the word Agreement, you can enter Agree?ent and get all matching results.

To search for a company, contract, or document, take the following steps:

1. In your navigation toolbar, enter a keyword into the search bar located on the left.
2. After you run a search, you are brought to a search results page with three tabs: Company, Contract, and Documents. Click on each of these tabs to view search results.

How do I set up and change column views?

Columns allow you to arrange your search results to view or hide relevant details. An example of current available columns are Document File Name, Type, Version, Company Name, Contract Number, Document Parent, and Last Updated On.

To add or remove columns to your search results view, take the following steps:

1. After you run a search, click on any of the three vertical dots in one of the columns on the results page.
2. Click on Columns.
3. Put a check mark next to the columns you want to display, and uncheck any columns you want to remove from your current view.
4. Click Save.

 **Tip:**

You can resize the columns by placing your cursor on the three vertical dots for each column, and dragging it to the left or the right.

As an example, you can select the columns Document File Name, Version and Last Updated On to create a view that keeps track of the progress of a document so you can see on what date it was last updated, and the most current version of the file.

How do I filter my search results?

You can filter your search results using keywords. In each column on the search results page, there is a search bar with a filter icon beside it. To filter your results, take the following steps:

1. Enter in a keyword into column's search bar.
Note: The keyword can be a specific file name, or text contained within the file. The * and ? search options mentioned in the "How do I search?" section also work in the filters search bar.
2. Click the filter icon to filter your results by the keyword you entered.

For example, in the Document File Name column, you could just enter "Lease" to search for a document named "Standard Lease Agreement".

Preview and Download Documents

You can preview the documents listed in your search results, and then download the documents from the preview window. To preview and download documents, take the following steps:

1. Click on the blue icon to the right of the file name listed in the search results to preview the contents of the file.
2. To download the document, click the green Download button in the lower right hand corner of the preview window.

How do I export my data to Excel?

To export your search results data to Excel, take the following steps:

1. From the search results page, depending on which tab you are on, click on Export Company results to Excel, Export Contract Results to Excel, or Export Document results to Excel.

Note:

You can export up to 10,000 records. If your results exceed the 10,000 limit, you will receive a message asking you to use Search Query or Reporting.

Limitations

- The new search feature does not search for Projects.
- Available to Casual and Full users only.
- Export limit of 10,000 records.

Classic Search

The Classic Search locates both text and numbers stored in Company and Contract Profiles. The information that is searched includes the data stored in a field in the Profile screen, as well as a selection made in a Profile field list.

Using Classic search, you can quickly search for both text and numbers stored in Company and Contract Profiles. The information that is searched includes the data stored in a Profile text field, as well as a selection made in a field list. Searching for a name, keyword, value/ number, or text string displays search results that are grouped by company and contract and each search record is linked to its associated profile. To locate information in a document that has been uploaded to a Company or Contract Profile, run a document search.

If your Search Results screen does not resemble the one above, you are running an Elastic Search.

Search field	Enter your search criteria, and click depress the ENTER key on your keyboard (or click the magnifying glass). Tip: The Search field is NOT case-sensitive.
Company Search section	Review the company search results, which display as linked records to Company Profiles.
Contract Search section	Review the contract search results, which display as linked records to Contract Profiles.
Download icon	Click the arrow icon to display a list of the documents stored in a Contract or Company Profile.
Documents list	Click on a document in the list to open the document in its default application.
Export to Excel button	Click to generate an Excel spreadsheet showing the Company or Contract search results.

Column display	To customize the information in the Company Search and Contract Search sections of the screen, hover over a column heading until the <input type="checkbox"/> icon displays, and click on it to open the Columns menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Show Items list	To change the number of data records that display on each screen, change the default selection.
Jump to Page option	To view a specific page of contract records, enter a value in the Page field and press the ENTER key on your keyboard.
Paging option	<ul style="list-style-type: none"> • To move forward or back one page, use the > and < icons. • To display the first or last page, use the >> and << icons.
Refresh option	To return the browse screen to the default view after making changes to the display, click the refresh icon.
Wild Card Operator	<p>The asterisk (*) can be used as a 'wild card' operator before or after a whole or partial word.</p> <p>Example: Searching for 'Blizz*' should return results for any contracts that have fields with a value containing 'Blizz'.</p>

Elastic Search

Using Elastic search, you can quickly search for a name, keyword, value/number, or text string in Company, Contract, and Document Profiles. Depending on the type of search you are running, results are displayed in different program screens. You can also use Boolean operators in your search string to expand or limit your search results.

 **Tip:**

If your Search Results screen does not resemble the one above, you are running a classic search.

<p>Elastic Search list</p>	<p>Make a selection in the list before entering your criteria in the Search field:</p> <ul style="list-style-type: none"> • All - displays results in the screen shown above. • Company - displays the All Companies screen with a list of company links matching your search criteria. • Contract - displays the All Contracts screen with a list of contract links matching your search criteria. • Documents - results display in the screen shown above, except only document links display.
<p>Elastic Search field</p>	<p>Enter your search criteria, and click the magnifying glass (or depress the ENTER key on your keyboard).</p>
<p>Contract results</p>	<p>View the contract search results, which display under linked Contract Profile headings.</p> <ul style="list-style-type: none"> • A contract result includes the contract number, type, status, effective date, current expiration date, date last modified, and term type, as well as the company name.
<p>Company results</p>	<p>View the company search results, which display under linked Company Profile headings.</p> <ul style="list-style-type: none"> • A company result includes the company number, type, group, status, category, address, and date last modified.
<p>Document results</p>	<p>View the document search results, which display under linked Document Profile headings.</p> <ul style="list-style-type: none"> • A document result includes the file name, document type, version number, effective date, date last modified, and author, as well as information that identifies the Profile where the document is stored.

TYPE check boxes	To filter search results by profile type, clear the Company, Contract, or Document check boxes to display only the search results for the selected Profile(s).
DATE MODIFIED radio buttons	To filter search results by the date the profiles were last modified, select an option other than All Time.
More Actions list - Contract and Company results	Click the Search Icon to display a menu listing the files stored in the Documents section of the Contract or Company Profile, and click on a file to download it.
More Actions list - Document results	Click the Search icon to display a menu, and click Download to download a copy of the document.
Next and Previous buttons	Use to scroll through the search results.

Boolean Operators

The following Boolean operators can be used in an elastic search:

Operator	DESCRIPTION
" "	Quotes - Enclose a phrase or text string in quotes to ensure the entire phrase/string is returned, instead of all instances of the individual words.
+	AND - Use to limit your search results. This operator requires both terms to be in each search result returned. If one term is contained in the Contract, Company, or Document Profile and the other is not, the search result is not included in the list. A "term" refers to a name, word, number, phrase, or text string.
	OR - Use to expand your search results. This operator returns either term (or both terms) in the search results.
-	NOT - Use to remove search results containing this term. Once search results are obtained, this operator reviews the results and removes any that contains this term.

Operator	DESCRIPTION
()	Parenthesis - Enclose terms in parenthesis when you want a search statement to be performed first.

Example: Using the search string "Paradigm Shift" +(Company | Contract) -Maintenance will display a link to the Paradigm Shift Company Profile, as well as links to all the Contract Profiles for Paradigm Shift, except those profiles that contain the word Maintenance. Be sure not to add any extra spaces after an AND or NOT operator (+ -), or your search results will not be accurate.

Creating a Search Query

Search Query is a robust feature that allows you define a set of criteria to search the populated fields in a Contract, Company, or Project Profile. This feature is useful in locating very specific information about the companies, contracts, and projects stored in Conga Contracts. You can also use a set of criteria to search for contract requests and the clauses stored in the Clause Library.

Search queries can also be performed to locate associated information, such as company relationships and specific messages sent and received in Conga Contracts. Currently, most of the stored data can be searched and reported upon, including the documents uploaded to individual Company and Contract Profiles using either an elastic search or the classic search.

The search query below will locate all the Supplier contracts with an Individual Agreement Type that are set to expire one year from the date on which the search is run.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, clic kNew in the toolbar.

 **Tip:**

Review the search queries you have already saved by clicking on individual links in the Recent Searches section since updating a search query might be more efficient than creating a new query. To view a complete list of all your saved searches, as well as the global searches that have been shared by other users, click Load in the toolbar at the bottom of the screen.

3. When the screen refreshes, set up the Company→Contract→Document hierarchy as the data set for the search:

- Click in the field list to display the hierarchy, and click the arrow icon to the left of the Company folder to expand the folder list.
 - Scroll down past the alphabetical listing of fields in the Company Profile, and click the arrow icon to the left of the Contract folder.
 - Scroll down past the alphabetical listing of fields in the Contract Profile, and click the Document folder.
4. Use the All Top Entity Records check box to expand or limit your search results:
- Select the check box to include results in each category listed in the Result Type hierarchy, which include Company records, Contract records, and Document records in this example.
 - Clear the check box to limit search results to the records in the second (and lower) levels, which include Contract records and Document records in this example.
5. In the Criteria section, define the criteria for the search:
- Identify the company as a supplier:
 - Click in the field list to display the hierarchy, click the arrow icon to the left of the Company folder, and click the Company Type folder.
 - Click in the inclusion list and select In.
 - Click in the value list and select Supplier.
 - Click And to provide additional criteria and limit search results. (Click Execute in the bottom left corner to expand search results.)
 - Identify the agreement type for the expiring contract:
 - Click in the field list, scroll past the fields in the Company Profile to the Contract folder and click its arrow icon, and then click the Agreement Type folder.
 - Click in the inclusion list and select In.
 - Click in the value list and select Individual.
 - Click And to provide additional criteria.
 - Identify the document type of the expiring contract:
 - Click in the field list, scroll down past the fields in the Company and Contract folders to the Document folder and click its arrow icon, and then scroll down and click the Document Type folder.
 - Click in the inclusion list and select In.
 - In the value list and select both Executed Contract and Final Word Version to cover the possible options for the final version of the contract.
 - Click And to provide additional criteria.
 - Identify the timeframe for the contract document:
 - Click in the field list, scroll down past the fields in the Company and Contract folders to the Document folder, locate the Document Current Expiration Date folder, and click it to select it.

- Click in the inclusion list and select After: today plus (x) days to ensure the search is based on the current date.
 - Click in the value field and enter 365 to search for contracts expiring within one year.
The Not Empty, Null, and Not Null operators in the inclusion list do not require a value.
6. Click Execute in the toolbar to run the query.
 7. When the Results view of the screen displays, review the search results.
(Optional) Click a search record to be directed to its Contract, Company, or Project Profile.
Tip: To redisplay the criteria for the search, click the Query Info header at the top of the screen. To redisplay the results, click the Results header at the bottom of the screen.
 8. (Optional) Customize the display of the search results:
 - Hover over a column heading until the down arrow displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
 - Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
 - Move a column to a different location in the Results screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the green tick icon displays, you are successfully moving the column.
 9. (Optional) Export the data in the Results screen:
 - Click Export to Excel to generate an Excel spreadsheet showing the information displayed in the screen.
 - Click Bulk Download Documents to export the results to a zip file that is downloaded to your PC. Open the zip file to extract the individual documents.
 - Click Run Advanced Report to run an advanced report for the search results.
 10. (Optional) Click Save Query in the toolbar to save the search query for future use.
 - In the Save Search Query prompt:
 - Enter a name for the search in the Filter Name field.
 - Enter a comprehensive description of the search in the Description field.
 - Click Save.

Criteria Record Fields

A criteria record includes a field list, and inclusion list, and a value list or field. The table below summarizes the options for the fields that comprise a criteria record.

Field List	Inclusion List	Value List or Field
<p>Use the expand (down arrow) icons to drill down and select the field for a criteria record.</p>	<ul style="list-style-type: none"> • If the criteria is a text field, the options are: • In - selection(s) in the value list appear in the search results. • Not In - everything except selection(s) in the Value list appear in the search results. • Is Null - displays search results where the field has a zero (0) value or is empty. • Is Not Null - displays search results where the field has a numeric value or is populated. • If the criteria is a value field, the options are: • Equals - search results are returned for number entered in the value field. • Greater Than - search results are returned for numbers larger than the one entered in the value field. • Less Than - search results are returned for numbers smaller than the one entered in the value field. • If the criteria is a date field, the options are: • Before - search results are returned for all dates before the date entered in the value field. • On - search results are returned for the date entered in the value field. • After - search results are returned for all dates after the date entered in the value field. 	<ul style="list-style-type: none"> • Value list includes text options • Value field can accommodate a number or date

Field List	Inclusion List	Value List or Field
	<ul style="list-style-type: none"> • Null - search results are returned for all records whose date field is not populated. • Not Null - search results are returned for all records whose date field contains any date. • Four ways to pinpoint a specific date: <ul style="list-style-type: none"> • After: today minus (x) days • After: today plus (x) days • Before: today minus (x) days • Before: today plus (x) days) <p>For example, if today is January 1, 2018 and you want to search for contracts that expire prior to January 1, 2019, you would set up two criteria inclusion lists to establish the time frame by clicking on And. In the first inclusion list, select the Before: today plus (x) days operator and enter 365 in the value field. In the second inclusion list, select the After: today plus (x) days operator and enter 0 in the value field.</p>	

A search query can be run to locate the clauses that have been revised by selecting Clause in the Result Type list, and then selecting Clause Revision as the search field in the Criteria record. Using an operator (Equals, Greater Than, or Less Than) and entering the appropriate number in the value field will generate the desired results. For example, to locate all clauses that have been revised more than once, select Greater Than as the operator and enter "1" in the value field.

Running a Saved Search Query

When you create a search query, you can save it so that it is available for future use. A saved search query can be updated and shared with other users.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
 - In the Query Info view of the screen, locate the search query you want to run:
 - If the query is listed in the Recent Searches section of the screen, click on it.
 - If the query is not listed, click Load in the toolbar.
 - In the Query Selection prompt, click on the query to select it, and click OK.
 - In the Results view of the screen, review the search results.
2. (Optional) Customize the display of the search results:
3. Hover over a column heading until the sort icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
4. Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
5. Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
6. Move a column to a different location in the Results screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the checkmark icon displays, you are successfully moving the column.
7. (Optional) Export the data in the Results screen:
 - Click Export to Excel to generate an Excel spreadsheet showing the information displayed in the screen.
 - Click Bulk Download Documents to export the results to a zip file that is downloaded to your PC. Open the zip file to extract the individual documents.
 - Click Run Advanced Report to run an advanced report for the search results.
8. (Optional) Save the search query for future use:
9. Click Save Query in the toolbar.
10. In the Save Search Query prompt:
 11. Enter a name for the search in the Filter Name field.
 12. Enter a comprehensive description of the search in the Description field.
 13. Click Save.

Sharing a Saved (Global) Search Query

You can share a search query that you have created and saved with other program users by designating the saved search as a global search. Other users can then access the search by loading it and running it so that it is saved as one of their recent searches.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In Query Info view of the screen, click Load in the toolbar.
3. In the Query Selection window:

- Locate the search query you want to share, and click on it to select it.
- Click its Global check box.
- Click OK.

Updating a Search Query

Once you have saved a search query, you can access it at any time, and re-run the search to obtain the most current information. You can also edit a saved search if the criteria needs to be updated or the search name/description needs to be changed.

A saved search query can also be accessed from the Search Query portlet in your Dashboard and from the Charting portlet where data is displayed visually, in a pie chart, bar chart, or time line.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click Load in the toolbar.
3. In the Query Selection window:
4. Locate the query you want to edit, and click on it to select it.
5. Click OK.
6. 4. In the Query Info view of the screen, you can update the following:
7. Result Type field to change the primary and/or secondary data set for the search.
8. All Top Entity Records check box to expand or limit the search results.
9. Criteria for the search by adding or removing criteria records, as well as using the ADD operand to limit results and the OR operand to expand results.
10. See Creating a Search Query for additional information.
11. 5. Click Execute in the toolbar to run the updated query.
12. 6. When the Results view of the screen displays, review the updated search results.
13. 7. Click Save Query in the toolbar.
14. 8. In the Save Search Query prompt:
15. (Optional) Update the name of the search in the Filter Name field.
16. (Optional) Update the description for the search in the Description field.
17. Click Save.

Deleting a Search Query

You can easily delete any of the search queries you have saved. You can also delete any of the global searches that you have shared with other users by first removing its global status.

Only a System Administrator can delete a global search shared by another user.

1. Click Search in the Navigation Toolbar, and click the Search Query link in the menu.

2. In the Query Info view of the screen, click Load in the toolbar.
3. In the Query Selection window, locate the search query you want to delete:
4. Click on the search query to select it.
5. Click its Delete icon.
6. In the confirmation prompt, click Yes.
7. Click OK.

 **Tip:**

If you are deleting one of your global (shared) searches, you must first clear its Global check box.

Bulk Downloading Documents

A popular use of search queries is to locate all the documents uploaded to a Contract Profile or a Company Profile. Once the search is run, you can use the Bulk Download Document option to export all the documents returned by the search to a single zip file.

The search query below will locate all documents stored in the Granick Contract Profiles.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set up the Company→Contract→Document hierarchy as the primary data set for the search:
 - Click v in Result Type list and click the > icon to the left of the Company folder. Scroll down to the Contract folder and click its > icon, and then scroll down and click the Document folder.
 - (Optional) Select the All Top Entity Records check box to expand your search results to include records that match all levels of the hierarchy in the Result Type list (Company, Contract, and Document). Clear the check box to include only records that match the second (and lower) levels (Contract and Document).
4. In the Criteria section, define the criteria for the document search:
 - Identify the company:
 - In the field list, click the > icon to the left of the Company folder, and click the Company Name folder.
 - In the inclusion list, select Equals.
 - In the value list, enter Granick.
 - Click And to provide additional criteria and limit search results. (Use Or to expand search results.)

- Identify the documents to include in the search:
 - In the criteria list, scroll down past the Company and Contract folders to the Document folder (for contracts) and click its > icon, and then click the Document Type folder.
 - In the inclusion list, select Not Null to include all documents stored in the Contract Profile since Document Type is a required field, and therefore, all uploaded documents must be assigned a document type.
5. Click Execute in the toolbar to run the query.
 6. In the Results view of the screen, review the search results.

Tip: To redisplay the criteria for the search, click the Query Info header at the top of the screen. To redisplay the results, click the Results header at the bottom of the screen.
 7. (Optional) Customize the display of the search results:
 - Hover over a column heading until the v icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
 - Resize a column by hovering over the right or left border of the column heading until the resize icon (two bars with opposite pointing arrows) appears. Then, click and drag the border to the desired width.
 - Move a column to a different location in the Results screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the green checkmark displays, you are successfully moving the column.
 8. Download the documents in the Results screen by clicking the Bulk Download Documents link.
 - Click on the zip file that is downloaded to your PC.
 - Open the zip file to extract the individual documents.
 9. (Optional) Export the search results to an editable spreadsheet by clicking the Export to Excel link.
 10. (Optional) Run an advanced report on the search results by clicking the Run Advanced Report link.
 11. (Optional) Save the search query for future use:
 - Click Save Query in the toolbar.
 - In the Save Search Query prompt:
 - Enter a name for the search in the Filter Name field.
 - Enter a comprehensive description of the search in the Description field.
 - Click Save.

Running a Document Search

A Document Search allows you to search for documents that have been uploaded to a Contract, Company, or Project Profile, as well as the global documents that have been shared by other users. You can also search for documents that meet certain criteria or contain a specific keyword, value, or text string in the title or body of the document.

1. Click Search in the Navigation Toolbar, and click the Document Search link in the menu. If the Document Search link is not in the menu, you are running an Elastic Search.
2. In the Document Search screen:
3. Select All to search all documents stored in Conga Contracts.
4. To search for documents that were shared by other users, select Global.
5. To search for documents stored in Company, Contract, or Project Profiles, select Company, Contract, or Project.
6. In the blank in the search field, enter a keyword, value, or text string that identifies the document type, or appears in the body of the document or in the document name, and click Search.
7. For example, you could enter Software License in the field to locate all documents that contain this phrase, or you could enter Executed Contract to locate all documents with this document type.
8. Review the document records returned as search results.
9. (Optional) Click on a document's download icon to download a copy of the document.
10. (Optional) Customize the display of the search results:
11. Hover over a column heading until the sort icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
12. Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
13. Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
14. Move a column to a different location in the Results screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the checkmark icon displays, you are successfully moving the column.

Companies

Companies are added to Conga Contracts, creating Company Profiles that house basic information. The Profile is linked to other program features, which are used to store and manage the company's contracts, documents, events, messages, tasks, flows, workflows, and other data.

Company Creation and Management

A company added to Conga Contracts generates a Company Profile, which is used to store basic information, as well as the company's contracts. The Company Profile is linked to program features, allowing tasks to be performed for the stored data, searches to be run, and reports to be generated.

Company Creation and Management Overview

A company that has been added to Conga Contracts generates a Company Profile, which is used to store all of the company's contracts, as well as the information your organization needs to conduct business with the company. The Company Profile is linked to program features using links contained in the Profile, allowing you to perform tasks for the stored data. The Search option can be used to quickly locate specific company information, and generate reports on the search results.

A Company Profile is accessed from the All Companies screen or the Recently Viewed Companies portlet in the Dashboard.

In managing companies, you can:

- [Add a company](#)
- [Edit company information](#)
- [Mark a company as a legal entity](#)
- [Unmark a company as a legal entity](#)
- [Associate companies after a merger or acquisition](#)
- [Record a company's name change](#)
- [Archive a company](#)

Adding a Company

When you add a company to Conga Contracts, you create a Company Profile that stores basic information and can house all of the company's contracts. The Company Profile

provides links to program screens where you can store additional company information, upload documents, and perform company-related tasks.

✓ **Tip:**

Before adding new company, ensure the company does not already exist by searching for the company name in the All Companies browse screen.

1. Click Companies in the Navigation Toolbar, and select the New Company link in the menu.
2. In the New Company Entry screen, populate the required fields and lists:
 - Company Name
 - Company Group
 - Status
 - Other fields may be required if your Administrator made them mandatory. The Company Profile is automatically assigned a system-generated number, which may be editable.
3. (Optional) Populate the remaining fields in the top portion of the screen, as well as the fields and lists in the Address Information and Description sections.
4. Click ? for a field to display a Quick Tip if you need help populating the field.
5. Enter both the area code and phone number, such as 407-745-3070, for the Phone Number and Fax Number fields.
6. A Phone Number Entry window displays if you do not use the correct format when entering the number. The window allows you to enter an extension number and a country code for international phone/fax numbers.
7. Expand the Company Additional Fields section, and populate any required fields.
8. (Optional) Populate the remaining fields and lists in the Company Additional Fields section.
9. Click Save.

Editing Company Information

The Company Profile stores system information for a company and provides links to other data related to the company. System information includes the company name, number, description, status, category and group, financial identifiers, and contact information, which can easily be edited.

Linked data is edited from the browse screens for contracts, and company people, additional

names, relationships, locations, tasks, documents, events, scorecards, projects, and additional forms.

1. Locate the Company Profile you want to edit, and click on it to select it.
2. In the Company Profile screen, click Edit Company in the toolbar.
3. When the screen displays in edit mode, update the information in the fields and lists, as needed.
4. Click Save.

Marking a Company as a Legal Entity

The Mark as Entity option is used to identify the companies stored in Conga Contracts that can legally be named as a party to a contract.

In Conga Contracts, companies are divided into two categories: internal and external. Internal companies are all of your legal entities, which include your primary company and any subsidiaries or other entities that have the legal capacity to enter into a contract. An external company refers to the other party that has entered into a contract with your company. The other parties to your contracts can be customers, suppliers, distributors, or vendors. A Company Profile should be created for all internal and external companies, and the Mark as Entity option should be applied to the companies that can legally be named as a party to a contract.

If you erroneously mark as company as a legal entity, you can easily unmark it as a legal entity.

1. Open the Company Profile for the company you want to mark as a legal entity.
2. In the Company Profile, click Admin Tools in the toolbar, and click the Mark as Entity link in the menu.
3. In the Request Complete prompt, click OK.

Unmarking a Company as a Legal Entity

If a company no longer has the legal authority to be a party to a contract, you can unmark it as a legal entity. However, if the company is currently assigned as the legal entity on any contracts, you will not be able to "unmark" it until you first reassign all its contracts to a different legal entity. An Administrator with the System Settings Admin permission can accomplish this reassignment using the Advanced Edit feature.

If you erroneously unmark as company as a legal entity, you can easily mark it as a legal entity.

1. Open the Company Profile for the company you want to unmark as a legal entity.

2. In the Company Profile, click Admin Tools in the toolbar, and click the UnMark as Entity link in the menu.
3. In the Request Complete prompt, click OK.

Archiving a Company

The Archive option is used when a Company Profile needs to be removed from Conga Contracts Archiving is usually used to remove a duplicate Company Profile, or when a Profile is created for a new customer, supplier, vendor, or distributor and a contractual agreement cannot be reached.

1. Open the Company Profile for the company you want to archive.
2. In the Company Profile screen, click Admin Tools in the toolbar, and click the Archive link in the menu.
3. In the Archive Company prompt, click Yes.

If the Operation Error prompt displays, one or more Contract Profiles are associated with the Company Profile. Run the Acquisition Wizard from the duplicate Company Profile to move the contracts to the original Company Profile.

Company Profile and Browse Screens

Companies added to Conga Contracts can be viewed from the All Companies browse screen, and the companies in the list can be searched/sorted to locate a specific company or group of companies. Additional information for a company is viewed from its Company Profile, which is launched by clicking on a company record in the browse screen.

All Companies Screen

The All Companies screen displays a list of the companies that have Company Profiles stored in Conga Contracts. The information that displays for each company, such as company name and number, can be customized to meet your at-a-glance viewing needs. The companies that display in the browse screen can also be filtered using the Status multi-select list and/or the Search option.

Company Profile

The Company Profile contains basic information for the company, such as its address, contact numbers, website, current status, as well as links to stored data, including the

company's contracts, documents, locations, points of contact, and relationships with other companies.

In addition to the default view of the Contracts screen in the Company Profile, there is also a Contract Tree view and Related Company Contract List view.

Open a Company Profile from the Recently Viewed Companies portlet in your Dashboard or the All Companies browse screen, or use the Elastic Search feature to locate the company.

Company basic information fields	Review the information captured for the company, including the required Company Name, Company Group, and Status fields. The company number is issued by Conga Contracts, but can be set by a user if the company numbering permission is enabled in System Settings.
Address Information section	Expand the section to review the address and phone number information captured for the company.
Description section	Expand the section to review the description provided for the company.
Company Additional Fields section	Expand the section to review any Admin-defined fields, which are designed to capture additional information for the company. Additional fields can be required or optional.
Profile toolbar	Use the buttons in the toolbar to perform company-related tasks.
Flow Stages and Steps	If present, click on an action button to complete a step in a company flow.
Links section	Review additional stored information for the company by clicking on the listed links. <ul style="list-style-type: none"> • The default display is the Contracts browse screen unless there are required Additional Forms that need to be captured for the company. • A link that is appended with a number other than zero (0) indicates there is additional information stored for the company. For example, a Contracts (5) link indicates there are five existing Contract Profiles linked to the Company Profile.

<p>Configure Icon</p>	<p>Click the configure icon to display a Configure Links prompt.</p> <ul style="list-style-type: none"> • Clear the check boxes for all the links you want to remove from the Links section of the Profile. • Click Submit. <p>You cannot remove the Contracts or the Additional Forms links from a Company Profile.</p>
<p>Contracts screen</p>	<p>Ensure the default Contracts screen is displayed. If the Additional Forms screen displays, there are required additional forms that have not been captured. Click the Contracts link to display the Contracts screen.</p>
<p>Contract List tab</p>	<p>Ensure the tab is selected to display the Contract List view.</p>
<p>Contract Profiles list</p>	<p>Identify the Contract Profiles that are stored in the Company Profile.</p>
<p>Download icon</p>	<p>Click the download icon to download a copy of the contract document. If there is more than one document stored in the Contract Profile, clicking the icon displays a list of documents links. Click on a link to download the document.</p>
<p>Multi-party document icon</p>	<p>Identify the contracts that are multi-party agreements, indicated by the presence of the multiparty icon.</p>
<p>Contract Status multi-select list</p>	<p>Make one or more selections in the list to filter the display of contracts by status.</p>
<p>Search option</p>	<ul style="list-style-type: none"> • (Optional) Click the Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Enter a beginning keyword or value in the Search field, and click the magnifying glass to search for a contract. • Click x to clear the filter. • The Search option, as well as the options shown in Steps O-R below, are available in most screens linked (Step E) to the Company Profile.

Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the checkmark icon displays, you are successfully moving the column.
Export to Excel button	Click to export the information in the screen to an Excel spreadsheet.
New Contract button	Click to add a root or incorporated contract to the Company Profile.

Contract Tree View

The Contract Tree view of the Contracts screen in the Company Profile shows a hierarchy of the company's contracts that are stored in the profile. At the top of the hierarchy are root contracts, such as Master, Individual, and other agreement types, which can stand alone as legally enforceable contracts. At the next level in the hierarchy are incorporated contracts, such as Exhibits, Schedules, and Statements of Work, which depend on root contracts for their meaning and enforceability.

Contract Tree tab	Click to display the Contract Tree view of the Contracts screen.
Root contracts	Identify the root contracts, which display at the top of the tree hierarchy.

Incorporated contracts	Identify the incorporated contracts, which display at the next level in the hierarchy and are linked to their root contract.
Status multi-select list	Make one or more selections in the list to filter the display of contracts by status.
Agreement multi-select list	Make one or more selections in the list to filter the display of contracts by agreement type.
New Contract button	Click to add a root or incorporated contract to the Company Profile.

Related Company Contract List View

The Related Company Contract List view of the Contracts screen in the Company Profile provides links to the contracts for those companies that share a relationship with the company named in the Company Profile.

Related Company Contract List tab	Click to display the Related Company Contract List view of the Contracts screen.
Contract Profile link	Click a link to display the Contract Profile for a company that shares a relationship with the active company.
Contract Status multi-select list	Make one or more selections in the list to filter the display of contracts by status.
Search option	<ul style="list-style-type: none"> • (Optional) Click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Enter a beginning keyword or value in the Search field, and click the magnifying glass to search for a contract. • Click x to clear the filter.
Export to Excel button	Click to export the information in the screen to an Excel spreadsheet.

New Contract button	Click to add a root or incorporated contract to the Company Profile.
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Locating a Company Profile

A company can be located from the All Companies browse screen, the Recently Viewed Companies portlet, or by running an Elastic (or Classic) search.

There are three ways to locate a Company Profile in Conga Contracts:

Search for the profile using the Elastic (or Classic) Search

- Search for the profile in the Recently Viewed Companies portlet in your Dashboard
- Search for the profile in the All Companies browse screen

You can locate a group of Company Profiles that share a characteristic using an Elastic Search or Classic Search or from the All Companies browse screen.

Elastic (or Classic) Search

Depending on the version of search you are using, you can quickly locate a Company Profile using the company name or a keyword/phrase that is stored in the Profile.

1. Select Company in the elastic search list in the Navigation Toolbar.
This list does not display if you are running a classic search.
2. Enter all or part of the company name, or other identifier, in the Search field, and press the ENTER key on your keyboard.
 - Enter a leading asterisk (*) if the search criteria is NOT the leading characters of the company name, or other identifier.
3. When the screen refreshes:
 - a. The All Companies screen displays for an Elastic Search and lists the companies that match your search criteria.
 - Click on a company record to display its Company Profile with captured data and links to related information.
 - A screen displays with both Company Search and Contract Search sections for a Classic Search.
 - Click on a company record to display its Company Profile with captured data and links to related information.

Recently Viewed Companies Portlet

You can quickly revisit the Company Profiles that you recently viewed from the Recently Viewed Companies portlet in your Dashboard.

1. From the Recently Viewed Companies portlet, locate the company by scrolling through the list.
2. Click on the company record to display its Company Profile with captured data and links to related information.

All Companies Screen

The All Companies browse screen displays a list of all the Company Profiles that are stored in your database, along with summary data for each company.

1. Click on Companies in the Navigation Toolbar, and select the Browse Companies link.
2. In the All Companies screen, enter the name of the company, or other identifier, in the Search field, and press the ENTER key on your keyboard.
3. To search specific fields in the Company Profile, click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search.
4. Click on a company record to display the Company Profile with captured data and links to related information.

Opening a Company Profile

A Company Profile provides basic information on the company and also houses the Contract Profiles for all of the company's contracts. The Company Profile contains links to the several program features available for companies, as well as a Profile Toolbar that allows you to perform company-related tasks.

A Company Profile can be opened in three ways:

Select Company in the elastic search list in the Navigation Toolbar. Type the company name in the Search field, and press the ENTER key on your keyboard. In the All Companies screen, click the company record.

- For a Classic Search, type the company name in the Search field, and press the ENTER key on your keyboard. In the Company Search section of the Results screen, click the company record.
- In the Recently Viewed Companies portlet in the Dashboard, locate the company in the list, and click it to select it.
- Click Companies in the Navigation Toolbar, and click the Browse Companies link in the menu. In the All Companies screen, locate the company in the list by scrolling or using the Search option. Click the company record.

Searching the All Companies Screen

The Search option in the All Companies browse screen can be used to search for a specific company or several companies that share a common characteristic.

Warning:

The browse screen can also be used to sort companies by status by making one or more selections in the Company Status multi-select list. The Export to Excel option allows the contents of the browse screen to be exported to a spreadsheet.

1. Click on Companies in the Navigation Toolbar, and select the Browse Companies link.
2. In the All Companies screen, click Search to display a list of the searchable fields, and select the check boxes for the fields you want to search.
3. Enter the name of the company, or other identifier, in the Search field, and press the ENTER key on your keyboard.

Tip:

Use leading and trailing asterisks (*) if you do not know the leading characters of the company name. If a company name contains the word Industries, you could enter *Industries* in the Search field.

Customizing the All Companies Screen

The company data that displays in your All Companies browse screen can be customized to meet your needs.

1. Click on Companies in the Navigation Toolbar, and select the Browse Companies link.
2. In the All Companies screen:
 - Sort the data in a column by clicking (toggling) on a column heading.
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
3. Click the Conga Contracts (or other logo) in the top left corner of the screen to return to the Dashboard.

Adding a Dynamic Logo to a Company Profile

Instead of using the default company branded logo at the top left of your Conga Contracts application, you can upload individual logos to an individual Company Profile. These logos display in all outbound emails associated with that specific Legal Entity.

1. From the Navigation Toolbar, go to Companies.
2. Click on the name of a company.
3. Under the Logo section, browse or drag-and-drop to add the file for your logo.

After the logo is added, it is included in all outbound emails associated with any Contract Profiles assigned to that Legal Entity.

Company Links

The Company Profile contains basic and supplemental information for a company, as well as links to the following program screens where you can perform tasks using these features: Contracts, People, Additional Names, Relationships, Locations, Tasks, Documents, Events, Messaging, Scorecards, Projects, Additional Forms, History.

Company Links Overview

The Company Profile contains system fields that store basic information for a company, as well as additional fields that your Administrators can add to capture company information that is required by your organization. The Company Profile also contains a Links section that quickly link you to the program screens that store additional information for the company:

- [Contracts](#)
- [People](#)
- [Additional Names](#)
- [Relationships](#)
- [Locations](#)
- [Tasks](#)
- [Documents](#)
- [Events](#)
- [Messaging](#)
- [Scorecards](#)
- [Projects](#)

- [Additional Forms](#)
- [History](#)

To manage the links that display in the Links section of the Company Profile, click the gear icon to launch the Configure Links prompt, and clear the check boxes for the links you do not want displayed. The Contracts and the Additional Forms links cannot be removed.

Contracts Link

The Contracts link in a Company Profile displays a Contracts browse screen showing all of the company’s contracts, in both a linear list and as a hierarchy. The link is appended by a number, indicating the number of contracts stored in the Profile. From the Contracts browse screen, you can access the Contract Profile for any contract.

To access the Contracts browse screen, open a Company Profile, and scroll down to the Links section of the screen.

A	Contracts link	Click to display the Contracts browse screen.
B	Contract records	<p>Review the list of the company's contracts, along with key information for each contract.</p> <ul style="list-style-type: none"> • Click on a contract record to link to the Contract Profile. • From the Profile, you can perform several program functions.
C	Download Document icon	<p>If the download icon is present, right-click on it to display a menu showing a list of the documents that have been uploaded to the Contract Profile.</p> <p>Click on a document in the list to view or download the document.</p>

D	Multi-Party icon	<p>If the multi-party icon is present, the contract is a multi-party agreement, which means there are more than two parties that are legally bound by the contract.</p> <ul style="list-style-type: none"> • To view the additional parties for the contract, click on the contract record to display the Contract Profile, and then click v in the Additional Parties section of the Profile, located at the top of the screen.
E	Contract Status multi-select list	<p>Make one or more selections in the list to filter contracts by status.</p>
F	Search option	<ul style="list-style-type: none"> • Enter the first few letters, values, or characters of your search criteria in the Search field, and click the magnifying glass. • Precede your search criteria with a leading asterisk (*) if you are not sure you have entered the first few letters, values, or characters. • (Optional) Click the Search icon to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Click x to clear the filter. <p>For example, entering the word Fixed and selecting the Term Type check box in the Search list will display accurate search results for all contracts with a fixed term type.</p>
G	Column display	<p>To customize the information in a browse screen, hover over a column heading until the sort icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>

H	Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the checkmark icon displays, you are successfully moving the column.
I	Export to Excel button	Click to export the data in the browse screen to an Excel spreadsheet.
J	Contract Tree view	Click to display a view of the contracts in a tree structure, with parent contracts at the top of the hierarchy (shown below).

To access the Contracts Tree View, click the Contract Tree tab in the Links section.

A	Contract Tree view	Review the root (Master and Individual) contracts, which are shown as top-level folders, and their incorporated contracts, such as Amendments and Schedules, which are shown as sub-folders.
B	Expand and Collapse icons	Use the - and + icons to collapse/expand the hierarchy.
C	Status multi-select list	Make one or more selections in the list to filter contracts by status.
D	Agreement Type multi-select list	Make one or more selections in the list to filter contracts by agreement type.
E	New Contract button	Click to add a new root or incorporated contract.

F	Related Company Contract List view	<p>Click to display a screen showing a list of contracts for any companies that have a relationship with the active company.</p> <ul style="list-style-type: none"> • Filter the contracts using the Contract Status multi-select list. • Locate one or more contracts using the Search option.
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People Link

The People link in a Company Profile displays a People browse screen showing the people associated with the company and its contracts. The link is appended by a number, indicating the number of people stored in the Profile.

To access the People browse screen, open a Company Profile, and scroll down to the Links section of the screen.

People link	Click to display the People browse screen.
Person record	<p>Review the list of people who are associated with the company and its contracts.</p> <ul style="list-style-type: none"> • Click on a person record to link to their Person Profile. • From the Profile, you can edit a person’s information or delete the person. You can also add a new person to the Company Profile from this screen.
History icon	Click the History icon to display a screen that shows a history of the changes made to the person's profile.

Search option	<ul style="list-style-type: none"> • Enter the first few letters, values, or characters of your search criteria in the Search field, and click the magnifying glass. • Precede your search criteria with a leading asterisk (*) if you are not sure you have entered the first few letters, values, or characters. • (Optional) Click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Click x to clear the filter. <p>For example, entering the word Fixed and selecting the Term Type check box in the Search list will display accurate search results for all contracts with a fixed term type.</p>
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Add Person button	Click to add a company person to the Company Profile.

Additional Names Link

The Additional Names link in a Company Profile displays an Additional Names browse screen showing any additional names for the company, including an AKA (also known as), DBA (doing business as), or FKA (formerly known as) name. The link is appended by a number, indicating the number of additional names for the company.

To access the Additional Names browse screen, open a Company Profile, and scroll down to the Links section of the screen.

Additional Names link	Click to display the Additional Names browse screen.
Additional Name records	<p>Review the additional names by which the company is known (AKA), as well as any other names the company uses to conduct business (DBA) and any former names of the company (FKA).</p> <ul style="list-style-type: none"> • Click on an additional name record to link to the Additional Name Profile. • From the Profile, you can edit the information for an additional name, or delete it.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Add Name button	Click to display a screen that will allow you to add an additional name for the company.

Relationships Link

The Relationships link in a Company Profile displays a Relationships browse screen showing any relationships that exist between the active company and other companies stored in Conga Contracts. The link is appended by a number, indicating the number of

relationships the company shares with other companies. For example, a parent company may own several smaller companies, or two companies may be involved in a joint partnership.

To access the Relationships browse screen, open a Company Profile, and scroll down to the Links section of the screen.

Relationships link	Click to display the Relationships screen.
Relationship records	View the current relationships the company shares with other companies. <ul style="list-style-type: none"> • Click on a relationship record to edit the company relationship. • Click on a hot link in the Company Name column to display the Company Profile for the related company. • If the + icon is present, click to display any notes explaining the relationship.
Delete icon	Click - to delete the company relationship.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
New Relationship button	Click to add a new relationship between two of the companies in Conga Contracts.

Locations Link

The Locations link in a Company Profile is used to display the Locations browse screen, which stores the physical addresses for a company. The link is appended by a number, indicating the number of locations that have been recorded for the company.

To access the Locations browse screen, open a Company Profile, and scroll down to the Links section of the screen.

Locations link	Click to display the Locations browse screen.
Location record	<p>Review the location records that have captured addresses for the company.</p> <ul style="list-style-type: none"> • Click on a location record to display a Location Profile with additional information for that location. • From the profile, you can add, edit, copy, and delete a company location.
History icon	Click the history to track a history the changes made to a location.
Copy to Clipboard icon	Click the copy icon to copy the location address to another program or application using the Copy to clipboard prompt.
Copy to Clipboard prompt	<p>Simultaneously hold down the Ctrl and C keys on your keyboard to copy the highlighted address.</p> <ul style="list-style-type: none"> • To copy only a portion of the address, click anywhere inside the window to remove the highlighting, and then use your mouse to highlight the information you want to copy.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.

Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Add Location button	Click to add a new company location.

Tasks Link

The Tasks link in a Company Profile is used to display the Tasks browse screen, which lists all the tasks that have been assigned for the company. The link is appended by a number, indicating the number of tasks added for the company.

To access the Tasks browse screen, open a Company Profile, and scroll down to the Links section of the screen.

The tasks for which you have some measure of responsibility can be viewed from your Upcoming Tasks portlet in the Dashboard.

Tasks link	Click to display the Tasks browse screen.
Task records	Review the incomplete tasks for the company. Tasks displayed in red text have not been completed and are past due.
Complete Task icon	Click the green checkmark to complete the task. The icon is present if you are the task owner or you created the task.
Calendar icon	Click the calendar icon in the Start Date or Due Date field to use a pop-up calendar to select a new date and reschedule a task.

<p>Add Task record</p>	<p>Populate the Task Subject, Due Date, and Task Owner fields, and then click the Add Task button to add a task.</p> <ul style="list-style-type: none"> • Edit the Start Date field, which is auto-populated with the current date, if needed. <p>Once you add a task, the only fields that you cannot edit can are Task Created By and Task Created On.</p>
<p>Show Completed button</p>	<p>Click to display both active and completed tasks (shown in screen shot below).</p>
<p>Add Task List button</p>	<p>Click to create a task list.</p>
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
<p>Completed task records</p>	<p>Review the completed tasks, which are displayed in strikethrough text. The Show Completed view also displays the tasks that are past due in red text.</p>
<p>Closure Notes field</p>	<p>Review any notes provided by the individual who completed the task, as well as the date the task was completed.</p>

Reopen icon	Click the clock with the checkmark icon to reopen a completed task. The icon is present if you are the task owner or you created the task.
Hide Completed button	Click to return to the default view.

Documents Link

The Documents link in a Company Profile is used to display a Documents browse screen, which stores the documents associated with the company, such as a certificate of insurance and financial statements. The link is appended by a number, indicating the number of documents stored in the profile.

To access the Documents browse screen, open a Company Profile, and scroll down to the Links section of the screen.

Events Link

The Events link in a Company Profile is used to display the Events browse screen, which stores all the events that have been added for the company. The link is appended by a number, indicating the number of events contained in the profile.

To access the Events browse screen, open a Company Profile, and scroll down to the Links section of the screen.

The events for which you have some measure of responsibility are viewed from Tools Menu or the Upcoming Events portlet your in your Dashboard.

Events link	Click to display the Events browse screen.
Event records	<p>Review the events that have been scheduled for the company.</p> <ul style="list-style-type: none"> • Click on an event record to display its Event Profile with additional information for the event. • From the profile, you can edit information for the event, complete the event, or delete it. If the event is part of a series, you can close the event series from the Event Profile, as well as view the completion history for the series.

<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Reorder and Resize Columns (linked browse screens)</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
<p>New Event button</p>	<p>Click to create a company event.</p> <p>When a user is designated as an event owner or identified as a person to be notified about the event, Conga Contracts automatically sends periodic email messages to all interested parties regarding the upcoming event.</p>

Messaging Link

The Messaging link in the Company Profile is used to display a Messaging window, which stores the messages that have been sent from the Profile, as well as the responses to the messages. The link is appended by a number, indicating the number of messages stored in the profile.

To access the Messaging window, open a Company Profile, and scroll down to the Links section of the screen.

You can view all the recent messages you have received (or been copied on) from your Recent Messages portlet in the Dashboard.

Messaging link	Click to display the Messaging window.
Message records	Locate the message you want to view or reply to, and click on it to display the body of the message at the bottom of the window. Tip: The most recent message is displayed at the top of the screen, and the Content column provides an at-a-glance view of the message. Use the + and - icons to expand/collapse the hierarchy of message threads.
Message body	View the content of the message, including any threads.
Reply button	Click to send a reply to the person who sent the displayed email message.
Reply All button	Click to send a reply to the person who sent the email message, along with those who have been copied on the message.
Delete Thread button	Click to delete the displayed message and its threads.
New Thread button	Click to send a new email message.
Close icon	Click x to close the Messaging window.

Scorecards Link

The Scorecards link in a Company Profile is used to display a Scorecards browse screen, which stores all the pending and completed scorecards for the company. The link is appended by a number, indicating the number of scorecards that have been added to the profile.

The current company rating is displayed numerically in the Company Profile header in a color-coded score box. This value is calculated by Conga Contracts and reflects the average value of all the scorecards completed for the company.

Score boxes are color-coded depending on the rating: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.

To access the Scorecards browse screen, open a Company Profile, and scroll down to the Links section of the screen.

Scorecards link	Click to display the Scorecards browse screen.
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<p>Scorecard records</p>	<p>Review the list of scorecards completed for the company, along with the members who were selected to complete each scorecard.</p> <ul style="list-style-type: none"> • Click on a scorecard record to display its Profile. • From the profile, you can complete a scorecard, edit a scorecard you have completed and submitted, add a member so that another person is required to complete the scorecard, change its availability date, archive a scorecard, or a delete scorecard you have completed.
<p>Score field</p>	<p>Identify the averaged score for the scorecard, which is calculated by adding all the scorecard totals and dividing the grand total by the number of people who completed the scorecard.</p> <p>Tip: If only one person completes a scorecard, that person's score appears in the field. If a scorecard has no value in the Score field, none of the people assigned to the scorecard have completed it.</p>
<p>Ratings box</p>	<p>View the current scorecard rating for the contract, company, or project.</p> <p>The ratings box is color-coded based on the rating: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.</p>
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>

<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the the green checkmark icon displays, you are successfully moving the column.
<p>Add Scorecard button</p>	<p>Click to add a scorecard to the Company Profile.</p>

Projects Link

The Projects link in a Company Profile is used to display a Projects screen, which stores the projects associated with the company. The link is appended by a number, indicating the number of projects linked to the profile. Projects are added to a Company Profile when a user creates a project and adds the Company Profile to the project.

To access the Projects screen, open a Company Profile, and scroll down to the Links section of the screen.

<p>Projects link</p>	<p>Click to display the Projects browse screen.</p>
<p>Project records</p>	<p>Review the projects that are using the Company Profile.</p> <ul style="list-style-type: none"> • Click on a project record to display its Project Profile. • From the Project Profile, you can add a project, run the Project Team Wizard, copy a project, edit project information, view a history of changes made to the project, delete a project, and manage the project's documents, additional forms, tasks, scorecards, flows, workflows, and send messages from the Profile.

<p>Search option</p>	<ul style="list-style-type: none"> • Enter the first few letters, values, or characters of your search criteria in the Search field, and click the magnifying glass. • Precede your search criteria with a leading asterisk (*) if you are not sure you have entered the first few letters, values, or characters. • (Optional) Click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Click x to clear the filter.
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Additional Forms Link

The Additional Forms link in a Company Profile is used to display the Additional Forms browse screen, which lists the forms that can be added to the Profile so that supplemental information can be captured for the company. The screen also displays a Forms Captured column, which indicates the number of times the form has been added to the Profile.

To access the Additional Forms browse screen, open a Company Profile, and scroll down to the Links section of the screen.

<p>Additional Forms link</p>	<p>Click to display the Additional Forms browse screen.</p> <ul style="list-style-type: none"> • Optional forms display with a white background and required forms display with a pink background. <p>If the information for a required additional form has not been captured, the Additional Forms browse screen automatically displays every time the Company Profile is opened. In addition, a Missing Required Additional Forms heading appears at the top of the screen.</p>
<p>Additional Form record</p>	<ul style="list-style-type: none"> • Review the list of additional forms that have been (and/or need to be) captured for the Profile. • Click on a form record that has been captured to display a browse screen showing each occurrence of the additional form added to the Profile. • Click on an occurrence of the additional form to display its Profile.
<p>Forms Captured field</p>	<p>Identify the number of times a form has been captured, or added, to the Profile. A required form must be captured at least once. Capturing a form more than once is useful if information, such as yearly certifications, need to be tracked.</p>
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the the green checkmark icon displays, you are successfully moving the column.

History Link

The History link in a Company Profile is used to display the History browse screen, which records the updates that have been made to the Profile. The link is appended by a number, indicating the number of history records stored in the Profile.

To access the History browse screen, open a Company Profile, and scroll down to the Links section of the screen.

History link	Click to display the History browse screen.
History records	<p>Review the changes that have been made to the fields in the Company Profile.</p> <ul style="list-style-type: none"> • Identify any invalidated flows, along with the date/ time stamp and the name of the person who invalidated the flow. • A change has been made if there is information in the Updated Value column. The Original Value column displays the original information, or is blank if the field was not populated when the Company Profile was initially created.
Sort Option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Company People

The people who are the points of contact (POC) for a company must be manually added to the Company Profile by creating a Person Profile for each POC.

Company People Overview

The people who are the points of contact (POCs) for a company must be manually added to the Company Profile by creating a Person Profile from the People browse screen, which is accessed by selecting the People link in the Links section of the Profile. A Person Profile is automatically created in the Contract Profile whenever that person is assigned a responsibility for the contract, which is accomplished from the Responsibilities section of the Profile. This section of the Profile displays only when the Profile is in edit mode, and the list of available people for a contract responsibility is limited to the people in the Address Book who have been assigned that responsibility (function).

The following tasks can be performed for the people associated with a company:

- [Identify company contacts](#)
- [Locate a Company Contact Profile](#)
- [Review a Person Profile](#)
- [Add a person to a company](#)
- [Edit a person's information](#)
- [Delete a person from a company](#)
- [View a history of changes made to a person's profile](#)

People Browse Screen - Company

The points of contact (POCs) for a company are stored in the People browse screen in a Company Profile.

To access the browse screen, open a Company Profile.

A	People link	Click the link to display the People browse screen.
B	Company Contact record	<p>Click on a company contact's record to display their Person Profile with additional information.</p> <ul style="list-style-type: none"> • From the Profile, you can add a company contact, edit their information, and delete them.

C	Search option	<p>Locate a contact person by typing the first few letters of their first or last name in the Search field, and clicking the magnifying glass. To clear the filter, click x. You can also search for a contact person using any of the other fields in the Search List list. For example, if you wanted to search for all people in a specific city, you would ensure City is selected in the Search list, and enter Atlanta in the Search field.</p>
D	History icon	<p>Click on the history icon to display a screen that shows a history of the changes made to the contact person's information.</p>
E	Sort option	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
F	Column Display option	<p>To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
G	Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
H	Show Items list	<p>Click on the list arrow icon if you want to change the number of records that display on each screen. The default is 25 records per screen, but you change the default to 5, 10, 50, or 100.</p>

I	Paging option	<ul style="list-style-type: none"> • To move forward or back one page, use the > and < icons. • To display the first or last page, use the >> and << icons.
J	Jump to Page option	To view a specific page of contract records, enter a value in the Page field and press the ENTER key on your keyboard.
K	Refresh option	To return the browse screen to the default view after a running a search or making changes to the display, click the refresh icon.
L	Add Person button	Click to add a contact person to the Company Profile. You can also add a company contract from the Person browse screen in your Tools menu.

Person Profile - Company Contact

The Person Profile holds all the contact information for a person associated with a company, along with the functions they can perform in Conga Contracts.

Open the Person Profile from the Person browse screen in your Tools menu, or the People browse screen in a Company Profile.

Data fields	Review the information captured for the company contact, including their physical address, email address, contact numbers, and the function(s) they hold in Conga Contracts.
Edit Person button	Click to edit the company contact's information.
Delete Person button	Click to delete the Profile for the company contact.
Add Person button	Click to add another contact person to the company.
View History button	Click review a history of the changes made to the company contact's information.
Browse People button	Click to return to the People (or Person) browse screen.

Locating a Person Profile

A Person Profile can be accessed from the Person browse screen in your Tools menu, or the People browse screen in a Company Profile or Contract Profile.

✓ **Tip:**

A search query can be run to locate a company person, and the Results screen links you to the Company Profile where their Person Profile can be accessed. From the Company Profile, you can also access the company's contracts, and from each Contract Profile you can identify the people who hold a position of responsibility for the contract.

Tools Menu

1. Click on Tools in the Navigation Toolbar.
2. In the Tools menu, click the People link.
3. In the Person Browse screen, select Company People in the list in the toolbar.
4. Locate the person whose Profile you want to review.
 - Type the first few letters of the person's first or last name in the Search field, and click the magnifying glass. To clear the filter, click x.
5. Click on their company contact record to display their Person Profile.

Company Profile

1. Open the Company Profile associated with the company contact.
2. In the Links section of the Company Profile, click the People link.
3. In the People browse screen, locate the person whose Profile you want to review.
 - Type the first few letters of the person's first or last name in the Search field, and click the magnifying glass. To clear the filter, click x.
4. Click on their company contact record to display their Person Profile.

Contract Profile

1. Open the Contract Profile that has people assigned to contract responsibilities.
2. In the Links section of the Contract Profile, click the People link.
3. In the People browse screen, locate the person whose Profile you want to review.
4. Click on the responsible person's record to display their Person Profile.

Search Query

A search query to locate a company person by last name is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set the following hierarchy in the Result Type list to search for a company person:
 - Company→Person
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll down and click the Person folder.
4. In the Criteria section, set the search hierarchy for the person's name in the field list:
 - Company→Person→Person Last Name
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Person folder.
 - Scroll down and click the Person Last Name sub-folder.
 - You can also search for a person by their first name or any of the other fields in the Person Profile.
5. In the Criteria section, define the operator and value(s) for the search:
 - Select Equals in the inclusion list.
 - Enter the person's last name in the value list.
6. Click Execute in the toolbar to run the query.
7. When the Results view of the screen displays, click a search record to display its Company Profile.
8. In the Links section of the Profile, click the People link.
9. In the People screen, click the person's record to display their Person Profile.

Adding a Company Contact

You can add a contact person to a company from two locations: Person browse screen in your Tools menu, or the People browse screen in a Company Profile.

A user with the appropriate permissions can add a contact person to a company from two locations: Person browse screen in your Tools menu, or the People browse screen in a Company Profile. They must be a Full user and hold a role with full access to the company group to which the Company Profile belongs.

People Browse Screen - Company Profile Locating a Person Profile

1. Open the Company Profile that needs the company contact.
2. In the Links section of the Company Profile, click the People link.
3. In the People browse screen, click Add Person in the toolbar.
4. When the screen refreshes, create a Person Profile for a company contact:
 - Populate the required fields.
 - In the Functions list, click on all the functions that the person can have in Conga Contracts.
 - Click on a selected function to deselect it.
 - (Optional) Populate the remaining fields.
 - In entering a phone number, enter the area code, followed by the phone number, such as 407-555-3770 or (407) 555-3770. To enter an extension, enter an "x" followed by the extension number, such as 407-555-3770 x47. If you incorrectly enter a phone number, the Phone Number Entry window displays to assist you.
 - Click Save.

Person Browse Screen - Tools Menu

1. Click on Tools in the Navigation Toolbar.
2. In the Tools menu, click the People link.
3. In the Person Browse screen, click Add Company Person in the toolbar.
4. In the New Company Person window:
 - Click in the Company Name field to display a searchable list of existing companies.
 - Locate a company by entering the first few characters of the company name in the Search field, and clicking the magnifying glass.
 - Click on the company name to select it.
 - Click Submit.
 - When the Company Profile displays for the selected company, follows Steps 4-7 above in Person Browse Screen - Company Profile.
 - Click the New Company link to add a new Company Profile for the company contact.
 - In the New Company Entry screen, populate the required fields, and click Save.
 - Follow Steps 2 - 7 above in Person Browse Screen - Company Profile.

Editing Information for a Company Contact

A user with the appropriate permissions can edit the information for a company contact. They must be a Full user and hold a role with full access to the company group to which the Company Profile belongs.

Changes made to the information for a company contact from the Company Profile are reflected in the Person Profile accessed from your Tools menu.

1. Open the Company Profile for the company contact.
2. In the Links section of the Company Profile, click the People link.
3. In the People browse screen, locate the company contact whose information you want to edit.
 - Type the first few letters of the person's first or last name in the Search field, and click the magnifying glass. To clear the filter, click x.
4. Click on the record for the company contact to select it.
5. In the Person Profile screen, click Edit Person in the toolbar.
6. When the screen redisplay in edit mode:
 - Update the information in the fields and lists, as needed.
 - Click Save.

Reviewing a Company Contact's History

The History option for a Person Profile records and stores all changes made to the profile, and can be accessed from two locations: Person browse screen in your Tools menu, or the People browse screen in a Company Profile.

People Browse Screen - Company Profile Adding a Company Contact

1. Open the Company Profile with the company contact whose history you want to review.
2. In the Links section of the Company Profile, click the People link.
3. In the People browse screen, locate the record for the company contact.
 - Type the first few letters of the person's first or last name in the Search field, and click the magnifying glass icon. To clear the filter, click x.
4. Click the company contact's clock icon.
5. In the History screen, review the changes made to the information for the company contact. A change has been made if there is information in the Updated Value

column. The Original Value column displays the original information, or is blank if the field was not populated when the Person Profile was initially created.

Person Browse Screen - Tools Menu

1. Click on Tools in the Navigation Toolbar.
2. In the Tools menu, click the People link.
3. In the Person Browse screen, locate the company contact whose information you want to review.
 - Type the first few letters of the person's first or last name in the Search field, and click the magnifying glass icon. To clear the filter, click x.
4. Click the company contact's clock icon.
5. In the History screen, review the changes made to the information for the company contact. A change has been made if there is information in the Updated Value column. The Original Value column displays the original information, or is blank if the field was not populated when the Person Profile was initially created.

Deleting a Company Contact

A user with the appropriate permissions can delete a company contact. They must be a Full user and hold a role with full access to the company group to which the Company Profile belongs.

 **Tip:**

A company contact that is deleted from the Company Profile is also removed from the Person browse screen, which is accessed from your Tools menu.

1. Open the Company Profile for the company contact.
2. In the Links section of the Company Profile, click the People link.
3. In the People browse screen, locate the company contact you want to delete.
 - Type the first few letters of the person's first or last name in the Search field, and click the magnifying glass icon. To clear the filter, click x.
4. Click on the record for the company contact to select it.
5. In the Person Profile screen, click Delete Person in the toolbar.
6. In the Delete Person confirmation prompt, click Yes.

Company Locations

The Locations feature allows companies with additional addresses and locations to store the information in Conga Contracts.

Company Locations Overview

A company may have several locations, such as corporate headquarters, billing and customer service offices, and shipping centers. While the Company Profile screen stores the primary location for a company, the Locations screen linked to the Profile allows you to store additional locations. The primary location, as well as any additional location, can be linked to the company's contract. The History option for a company location records changes to the address and the location name/type, while the Copy option allows the address block for a company location to be copied from Conga Contracts and pasted into another application, window, or screen.

The following tasks can be performed for company locations:

- [Identify company locations](#)
- [Open a Location Profile](#)
- [Review a Location Profile](#)
- [Add a company location](#)
- [Edit a company location](#)
- [Copy a company address block](#)
- [Delete a company location](#)
- [Review a history of changes made to a location](#)

Locations Browse Screen

The locations associated with a company, such as its billing office and shipping center, are stored in the Locations browse screen in a Company Profile.

To access the browse screen, open a Company Profile.

Locations link	Click to display the Locations browse screen.
Location record	<p>Click on a location record to display its Location Profile.</p> <ul style="list-style-type: none"> • From the Profile, you edit location information and delete a location.

Copy icon	Click the copy icon to copy and paste the address block from Conga Contracts to another application, window, or screen.
History icon	Click the history icon to review a history of the changes made to the location.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column Display option	<p>To customize the information in a browse screen, hover over a column heading until the the column icon icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p> <p>The Actions field must be selected or the History and the Copy icons will not display.</p>
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Add Location button	Click to add a company location.

Location Profile

A Location Profile contains information for an additional company location, including the location name and type, contact numbers, and the physical (or mailing) address of the location. The Profile toolbar contains buttons that allow you to edit location information or delete the location. The primary location for a company is stored in the Address Information section of the Company Profile screen.

Open a Location Profile by clicking on an address record in the Locations browse screen in a Company Profile.

Location Name field	Identify the name assigned to the location.
Location Type field	Identify the classification assigned to the location.
Address fields	Review the address information for the location.
Contact number fields	Review the phone and fax numbers provided for the location.
Edit Location button	Click to edit the location information.
Delete Location button	Click to delete the location.
Browse Locations button	Click to return to the Locations browse screen.

Opening a Location Profile

When the information for an additional location is captured, you can review the address and contact information from the Location Profile in its Company Profile. You can also identify companies with additional locations by running a search query.

Company Profile

1. Open the Company Profile containing the Location Profile you want to review.
2. In the Company Profile, click the Locations link in the Links section of the screen.
3. In the Locations browse screen, click the location you want to review to display its Location Profile.

Search Query

A search query to find a company location by its type is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
 - Company→Company Location
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll down and click the Company Location folder. When the screen refreshes, set the following hierarchy in the Result Type list to search for a company location. You can also search for a location by address, phone number, or any of the other fields in the Location Profile.

3. In the Criteria section, set the search hierarchy for the location type in the field list:
 - a. Company→Company Location→Location Type
 - b. Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - c. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Location folder.
 - d. Scroll down and click the Location Type sub-folder.
4. In the Criteria section, define the operator and value(s) for the search :
 - Select In in the inclusion list.
 - Select the location type in the value list.
5. Click Execute in the toolbar to run the query.
6. When the Results view of the screen displays, click a search record to display its Company Profile.
7. In the Company Profile, click the Locations link in the Links section of the screen.
8. In the Locations screen, click a location to display its Location Profile.

Adding a Company Location

A user with the appropriate permissions can add an additional location for a company. A company may have one or more Sales or Regional offices, or the company may have acquired another company that can legally enter into a contract, which would require recording the mailing or physical address of the acquired company.

1. Open the Company Profile that needs the additional location.
2. In the Links section of the Company Profile, click the Locations link.
3. In the Locations browse screen, click Add Location in the toolbar.
4. When the screen refreshes, create a Location Profile.
5. Enter a descriptive name for the location in the Location Name field.
6. If you need help populating a field, mouse-over its ? icon to display a quick tip with helpful information or instructions.
 - a. (Recommended) Make a selection in the Location Type list.
 - b. (Optional) Populate the physical address fields and make a selection in the Country list.
 - c. (Optional) Populate the Phone Number and Fax Number fields.
 - d. In entering a phone number, enter the area code, followed by the phone number, such as 407-555-3770 or (407) 555-3770. To enter an extension, enter an "x" followed by the extension number, such as 407-555-3770 x47. If you incorrectly enter a phone number, the Phone Number Entry window displays to assist you.
7. Click Save.

Copying a Company Address Block

An address stored in the Locations screen in a Company Profile can be copied from Conga Contracts and pasted into another application, window, or program screen.

1. Open the Company Profile that contains the address you want to copy.
2. In the Links section of the Company Profile, click the Locations link.
3. In the Locations browse screen, locate the address you want to copy, and click its copy icon.
4. In the Copy to Clipboard prompt:
 - Simultaneously hold down the Ctrl and C keys on your keyboard to copy the highlighted address.
 - To copy only a portion of the address, click anywhere inside the window to remove the highlighting, and then use your mouse to highlight the line item you want to copy.
 - Click x to close the prompt.
5. Open the application, window, or screen where you want to copy the address.
6. Position your cursor at the point where you want to insert the address.
7. Simultaneously hold down the Ctrl and V keys on your keyboard to paste the address in the desired location.

Editing a Company Location

A user with the appropriate permissions can edit the information for an additional company location. The primary location for a company is edited from the Address Information section of the Company Profile screen.

1. Open the Company Profile for the company whose location needs to be edited.
2. In the Links section of the Company Profile, click the Locations link.
3. In the Locations browse screen, locate the address you want to edit, and click on it to select it.
4. In the Location Profile, click Edit Location in the toolbar.
5. When the screen redisplay in edit mode:
 - Update the information in the fields and lists, as needed.
 - Click Save.

Reviewing a Company Location's History

The History option for a Location Profile records and stores all changes made to the address information, location type, and location name.

1. Open the Company Profile whose location history you want to review.
2. In the Links section of the Company Profile, click the Locations link.
3. In the Locations browse screen, locate the additional company location you want to review, and click its clock icon.
4. In the History screen, review the changes made to the information for the company location. A change has been made if there is information in the Updated Value column. The Original Value column displays the original information, or is blank if the field was not populated when the Location Profile was initially created.

Deleting a Company Location

A user with the appropriate permissions can delete an additional company location.

1. Open the Company Profile for the company whose location needs to be deleted.
2. In the Links section of the Company Profile, click the Locations link.
3. In the Locations browse screen, locate the address you want to delete, and click on it to select it.
4. In the Location Profile screen, click Delete Location in the toolbar.
5. In the Delete Company Location confirmation prompt, click Yes.

Additional Names

The Additional Names feature provides a way of storing the different names under which a company has conducted, or is currently conducting business.

Additional Names Overview

The Additional Names feature is useful in recording other names under which a company, organization, limited partnership, institution, or government agency conducts business. For example, a company that has been acquired by another company through merger or acquisition may still be able to legally enter into a contractual agreement under its original name. The feature is also useful in recording other names by which is company is currently known or was formerly known. For example, Contract Management Solutions Inc. is also known as CMSI, and Conga Contracts was formerly known as Conga Contracts Inc.

The default company name types are Also Known As (AKA), Doing Business As (DBA), and Formerly Known As (FKA), but your administrators may have added other types.

The following tasks can be performed for a company's additional name:

- [Identify a company's additional names](#)

- [Locate an Additional Name Profile](#)
- [Review the Additional Names Profile](#)
- [Add an additional company name](#)
- [Edit an additional company name](#)
- [Delete an additional company name](#)

Additional Names Browse Screen

The additional names associated with a company are stored in the Additional Names browse screen in a Company Profile, and are categorized as: Also Known As (AKA), Doing Business As (DBA), and Formerly Known As (FKA). When a company changes its name (FKA), the Company Acquisition Wizard is an effective tool in transferring data and responsibilities.

Tip: Although the default additional name types are AKA, DBA, and FKA, your Administrators can add other name types.

To access the browse screen, open a Company Profile.

Additional Names link	Click to display the Additional Names browse screen.
Additional Name records	<p>Click on an additional name record to display its Additional Name Profile.</p> <ul style="list-style-type: none"> • From the Profile, you can edit and delete the additional company name.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column Display option	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.

Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Add Name button	Click to add an additional name for the company.

Additional Name Profile

An Additional Name Profile contains information for another name by which a company is known (Also Known As or Doing Business As), or was previously known (Formerly Known As). The information includes the effective date for the other company name, as well as a description of the circumstances surrounding the alternate or former name.

Open an Additional Name Profile by clicking on a company name record in the Additional Names browse screen in a Company Profile.

Company Name field	<p>Identify the alternate (or former) name for the company.</p> <ul style="list-style-type: none"> • To edit the information in a field, click in the field to activate it, and then type over the existing text, or make a different selection in the list.
Additional Name Type list	<p>Identify the type of additional name for the company:</p> <ul style="list-style-type: none"> • Also Known As (AKA) • Doing Business As (DBA) • Formerly Known As (FKA) • Although the default additional name types are AKA, DBA, and FKA, your Administrators may have added other name types.
Effective Date field	<p>Identify the date on which the alternate (or former) company name became effective.</p>
Description field	<p>Review the information provided on the alternate (or former) company name.</p>

Delete button	Click to delete the additional name from the Company Profile.
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Locating an Additional Name Profile

When an additional company name is captured, you can review the information surrounding the company name from the Additional Name Profile in its Company Profile. You can also identify companies with additional names by running a search query.

Company Profile

1. Open the Company Profile containing the Additional Name Profile you want to review.
2. In the Company Profile, click the Additional Names link in the Links section of the screen.
3. In the Additional Names browse screen, click on a company name to display its Additional Name Profile.

Search Query

A search query to find an additional name type used by companies, such as Formerly Known As, Also Known As, and Doing Business As, is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set the following hierarchy in the Result Type list to search for an additional company name:
 - Company→Additional Name
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Click the Additional Name folder.
4. In the Criteria section, set the search hierarchy for the additional name type in the field list:
 - Company→Additional Name→Company Additional Name Type
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Additional Name folder.
 - Click the Company Additional Name Type sub-folder.
5. In the Criteria section, define the operator and value(s) for the search:

- Select In in the inclusion list.
 - Select the additional name type in the value list.
6. Click Execute in the toolbar to run the query.
 7. When the Results view of the screen displays, click a search record to display its Company Profile.
 8. In the Company Profile, click the Additional Names link in the Links section of the screen.
 9. In the Additional Names browse screen, click on a company name to display its Additional Name Profile.

Adding an Additional Company Name

A user with the appropriate permissions can add an additional name for a company. The Additional Names feature provides a way of storing and tracking the different names under which a company has conducted, or is currently conducting business. Conga Contracts provides three ways of categorizing additional company names: Also Known As (AKA), Doing Business As (DBA), and Formerly Known As (FKA). However, your Administrators may have added other name types.

1. Open the Company Profile that needs the additional company name.
2. In the Links section of the Company Profile, click the Additional Names link.
3. In the Additional Names browse screen, click Add Name in the toolbar.
4. When the screen refreshes, create an Additional Name Profile:
 - Enter the alternate (or former) company name in the Company Name field.
 - Make a selection in the Additional Name Type list
 - (Optional) Enter the effective date for the alternate (or former) company name in the Effective Date field.
 - (Optional) Provide information on the alternate (or former) company name in the Description field.
 - Click Save.

Editing an Additional Company Name

A user with the appropriate permissions can edit the information for an additional company name. The primary name for a company is edited from the Company Profile screen.

1. Open the Company Profile for the company whose additional name needs to be edited.
2. In the Links section of the Company Profile, click the Additional Names link.

3. In the Additional Names browse screen, locate the company name you want to edit, and click on it to select it.
4. In the Additional Name Profile, click inside any field to enable it.
 - Type over the existing information in a field, or make a different selection in the Additional Name Type list.
5. Click Save.

Deleting an Additional Company Name

A user with the appropriate permissions can delete an additional company name.

1. Open the Company Profile for the company whose additional name needs to be deleted.
2. In the Links section of the Company Profile, click the Additional Names link.
3. In the Additional Names browse screen, locate the company name you want to delete, and click on it to select it.
4. In the Additional Name Profile, click Delete in the toolbar.
5. In the Delete Additional Name confirmation prompt, click Yes.

Company Relationships

The Company Relationships feature allows you to record the relationships between the companies in your Conga Contracts database.

Company Relationships Overview

The Relationships feature is useful in recording any relationship that exists between the companies that have Company Profiles in Conga Contracts. For example, when a company acquires another company, that relationship can be recorded in both Company Profiles with the acquiring company being identified as the parent company and the acquired company identified as the child company.

The default relationships are Child Of, Parent Of, and Relates To, but your administrators may have added other types of relationships.

The following tasks can be performed for company relationships:

- [Identify a company's relationships](#)
- [Review the Company Relationship Profile](#)
- [Locate a company relationship](#)
- [Add a company relationship](#)
- [Edit a company relationship](#)

- [Remove a company relationship](#)

Company Relationships Browse Screen

When two companies share a relationship, information on their connection can be viewed from the Relationships browse screen in the Company Profile for both companies.

To access the Relationships browse screen, open a Company Profile.

Relationships link	Click to display the Relationships screen.
Relationship records	View the types of relationships that this company shares with other companies.
Relationship Notes	Click + for a relationship type to view notes on the relationship.
Company link	Click the link to display the Company Profile for the related company. <ul style="list-style-type: none"> • Click the Relationships link in the Links section of the screen to display the reciprocal company relationship.
Delete icon	Click - to delete the relationship.

Company Relationship Profile

A Relationship Profile is created whenever a relationship between two companies is defined in either of their Company Profiles. When the Relationship Profile is created in one Company Profile, a reciprocal Profile is created in the related Company Profile.

Open a Relationship Profile by clicking on a relationship record in the Relationships browse screen in a Company Profile.

Relationship Type list	Identify the type of relationship enjoyed by the company in the active Profile. Tip: Although the default relation types are Parent Of, Child Of, and Relates To, your Administrators may have added other relationship types.
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Company Name list	<p>Identify the name of the related company.</p> <ul style="list-style-type: none"> To edit the information in a field or list, click in the field to activate it, and then make a different selection in the list or type over the existing text in a field.
Notes field	Review the notes provided on the relationship between the two companies.
Back to Browse button	Click to return to the Relationships browse screen.

Locating a Company Relationship

When a relationship between two companies is captured, you can review the information surrounding the relationship from the Relationship Profile in either Company Profile. You can also identify companies that have relationships by running a search query.

Company Profile

1. Open the Company Profile containing the Relationship Profile you want to review.
2. In the Company Profile, click the Relationships link in the Links section of the screen.
3. In the Relationships browse screen, click on a relationship record to display its Company Relationship Profile.

Search Query

A search query to find a particular type of relationship between companies, such as Parent Of, Child Of, or Relates To.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set the following hierarchy in the Result Type list to search for a company relationship:
 - Company→Relationship
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll down and click the Relationship folder.
4. In the Criteria section, set the search hierarchy for the relationship type in the field list:
 - Company→Relationship→Relationship Type

- Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Relationship folder.
 - Scroll down and click the Relationship Type sub-folder.
5. In the Criteria section, define the operator and value(s) for the search:
 - Select In in the inclusion list.
 - Select the relationship type in the value list.
 6. Click Execute in the toolbar to run the query.
 7. When the Results view of the screen displays, click a search record to display its Company Profile.
 8. In the Company Profile, click the Relationships link in the Links section of the screen.
 9. In the Relationships browse screen, click on a relationship record to display its Company Relationship Profile.

Adding a Company Relationship

A user with the appropriate permissions can record the connection between two companies using the Relationships feature. Adding a company relationship not only creates a Relationship Profile in the active Company Profile, but also creates a reciprocal Relationship Profile in the related Company Profile.

1. Open the Company Profile for one of the companies in the relationship.
2. In the Links section of the Company Profile, click the Relationships link.
3. In the Relationships browse screen, click New Relationship in the toolbar.
4. When the screen refreshes, create a Relationship Profile:
 - Select Parent of, Child of, or Relates > to in the is lis. If your Administrators have added other types of relationships, other options will be available.
 - Click in the To Company field to display a window with an alphabetical listing of companies:
 - Enter the first few letters of the company name in the Search field and click the magnifying glass.
 - Click on the company name to select it.
 - (Optional) Provide information to explain the relationship between the companies in the Notes field.
 - Click Save.
5. (Optional) When the screen refreshes, click the Company Name link in the Relationship Profile to display its Company Profile.
 - In the Links section of the Company Profile, click the Relationships link.

- In the Relationships screen, verify the relationship has been created for the related company.

Editing a Company Relationship

When a relationship between two companies is captured, you can review the information surrounding the relationship from the Relationship Profile in either Company Profile. You can also identify companies that have relationships by running a search query.

Company Profile

1. Open the Company Profile containing the Relationship Profile you want to review.
2. In the Company Profile, click the Relationships link in the Links section of the screen.
3. In the Relationships browse screen, click on a relationship record to display its Company Relationship Profile.

Search Query

A search query to find a particular type of relationship between companies, such as Parent Of, Child Of, or Relates To.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set the following hierarchy in the Result Type list to search for a company relationship:
 - a. Company→Relationship
 - b. Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - c. Scroll down and click the Relationship folder.
4. In the Criteria section, set the search hierarchy for the relationship type in the field list:
 - a. Company→Relationship→Relationship Type
 - b. Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - c. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Relationship folder.
 - d. Scroll down and click the Relationship Type sub-folder.
5. In the Criteria section, define the operator and value(s) for the search:
 - Select In in the inclusion list.
 - Select the relationship type in the value list.
6. Click Execute in the toolbar to run the query.

7. When the Results view of the screen displays, click a search record to display its Company Profile.
8. In the Company Profile, click the Relationships link in the Links section of the screen.
9. In the Relationships browse screen, click on a relationship record to display its Company Relationship Profile.

Removing a Company Relationship

A user with the appropriate permissions can remove a relationship that was created between two companies. When a company relationship is removed from the Company Profile of one company, it is also removed from the Company Profile of the related company.

1. Open the Company Profile for one of the companies in the relationship that needs to be removed.
2. In the Links section of the Company Profile, click the Relationships link.
3. In the Relationships browse screen, locate the relationship record you want to edit, and click -.
4. In the Remove Relationship confirmation prompt, click **Yes**.

Company Wizards

The Company Name Change, Acquisition, Move Document, and Workflow wizards are available in Company Profiles. Company-wide changes can also be made using the Archive and Mark as Entity features.

Company Wizards Overview

The Company Profile contains an Admin Tools button that displays a menu, which provides access to two company wizards, an archiving feature, and a feature that allows you to "mark" a company as a legal entity.

The wizards and features accessed from the Admin Tools menu are:

- [Acquisition wizard](#), which allows you to transfer selected data from the acquired company to the acquiring company.
- [Change Name wizard](#), which automatically updates the company name throughout the Conga Contracts system.
- [Archive feature](#), which removes the Company Profile so that it no longer displays in browse screens, or is returned as a search result.

- [Mark as Entity feature](#), which allows you to designate a company as a legal party to a contract.

The Profile also contains a Workflows button that launches the [Workflow Wizard](#), which allows you to create and edit company workflows. In addition, the Documents screen in a Company Profile contains a links to a [Move Document Wizard](#), which allows you to move documents between Company and Contract Profiles.

Running the Company Acquisition Wizard

The Acquisition Wizard is used when one company merges with, or is acquired by, another company. The wizard walks you through the process of combining the data records of the two companies, allowing you to select which information, as well as which contracts will be transferred to the acquiring company.

After running the Acquisition Wizard, the Company Profile of the acquiring company displays. The Wizard updates the status of the acquired company, and adds the name of the acquired company as an additional name (FKA) for the acquiring company.

1. Open the Company Profile of the company being acquired.
2. In the Company Profile screen, click Admin Tools in the toolbar, and select Merger/ Acquisition.
3. In the Company Acquisition Wizard, click Next in the Welcome step.
4. In the Acquiring Company Selection step:
 - Click v in the Acquiring Company list, locate the acquiring company, and click on it to select it.
 - Click Next.
5. In the Update Acquired Company Status step:
 - (Optional) Update the status of the company being acquired.
 - Click Next.
6. In the Item Selection step:
 - Click inside the check box for each item that you want to transfer to the acquiring company.
 - To select all items, click in the Item check box at the top of the list. Items include all the stored information in the linked program screens, such as People, Events, Documents, Tasks, as well as any additional forms that can be added to the Company Profile.
 - Click Next.
7. In the Contract Selection step:
 - Click inside the check box for each contract that you want to transfer to the acquiring company.

- To select all contracts, click in the check box at the top of the list. Search for a contract by entering the first few characters of the contract number, or other identifier, in the Search field, and clicking the magnifying glass. Control the display of information for contracts by selecting the columns that display, sorting information, and resizing/repositioning columns of data.
 - Click Next.
8. In the Company Acquisition Summary step, verify the information, and click Finish.

Running the Move Company Document Wizard

The Move Document Wizard allows you to move documents from one Company Profile to another, or from a Company Profile to a Contract Profile. This tool is helpful in the event you make an error and upload a document to the wrong profile, or if you upload a document as a new document, rather than a revision to an existing document.

1. Locate the Company Profile containing the document that needs to be moved, and open the Profile.
2. In the Links section, click the Documents link.
3. In the Documents screen, locate the document you want to move, and click on the document record.
4. In the Document Profile screen, click the three horizontal lines icon in the toolbar, select Advanced in the menu, and then click Move Document.
5. In the Move Document Wizard, click Next in the Welcome step.
6. In the Document Selection step, click inside one radio button:
 - Please click here to move only the > current document. This option moves only the document whose profile you opened.
 - Please click here to move this document's entire document family. This option moves the document whose profile you opened and all of its revisions.
 - Click Next.
7. In the Document Location step, click inside one radio button:
 - Company - moves the document to a Company Profile.
 - Contract - moves the document to a Contract Profile.
 - Document Family - moves the document so that it is now grouped with another document. For example, if you erroneously uploaded a document revision as a new document, selecting this option allows you to move the document so that it now appears in the hierarchy of the original document in the Documents browse screen. The Document Family option displays only if you did not select the document's entire document family option in Step 6.
 - Click Next.

8. In the Document Target step:
 - Click v in the Company Name list, locate the company that should house the document, and click on it to select it.
 - Click Next.
9. In the Document Move Summary step, review the information for accuracy, and click Finish.

Running the Company Name Change Wizard

The Company Name Change Wizard is used when a company has legally changed its name, and all the information linked to the previous company name must be transferred to the new name. The wizard walks you through the process of recording the name change so that it is reflected in all the appropriate locations in Conga Contracts.

When the wizard completes the name change process, the old company name will be listed in the Additional Names screen of the Company Profile as a FKA (formerly known as).

1. Open the Company Profile for the company whose name needs to be changed.
2. In the Company Profile screen, click Admin Tools in the toolbar, and select Change Name.
3. In the Company Name Change Wizard, click Next in the Welcome step.
4. In the New Company Name step:
 - Enter the name of the new company.
 - Provide the reason for the company name change.
 - Enter the date on which the company name change became effective.
 - Click Next.
5. In the Company Name Change Summary step, verify the information, and click Finish.

Company Shared Features

The Company Profile provides links to the features shared by contracts and projects: Documents, Additional Forms, Flows, Workflows, Events, Tasks, Messaging, Projects, and History.

Shared Features Overview - Company

The Company and Contract Profiles contain several of the same links since there are features that are available to both companies and contracts: Documents, Additional Forms, Events, Tasks, Messaging, Projects, and History. However, a browse screen in a Company Profile contains different data than a browse in one of its Contract Profiles, and a few of the browse screens contain different components. For example, the History screen

in a Contract Profile contains Work Log History and True-Up History tabs that are not present in the Company Profile.

The Workflow Wizard is also available from both the Company Profile and Contract Profile, and flows can be run on both Profiles.

The following shared browse screens are available from a Company Profile:

- [Additional Forms](#)
- [Documents](#)
- [Events](#)
- [History](#)
- [Messaging](#)
- [Projects](#)
- [Scorecards](#)
- [Tasks](#)

The following shared features are available from a Company Profile:

- [Flows](#)
- [Workflows](#)

Company Additional Forms

An additional form is used to capture supplemental information for a Company Profile that is not captured by the default fields in the profile. An additional form typically contains more than two fields, and the form is automatically available from a new profile if an Administrator has linked the form to the profile. If the Administrator designated the additional form as required, you will receive constant reminders from Conga Contracts that the required form is "missing" until you complete the form by providing the required information. If the form is optional, it will be available via the Additional Forms link in the Company Profile, and you can complete the form, if appropriate.

An example of a company additional form would be a Certification form that captures certification types and expiration dates for each type of certification.

If additional forms exist for a Company Profile, you can perform the following tasks:

Although the linked tasks below were written for a contract additional form for a contract, the steps in each task also apply to a company additional form.

- [View additional forms](#)
- [Locating an Additional Form \(Opening the Form Profile\)](#)
- [Add an additional form](#)
- [Copy an additional form](#)

- [Edit an additional form](#)
- [View the history of an additional form](#)
- [Delete an additional form](#)

Company Documents

Documents can be uploaded and stored in a Company Profile to provide easy access to company documents, such as insurance certificates, financial statements, and MWBE (Minority and Women-owned Business Enterprise) verifications. A document stored in a profile can also be downloaded for review and revision, and then uploaded back to the profile. The Conga Contracts system tracks and identifies the revisions to a document so that the most recent version is always readily apparent and available for use. While any type of document can be uploaded to a profile, the Conga Contracts system was designed to work with MS Word and Adobe PDF files in performing the several tasks that the system can perform.

The tasks that can be performed for a document are available from two locations: Documents browse screen, which displays a list of all the documents stored in the Company, Contract, or Project profile, and the Document Profile, which displays all the stored information on a single document.

Although the linked tasks below were written for a contract document, the steps in each task also apply to a company document.

- You can perform the following tasks from the Documents browse screen:
 - [View the documents](#) stored in the Company Profile, along with some summary information for each document
 - [View a Document Profile](#)
 - [Add a document](#)
 - [Use the Multi-Print function](#) to print some or all of the documents listed in the browse screen

You can perform the following tasks from the individual Document Profiles:

- [View document information](#)
- [Edit basic document information](#)
- [Edit a MS Word document in Conga Contracts \(Direct Editing\)](#)
- [Delete a document](#)
- [Upload a document revision](#)
- [Compare document revisions](#)
- [Download a document](#)
- [Move a document](#)

Company Events

A company event can be created for a single occurrence, or an event series can be set up for an event that is repeated on a regular basis.

The Events feature is available from both the Company Profile and the Contract Profile. A company event is an important occurrence, such as the date on which a company's insurance certificate expires. An event can be created for a single occurrence, or an event series can be set up for an event that is repeated on a regular basis (i.e., weekly, monthly, or yearly).

Once you create an event, Conga Contracts automatically sends an email message (i.e., event alert) to all the recipients you designate. The message is sent prior to the event date, and you determine the number of days prior to the event date that the message will be sent. If you choose to set up a reminder for the event, which is simply a follow-up email reminding recipients about the upcoming event, you can set the date the reminder email is sent out and also select the individuals who receive the follow-up email message about the event.

Conga Contracts will automatically generate weekly (or daily) Event Notification Reports and email the reports to the event owner, as well as those users who subscribe to the event. These reports are designed to help event owners in identifying the events that need to be completed or closed.

Although the linked tasks below were written for a contract event, the steps in each task also apply to a company event.

You can perform the following tasks from the Events browse screen:

- [View events](#)
- [View an Event Profile](#)

You can perform the following tasks from the individual Event Profiles:

- [Create an event](#)
- [Edit an event](#)
- [Subscribe or unsubscribe to an event](#)
- [Complete an event](#)
- [Close an event series](#)
- [Delete an event](#)
- [View an event's completion history](#)

Understanding the way in which events are managed in Conga Contracts will help you in setting up your event alerts.

Company History

The History feature records all of the changes made to the fields in the Company Profile screen, including changes to the Company Additional Fields that have been added by an Administrator. The History screen also records any company flows that were invalidated.

1. Open the Company Profile whose history you want to review.
2. Click the History link in the Links section of the screen.
3. In the History screen, identify the change to a field by comparing the information in its Updated Value column to that in the Original Value column. If there is information in the Updated Value field, but the corresponding Original Value field is blank, the field was not populated when the Company Profile was created.
4. (Optional) Customize the screen display:
 - Change the fields that display by hovering over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
 - Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
 - Move a column to a different location in the browse screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
5. (Optional) Locate any fields that display Invalidated Flow, and identify the user who invalidated the company flow, and the date/time it was invalidated.
6. Click any link or button to exit the History screen.

Company Messaging

The Messaging feature allows you to send and receive email messages from a Company Profile. The recipients for the message can be individual program users, company contacts, and external participants, or an entire distribution list. Messaging is also available for other program features, including Events, Workflows, Tasks, Document Packages, Scorecards, and Scheduled Reports.

The Messaging feature allows you to send and receive email messages from a Company Profile. The recipients for the message can be individual program users, company contacts,

and external participants, or an entire distribution list. If you are a program user, you can also reply to a message from a Company Profile.

Email messages can be sent by selecting the Messaging link in a Company Profile; however, messaging is also available in several other program features, including Events, Workflows, Tasks, Document Packages, Scorecards, and Scheduled Reports.

You can perform the following message-related tasks from a Company Profile:

Although the linked tasks below were written for messaging from a Contract Profile, the steps in each task also apply to messaging from a Company Profile.

- [View the messages in a profile](#)
- [Send a new message](#)
- [Reply to a message](#)
- [Delete a message](#)

Company Projects

When a project is created and an existing Company Profile is added to the project, that information is displayed in the Projects screen in the Company Profile. The information provided includes a description of the project, its status, the date on which it was created, and the person who created it. Any project listed in the Projects screen can be accessed by clicking its project record.

1. Open the Company Profile whose history you want to review.
2. Click the Projects link in the Links section of the screen.
3. In the Projects screen, identify the projects currently using the Company Profile.
 - Enter any of the words used in a project name or description in the Search field, and click the magnifying glass to locate the project.
4. (Optional) Click on a project record to display its Project Profile.
5. (Optional) Customize the screen display:
 - Change the fields that display by hovering over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
 - Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.

- Move a column to a different location in the browse screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
6. Click any link or button to exit the Projects screen.

Company Scorecards

Scorecards is a feature that allows you to rate the performance of a company using a pre-defined set of criteria. Your Administrators create and link scorecards to specific Company Profiles so that whenever you open a profile that is linked to a scorecard, and a scorecard has not yet been assigned, an Assign Scorecard dialogue box automatically displays. The dialogue box prompts you to select from a list of available scorecards and then select the users you want to complete the scorecard using the Address Book. You can assign the scorecard to yourself, as well as other users or a distribution list, and also choose the date on which you want to make the scorecard available to users. On that date, the Conga Contracts system sends out an email message, notifying each user that he/she has been selected to complete the company scorecard.

The current scorecard rating for a company is displayed numerically in a color-coded score box located in the upper right corner of the Company Profile header. This rating is calculated by the Conga Contracts system and reflects the average of all the scorecard values listed in the Scorecards browse screen. Score boxes are color-coded, depending on the average rating of all scorecards completed: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.

The following tasks can be completed for a scorecard:

Although the linked tasks below were written for a contract scorecard, the steps in each task also apply to a company scorecard.

- [View scorecards](#)
- [View a Scorecard Profile](#)
- [Add a scorecard](#)
- [Complete a scorecard](#)
- [Change a scorecard's start date](#)
- [Add a member to a scorecard](#)
- [Edit a scorecard](#)
- [Archive and delete scorecards](#)

Company Tasks

A single task can be added to a Company Profile and be assigned to a program user for completion. Similarly, a Task List can be added to a profile to identify the steps that must be followed to accomplish a company-related process or procedure. For example, a Task List can be created to standardize the process for renewing company certifications.

Workflows are enhanced Task Lists, which allow you to send messages from a step in the workflow. In addition, a workflow step can require one or more approvals before activating the next step. Therefore, it is recommended that you consider both Workflows and Task Lists and determine which option better suits your needs.

You can perform the following task-related activities:

Although the linked activities below were written for a contract task, the steps in each activity also apply to a company task.

- [View tasks](#)
- [Add a task](#)
- [Edit a task](#)
- [Complete a task](#)
- [View completed tasks](#)
- [Reopen completed and past due tasks](#)
- [Create a task list](#)

Company Flows

The Flows feature is an automated version of the Workflows feature, which uses both stages and steps to delineate the processes or procedures that a company must go through. In addition, the stages and steps in the flow automatically display at the top of the Company Profile, and are "grayed out" as they are completed, so that you always know what action needs to be taken to move the flow to the next step or stage. Like workflows, your Administrators create flows and then link them to the appropriate Company Profiles. Therefore, a flow may or may not display in a Company Profile screen. A flow is like a road map you must follow to accomplish the tasks your Administrators want you to accomplish for a Company Profile in the Conga Contracts system.

In working with a company flow, you can perform the following tasks:

Although the linked tasks below were written for a contract flow, the steps in each task also apply to a company flow.

- [View flows in a Profile](#)

- [Receive email for a flow step](#)
- [Complete a flow step](#)
- [Reassign a flow step](#)
- [View flow activities](#)
- [View Flow Diagram](#)
- [Invalidate a flow](#)
- [Launch a flow for an existing profile](#)

Company Workflows

The Workflows feature is run on a Company Profile via the Workflow Wizard, which provides different templates that mirror your company's business processes using a series of steps that are assigned, completed, and tracked. The wizard allows you to select the template and the team members needed to accomplish the workflow. Once a workflow step is completed, you and the other team members are notified via email so that attention can be directed to the next step. Communication with members of the workflow team may also be available from a workflow step. Documents can be uploaded and stored in a workflow for review and editing by members of the team. If a workflow step requires approval, a single approver may be designated, or a routing table may be required for two or more approvers.

A Task List is a simplified version of a workflow in that messaging is not available for individual steps and none of the steps can be approved or declined. Therefore, it is recommended that you review both the Workflow and Task List features to determine which option better suits your needs.

You can perform the following tasks related to a company workflow:

Note: Although the linked tasks below were written for a contract workflow, the steps in each task also apply to a company workflow.

- [View Workflows](#)
- [Create a Workflow](#)
- [Receive Email for a Workflow Step](#)
- [Viewing Workflow Steps](#)
- [Manage Workflow Documents](#)
- [Send a Message for a Workflow Step](#)
- [Approve a Workflow Step](#)
- [Reassign a Workflow Step](#)
- [Complete a Workflow Step](#)
- [Close and Re-open Workflows](#)
- [Edit and Delete Workflows](#)

Contracts

Contracts are added to Company Profiles, creating Contract Profiles that house basic information. The Contract Profile is linked to other program features, which are used to store and manage the contract's documents/revisions, events, tasks, messages, products, payments, flows, workflows, and other data.

Contract Creation and Management

A contract added to Conga Contracts generates a Contract Profile that is housed within a Company Profile. The Contract Profile is used to store basic information, and is linked to program features, allowing tasks to be performed for the contract. Searches can be run and reports can be generated on information stored in a Contract Profile.

Contract Creation and Management Overview

A contract is created from a Company Profile by generating a root (parent) or incorporated (child) Contract Profile where information is stored and managed. The Contract Profile is linked to program features using the links contained in the Profile, allowing you to perform tasks for the stored data. The Search option can be used to quickly locate specific contracts, and generate reports on the search results.

A Contract Profile is accessed from its Company Profile, the All Contracts screen, or the Recently Viewed Contracts portlet in the Dashboard.

In managing contracts, you can:

- [Add a root contract](#), which includes adding an event alert for a contract's original expiration date
- [Add an incorporated contract](#)
- [Add a contract using a Creation Wizard](#)
- [Locate, add, edit, and delete](#) additional parties to a contract
- [Add an event alert for the contract's original expiration date](#)
- [Add a contract by copying an existing contract](#)
- [Edit the information for an existing contract](#)
- [Renew a contract](#)
- [Assign a contract](#) to another company
- [Inactivate a contract](#)

- [Archive a contract](#) a contract added to Conga Contracts can be archived, but not deleted.

Adding a Root Contract

A root contract is a contract that can stand on its own as a legal document, binding all parties to its terms and conditions. When a Contract Profile is created for a root contract, the Agreement Type field will typically reflect either a Master or Individual contract. The Profile also contains links to other program features, allowing you to upload documents, add supplemental information, and perform contract-related tasks, such as negotiating the terms of a contract.

The Contract Profile provides a view of the contract family by displaying the root contract you add, along with any other root or incorporated contracts, such as Exhibits, Addendums, and Schedules, stored in the Company Profile. Since a Contract Profile is housed in a Company Profile, you can also view the company's contract tree from the Contracts link in the Company Profile.

A root contract can be added from the Company Profile or by selecting the New Contract link in the Contracts menu in the Navigation Toolbar.

Adding a Contract from the Company Profile

1. Open the Company Profile that needs the root contract.
2. In the Company Profile screen, click Add Contract in the toolbar. You can also click the New Contract button in the Contracts screen, which displays automatically in the Links section of the Company Profile since this allows you to view the company's existing contracts before adding a new Contract Profile.
3. In the Contract Profile Edit screen, populate the required fields and lists:
 - Contract Group
 - Agreement Type - select an agreement type in bold text to denote a root agreement.
 - Contract Type
 - Legal Entity
 - Term Type
 - Original Exp Date (field is not required for the Perpetual term type)
 - Status
4. (Optional) Populate the remaining fields.
 - Click ? for a field to display a Quick Tip if you need help populating the field.
 - Click the calendar icon for a date field to display a calendar to help you select the correct date.

- (Optional) Provide the Renewal and Notice information using the following fields:
 - Renewal Interval - Enter the number of months before the contract is up for renewal. For example, if a contract's effective date is 2/12/18 and it will be up for renewal on 12/12/20, enter 24 in the field, which is 2 years, expressed in months.
 - Notice Period - Enter the number of days prior to the contract's current expiration date that you have to provide notice of your intent to terminate or renew the contract. The program automatically populates the Notice Date field.
- 5. Expand the Contract Additional Fields section, and populate any required fields.
- 6. (Optional) Populate the remaining fields in the Contract Additional Fields section.
- 7. In the Responsibilities section, assign all required responsibilities for the contract to a user:
 - Click in the Name field for a responsibility, and select a user in the list that displays.
 - (Optional) Populate any unpopulated fields in the user's record.
 - (Optional) Customize the columns of information that display for the user(s) responsible for the contract.
 - Hover over a column heading until the column icon displays, and click it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - (Optional) Click Add Responsibility to add a contract responsibility.
 - Use the information above for a required responsibility to assign the contract responsibility, provide additional user information, and customize the display of information. The eSignature Role field in the responsibility record is used to indicate the user's authority in signing a contract. If the field is blank, the user does not have the authority, but if Sign appears in the field, the user can sign a contract and is automatically added as a signatory when the eSignature Package Wizard is run without a template
 - Click Save.

Adding a Contract from the Navigation Toolbar

1. Click Contracts in the Navigation Toolbar, and click the New Contract link in the menu.
2. In the New Contract prompt:
 - Click in the Company Name field to select an existing company using a pop-up window of alphabetized company names in a scrollable list.

- In the window, enter the first few letters of the company name in the Search field, and click the magnifying glass.
 - Click on the company record to select it.
 - Click the Create Company link to display the New Company Entry screen and create a Company Profile for the new company.
3. When the Contract Profile Edit screen displays, follow Steps 3-8 in Adding a Contract from the Company Profile.

Adding an Incorporated Contract

An incorporated contract is a contract that cannot stand on its own as a legal document since it amends, augments, or edits the terms of another contract, such as a Master or Individual agreement, which are parent or root contracts. Examples of an incorporated, or child contract include a Schedule, Addendum, Amendment, Purchase Order, and a Statement of Work.

1. Open the Contract Profile of the root contract that needs the incorporated contract.
2. In the Contract Profile Edit screen, populate the required fields and lists:
 - Agreement Type - select an agreement type that is not in bold text since these denote root agreements.
 - Agreement Link - select the root contract that is the parent for the incorporated contract in the list, which includes all of the company's contracts, as well as the contracts of companies who have a relationship with this company.
 - Click the Missing Parent check box to remove the Agreement Link list if you do not know the parent contract number. The Missing Parent check box only displays if your Administrator has activated this option.
 - Term Type
 - Original Exp Date (field is not required for the Perpetual term type)
 - Status
 - The required Contract Type and Legal Entity fields are automatically populated with the information from the root contract, but can be edited.
3. (Optional) Populate the remaining fields.
 - Click ? for a field to display a Quick Tip if you need help populating the field.
 - Click the calendar icon for a date field to display a calendar to help you select the correct date.
 - (Optional) Provide the Renewal and Notice information using the following fields:
 - Renewal Interval - Enter the number of months before the contract is up for renewal. For example, if a contract's effective date is 3/1/18 and it will be up for renewal on 3/1/21, enter 36 in the field, which is 3 years, expressed in months.

- Notice Period - Enter the number of days prior to the contract's current expiration date that you have to provide notice of your intent to terminate or renew the contract. The program automatically populates the Notice Date field.
4. Expand the Contract Additional Fields section, and populate any required fields.
 5. (Optional) Populate the remaining fields in the Contract Additional Fields section.
 6. In the Responsibilities section, assign all required responsibilities for the contract to a user:
 - Click in the Name field for a responsibility, and select a user in the list that displays.
 - (Optional) Populate any unpopulated fields in the user's record.
 - (Optional) Customize the columns of information that display for the user(s) responsible for the contract.
 - Hover over a column heading until the column icon displays, and click it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - (Optional) Click Add Responsibility to add a contract responsibility.
 - Use the information above for a required responsibility to assign the contract responsibility, provide additional user information, and customize the display of information.
 - The eSignature Role field in the responsibility record is used to indicate the user's authority in signing a contract. If the field is blank, the user does not have the authority, but if Sign appears in the field, the user can sign a contract and is automatically added as a signatory when the eSignature Package Wizard is run without a template
 7. Click Save.

Editing Contract Information

The Contract Profile stores system information for a contract and provides links to other data related to the contract. System information includes the contract number, value, status, type and agreement type, purpose and description, term and renewal data, and the users who hold a contract responsibility.

Linked data is edited from the browse screens for the contract documents, clauses, events, tasks, document packages, payments, people, addresses, products, scorecards, projects, and additional forms.

1. Locate the Contract Profile you want to edit, and click on it to select it.
2. In the Contract Profile screen, click Edit Contract in the toolbar.
3. When the screen displays in edit mode, update the information in the fields and lists of the root or incorporated contract, as well as the event alert for the contract's original expiration date.
4. Click Save.

Adding an Event Alert for a Contract Original Expiration Date

You can create and edit an event alert for the original expiration date of a contract. The components of the event alert include the date the event alert is sent out, the event owner (person responsible for renewing the contract), the people notified about the contract's expiration date, and the number of days after the first event alert that a reminder email is sent.

1. Display the Original Exp. Date window:
 - Open the Contract Profile.
 - Click Edit Contract in the toolbar.
 - Click clock icon in the Original Exp Date field.
2. Click the Create Event check box.
3. Click ∨ in the Event Owner list, and select the user responsible for renewing the contract.
4. Click ∨ in the Notification List field to display the Address Book, and select the users, company contacts, external people, or distribution list that needs to be notified about the contract's expiration date.
 - Enter the first few letters of the person's first or last name, or the distribution list name in the Search field, and click the magnifying glass.
 - Click on a name or distribution list to select it, adding it to the Addresses list box. Click the - to clear the filter
 - Click Submit.
 - (Optional) Select a template in the Template list to automatically populate several of the fields. A template will populate the Warn Days, Description, Notification Text, Remind Days, and Reminder Text fields with the information provided by the Administrator who created the template. Select the Use Reminder check box, and then click OK to create the event alert.
5. Populate the required fields if no selection is made in the Template list:
 - Warn Days - enter the number of days prior to the event date that the email alert is sent.

- Description - enter the text you want displayed in the subject line of the email alert.
 - Notification Text - enter the text you want in the body of the email alert.
 - (Optional) Click the Use Reminder check box to send a follow-up email if the event is not completed.
 - Remind Days - enter the number of days after the Notification Date (Event Date - Number of Warn Days) that the reminder email alert is sent if the event has not been completed.
 - Reminder Text - enter the text you want displayed in the body of the reminder email alert that is sent if the expiration date event has not been completed by the warning date.

 - (Optional) Click ∨ in the Reminder List field to display the Address Book, and select the users, company contacts, external people, or distribution list that needs to be reminded if the event for the contract's expiration date has not been completed.
 - Make no selections to send the reminder to the same individuals in the Notification List field.
6. Click OK to close the Original Exp Date window.
 7. Click Save in the toolbar of the Contract Profile screen.

Locating and Adding Additional Parties to a Contract

The contracts stored in your Conga Contracts database are typically contracts between your company and another company, organization, partnership, or institution. The Additional Parties option allows you to identify all the parties in a multi-party agreement, as well as search for contracts that have more than two parties.

Prior to adding an additional party to a Contract Profile, ensure a Company Profile has been created for the additional party.

Locating Contracts with Additional Parties

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click ∨ in Result Type list and click the > icon to the left of the Company folder. Scroll down to the Contract folder and click its > icon.
3. In the Criteria section of the screen:
 - Click in the field list, and click the > icon to the left of the Company folder. Scroll down to the Contract folder and click its > icon, and then scroll down to the Contract Additional Party folder and click its > icon. Click Additional Party

- Type so that the display in the field is Company→Contract→Contract Additional Party→Additional Party Type.
 - Click in the inclusion list, and select In.
 - Click in the value list, and select Additional Signing Party.
4. Click Execute in the toolbar to display the Results view of the screen, listing contracts with more than two parties.
 5. (Optional) Click Save Query in the toolbar to save the search query for future use.

Adding an Additional Party to a Contract

1. Open the Contract Profile that needs the additional party.
2. In the Contract Profile screen, click v in the Additional Parties header to display the section (if it is not already displayed).
3. When the section refreshes, click Add Additional Party in the toolbar.
4. When the section refreshes with fields to capture the information:
 - Click in the Additional Party field to display a pop-up window of alphabetized company names in a scrollable list.
 - In the window, enter the first few letters of the additional party name in the Search field, and click magnifying glass.
 - Click on the company record to select the additional party to the contract.
 - (Optional) Enter any notes or information relevant to the company becoming an additional party to the contract in the Notes field.
 - (Optional) Update the selection in the Party Type list to edit the role of the additional party.
 - (Optional) Enter the date on which the additional party became a party to the contract in the Party Effective Date field.
 - Click the calendar icon for a date field to display a calendar to help you select the correct date.
 - (Optional) Enter the date on which the additional party will cease to be a party to the contract in the Party Expiration Date field.
 - Click Save in the toolbar.
5. (Optional) Customize the columns of information that display for the additional party.
 - Sort the data in a column by clicking (toggling) on a column heading.
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
6. (Optional) When the section refreshes, click ← to display the Company Profile for the additional party.

Editing and Deleting Additional Parties to a Contract

You can easily edit the information for an additional party to a contract, as well as remove an additional party from a Contract Profile.

Editing Information for an Additional Party to a Contract

1. Open the Contract Profile whose additional party information needs to be edited.
2. In the Contract Profile screen, click v in the Additional Parties header to display the section (if it is not already displayed).
3. When the section refreshes, locate the additional party whose information you want to edit, and click on the record to select it.
4. When the section display its fields in edit mode, update the information in the fields and lists, as needed.
5. Click Save.

Removing an Additional Party from a Contract Profile

1. Open the Contract Profile whose additional party information needs to be deleted.
2. In the Contract Profile screen, click v in the Additional Parties header to display the section (if it is not already displayed).
3. When the section refreshes, locate the additional party you want to delete, and click its - icon.
4. In the Delete Party confirmation prompt, click Yes.

Copying a Contract

The Copy Contract Wizard is used to add a Contract Profile that is very similar to one that already exists in Conga Contracts. The copied Profile, along with all its stored data, can then be edited, as needed.

If you need to create a contract that is very similar to one that already exists, you can make a copy of the contract using the Copy Contract Wizard. The wizard populates the fields in the new Contract Profile screen with information found in the duplicated Profile, while allowing you to select any captured additional forms that you want to include in the new Profile. Once the new Contract Profile is created, you can add new information to the Profile, as well as edit the copied information.

1. Open the Contract Profile you want to copy.
2. In the Contract Profile screen, click Copy Contract in the toolbar.

3. In the Copy Contract Wizard:
 - a. Click Next in the Welcome step.
 - b. In the Additional Form Selection step, select the check boxes for all the additional forms you want added to the new Contract Profile, and click Next. The list that displays is a comprehensive listing of all the additional contract forms that have been added to Conga Contracts. Click on the Form Captured column heading to sort the forms in descending order to quickly identify the forms that were captured and saved in the Contract Profile you are copying. Captured forms have a number other than "0" in the Form Captured column.
 - c. In the Completion step, verify the additional forms selected, and click Finish.
4. When the screen refreshes, the new Contract Profile displays in edit mode.
 - a. Populate the Original Exp Date field, and any other required fields.
 - b. Make a selection in the Agreement Type field to indicate whether the new Profile is for a root or an incorporated contract.
 - c. (Optional) Populate (or update) the remaining optional fields, including the fields in the Term and Renewal and Responsibilities sections.
5. Click Save.

Inactivating a Contract

The Inactivate option distinguishes active contracts from inactive contracts without archiving the Contract Profile. When a Contract Profile is inactivated, the Profile is still accessible, along with its documents and other related information. Archiving a Contract Profile removes the Profile so that it is not longer available to users.

1. Open the Contract Profile for the contract you want to inactivate.
2. In the Contract Profile screen, click Edit Contract in the toolbar.
3. When the screen refreshes, change the selection in the Status field to Inactive.
4. Click Save.
5. (Optional) If the Inactivating Contract prompt displays, select the appropriate check boxes:
 - Close events for the contract, which includes the event alert for the contract expiration date
 - Close events for other contracts in the contract family, such as an event for a incorporated contract like a Statement of Work or Purchase Order
 - Inactivate the contract family, which changes the status of other contracts in the family to Inactive.
6. Click Save.

Archiving a Contract

The Archive option is used when a Contract Profile needs to be removed from Conga Contracts. Archiving is usually used to remove a duplicate Contract Profile, or when a Profile is created for a new customer, supplier, vendor, or distributor and contract negotiations did not result in a mutually acceptable contractual agreement.

1. Open the Contract Profile for the contract you want to archive.
2. In the Contract Profile screen, click Archive in the toolbar.
3. In the Archive Contract prompt, click Yes.

If the Profile has any open events, tasks, document packages, flows, or workflows, a prompt will display. You must complete the open items before archiving the contract.

Contract Profile and Browse Screens

Contracts added to Conga Contracts can be viewed from the All Contracts browse screen, and the contracts listed can be searched/sorted to locate a specific contract or group of contracts. Additional information for a contract is viewed from its Contract Profile, which is launched by clicking on a contract record in the browse screen.

All Contracts Screen

The All Contracts screen displays a list of the contracts that have Contract Profiles stored in Conga Contracts. The information that displays for each contract, such as contract number and term type, can be customized to meet your at-a-glance viewing needs. The contracts that display in the browse screen can also be filtered using the Contract Status multi-select list and/or the Search option.

Contract Profile

The Contract Profile contains basic information for the contract, such as its value, purpose, status, effective and expiration dates, and renewal information, as well as links to stored data, including contract documents, events, and document packages that are used to negotiate contracts and obtain electronic signatures on final documents.

When the Contract Profile is in edit mode, you can create an event alert for the original expiration date and manage the responsibilities associated with the contract.

Open a Contract Profile from the Recently Viewed Contracts portlet in your Dashboard or the All Contracts browse screen, or use the Elastic Search feature to locate the contract.

Contract Profile - Active Mode

Additional Parties section	<p>Click v to display the additional parties to the contract if there is a number other than (0) appended to the section title.</p> <p>A contract is typically an agreement between two parties.</p>
Contract basic information fields	<p>Review the information captured for the contract, including the required fields: Contract Group, Contract Number, Agreement Type, Contract Type, Legal Entity, and Status.</p> <ul style="list-style-type: none"> • Identify the default field lists that offer options for populating the field: Contract Group, Additional Party Type, Address Type, contract Location, Agreement Type, contract Status, Contract Type, and Contract Responsibility. • The contract number is issued by Conga Contracts, but can be set by a user if the contract numbering permission is enabled in System Settings.
Term and Renewal section	<p>Review the contract's effective and expiration dates, term type, and renewal information.</p>
Contract Additional Fields section	<p>Expand the section to review any Admin-defined fields, which are designed to capture additional information for the contract. Additional fields can be required or optional.</p>
Profile toolbar	<p>Use the buttons in the toolbar to perform contract-related tasks.</p>
Flow Stages and Steps	<p>If present, click on an action button to complete a step in a contract flow.</p>

<p>Links section</p>	<p>Review additional stored information for the contract by clicking on the listed links.</p> <ul style="list-style-type: none"> • The default display is the Contract Family browse screen unless there are required Additional Forms that need to be captured for the contract. • A link that is appended with a number other than zero (0) indicates there is additional information stored for the contract. For example, a Contract Family (2) link indicates there are two related Contract Profiles in the family.
<p>Configure Icon</p>	<p>Click the gear icon to display a Configure Links prompt.</p> <ul style="list-style-type: none"> • Clear the check boxes for all the links you want to remove from the Links section of the Profile. • Click Submit. • You cannot remove the Contract Family or the Additional Forms links from a Contract Profile.
<p>Contract Family screen</p>	<p>Ensure the default Contract Family screen is displayed. If the Additional Forms screen displays, there are required additional forms that have not been captured. Click the Contract Family link to display the Contract Family screen.</p>
<p>Root contracts</p>	<p>Identify the root contracts, which display at the top of the tree hierarchy.</p> <p>The active contract number is displayed in bold text and the remaining information is displayed in dark red text.</p>
<p>Incorporated contracts</p>	<p>Identify the incorporated contracts, which display at the next level in the hierarchy and are linked to their root contract.</p>
<p>Status multi-select list</p>	<p>Make one or more selections in the list to filter the display of contracts by status.</p>
<p>Agreement multi-select list</p>	<p>Make one or more selections in the list to filter the display of contracts by agreement type.</p>

Column display	<p>To customize the information in a browse screen, hover over a column heading until the icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p> <p>Tip: The Column display option, as well as the options shown in Steps O-P below, are available in most screens linked (Step G) to the Contract Profile. Most linked screens contain the Search option.</p>
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns (linked browse screens)	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the the green checkmark icon displays, you are successfully moving the column.

Contract Profile - Edit Mode

To display the Contract Profile in edit mode, click Edit Contract in the toolbar.

Event Alert icon	Click in the Original Exp Date field to set up an event alert for the original expiration date.
Help icon	Click ? to receive instructions or information on correctly populating a field or making a selection in a list.

<p>Responsibilities section</p>	<p>Manage the responsibilities associated with the contract:</p> <ul style="list-style-type: none"> • Click Add Responsibility to add a contract responsibility. • Click - to remove a contract responsibility. • Click in the Name field to activate the list, and update the contract responsibility by assigning it to another user. <p>Tip: The eSignature Role field is used to indicate the user's authority in signing a contract. If the field is blank, the user does not have the authority, but if Sign appears in the field, the user can sign a contract and is automatically added as a signatory when the eSignature Package Wizard is run without a template.</p>
<p>Responsibility fields display</p>	<p>To customize the fields that display for a user, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Save button</p>	<p>Click to return to the Contract Profile to active mode.</p>

Locating a Contract Profile

A contract can be located from the All Contracts browse screen, the Company Profile, the Recently Viewed Contracts portlet, the My Contracts portlet, or by running an Elastic (or Classic) search.

There are four ways to locate a Contract Profile in Conga Contracts:

- Search for the profile using the Elastic (or Classic) Search
- Search for the profile in the Recently Viewed Contracts or My Contracts portlet in your Dashboard
- Search for the profile in the All Contracts browse screen
- Search for the profile in the Company Profile

You can locate a group of Contract Profiles that share a characteristic using an Elastic Search or Classic Search or from the All Contracts browse screen.

Elastic (or Classic) Search Locating a Company Profile

Depending on the version of search you are using, you can quickly locate a Contract Profile using the contract number or a keyword/phrase that is stored in the Profile.

1. Select Contract in the elastic search list in the Navigation Toolbar. This list does not display if you are running a classic search.
2. Enter all or part of the contract number, or other identifier, in the Search field, and press the ENTER key on your keyboard.
3. Enter a leading asterisk (*) if the search criteria is NOT the leading characters in the contract number, or other identifier.
4. When the screen refreshes:
 - The All Contracts screen displays for an Elastic Search and lists the contracts that match your search criteria.
 - Click on a contract record to display its Contract Profile with captured data and links to related information.
 - A screen displays with both Company Search and Contract Search sections for a Classic Search.
 - Click on a contract record to display its Contract Profile with captured data and links to related information.

Recently Viewed Contracts and My Contracts Portlets

You can quickly revisit the Contract Profiles that you recently viewed from the Recently Viewed Contracts portlet in your Dashboard. From the My Contracts portlet, you can quickly access the contracts where you are identified as a responsible person.

1. From the Recently Viewed Contracts or the My Contracts portlet, locate the contract by scrolling through the list.
2. Click on the contract record to display its Contract Profile with captured data and links to related information.

All Contracts Screen

The All Contracts browse screen displays a list of all the Contract Profiles that are stored in your database, along with summary data for each Profile.

1. Click on Contracts in the Navigation Toolbar, and select the Browse Contracts link.
2. In the All Contracts screen, enter the contract number, or other identifier, in the Search field, and press the ENTER key on your keyboard. To search specific fields in the Contract Profile, click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search.

3. Click on a contract record to display its Contract Profile with captured data and links to related information.

Company Profile

The contracts for a company are stored as Contract Profiles in the Company Profile. A list of a company's contracts can be viewed from the Company Profile, and individual Contract Profiles can be accessed from the Company Profile.

1. Open the Company Profile.
2. Click the Contracts link if the Contracts screen is not automatically displayed.
3. In the Contracts screen, locate the contract in the list.
4. Click on the record to display its Contract Profile with captured data and links to related information.

Opening a Contract Profile

The Contract Profile provides basic information on a contract, and the Profile contains links to the several program features available for contracts, as well as a Profile Toolbar that allows you to perform contract-related tasks.

A Contract Profile can be opened in the following ways:

- Select Contract in the elastic search list in the Navigation Toolbar. Type the company name associated with the contract in the Search field, and press the ENTER key on your keyboard. In the All Contracts screen, locate the contract record link, and click on it.
- For a Classic Search, type the contract number, or other identifier, in the Search field, and press the ENTER key on your keyboard. In the Contract Search section of the Results screen, click the contract record link.
- In the Recently Viewed Contracts portlet in the Dashboard, locate the contract in the list, and click on it.
- Click Contracts in the Navigation Toolbar, and click the Browse Contracts link in the menu. In the All Contracts browse screen, locate the contract in the list by scrolling or using the Search option. Click the contract record link.
- Open a Company Profile and click the Contracts link. In the Contracts screen, locate the contract in the list, and click on it.

Searching the All Contracts Browse Screen

The Search option in the All Contracts browse screen can be used to search for a specific contract or several contracts that share a common characteristic.

Important: The browse screen can also be used to sort contracts by status by making one or more selections in the Contract Status multi-select list. The Export to Excel option allows the contents of the browse screen to be exported to a spreadsheet.

1. Click on Contracts in the Navigation Toolbar, and select the Browse Contracts link.
2. In the All Contracts screen, click Search to display a list of the searchable fields, and select the check boxes for the fields you want to search.
3. Enter the contract number, or other identifier, in the Search field, and press the ENTER key on your keyboard.
 - Use leading and trailing asterisks (*) if you do not know the leading characters of the contract number. If a contract number contains the number 127, you could enter *127* in the Search field.
 - To locate only documents that are attachments to a contract, select the Agreement Type check box in the Searchable Fields list, enter "Attachment" in the Search field, and press ENTER.

Customizing the All Contracts Browse Screen

The contract data that displays in your All Contracts browse screen can be customized to meet your needs.

1. Click on Contracts in the Navigation Toolbar, and select the Browse Contracts link.
2. In the All Contracts screen:
 - Sort the data in a column by clicking (toggling) on a column heading.
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
3. Click the Conga Contracts (or other logo) in the top left corner of the screen to return to the Dashboard.

Contract Links

The Contract Profile contains basic and supplemental information for a contract, as well as links to links to the following program screens where you can perform tasks using these features: Contract Family, Documents, Events, Messaging, Tasks, Document Packages, Payments, People, Addresses, Products, Scorecards, Projects, Additional Forms, and History.

Contract Links Overview

The Contract Profile contains system fields that store basic information for a contract, as well as additional fields that your Administrators can add to capture contract information that is required by your organization. The Contract Profile also contains a Links section that quickly link you to the program screens that store additional information for the contract:

- [Contract Family](#)
- [Documents](#)
- [Clauses](#) (displays only for [Clause ID & Management](#) feature)
- [Events](#)
- [Messaging](#)
- [Tasks](#)
- [Document Packages](#)
- [Payments](#)
- [People](#)
- [Addresses](#)
- [Products](#)
- [Scorecards](#)
- [Projects](#)
- [Additional Forms](#)
- [History](#)

To manage the links that display in the Links section of the Contract Profile, click the gear icon to launch the Configure Links prompt, and clear the check boxes for the links you do not want displayed. The Contract Family and the Additional Forms links cannot be removed.

Contract Family Link

The Contract Family link in the Contract Profile displays the Contract Family browse screen showing the hierarchical relationship between the active contract and other contract agreements. The link is appended by a number, indicating the number of contracts in the contract's family.

To access the browse screen, open a Contract Profile, and scroll down to the Links section of the screen.

Contract Family link	Click to display the Contract Family browse screen.
Contract Family hierarchy	<p>Review the hierarchical relationships between root (top-level) documents like Master or Individual contracts to incorporated (lower-level) documents like Schedules, Service Agreements, Exhibits, and Amendments.</p> <ul style="list-style-type: none"> • Link to any of the contracts in the family by clicking on their contract record. The active contract is displayed in dark red text. • The default setting is to display all contracts, but clicking - collapses the view to display only the top-level (root) contracts.
Status multi-select list	Make one or more selections in the list to filter contracts by status.
Agreement multi-select list	Make one or more selections in the list to filter contracts by agreement type.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the the green checkmark icon displays, you are successfully moving the column.

Documents Link - Contracts Profile

The Documents link in a Contract Profile is used to display a Documents browse screen, which provides links to the documents associated with the contract. The link is appended by a number, indicating the number of documents stored for the contract.

To access the Documents screen, open a Contract Profile, and scroll down to the Links section of the screen.

Documents link	Click to display the Documents browse screen.
Document records	<p>Review the documents that have been uploaded to the Contract Profile.</p> <ul style="list-style-type: none"> • Click on a document record to display its Document Profile. • From the profile, you can edit the document's information, directly edit a MS Word document in Conga Contracts, download the document, upload a revision, compare revisions, move the document to another profile, or delete the document.
Revision Number	<p>Identify the number of times the document has been revised.</p> <ul style="list-style-type: none"> • To review or download earlier versions of the document, click on the document record to display the Document Profile screen, and scroll down to the Revisions section of the screen.
Download icon	Click the download icon to view or download a copy of a document.
Search option	<ul style="list-style-type: none"> • Enter the first few letters, values, or characters of your search criteria in the Search field, and click the magnifying glass. • Precede your search criteria with a leading asterisk (*) if you are not sure you have entered the first few letters, values, or characters. • (Optional) Click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Click x to clear the filter.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.

Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
New Document button	Click to display a screen that allows you to add a new contract document.
Multi-Print button	Click to select multiple documents for printing.

Clauses Link (Optional)

The Clauses link in a Contract Profile is used to display the Clauses browse screen, which displays a list of the clauses that were automatically processed by Conga Contracts when a document was uploaded to the Profile, as well as those that were manually processed by users during Document Clause Processing. The link is appended by a number, indicating the number of clauses that have been processed.

To access the Clauses screen, open a Contract Profile, and scroll down to the Links section of the screen.

Clauses link	Click to display the Clauses browse screen.
Clause records	View the clauses that were trained during automatic and manual document processing.
Standard column	<p>Locate the clauses with an entry of:</p> <ul style="list-style-type: none"> • "Y" to identify the clauses that contain your company's standard contract language. • "N" to identify clauses that have been modified, and therefore, no longer conform to your company's standard contract language.

<p>History icon</p>	<ul style="list-style-type: none"> • Click the history icon for a clause with a "N" in the Standard column to display its Clause Type window. • Identify the changes that have been made to the clause language. Additions are displayed with a green background, and deletions are displayed with a pink background and text with a strikethrough effect.
<p>Created By column</p>	<p>Identify the clauses with an entry of:</p> <ul style="list-style-type: none"> • SYSTEM, ACCOUNT to identify the clauses that were automatically processed by Conga Contracts. • [USER LOGIN NAME] to identify the clauses that were manually processed by a user.
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Reorder and Resize Columns (linked browse screens)</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Events Link - Contract Profile

The Events link in a Contract Profile is used to display the Events browse screen, which contains a list of all the events for the contract. The link is appended by a number, indicating the number of events created for the contract.

To access the Events browse screen, open a Contract Profile, and scroll down to the Links section of the screen.

The events for which you have some measure of responsibility can be viewed from your Tools menu or the Upcoming Events portlet in your Dashboard.

Events link	Click to display the Events browse screen.
Event record	<p>Review the events that have been scheduled for the contract.</p> <ul style="list-style-type: none"> • Click on an event record to display its Event Profile with additional information for the event. • From the profile, you can edit information for the event, complete the event, or delete it. If the event is part of a series, you can close the event series from the Event Profile, as well as view the completion history for the series.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.

<p>Reorder and Resize Columns (linked browse screens)</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
<p>New Event button</p>	<p>Click to create a contract event.</p> <p>When a user is designated as an event owner or identified as a person to be notified about the event, Conga Contracts automatically sends periodic email messages to all interested parties regarding the upcoming event.</p>

Messaging Link - Contract Profile

The Messaging link in a Contract Profile is used to display a Messaging window, which stores all the messages that have been sent from the Profile, as well as responses to the messages. The link is appended by a number, indicating the number of messages stored in the profile.

To access the Messaging window, open a Contract Profile, and scroll down to the Links section of the screen.

You can view all the recent messages you have received (or been copied on) from your Recent Messages portlet in the Dashboard.

<p>Messaging link</p>	<p>Click to display the Messaging window.</p>
<p>Message records</p>	<p>Locate the message you want to view or reply to, and click on it to display the body of the message at the bottom of the window. The most recent message is displayed at the top of the screen, and the Content column provides an at-a-glance view of the message. Use the + and - icons to expand/collapse the hierarchy of message threads.</p>
<p>Message body</p>	<p>View the content of the message, including any threads.</p>

Reply button	Click to send a reply to the person who sent the displayed email message.
Reply All button	Click to send a reply to the person who sent the email message, along with those who have been copied on the message.
Delete Thread button	Click to delete the displayed message and its threads.
New Thread button	Click to send a new email message.
Close icon	Click x to close the Messaging window.

Tasks Link - Contract Profile

The Tasks link in a Contract Profile is used to display the Tasks browse screen, which stores all the tasks that have been assigned for contract. The link is appended by a number, indicating the number of tasks contained in the profile.

To access the Tasks browse screen, open a Contract Profile, and scroll down to the Links section of the screen.

The tasks for which you have some measure of responsibility can be viewed from the Upcoming Tasks portlet in your Dashboard.

Tasks link	Click to display the Tasks browse screen.
Task records	Review the incomplete tasks for the contract. If any task has not been completed and is past due, it is displayed in red text.
Task List records	Review any incomplete task lists for the contract. A task with no Start Date or Due Date is an incomplete task in a Task List. Often, tasks in a list are numbered to identify correct sequencing.
Complete Task icon	Click the the green checkmark to complete a task or a task in a list. <ul style="list-style-type: none"> In the Task Completion prompt, provide notes on completing the task, and click Submit.

<p>Calendar icon</p>	<p>To reschedule a task:</p> <ul style="list-style-type: none"> • Click in the Start Date or Due Date field to activate it. • Click the calendar icon to display a pop-up calendar and select a new date.
<p>Add Task option</p>	<p>To add a task:</p> <ul style="list-style-type: none"> • Populate the Task Subject, Due Date, and Task Owner fields. • Click the Add Task button. • (Optional) Click the calendar icon to display a pop-up calendar and change the default (today's date) in the Start Date field. • Once you add a task, the only fields that you cannot edit are the Task Created By and Task Created On fields.
<p>Add Task List button</p>	<p>Click to create a task list Creating a Task List using the Add Task List prompt.</p>
<p>Show Completed button</p>	<p>Click to view both active and completed tasks.</p>
<p>Completed task records</p>	<p>View the completed tasks, which are displayed in strikethrough text and contain Closure Notes provided by the individual who completed the task.</p>
<p>Reopen icon</p>	<p>Click the icon of a checkmark and a clock to reopen a completed task. The icon is present if you have the authority to reopen a task (you are the task owner or you created the task).</p>
<p>Hide Completed button</p>	<p>Click to return to the default view (hide completed tasks).</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>

Column Display option	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize options	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Document Packages Link

The Document Packages link in a Contract Profile is used to display the Document Packages browse screen, which stores the document packages that have been created for the contract, either during negotiation or in enforcing the contract. A document package is comprised of one or more documents that are shared and edited by a group of users for the purpose of performing a contract-related task.

Document packages are added to a Contract Profile using the Document Package Wizard. To run the wizard, click the Wizard Tools button in the toolbar and select Document Package Wizard in the menu. Before running the wizard, upload all the needed documents for the package using the Documents link.

To access the Document Packages browse screen, open a Contract Profile, and scroll to the Links section of the screen. The document packages for which you have some measure of responsibility can be viewed from the Document Packages portlet in your Dashboard.

Document Packages link	Click to display the Document Packages browse screen.
Document Package records	View the current (active) document packages for the contract.

<p>Document Package tabs</p>	<p>In the Current (default) view, review the open document packages for which you are a member. You can also select one of the other views:</p> <ul style="list-style-type: none"> • Checked Out - review documents that have been checked out for review or edit. • Submitted - review documents submitted for electronic signature and the people required to sign the documents. • Completed - review completed document packages for which you are a member • All Packages - review all incomplete document packages. • All Completed - review all document packages that have been completed.
<p>Search option</p>	<ul style="list-style-type: none"> • Enter the first few letters, values, or characters of your search criteria in the Search field, and click the magnifying glass. • Precede your search criteria with a leading asterisk (*) if you are not sure you have entered the first few letters, values, or characters. • (Optional) Click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Click x to clear the filter.

<p>Document Package icons</p>	<p>Review the following icons, which are used to perform tasks related to the entire document package:</p> <ul style="list-style-type: none"> • User Settings - click to manage the user settings for the document package, including notifications when documents are checked in and out of the package. • User Admin - click to add and delete members of the document package, as well as modify their permissions. • Document Package Profile - click to jump to the Document Package Profile screen. • Complete Document Package - click to complete the document package after the contract has been finalized. • Conga Contracts moves the document package to the Completed view. • Delete - click to delete the document package. • Submit for Electronic Signature - click to initiate the eSignature process using DocuSign or Adobe Sign. • Review Envelope icon - click to review a document package that has been submitted for electronic signature. • Go To icon - click to jump to the Contract Profile.
<p>Document icons</p>	<p>Review the following icons, which are used to perform tasks for individual documents in the document package:</p> <ul style="list-style-type: none"> • Check Out Document - click to check out a document from the document package. While the document is checked out, no other member of the Document package can edit the document. • Check In Document - click to check a document back in to the document package. • Lock Document - click to lock the document so that no other edits can be made. • Unlock Document - click to unlock a document so that the document can be edited. • Revision History - click to display a screen showing a history of the revisions to the document. • Download Document - click to download a read-only copy of the document. • Delete - click to delete the document.
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>

<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Reorder and Resize options</p>	<ul style="list-style-type: none"> • To resize a column, mouse over the right or left border of the header until the resize icon appears. Then, click on the border and drag it until the column is the desired width. • To move a column to a different location in the browse screen, click on the column header and then drag it to the left or right, and drop it in the desired location. If you are successfully moving a column of data, the green checkmark icon displays during the move.

Payments Link

The Payments link in a Contract Profile is used to display a Payments browse screen, which records all the payments that have been made or received for the contract. The link is appended by a number, indicating the number of payment records stored in the profile.

To access the Payments browse screen, open a Contract Profile, and scroll to the Links section of the screen.

<p>Payments link</p>	<p>Click to display the Payments browse screen.</p>
<p>Payment records</p>	<p>Review the payment records in the payment stream. Tip: Use the - and + icons in the Payment Stream header to collapse and expand the payment stream.</p>
<p>Edit icon</p>	<p>Click the pencil icon to edit the payment stream.</p>
<p>Delete icon</p>	<p>Click - to delete the payment stream.</p> <ul style="list-style-type: none"> • To delete a payment record in the stream, click the pencil icon to display the stream in edit mode, and then click the payment record's - icon.

Payment Forecasting icon	Click the calculator icon to create or edit a payment forecast.
Add Stream button	Click to add a new payment stream for the contract.
View Forecast button	Click to review any existing payment forecasts.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column display	To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize options	<ul style="list-style-type: none"> • To resize a column, mouse over the right or left border of the header until the resize icon appears. Then, click on the border and drag it until the column is the desired width. • To move a column to a different location in the browse screen, click on the column header and then drag it to the left or right, and drop it in the desired location. If you are successfully moving a column of data, the green checkmark icon displays during the move.

People Link - Create Profile

The People link in the Contract Profile is used to display the People browse screen, which stores contact information all the people associated with the contract. The link is appended by a number, indicating the number of people who have been added to the profile.

To access the People browse screen, open a Contract Profile, and scroll to the Links section of the screen.

People link	Click to display the People browse screen.
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<p>Person records</p>	<p>Review the people who have some measure of responsibility for the contract.</p> <ul style="list-style-type: none"> • Link to a person in the list by clicking on their record to display their Person Profile. • From the profile, you can view a history of the changes made to the person's profile. You cannot add, edit, or delete a company person from the Contract Profile. These tasks can only be accomplished from the People link in a Company Profile.
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the column move icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the the green checkmark icon displays, you are successfully moving the column

Addresses Link

The Addresses link in a Contract Profile is used to display the Addresses browse screen, which stores the addresses associated with the contract. The link is appended by a number, indicating the number of contract address stored in the profile.

To access the Addresses browse screen, open a Contract Profile, and scroll down to the Links section of the screen.

<p>Addresses link</p>	<p>Click to display the Addresses browse screen.</p>
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Address records	Review the information for each contract address.
History icon	Allows you to view a history of the changes made to the contract address.
Copy to Clipboard icon	Displays the Copy to clipboard prompt that allows you to copy the contract address to another program or application.
Copy to Clipboard prompt	<p>To copy a stored contract address:</p> <ul style="list-style-type: none"> • Simultaneously hold down the Ctrl and C keys on your keyboard to copy the highlighted address. • To copy only a portion of the address, click anywhere inside the window to remove the highlighting, and then use your mouse to highlight the line item(s) you want to copy. • Position your cursor at the appropriate location in the program or application, and simultaneously hold down the Ctrl and V keys.
Column display	To customize the information in a browse screen, hover over a column heading until the displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the icon displays, you are successfully moving the column
Edit Addresses button	Click to edit any of the addresses for a contract.

In edit mode, the contract Addresses screen provides additional functionality.

Show (Hide) Company Locations toggle button	Click Show Company Locations to display the Company Locations section of the screen listing the company's locations.
Add icon	Adds an address to automatically add an existing company location to the contract.
New Company Location button	Click to add a new company location to the contract profile.
History icon	To view a history of the changes made to the company location.
Delete icon	Delete a contract address.
Save button	Click to save your changes.

Products Link

The Products link in a Contract Profile is used to display a Products browse screen, which stores information on any products that are covered by a contract. The link is appended by a number, indicating the number of product records stored in the profile.

To access the Products browse screen, open a Contract Profile, and scroll to the Links section of the screen.

Products link	Click to display the Products browse screen.
Product records	<p>Review the products that have been added to Contract Profile.</p> <ul style="list-style-type: none"> • Link to a Product Profile screen with additional information for a product by clicking on its product record. • From the Profile, you can edit the product's information or delete the product.

Column display	To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
New Product button	Click to add a product to the product grid.
Edit Product Grid button	Click to display a screen that allows you manage the products stored in the Product Grid. The Product Grid allows you to edit (or delete) more than one product from a single location. The grid is a convenient alternative to editing or deleting products individually from their Product Profiles.

Scorecards Link - Contract Profile

The Scorecards link in a Contract Profile is used to display a Scorecards browse screen, which stores all of the pending and completed scorecards for the contract. The current contract rating is displayed numerically in the Contract Profile header in a color-coded score box.

The Scorecards link in a Contract Profile is used to display a Scorecards browse screen, which stores all the pending and completed scorecards for the contract. The link is appended by a number, indicating the number of scorecards that have been added to the profile.

The current contract rating is displayed numerically in the Contract Profile header in a color-coded score box.. This value is calculated by Conga Contracts and reflects the average value of all the scorecards completed for the contract.

Score boxes are color-coded depending on the rating: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.

To access the Scorecards browse screen, open a Contract Profile, and scroll to the Links section of the screen.

Scorecards link	Click to display the Scorecards browse screen.
Scorecard records	<p>Review the list of scorecards completed for the contract, along with the members who were selected to complete each scorecard.</p> <ul style="list-style-type: none"> • Click on a scorecard record to display its Profile. • From the profile, you can complete a scorecard, edit a scorecard you have completed and submitted, add a member so that another person is required to complete the scorecard, change its availability date, archive a scorecard, or a delete scorecard you have completed.
Score field	<p>Identify the averaged score for the scorecard, which is calculated by adding all the scorecard totals and dividing the grand total by the number of people who completed the scorecard.</p> <p>Tip: If only one person completes a scorecard, that person's score appears in the field. If a scorecard has no value in the Score field, none of the people assigned to the scorecard have completed it.</p>
Ratings box	<p>View the current scorecard rating for the contract, company, or project.</p> <p>The ratings box is color-coded based on the rating: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.</p>

Column display	To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Add Scorecard button	Click to add a scorecard to the Contract Profile.

Projects Link - Contract Profile

The Projects link in a Contract Profile is used to display a Projects screen, which stores all of the projects associated with the contract. The link is appended by a number, indicating the number of projects linked to the profile. Projects are added to a Contract Profile when a user creates a project and adds the Contract Profile to the project.

To access the Projects screen, open a Contract Profile, and scroll to the Links section of the screen.

Projects link	Click to display the Projects browse screen.
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<p>Project records</p>	<p>Review the projects that are using the Contract Profile.</p> <ul style="list-style-type: none"> • Click on a project record to display its Project Profile. • From the Project Profile, you can add a project, run the Project Team Wizard, copy a project, edit project information, view a history of changes made to the project, delete a project, and manage the project's documents, additional forms, tasks, scorecards, flows, workflows, and send messages from the Profile.
<p>Search option</p>	<ul style="list-style-type: none"> • Enter the first few letters, values, or characters of your search criteria in the Search field, and click the magnifying glass. • Precede your search criteria with a leading asterisk (*) if you are not sure you have entered the first few letters, values, or characters. • (Optional) Click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Click x to clear the filter.
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Additional Forms Link - Contract Profile

The Additional Forms link in a Contract Profile is used to display the Additional Forms browse screen, which lists the forms that can be added to the Profile so that supplemental information can be captured for the contract. The screen also displays a Forms Captured column, which indicates the number of times the form has been added to the Profile.

To access the Additional Forms browse screen, open a Contract Profile, and scroll down to the Links section of the screen.

<p>Additional Forms link</p>	<p>Click to display the Additional Forms browse screen.</p> <ul style="list-style-type: none"> • Optional forms display with a white background and required forms display with a pink background. <p>If the information for a required additional form has not been captured, the Additional Forms browse screen automatically displays every time the Contract Profile is opened. In addition, a Missing Required Additional Forms heading appears at the top of the screen.</p>
<p>Additional Form record</p>	<ul style="list-style-type: none"> • Review the list of additional forms that have been (and/or need to be) captured for the Profile. • Click on a form record that has been captured to display a browse screen showing each occurrence of the additional form added to the Profile. • Click on an occurrence of the additional form to display its Profile.
<p>Forms Captured field</p>	<p>Identify the number of times a form has been captured, or added, to the Profile.</p> <p>A required form must be captured at least once. Capturing a form more than once is useful if information, such as contract milestones, need to be tracked.</p>
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>

Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

History Link - Contract Profile

The History link in the Contract Profile is used to display the History browse screen, which records all of the updates that have been made to the Profile. The browse screen has two additional views: Work Log History and True-Up History. The Work Log browse screen displays all the activities users have performed in the Contract Profile and the True-Up History screen records the date/time of each true-up session, along with the program fields that have been updated in accordance with the final contract stored in the Contract Profile. The History link is appended by a number, indicating the number of history records stored in the Profile.

To access the History browse screen, open a Contract Profile, and scroll down to the Links section of the screen.

History Screen

History link	Click to display the History browse screen.
History records	<p>Review the changes that have been made to the Contract Profile.</p> <p>A change has been made to a field if the Original Value column is populated. The new value for the field is displayed in the corresponding Updated Value column.</p>

Column display	To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Work Log History View

Work Log History tab	Click to view the Work Log History view of the History browse screen.
Work Log Activity records	Review the activities that users have performed in the Contract Profile.
Work Log Activity links	Click on any workflow, document, task, or document package link to be directed to the appropriate screen if you need additional information.

<p>Log Level multi-select list</p>	<p>The default view is all Work Log History records, but you can refine the view by clicking on a selected item to remove it from the list:</p> <ul style="list-style-type: none"> • Viewed record - all users who have viewed the Contract Profile. • Created record - all events, additional forms, and workflows that users add to the profile, as well as the messages they send from the profile. • Edited record - all fields that users update in the Contract Profile, along with the edits they make to documents and additional forms, as well as events and workflows (editing, completing, closing). • Downloaded record - all documents that users download to the profile. • Completed workflow - all workflows that users complete from the profile. • Started Workflow Step - all workflow steps that users initiate from the profile. • Completed Workflow Step - all workflows steps that users complete from the profile. • Completed Tasks - all tasks that users complete from the profile Document Package. • Signatures Complete - all document packages that were submitted for electronic signature Document Package. • Signed - all document packages that users complete (close).
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True-Up History View

<p>True-Up History tab</p>	<p>Click to view the True-Up History view of the History browse screen.</p>
<p>True-Up session</p>	<p>Identify a session, which consists of a Completed True-Up session record, followed by a Started True-Up session record further down in the list, and all the field update records that fall in between.</p>
<p>Original Value field</p>	<p>Identify the original value for a field, which was stored in the Contract (or Company) Profile screen or an additional form.</p>

Updated Value field	Identify the updated value for a field, which was automatically changed in the Contract (or Company) Profile screen or additional form during the true-up process.
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My Contracts

The My Contracts browse screen displays a list of all the contracts for which you have been assigned a responsibility. The responsibility is stored, and can be viewed, in the Contract Profile screen.

The contracts for which you have been assigned a responsibility are also listed in the My Contracts portlet in your Home page.

Navigation Toolbar	Click Home to display the menu, and then click the My Contracts link.
Contract records	View a summary of the information for your contracts. <ul style="list-style-type: none"> To display additional information for a contract, click on the contract record to display its Contract Profile where you can perform tasks and link to other program features.
Contract Status list	Make a selection in the list to filter your contracts by status. The default is all contract statuses.
Search list	Hover over the Search label until it turns blue Search, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.
Search field	Locate a specific contract by typing the first few letters of the company name in the Search field, and clicking the magnifying glass. <ul style="list-style-type: none"> To clear the filter, click x. You can also search for a contract using any of the other fields in the Search list.

Contract records display	<p>Manage the display of information in the screen:</p> <ul style="list-style-type: none"> • Update the columns that display using the Sort/Column menu. • Reorder and resize the columns to manage the display of information in the browse screen. • Sort the data in a column by clicking (toggling) on a column heading.
Document icon	<p>Click the document icon to display a list of the documents associated with the contract.</p> <ul style="list-style-type: none"> • To open the document in its default format or download the document, click on a document in the list to display an Open window and follow the onscreen prompts.
Export to Excel button	<p>Click to export all the data in the browse screen to an Excel spreadsheet.</p>

Contract People

The people added to a Company Profile are available to be associated with any of the company’s contracts via the People link in the Contract Profile. A person is automatically associated with a contract whenever that person is assigned a responsibility in the Contract Profile screen.

Contract People Overview

A contact person is automatically added to the People browse screen in the Contract Profile whenever that person is assigned to a responsibility for the contract, which is accomplished from the Responsibilities section of the Profile that displays when it is in edit mode. However, the list of available people for a contract responsibility is limited to the people in the Address Book who have been assigned that responsibility (function).

Conversely, the people who are the points of contact (POCs) for a company must be manually added to the Company Profile by creating a Person Profile from the People browse screen, which is accessed by selecting the People link in the Links section of the Profile.

You can perform the following tasks for the people associated with a contract:

- [Identify the people assigned to a responsibility for a contract](#)
- [Review the Profile for a person assigned to a contract responsibility](#)
- [Add a responsible person to a contract](#)
- [Reassign a contract responsibility](#)
- [Delete a contract responsibility](#)
- [Review a history of changes made to the Profile for a person assigned a contract responsibility](#)

People Browse Screen - Contract

The people who have some measure of responsibility for a contract are added by assigning them a responsibility in the Contract Profile. A list of these responsible people is stored in the People browse screen in the Profile.

To access the browse screen, open a Contract Profile.

People link	Click the link to display the People browse screen.
Contact responsibility record	Click on a responsible person's record to display their Person Profile with additional information. <ul style="list-style-type: none"> • From the Profile, you can review a history of the changes made to their information.
Sort options	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column Display option	To customize the information in a browse screen, hover over a column heading until the move column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Columns	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Person Profile - Contract Responsibility

The Person Profile holds all the contact information for a person assigned to a responsibility for a contract, along with the functions they can perform in Conga Contracts. From the Contract Profile, you can only view the information for program users and company contacts, but you can both view and edit the information for external people. From the Company Profile you can view company contacts, edit their information, and delete them.

Open the Person Profile from the Person browse screen in your Tools menu, or the People browse screen in a Contract Profile.

Data fields	Review the information captured for the user or external person, including their physical address, email address, contact numbers, and the function(s) they hold in Conga Contracts.
Edit Person button	Click to edit the external person's information. The button will not be present for a program user.
View History button	Click review a history of the changes made to the user's or external person's information.
Browse People button	Click to return to the People (or Person) browse screen.

Adding a Responsible Person to a Contract

A contract usually requires people to negotiate its terms prior to signing, as well as those who decide whether or not to renew the contract prior to its expiration date. The responsibilities associated with a contract can be recorded in its Contract Profile and assigned to any of the people who have been added to the Address Book.

1. Open the Contract Profile for the contract that needs a responsibility to be defined.
2. In the Contract Profile screen, click Edit Contract in the toolbar.
3. In the Responsibilities section of the screen, click Add Responsibility in the toolbar.
4. In the menu, click on a responsibility.
5. When a blank responsibility record displays:
 - Click in the Name field and begin typing the first or last name of the person you want to assign to the responsibility to display a list of possible matches.

- Click on the correct person to select them and populate the field, as well as the Email Address field and other fields in the responsibility record. If the person's name does not display in the possible match list, click in the Name field and then click the arrow icon to display a list of those who are qualified to perform the contract responsibility.
6. Click Save in the toolbar of the Contract Profile screen.

Reassigning a Contract Responsibility

A contract responsibility can be reassigned to another person if they are unable to take on the responsibility or if someone else is more suited to the task.

1. Open the Contract Profile for a contract with a responsibility that needs to be reassigned.
2. In the Contract Profile screen, click Edit Contract in the toolbar.
3. In the Responsibilities section of the screen, locate the contract responsibility you want to reassign.
4. Click in the Name field of the responsibility record to display a list of qualified users, company contacts, and external people.
5. Click on a person's name to reassign the responsibility to them.
6. Click Save in the toolbar of the Contract Profile screen.

Deleting a Contract Responsibility

A contract responsibility can be deleted if the obligation for the contract needs to be removed, rather than reassigned. When the responsibility is removed, the person assigned to the responsibility is removed from the Persons screen in the Contract Profile.

1. Open the Contract Profile for a contract with a responsibility that needs to be deleted.
2. In the Contract Profile screen, click Edit Contract in the toolbar.
3. In the Responsibilities section of the screen, locate the contract responsibility you want to delete, and click its - icon.
4. In the Remove Person confirmation prompt, click Yes.
5. Click Save in the toolbar of the Contract Profile screen.

Reviewing a Responsible Contract Person's History

The Person Profile records and stores all changes to the person's information, which can be helpful in assigning them to a contract responsibility.

1. Open the Contract Profile that has a contract responsibility assigned to a person whose history you want to review.
2. In the Contract Profile, click the People link in the Links section of the screen.
3. In the People screen, locate the person whose history you want to review, and click on their name to select them.
4. In the Person Profile screen, click View History in the toolbar.
5. In the History screen, review the changes that have been made to the person's information.

A change has been made if there is information in the Updated Value column for a field. The original information for the field is displayed in the corresponding Original Value column. If the Original Value field is blank, the information in the Updated Value field was provided after the Profile was initially created.

Contract Addresses

The Addresses feature in the Contract Profile is linked to the Locations feature in the Company Profile, and allows addresses to be added to contracts using a company's existing locations.

Contract Addresses Overview

The Addresses link in a Contract Profile provides access to the locations that have been added to its Company Profile. From the Addresses screen in a Contract Profile, any company location can be designated as the address to be used for the contract, including the primary location captured in the Address Information section of the Company Profile, or any additional location added from the Locations screen. When the correct contract address is not listed as one of the company locations, it must first be added as a new company location and then designated as the address for the contract. A new company location can be added from both the Company Profile and the Contract Profile, but when it is added from the Contract Profile, it is not added as a new location in the Company Profile.

The following tasks can be performed for contract addresses:

- [View addresses associated with a contract](#)
- [Add a contract address using a company location](#)
- [Add a new company address for a contract](#)
- [Edit a contract address](#)
- [Copy a contract address](#)

- [Review the history of a contract address](#)
- [Delete a contract address](#)

Addresses Screen

A list of company locations can be accessed from the Contract Profile via the Addresses link. Any company location can be identified as an address for the contract, or a new company location can be added from the Contract Profile and then identified as a contract address.

The Addresses browse screen is used to access the existing company locations , which that can be associated with the Addresses link. Any company location can be identified as an address for the contract, or a new company location can be added from the Contract Profile and then identified as a contract address.

To access the Addresses screen, open a Contract Profile.

Addresses link	Click to display the Addresses browse screen.
Address records	Review the types of address records associated with contract. Tip: If the Address Type is Primary Address, the contract address is the same as the company address that was captured in the Address Information section of the Company Profile.
History icon	Click the clock icon to view a history of the changes made to the address in its Location Profile.
Copy icon	Click the copy icon to copy the address block so that it can be pasted into another application, window, or screen.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column Display option	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field. The Actions field must be selected or the History and the Copy icons will not display.

<p>Reorder and Resize Column options</p>	<ul style="list-style-type: none"> • To resize a column, mouse over the right or left border of the header until the resize icon appears. Then, click on the border and drag it until the column is the desired width. • To move a column to a different location in the browse screen, click on the column header and then drag it to the left or right, and drop it in the desired location. If you are successfully moving a column of data, the green checkmark icon displays during the move.
<p>Edit Addresses button</p>	<p>Click to display the browse screen in edit mode where you can:</p> <ul style="list-style-type: none"> • Add an existing address to a contract • Add a new contract address • Edit a contract address • Delete a contract address

Adding a Contract Address Using a Company Location

Users with the appropriate permissions can associate a company location with a contract address to identify the physical or mailing address of the responsible party. If none of the existing company locations reflects the correct address for the contract party, a new company location must be added, and then associated with the contract.

1. Open the Contract Profile for the contract that needs a company location added an address.
2. In the Links section of the Contract Profile, click the Addresses link.
3. In the Addresses screen, click Edit Addresses in the toolbar.
4. When the screen refreshes, click Show Company Locations in the toolbar.
5. In the Company Locations section of the screen, click + for the company location you want to add as the contract address.
6. When the location record is added to the Contract Addresses section of the screen:
 - Click in the Address Type field to enable it, and select the type of contract address you are adding.
 - (Optional) Add information for the contract address by clicking inside any of the other blank fields, and typing in the data.
 - Add additional fields by hovering over a column heading until the column icon displays, and clicking on it to open the Sort/Column menu. Click Columns to

display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.

- Click Save in the toolbar.

Adding a New Contract Address

If the address you want to add to a contract was not captured as a location in the Company Profile, you can add the location to the Company Profile and then associate the address to the contract in the Contract Profile. Alternatively, you can perform both functions from the Contract Profile by adding the new company location, and then adding the location as the contract address. However, adding a new company location from the Contract Profile will not add the location to the Company Profile.

1. Open the Contract Profile for the contract that needs an address.
2. In the Links section of the Contract Profile, click the Addresses link.
3. In the Addresses screen, click Edit Addresses in the toolbar.
4. When the screen refreshes, click New Company Location in the toolbar.
5. When the screen refreshes:
 - Enter a descriptive name for the location in the Location Name field. If you need help populating a field, mouse-over its ? icon to display a quick tip with helpful information or instructions.
 - (Optional) Make a selection in the Location Type list.
 - (Optional) Populate the physical address fields and make a selection in the Country list.
 - (Optional) Populate the Phone Number and Fax Number fields. In entering a phone number, enter the area code, followed by the phone number, such as 407-555-3770 or (407) 555-3770. To enter an extension, enter an "x" followed by the extension number, such as 407-555-3770 x47. If you incorrectly enter a phone number, the Phone Number Entry window displays to assist you
 - Click Save.
6. When the Addresses screen redisplay, click Edit Addresses in the toolbar.
7. When the screen refreshes, click Show Company Locations in the toolbar.
8. In the Company Locations section of the screen, click the + icon for the company location you just added.
9. When the location record is added to the Contract Addresses section of the screen:
 - Click in the Address Type field to enable it, and select the type of contract address you are adding.
 - (Optional) Add information for the contract address by clicking inside any of the other blank fields, and typing in the data.

- Add additional fields by hovering over a column heading until the column icon displays, and clicking on it to open the Sort/Column menu. Click Columns to display a list of available fields, and click in the check box to the left of a field to add it to the address record.
- Click Save in the toolbar.

Copying a Contract Address Block

An address stored in the Addresses screen in a Contract Profile can be copied from Conga Contracts and pasted into another application, window, or program screen.

1. Open the Contract Profile that contains the address you want to copy.
2. In the Links section of the Contract Profile, click the Addresses link.
3. In the Addresses browse screen, locate the address you want to copy, and click its copy icon.
4. In the Copy to Clipboard prompt:
 - Simultaneously hold down the Ctrl and C keys on your keyboard to copy the highlighted address.
 - To copy only a portion of the address, click anywhere inside the window to remove the highlighting, and then use your mouse to highlight the line item(s) you want to copy.
 - Click x to close the prompt.
5. Open the application, window, or screen where you want to copy the address.
6. Position your cursor at the point where you want to insert the address.
7. Simultaneously hold down the Ctrl and V keys on your keyboard to paste the address in the desired location.

Editing a Contract Address

A user with the appropriate permissions can edit the address fields that are specific to a contract from the Contract Profile, including the Address Type list and any of the Attention To fields. The remaining location information (physical address, contact phone numbers, and location name and type) must be edited from the Company Profile.

1. Open the Contract Profile for the contract whose address needs to be edited.
2. In the Links section of the Contract Profile, click the Addresses link.
3. In the Addresses browse screen, click Edit Addresses in the toolbar.
4. When the screen redisplay in edit mode, locate the address record you want to edit.
5. (Optional) Add a field to capture and store additional information for the contract address.

- Hover over a column heading until the column icon displays, and click it to open the Sort/Column menu. Click Columns to display a list of available fields, and click in the check box to the left of the field to add it to the address record.
6. Click in any of the following fields or lists to update the information:
 - Address Type
 - Location Notes
 - Attention
 - Attention To
 - Attn. to Email
 - Attn. to Fax
 - Attn. to Phone
 7. Click Save.

Reviewing the History of a Contract Address

The History option for each contract address stores all changes made to its Address Type, Location Notes, and any of the Attention To fields.

1. Open the Contract Profile whose address history you want to review.
2. In the Links section of the Contract Profile, click the Addresses link.
3. In the Addresses browse screen, locate the address you want to review, and click its clock icon.
4. In the History screen, review the changes made to the information for the contract address.

A change has been made if there is information in the Updated Value column. The Original Value column displays the original information, or is blank if the field was not populated when the address record was initially added.

Deleting a Contract Address

A user with the appropriate permissions can delete a contract address.

1. Open the Contract Profile for the contract whose address needs to be deleted.
2. In the Links section of the Contract Profile, click the Addresses link.
3. In the Addresses browse screen, click Edit Addresses in the toolbar.
4. When the screen redisplayes in edit mode, locate the address record you want to delete, and click its - icon.
5. In the Remove Location confirmation prompt, click Yes.

If the address you want to delete is not shown in the Contract Addresses section of the screen, it is a company location and must be deleted from the Company Profile.

Contract Wizards

The Wizard Tools menu in the Contract Profile provides access to four contract wizards: Contract Renewal, Contract Assignment, Document Package, and eSignature Package. Four other wizards are available from the Contract Profile: Contract Creation, Workflow, Copy Contract, and Move Document.

Contract Wizards Overview

The Wizard Tools menu in the Contract Profile provides access to four contract wizards: Contract Renewal, Contract Assignment, Document Package, and eSignature Package wizards. Four other wizards are available from the Contract Profile: Contract Creation, Copy Contract, Move Document, and Workflow.

The toolbar in the Contract Profile contains a Wizard Tools button that displays a menu, which provides access to four contract wizards:

- [Contract Renewal wizard](#)
- [Contract Assignment wizard](#)
- [Document Package wizard](#)
- eSignature Package wizard, which is run with a template or without a template

If you have permissions to create a contract, there will also be a Creation Wizard button in the toolbar, which allows you to run the [Contract Creation Wizard](#).

The Contract Profile also employs three other wizards:

- [Copy Contract Wizard](#), which creates a new Contract Profile by making a copy of an existing Contract Profile, and also allows you to select the additional forms that you want to copy to the new Contract Profile.
- [Move Document Wizard](#), which allows you to move documents from one Contract Profile to another Contract (or Company) Profile if you inadvertently uploaded the document to the wrong profile.
- [Workflow Wizard](#), which allows you to create contract workflows and also edit these workflows.

Running the Creation Wizard

The Creation Wizard allows you to create a contract using a template created by one of your program Administrators.

1. From the Contract Profile screen for a root contract or incorporated contract, click Creation Wizard in the toolbar.
2. In the Creation Wizard Selection prompt, select a template in the Template Name list, and click Submit. If you receive a message stating there was an error creating the contract, it is because the template you selected will create a type of contract document for which you do not have permission.
3. In the Contract Creation Wizard, click Next in the Welcome step. If the template you selected does not require you to answer any questions before creating the contract, the Contract Creation Wizard will not display, and the Creation Wizard Finished prompt displays.
4. In the Question screen(s), answer the questions to create a customized contract. Click Next or Finish.
5. In the Creation Wizard Finished prompt:
 - (Optional) Click the click here link to to download a copy of the contract.
 - Click Close.
6. (Optional) Click the Documents link in the Links section of the Contract Profile to displays the Documents screen, and verify the contract has been created.

**Tip:**

The Document Type for the new contract is Contract Template.

Running the Renewal Wizard

The Renewal Wizard steps you through the process of renewing a contract in Conga Contracts. The wizard requires you to enter a new expiration date for the contract, and update the event alert for the new expiration date. The Renewal Wizard can be used to renew both fixed and auto-renewal contracts.

The status of the Contract Profile must be Active to run the Contract Renewal Wizard.

1. Locate the Contract Profile for the contract that needs to be renewed, and open the Profile.
2. In the Contract Profile screen, click Wizard Tools in the toolbar, and select Renew Contract.
3. In the Contract Renewal Wizard, click Next in the Welcome step.
4. In the Updated Current Expiration Date step:
 - Enter the number of months until the next renewal date in the Renewal Interval field.
 - The New Current Exp Date field is automatically populated based on the value you enter in the Renewal Interval field. Edit the expiration date, if needed.

- (Optional) Enter the number of days prior to the end of a contract's current term that your company is required to provide notice of intent to renew or terminate the contract in the Notice Date field.
 - The Notice Period field is automatically populated when a value is entered in the Notice Date field.
 - Click Next.
5. In the Updated Event Information step:
- If there were no event alerts set for the contract's original expiration date, this step will not display.
 - (Optional) Change the number of days prior to the new expiration date that an email notification is sent out in the Warn Days field.
 - Enter the text that you want to appear in the email message of the event alert that is sent out the next time the contract is up for renewal in the Event Closure Notes field.
 - Click Next.
6. In the Contract Renewal Notes step:
- Enter a description of the renewal process for this contract in the Renewal Wizard Notes field.
 - Click Next.
7. In the Contract Renewal Summary step:
- Verify the information for the renewal.
 - Click Finish.

Running the Contract Reassign Wizard

The Contract Reassign Wizard provides an efficient way to transfer a contract from one company to another. When a contract is reassigned, all of its data, including any incorporated contracts, as well as the events, tasks, messages, people, payments, products, and scorecards associated with the contract are also transferred to the new company. Conga Contracts also stores a record of the assignment so that the contract's history can be tracked.

1. Locate the Contract Profile for the contract that needs to be reassigned, and open the Profile.
2. In the Contract Profile screen, click Wizard Tools in the toolbar, and select Assign Contract.
3. In the Contract Reassign Wizard, click Next in the Welcome step.
4. In the Company Selection step:

- Click v in the Company Selection list, locate the company that should be assigned to the contract, and click on it to select it.
 - (Optional) Select the Suppress Assignment History check box to prevent the assignment of the contract from showing up in the History screen for the contract.
 - Click Next.
5. (Optional) In the Contract Selection step, which only displays if the contract you are assigning is an incorporated contract:
- Select the parent contract for the incorporated contract in the Agreement Link list.
 - Click Next.
6. In the Contract Reassign Summary step, review the information for accuracy, and click Finish.

Running the Move Contract Document Wizard

The Move Document Wizard moves documents from one Contract Profile to another Contract Profile, or from a Contract Profile to a Company Profile. This tool is helpful in the event you make an error and upload a document to the wrong profile, or if you upload a document as a new document, rather than a revision to an existing document.

1. Locate the Contract Profile containing the document that needs to be moved, and open the Profile.
2. In the Links section, click the Documents link.
3. In the Documents screen, locate the document you want to move, and click on the document record.
4. In the Document Profile screen, click the three horizontal lines icon in the toolbar, select Advanced in the menu, and then click Move Document.
5. In the Move Document Wizard, click Next in the Welcome step.
6. In the Document Selection step, click inside one radio button:
 - a. Please click here to move only the > current document. This option moves only the document whose profile you opened.
 - b. Please click here to move this document's entire document family. This option moves the document whose profile you opened and all of its revisions.
 - c. Click Next.
7. In the Document Location step, click inside one radio button:
 - a. Company - moves the document to a Company Profile.
 - b. Contract - moves the document to a Contract Profile.
 - c. Document Family - moves the document so that it is now grouped with another document. For example, if you erroneously uploaded a document revision as a new document, selecting this option allows you to move the document so that it

now appears in the hierarchy of the original document in the Documents browse screen.

8. Click Next. The Document Family option displays only if you did not select the document's entire document family option in Step 6.
9. In the Document Target step:
 - a. Click v in the Contract Number list, locate the contract that should house the document, and click on it to select it.
 - b. Click Next.
10. In the Document Move Summary step, review the information for accuracy, and click Finish.

Copy Contract Wizard

The Copy Contract Wizard creates a new Contract Profile by duplicating an existing profile. While the wizard automatically populates the fields in the new Contract Profile screen with the information found in the fields of the existing Profile screen, the wizard allows you to select the additional forms that you want added to the Profile. Any captured forms that you select will be stored in the Additional Forms screen in the new Profile.

Once a copy of the Contract Profile has been generated, and any additional forms have been copied, you can update the information, as needed.

Document Package Wizard

The Document Package Wizard steps you through the process of creating a document package that is used in contract negotiations or other related tasks. The wizard not only identifies the documents that will be stored in the package, but also allows you to select the people who will participate in performing the tasks associated with the documents in the package. Document packages can be stored in Conga Contracts for future reference or deleted when the tasks associated with the package have been completed.

Before running the Document Package Wizard, make sure all the documents needed for the document package have been uploaded to the Contract Profile.

eSignature Package Wizard

The eSignature Package Wizard is run from a Contract Profile after a contract document uploaded to the profile has been finalized, and one or more electronic signatures are needed to produce a legally enforceable document.

You can elect to run the wizard using a Conga Contracts template, or you can run the wizard without a template. Using a template restricts the number of signatories on a contract and also limits the number of individuals who participate in the eSignature process. Running the wizard without a template allows you to have as many signatories as you need, copy as many recipients as you like, and even send acknowledgments to other individuals. In selecting the signatories and recipients of the email message for the electronic signing process, you can use any of the email addresses in your Address Book.

After completing the wizard, you are immediately directed to the Portal where you must "tag" all the locations in the contract where the signatories need to sign or add information to the document. After tagging the contract, you can preview what each signatory will see when they receive the email message before you submit the contract for electronic signature.

Before running the eSignature Package Wizard, make sure all the documents needed for the eSignature package have been uploaded to the Contract Profile.

Document Packages Overview

The Document Package feature uses a Wizard to assemble a team of administrators, program users, and external participants for the purpose of performing a document-related task, such as negotiating the terms of a contract.

Overview of Document Packages

The Document Packages feature is a powerful and comprehensive tool that assembles a team for the purpose of performing a specific task, such as negotiating the terms of a contract. The team has exclusive access to the document package, which houses one or more contract documents, and can perform activities related to these documents. The members of the team, which includes an Administrator of the package, communicate with one another via email messages sent from Conga Contracts. If a member is not a Conga Contracts user, they can participate in the package via the Conga Contracts Portal. Once the contract is finalized, the eSignature Package Wizard can be run to submit the final contract for electronic signature.

Document packages are managed from your Documents menu, or from the Contract Profile, and involve the following steps.

- A program user adds a document package to the Contract Profile using a wizard.
- Document Package Wizard - use if a contract is still being negotiated and documents need to be checked in and out for revisions before arriving at the final document.

- eSignature Package Wizard - use if the contract has been finalized and you want to submit the document for electronic signature. The wizard locks all the documents in the document package so they cannot be edited.
- After a user runs one of the wizards and selects the Administrators, program users, and external participants for the document package, each person receives email notification that they have been invited to be a member of the document package.
- Program users and Administrators perform tasks related to the documents in the package from both the Document Packages browse screen and the Document Package Profile. Most tasks are available from the Document Packages or the eSignature Packages portlets in the Dashboard.
- External participants and company contacts perform tasks related to the documents in the package via the Conga Contracts Portal.

Document Packages Browse Tasks

Administrators and members of the package can perform the following tasks from the Document Packages browse screen:

- [View the existing document packages for a contract](#)
- [Create a document package using the Document Packages Wizard](#)
- [Link to document package from email message](#)
- [Check documents in and out of the package](#)
- [Lock and unlock documents in the package](#)
- [Mark a document in the package as complete](#)
- [Download a document from the package](#)
- [Compare document revisions in the package](#)
- [View the revision history of a document](#)
- [Delete a document from the package](#)
- [Manage the types of emails you receive about the document package](#)
- [Manage the members of the document package](#)
- [Submit a document for electronic signature](#)
- [Mark a document package as complete](#)
- [Delete a document package](#)

Document Packages Profile Tasks

Administrators and members of the package can perform the following tasks from the Document Packages Profile:

- [View the Document Package Profile](#)
- [Add a contract and attachment to the document package](#)

- [View and manage invitations, users, and signers in the document package](#)
- [Send messages to members of the document package](#)
- [Generate a Document Package Report](#)

eSignature Tasks

The following tasks can be performed for a document that is submitted for eSignature from a document package, as well as a document that is submitted for eSignature after running the eSignature Package Wizard:

- [Revise the envelope prior to submission](#)
- [Revise the envelope after submission](#)
- [Track a document submitted for electronic signature](#)
- [Resubmit a request for electronic signature](#)
- [Reassign a signatory](#)
- [Sign a document Electronically in the Cloud](#)
- [Sign a document Electronically in Conga Contracts](#)
- [Add a witness to the eSignature process](#)
- [Assign a witness \(reassign signatory\)](#)
- [Witness a document](#)
- [Void an envelope](#)

The envelope is the email message that contains the document that is to be signed electronically, and is sent to the signatories, as well as the other recipients, who are participating in the electronic signing process.

Running the Document Package Wizard

The Document Package Wizard creates the document packages that are used in contract negotiations or other document-related tasks. The wizard not only requires you to identify the documents that need to be included in the package, but also allows you to select the individuals who will participate in the tasks associated with the documents.

Before running the Document Package Wizard, make sure all the documents needed for the document package have been uploaded to the Contract Profile.

1. Locate the Contract Profile that needs the document package, and open the Profile.
2. Click on Wizard Tools in the Profile Toolbar, and select Document Package Wizard.
3. In the Wizard, click Next in the Introduction step.
4. In the Document Package Description step, enter a name and description for the document package.
5. In the Documents step, select all the documents that need to be negotiated in the document package by clicking in each document's check box. Click Next.

6. Control the display of information for documents by selecting the columns that display, sorting information, and resizing/repositioning columns of data.
7. In the Portal User Selection step:
8. Click v in the All People field to display the Address Book, and select the members of the document package. Document package members can be program users, company contacts, and external participants who will be notified via email that they have been invited to be members of the document package. Users participate in the document package in the Conga Contracts program, while company contacts and external participants use the Conga Contracts (Negotiation) Portal.
 - (Optional) Click v in the Administrator field to display the Address Book, and select additional administrators for the document package. By default, you are the Administrator of the document package.
 - (Optional) Edit or augment the default message in the Personal Message field to provide members and Administrators with additional information on the document package. The message appears in the email sent to members and Administrators of the package.
 - Click Next.
9. In the Document Package Summary Information step, verify the information, and click Finish.

Receiving Email Notification for Document Packages

Conga Contracts sends out email notifications to the administrators, program users, company contacts, and external participants, who are have been identified as members of the document package, inviting them to the participate in the package.

When a Conga Contracts program user creates a document package using the Document Package Wizard, they add the documents that will be used to the package, and also identify the administrators, program users, and external participants who will be collaborating on the documents.

If you were selected to participate in the process, you will receive an email notification, inviting you to be a member of the document package. The email will have a subject line of Conga Contracts Document Package Invitation if you are a Conga Contracts program user, or Conga Contracts Portal Document Package Invitation if you are not a program user and access Conga the program through the Portal.

1. Review the document package information provided in the email message.
2. Click the Please use this link to view document package link in the message to be directed to the document package once you log in to Conga Contracts or the Portal.

3. (Optional) Click the Go to Contract and/or Go To Company links in the message to review additional information in the Contract and/or Company Profiles for the document package.

Logging in to the Conga Contracts Portal

External participants are required to log in to the Conga Contracts Portal if they were invited to be a member of a Document Package, sign a document electronically, or register as a supplier, and they do not have a login to Conga Contracts. Typically, an external participant will be provided with a link in an email message, which takes them to the Login screen for the Portal where they can enter their email address and password, and then participate in a Conga Contracts process in a secure environment.

1. Copy and paste the URL, which was provide to you by a Conga Contracts representative, into a browser window.
2. When the Conga Contracts Login screen displays, enter the email address that was used to notify you of the Portal invitation in the Email Address field. If you do not have a Conga Contracts Portal account, you will be required to create an account by registering at the Login screen.
3. Enter your Portal password, and click Login. If you don't remember your password, click Forgot Password to answer a security question. When you correctly answer the question, you will receive an email message to reset your password.

Creating a Conga Contracts Portal Account

If you do not have a Portal account, you must create one. A Portal account is needed for those who are participating in a Conga Contracts activity, such as negotiating a contract, signing a document electronically, or registering as a supplier, but do not have login credentials to the program.

1. Copy and paste the URL, which was provide to you by a Conga Contracts representative, into a browser window.
2. In the Portal Login screen, click the I need to register radio button. If you already have Portal credentials, enter the email address that was used to notify you of the Portal invitation in the Email Address field, provide your Portal password in the Password field, and click Login.
3. When the Conga Contracts Login screen displays, select the I need to register radio button.
4. In the Register screen, enter your user information, including:
 - Email Address - enter the email address used in your Portal Invitation.

- Password - use a password that is at least 8 characters long and contains at least one uppercase character (A-Z) and one lowercase character (a-z). Passwords must also contain one number (0-9) OR one symbol [!@#\$%^&*()].
5. In the Portal Settings section, clear the check box if you do not want to receive an email for the following:
 - Send Check-in Notifications - a document package, eSignature package, or supplier registration document has been checked back into the Portal.
 - Send Check-out Notifications - a document package, eSignature package, or supplier registration document has been checked out of the Portal.
 - Send Document Completed > Notifications - a document package, Signature package, or supplier registration document has been completed in the Portal.
 6. Click Register. You will be redirected to the Login screen where you will enter your email address and password so that you can participate in the document package, electronic signing process, or supplier registration.

Participating in a Document Package in the Portal

Individuals who do not have a login to Conga Contracts but are needed in the negotiation of a contract in a document package, participate as external participants in the package via the Conga Contracts Portal.

External participants in a document package are those individuals who do not have a login to Conga Contracts but can participate in the negotiation of a contract document through the Conga Contracts Portal. External participants receive an email message, stating that they have been invited to be a member of the document package. The email contains a link that takes the participant to the Portal where they can login if they already have a user account, or create an account if they are a new user. Once an external participant logs into the Portal, they are immediately directed to a screen where they can view and manage the documents in the document package.

After the document has been successfully negotiated, an external participant whose signature is required on the final document will receive an email notification from Conga Contracts. The email message will contain a link that will return the signatory to the Portal, or to the DocuSign cloud, so that they can complete the negotiation process by signing the document electronically.

Participating in the Negotiation Process

1. Log in to the Conga Contracts Portal.

2. In the default Documents view for an Open package, click on a document record to display an Action Window with a description of the tasks that can be performed for a document using the various icons, or hover over an icon to display its description:
 - Check Out icon - checks a document out of the package so that it can be revised.
 - Redo icon - undoes the check out option.
 - Check In icon - checks a revised version of the document back into the package.
 - Microsoft Word icon - launches MS Word, and allows you to directly edit the document in the Portal. When you save your edits, the revised document is saved as the current version of the document.
 - Revision History icon - displays a history of the revisions to the document.
 - Download icon - downloads a copy of a document.
3. Click on an action button to perform other tasks related to the document package:
 - Add Attachment - uploads an additional document to the package.
 - Messaging - sends an email message to members of the package.
 - Document Package Report - generates a report on the current status of the package.
4. (Optional) Compare two versions of a document:
 - Double-click on a document record that has more than one version.
 - When the screen refreshes, click Compare Revisions.
 - In the Compare Document Revisions window, select the check boxes for the two versions of the document you want to compare, and click Compare.
 - In the Preview window, locate the changes:
 - An addition to the document is indicated by red underlined text.
 - A document deletion is indicated by red text with the strikethrough effect.
 - To navigate the document, use the scroll bar or click the thumbnail icon to display thumbnails of the document pages, and click on a thumbnail to jump to the page. Use the icons in the toolbar to perform additional tasks, such as printing and downloading the document. Click the find icon to search the document for text or a value. Select the Highlight all check box to highlight all instances of the text or value in the document.
5. (Optional) Click the User Settings tab to update any of your Portal user settings, including changing your password.
6. Click the Logout link to exit the Conga Contracts Portal.

Signing a Document Electronically

When an external participant needs to provide their electronic signature on a document that has been negotiated in a document package, they receive an email message with a

link to the DocuSign or Adobe Sign cloud if your company is using the native version of the DocuSign/Adobe Sign eSignature solution.

However, if your company is running the embedded version of the eSignature solution, the external participant will be directed to the Conga Contracts Portal.

1. Log in to the Conga Contracts Portal.
2. Ensure the Completed tab is selected at the top of the screen.
3. In the Completed view of the screen, click the You have documents awaiting signature link.
4. When the screen refreshes, ensure the DocuSign Signers tab is selected, and click Sign Now.
5. In the eSignature Portal, click Start and follow the onscreen prompts to provide your eSignature and other requested information.
6. Click FINISH to exit the eSignature Portal.
7. (Optional) Click the User Settings tab to update any of your Portal user settings, including changing your password.
8. Click the Logout link to exit the Conga Contracts Portal.

Document Packages Browse Screen

The document packages associated with a contract are viewed and managed in the Document Packages browse screen. Tasks that can be performed include checking documents in and out of the package, managing and emailing members, downloading and deleting documents, and submitting the final contract document for electronic signatures.

Document Packages - Browse Screen

From the Document Packages browse screen or the Document Packages portlet, you can perform several tasks, including checking documents in and out of the package, downloading and deleting documents, and submitting the final contract document for electronic signatures.

The document packages associated with a contract are viewed and managed in the Document Packages browse screen. The browse screen contains six tabs:

Current - your current/active document packages.













- Checked Out - documents that you have "checked out" for review or revision.
- Submitted - documents that you have submitted for electronic signature, along with the status of the signing ceremony for each signatory.
- Completed - document packages that you have completed.





- All Packages – document packages created by all users, both active and completed.
- All Completed – document packages that have been completed by all users.

The Document Packages screen can be launched from three different locations: Document Packages/eSignature Packages portlets, Documents menu (as shown above), and Contract Profile.

In the browse screen, you can perform the following tasks by clicking on the appropriate icon or button:

You can also perform several of the tasks from the Document Package Profile screen.

Icon	Description
	Check documents in and out
	Undo the "check out" of a document
	Lock and unlock documents
	Download a copy of a document
	Compare document revisions
	View the document(s) revision history
	Manage document package members
	Manage email notifications for users
	View Document Package Profile
	Submit a document for eSignature
	Review and revise a document prior to submittal for eSignature
	Edit an envelope after submission

Icon	Description
	Void a document package submitted for eSignature
	Mark a document as complete Mark a document package as complete
	Delete a document Delete a document package
	Generate a One-Click Document Package Report

Locating a Document or eSignature Package

The document and eSignature packages associated with a contract are viewed and managed in the Document Packages browse screen. You can access the browse screen from the Contact Profile, the Document Packages/eSignature Packages portlet, and your My Place menu.

A document package is created when the Document Package Wizard or the eSignature Package Wizard is run. You can open the document packages that you have been invited to join as a member or Administrator, as well as the eSignature packages for which you are a signatory or recipient in the electronic signing process.

You can locate your document/eSignature packages from:

- Document Packages or eSignature Packages portlet in the Dashboard
- Documents menu in the Navigation Toolbar
- Contract Profile

Document or eSignature Packages Portlet

1. In the Dashboard, locate (or add) the Document Packages or eSignature Packages portlet.

Use the Document Packages portlet to locate a package that has not been submitted for eSignature.

1. In the portlet, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
 - Click on a document (or Signer) record to display the document (or eSignature) package in a new browser window.
 - Click on an icon to perform a task for the package, or a document in the package.
 - Click [View Document Package Profile](#) to display the Document Package Profile to perform additional tasks for the package and/or documents in the package.
2. (Optional) Manage the display of information in the portlet:
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

Documents Menu

The Document Packages browse screen that is accessed from your My Place menu contains only the document packages where you have been named as a member or Administrator.

1. Click Documents in the Navigation Toolbar.
2. In the Documents menu, click the Document Packages link.
3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
 - Click on an icon to perform a task for the package, or a document in the package.
 - Click [View Document Package Profile](#) to display the Document Package Profile to perform additional tasks for the package and/or documents in the package.
4. (Optional) Manage the display of information in the screen:
 - a. Update the columns that display using the Sort/Column menu.
 - b. Reorder and resize the columns to manage the display of information in the browse screen.
 - c. Sort the data in a column by clicking (toggling) on a column heading.

Contract Profile

1. Open the Contract Profile containing the document package or eSignature package.
2. Click the Document Packages link.
3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard. You can also search for a document package using any of the other fields in the Search list.
4. Click on an icon to perform a task for the package, or a document in the package.
5. Click [View Document Package Profile](#) to display the Document Package Profile to perform additional tasks for the package and/or documents in the package.
6. (Optional) Manage the display of information in the screen:
 - a. Update the columns that display using the Sort/Column menu.
 - b. Reorder and resize the columns to manage the display of information in the browse screen.
 - c. Sort the data in a column by clicking (toggling) on a column heading.

Checking Documents In and Out

You can check out a document that needs to be revised, update it, and then check the revised document back into the system. Whenever you check out a document, it is unavailable to other members of the document package until you check the document back in again.

During negotiations, some or all of the documents in a document package may need to be revised. If you are a member or Administrator of the document package, you can check out a document that needs to be revised, update it, and then check the revised document back into the package. Whenever you check out a document, it is unavailable to other members of the package until you check the document back in again.

Whenever a document is checked in or out of the package, email notification is sent to all members and Administrators of the document package, notifying them of the status change for the document being negotiated.

 **Tip:**

If you want to download a copy of a contract document just to review it (and not make any revisions), use the Download Document option.

Checking Out a Document

1. In the Dashboard, locate the Document Packages portlet. You can also check a document out of the package from the Current tab in the Document Packages screen in a Contract Profile, or from the Current tab in the screen that displays when you click the Document Packages link in your Documents menu.
2. In the portlet, locate the package with the document you want to check out for revision.
3. In the document package, locate the document, and click its check-out icon.
4. In the Download Document prompt:
 - Click the download document link to download copy of the document you are checking out of the package.
 - Click OK.

Checking In a Document

1. In the Dashboard, locate the Document Packages portlet. You can also check a document back in to the package from the Checked Out tab in the Document Packages screen in a Contract Profile, or from the Checked Out tab in the screen that displays when you click the Document Packages link in your Documents menu.
2. In the portlet, locate the package containing the document you want to replace with your revised version of the document.
3. In the document package, locate the document, and click its arrow icon.
4. In the Upload New Document Revision prompt:
 - Click Select, navigate to your document revision, and follow the onscreen prompts.
 - Enter a description of the revisions you made to the document in the Notes field.
 - (Optional) Select the Keep file checked out check box to make the document available to you for future revisions, but unavailable to other members of the document package.
 - Click Upload.

Locking and Unlocking Documents

A document in a document package can be "locked" by the package Administrator to ensure no further edits are made. A locked document can also be "unlocked" by the Administrator if it is determined that further edits need to be made. Whenever a document is locked or unlocked, email notification is sent to all members of the document package, notifying them of the status change for the document being negotiated.

The process of locking a document is identical to that of marking a document as complete. Conversely, the process of unlocking a document is identical to that of "unmarking" a completed document.

Locking a Document

1. In the Dashboard, locate the Document Packages portlet. You can also lock a document from the Current tab in the Document Packages screen in a Contract Profile, or from the Current tab in the screen that displays when you click the Document Packages link in your My Place menu.
2. In the portlet, locate the package with the document you want to lock so that no further revisions can be made.
3. In the document package, locate the document, and click its lock icon.
4. In the Complete Document prompt, click Yes.
 - Verify the icon is replaced by the unlock icon and the Negotiation Status of the document is updated to Completed.
 - Once all the documents in a document package are marked as complete, the contract can be printed and sent to the appropriate parties for signature, or submitted for eSignature.

Unlocking a Document

While an Administrator who is a Conga Contracts program user can unlock a locked document, an Administrator who accesses a document package from the Conga Contracts Portal cannot unlock a locked document.

1. In the Dashboard, locate the Document Packages portlet.
2. You can also unlock a document from the Completed tab in the Document Packages screen in a Contract Profile, or from the Completed tab in the screen that displays when you click the Document Packages link in your Tools menu.
3. In the portlet, locate the package with the document you want to lock so that further revisions can be made.
4. In the document package, locate the document, and click its unlock icon.
 - Verify the icon is replaced by the lock icon and the Negotiation Status of the document is updated to Open.

Downloading a Document in the Package

A document can be downloaded from the document package if you want to review it. However, the downloaded copy will be in a 'Read Only' format, meaning you will not be able to edit the document unless you save it as a new file to your PC. If you want to revise a contract document and make your revisions available to other members of the Document Packages team, use the document check out/check in feature.

Both members and Administrators of a document package can download any of the documents in the package for review. However, the downloaded copy will be in a 'Read Only' format, meaning you will not be able to edit the document, even if you save it as a new file to your PC. If you want to revise a contract document and make your revisions available to the Administrators and members of the document package, use the document check out/check in feature.

1. In the Dashboard, locate the Document Packages portlet.

You can also download a document in the package from the Current tab in the Document Packages screen in a Contract Profile, or from the Current tab in the screen that displays when you click the Document Packages link in your Documents menu.

1. In the portlet, locate the package containing the document you want to download.
2. In the document package, locate the document, and click its download icon.
3. Follow the onscreen prompts to download the document.

Comparing Revisions in a Document Package

When more than one version of a document has been uploaded to a document package in a Contract Profile, you can run a comparison between any two versions of the document. Currently, you can run a comparison between two MS Word documents and two PDF files.

1. In the Dashboard, locate the Document Packages portlet.
2. In the portlet, locate the package with the document revisions you want to compare.
3. In the document package, locate the document, and click its compare revisions icon.
4. In the Compare Documents window, select the check boxes for the two versions of the document you want to compare, and click Compare.
5. In the Document Compare window, locate the changes:
 - An addition to the document is indicated by red underlined text.
 - A document deletion is indicated by red text with the strikethrough effect.
 - To navigate the document, use the scroll bar or click the thumbnail icon to display thumbnails of the document pages, and click on a thumbnail to jump to the page.
 - Optional) Use the icons in the toolbar to perform additional tasks, such as printing and downloading the document.
 - Click magnifying glass to search the document for text or a value. Select the Highlight all check box to highlight all instances of the text or value in the document.
 - Click x to close the Document Compare and Compare Documents windows.

Marking and Unmarking a Document As Complete

All of the individual documents in a document package must be "marked as complete" before the package can be closed or the contract document(s) can be submitted for eSignature.

The process of "marking a document as complete" is identical to that of locking a document. Conversely, the process of "unmarking a completed document" is identical to that of unlocking a document.

The Administrator of the package marks a document as "complete," or locks the document, when no further revisions should be made. However, an Administrator can "unmark," or unlock, a completed document, which changes its status to Open, and allows members of the package to check the document out for additional revisions.

Whenever a document is marked or unmarked as complete, email notification is sent to all members of the document package, notifying them of the status change for the document being negotiated.

Deleting a Document in a Document Package

The Administrator of a document package can delete documents from the package as negotiations progress, removing documents that are no longer needed, as well as old versions of a document.

Administrators can delete a document in the package from (1) Document Packages portlet in the Dashboard, (2) Documents menu in the Navigation Toolbar, and (3) Contract Profile.

From the Document Packages Portlet

1. In the Dashboard, locate the Document Packages portlet.
2. In the portlet, locate the package containing the document you want to delete.
3. In the document package, locate the document, and click its - icon.
4. In the Delete Document confirmation prompt, click Yes.

From the Documents Menu

1. Click on Documents in the Navigation Toolbar.
2. In the Documents menu, click the Document Packages link.

3. In the Document Packages screen, locate the package containing the document you want to delete.
4. In the document package, locate the document, and click its - icon.
5. In the Delete Document confirmation prompt, click Yes.

From the Contract Profile

1. Open the Contract Profile containing the document package with the document you want to delete.
2. Click the Document Packages link.
3. In the Document Packages screen, locate the package containing the document you want to delete.
4. In the document package, locate the document, and click its - icon.
5. In the Delete Document confirmation prompt, click Yes.

Administrators can also delete a document by clicking on its - icon in the Document Package Profile. To access the Profile, click the Document Packages link in the Contract Profile, locate the document package in the Document Packages screen, and click its Note icon.

Tracking the History of a Document Package

Conga Contracts records the changes made to each document stored in a document package, and captures any notes provided by the user who made the change, along with their name and a timestamp for the change. Administrators and members of the document package can not only review these changes, but also download individual documents by clicking their download icon, allowing comparisons to be made between documents at different stages in the negotiation process.

Both members and Administrators of a document package can track the history from (1) Document Packages portlet in the Dashboard, (2) Documents menu in the Navigation Toolbar, and (3) Contract Profile.

Document Packages Portlet

1. In the Dashboard, locate the Document Packages portlet.
2. In the portlet, locate the package containing the document you want to track.
3. In the document package, locate the document, and click its clock icon.

Documents Menu

1. Click on Documents in the Navigation Toolbar.
2. In the Documents menu, click the Document Packages link.
3. In the Document Packages screen, locate the package containing the document you want to track.
4. In the document package, locate the document, and click its clock icon.

Contract Profile

1. Open the Contract Profile containing the document package with the document you want to track.
2. Click the Document Packages link.
3. In the Document Packages screen, locate the package containing the document you want to track.
4. In the document package, locate the document, and click its clock icon.

Managing Your Email Notifications

1. As a member or Administrator of a document package, you can control the types of email messages you receive for the activities that occur in individual document packages.
2. In the Dashboard, locate the Document Packages portlet. You can also manage email notifications for a document package from the Current tab in the Document Packages screen in a Contract Profile or from the Current tab in the screen that displays when you click the Document Packages link in your Documents menu.
3. In the portlet, locate the package whose email notifications you want to manage.
4. Click on the document package's gear icon.
5. In the Document Package Settings prompt:
 - Clear the check boxes to stop the following notifications:
 - Send Check-In Notifications - email is sent whenever a member or Administrator checks a document out of the document package.
 - Send Check-Out Notifications - email is sent whenever a member or Administrator checks a document back in to the document package.
 - Send Document Complete - email is sent whenever a document in the document package is completed.
 - Click Save.

Managing Document Package Members

The Administrator of a document package can add new members to the package, remove members, and grant Administrator status to individual members of the package. Members and Administrators of a document package can be program users, as well as company contacts and external participants who access the package from the Conga Contracts Portal. Each person who is "invited" to join the document package receives an email notification with a link to the document package.

Adding a Member to a Document Package

1. In the Dashboard, locate the Document Packages portlet. Administrators can also add members to a document package from Current tab in the Document Packages screen in a Contract Profile or from the Current tab in the screen that displays when you click the Document Packages link in your Documents menu.
2. In the portlet, locate the package that needs the new member or Administrator.
3. Click on the document package's + icon.
4. In the Invite User dialog box:
5. Click the Add Users tab.
6. Click on the list arrow v in the Administrators box to display the Address Book, and select the individuals you want to invite to be Administrators of the document package.
7. Click on the list arrow v in the Users box to display the Address Book, and select the individuals you want to invite to be members of the document package.
8. (Optional) Replace or augment the text in the Personal Message field.
9. Click Send Invites.

The selected program users, company contacts, and external participants receive an email invitation to join the document package, which contains a link that directs them to the Document Packages browse screen for the contract document once they log in to Conga Contracts (program users) or the Portal (company contacts and external participants).

Managing Members of a Document Package

1. In the Dashboard, locate the Document Packages portlet. Administrators can also manage the members of a document package from Current tab in the Document Packages screen in a Contract Profile or from the Current tab in the screen that displays when you click the Document Packages link in your Documents menu.
2. In the portlet, locate the package that needs the member update.
3. Click on the document package's + icon.

4. In the Invite User dialog box:
5. Ensure the Manage Users tab is selected.
6. (Optional) Click in a member's Admin check box to make them an Administrator of the document package, or clear the check box to remove their Administrator status.
7. (Optional) Click - for a member to remove them as a member of the document package.
8. In the Delete Document Package Member confirmation prompt, click Yes.
9. Click x to close the dialog box.

Submitting a Document for eSignature

Once the contract in a document package has been negotiated and is ready for signature, an Administrator of the package can submit the document for electronic signature. Conga Contracts works in conjunction with DocuSign and Adobe Sign to implement the electronic signing process, resulting in a secure and legally binding contract document.

The process of submitting a document in a document package for electronic signature involves three steps:

1. Run the eSignature Wizard (with a template or without a template) so that you can identify the document(s) in the package that need to be signed electronically, and provide the email addresses for the signatories and any individuals you want to copy on the email message containing the document(s) sent for eSignature.
2. Add Signature fields to indicate the locations where each signatory needs to provide their electronic signature. In addition, other fields, such as Initials, Date, and Attachment tags can be inserted to indicate the locations where a signatory needs to initial the document, provide the date he/she signed the contract, or add an attachment to the signed contract. Based on the eSignature solution you are using, the process of adding Signature fields in DocuSign will differ slightly from that used in Adobe Sign.
3. Submit Document for eSignature after previewing it and making any necessary edits. Edits can be made prior to submission of the envelope, as well as after the envelope is submitted. If needed, the envelope can be voided so that the request for signature contained in the email message is called back. An Administrator of the document package can run the eSignature Wizard from three locations:

Document Packages portlet in the Dashboard.

1. In the portlet, click on any document record to display the portlet in full screen mode.

2. In the Document Packages screen, locate the package you want to submit for eSignature, and click its Go To envelope icon.

Document Packages screen in the Contract Profile

1. In the Document Packages portlet in the Dashboard, click Go To envelope icon to jump to the Document Packages screen in the Contract Profile.
2. In the Document Packages screen, locate the document package you want to submit for eSignature, and click its Go To envelope icon.

Documents menu in the Navigation Toolbar

1. In the menu, click the Document Packages link.
2. In the Document Packages screen, locate the document package you want to submit for eSignature, and click its Go to envelope icon icon.

Once the contract is submitted for electronic signature, you can track the document to ensure the counter-party signs the contract electronically in Conga Contracts or the DocuSign/Adobe Sign cloud. If the contract is not signed in a timely manner, you may need to resubmit the request for electronic signature. Once the counter-party signs the contract, you need to ensure that your signatory electronically signs the document, or reassigns a signatory in his/her absence. In DocuSign, a witness can be added to validate the electronic signing of the contract.

Marking a Document Package as Complete

Once the work has been finished, an Administrator of a document package can "complete" the package so that it will be stored in the Contract Profile, or delete it if the package is no longer valid. Prior to completing the document package, all the documents in the package must be marked as complete.

When an Administrator "completes" a document package, no further changes can be made. The Administrator can select the documents that are copied and stored in the package in the Contract Profile.

For document packages that are submitted for electronic signature, the Administrator must mark all the documents in the package as complete before the package is submitted for eSignature. The Administrator can then mark the package as complete after electronic signatures have been obtained by clicking the Submitted tab to verify the status for all signers is Completed. However, if your System Admin has turned on the option to automatically close the package when the required eSignatures are obtained, the package Administrator does not need to manually close the eSignature package.

1. In the Dashboard, locate the Document Packages portlet.

Administrators can also mark a document package as complete from the Current (or Submitted) tab in the Document Packages browse screen in a Contract Profile or from the Current (or Submitted) tab in the screen that displays when you click the Document Packages link in your Documents menu.

1. In the portlet, locate the document package that you want to complete, and click the package's checkmark icon.
2. In the Document Package Completion dialog box:
 - Select the check box for each document you want to save/store with the completed document package.
 - In selecting the documents, if "Signed document" appears in the Notes field, select the document since it is a copy of the final executed contract document. If "Attachment" appears in the field, this is an attachment to the executed contract and should also be selected.
 - Enter information pertinent to completing the document package in the Document Package Notes field.
 - Click Submit.
3. In the Package Completed confirmation prompt, click OK.
4. (Optional) In the Document Packages screen, click the Completed tab.
 - Click the download icon for a document to download a copy of the document.
 - Click the clock icon for a document to view the history of the revisions that the document underwent.

Deleting a Document Package

In using a document package to negotiate or renegotiate the terms of a contract, it is recommended that the package Administrator delete the package if the terms are not accepted by both parties, which would make the contract invalid. An Administrator should also delete a package if negotiations are suspended to ensure the invalid documents in the package are not stored in the Contract Profile.

1. In the Dashboard, locate the Document Packages portlet. Administrators can also delete a document package from Current tab in the Document Packages screen in a Contract Profile or from the Current tab in the screen that displays when you click the Document Packages link in your My Place menu.
2. In the portlet, locate the package you want to delete, and click the package's - icon.
3. In the Delete Package confirmation prompt, click Yes.

Document Package Profile

The Document Package Profile stores key data for each document in the package and contains icons that link to several tasks related to the package, such as adding and downloading documents, sending messages to members, and generating reports.

Document Package Profile Screen





The Document Package Profile contains additional functionality for the document/ eSignature package that is not provided in the Document Packages browse screen. The Profile is a divided screen with basic information in the top portion of the screen, along with action buttons that are used to perform additional tasks related to the document package. In the bottom section of the screen are four tabs (views) with action buttons to perform tasks related to the Documents, Invitations, Users, and Signers for the document package.


The Document Package Profile screen can be launched from three different locations: eSignature Packages portlet, Tools menu, and Contract Profile.

In the Document Package Profile, you can perform the following tasks:

- [Add a contract and attachment](#)
- [Manage invitations to the document package](#)
- [Send an email message to a member](#)
- [Generate a Document Package Report](#)
- [Refresh a Document Package Profile](#)

You can also click on the appropriate icon in the Documents section of the Profile to perform the following tasks for individual documents in the package:

Icon	Description
	Check documents in and out
	Undo the "check out" of a document
	Lock and unlock documents
	Download a copy of a document

Icon	Description
	<p>Delete a document</p> <p>Delete a document package</p>

Locating a Document Package Profile

The Document Package Profile stores basic information for the document package or eSignature package, and provides access to additional tasks for the package. You can open the Document Package Profile for the document packages that you have been invited to join as a member or Administrator, as well as the eSignature packages for which you are a signatory or recipient in the electronic signing process.

You can locate the Document Package Profiles for your document/eSignature packages from:

- Document Packages portlet in the Dashboard (for packages that have not been submitted for eSignature)
- eSignature Packages portlet in the Dashboard (for packages that have been submitted for eSignature)
- Documents Menu in the Navigation Toolbar
- Contract Profile

Document Packages Portlet

1. In the Dashboard, locate the Document Packages portlet.
2. In the portlet, locate the package, and click the package's Go To envelope icon.
3. In the Document Packages screen in the Contract Profile, locate the package, and click the package's document icon.

eSignature Packages Portlet

1. In the Dashboard, locate the eSignature Packages portlet if the package has been submitted for eSignature.
2. In the portlet, locate the package, and click the package's Go To envelope icon.

Documents Menu

1. Click on Documents in the Navigation Toolbar.
2. In the Documents menu, click the Document Packages link.
3. In the Document Packages screen, locate the package, and the package's Go To envelope icon.

Contract Profile

1. Open the Contract Profile containing the document package or eSignature package.
2. Click the Document Pkgs link.
3. In the Document Packages screen, locate the package, and click the package's Go To envelope icon.

Adding a Contract and Attachment

Once you create a document package using the Document Package Wizard, and select the documents that will be negotiated in the package, you may need to add an attachment for one of the documents, or add a new contract as negotiations progress.

Adding an Attachment to a Document Package

1. Click on Documents in the Navigation Toolbar. You can also add an attachment from the Document Packages screen in a Contract Profile.
2. In the Documents menu, click the Document Packages link.
3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
4. Click the package's document icon.
5. In the Document Package Profile, ensure the Documents tab is selected in the bottom section of the screen.
6. Click Add Attachment.
7. In the Upload Document dialog box:
 - Click Browse, and follow the onscreen prompts to locate and select the document attachment.
 - Enter a description of the attachment in the Notes field.
 - Click Upload.
 - When an attachment is added to a document package, the word "Attachment" will be displayed in the Negotiation column for the document in the Document Packages screen.

Adding a Contract to a Document Package

Before a new contract document can be added to a document package, it must be uploaded to the Contract Profile. If the new contract is replacing an existing contract in the package, be sure to delete the old contract.

1. Click on Documents in the Navigation Toolbar. You can also add a contract from the Document Packages screen in a Contract Profile.

2. In the Documents menu, click the Document Packages link.
3. In the screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
4. Click the package's document icon.
5. In the Document Package Profile, ensure the Documents tab is selected in the bottom section of the screen.
6. Click Add Contract.
7. In the Upload Contract dialog box:
8. Locate the contract you want to add to the document package, and select its check box.
9. To select all the documents, click in the first check box, located to the left of the Revision column.
10. Click Upload.

Managing Invitations to a Document Package

The members and Administrators of a document package are selected using the Address Book when a user runs the Document Package Wizard. Conga Contracts sends each member and Administrator an email invitation containing a link to the document package. In the event an invitation is not accepted, you can resend the invitation or delete the invitation from the Document Package Profile.

Resending an Invitation to a Document Package

Both members and Administrators of a document package can resend an invitation for the package. An invitation can be resent to any company contact or external person who was sent an invitation, but did not acknowledge the invitation by selecting the link in the email message sent by Conga Contracts. The link in the email would take the member (or Administrator) to the Portal where they could participate in the document package.

1. Click on MyPlace in the Navigation Toolbar. You can also resend an invitation from the Document Packages screen in a Contract Profile.
2. In the My Place menu, click the Document Packages link.
3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
4. Click the package's document icon.
5. In the Document Package Profile, click the Invitations tab.

6. Locate the company contact or external person whose invitation you want to resend, and click on their envelope icon. Conga Contracts will resend the invitation using the email address listed for that person in the Address Book. If you want to personally resend the invitation, click their link icon. In the Portal Request Link prompt, copy the link provided, and paste it into your email message.

Deleting an Invitation to a Document Package

Only Administrators of a document package can delete an invitation that was sent to a company contact or external person.

1. Click on MyPlace in the Navigation Toolbar. You can also delete an invitation from the Document Packages screen in a Contract Profile.
2. In the My Place menu, click the Document Packages link.
3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
4. Click the package's document icon.
5. In the Document Package Profile, click the Invitations tab.
6. Locate the company contact or external person whose invitation you want to delete, and click their - icon.
7. In the Delete Portal Request prompt, click Yes.

Messaging Members of a Document Package

A document package added to a Contract Profile contains a Messaging feature to facilitate communication between members of the document package. In sending a message from a document package, you can include any of the documents in the package as attachments to the message.

When a message is sent from a document package, Conga Contracts sends an email to each recipient using the email address listed for them in the Address Book. In replying to the message, a recipient can respond by clicking the link in the email message, which directs them to the Conga Contracts Login screen (program users) or to the Conga Contracts Portal (company contacts and external people).

Sending a Message

1. Click on Documents in the Navigation Toolbar. A program user can also message members from the Document Packages screen in a Contract Profile. A company contact or external person can send a message from the Conga Contracts Portal.

2. In the Documents menu, click the Document Packages link.
3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
4. Click the package's document icon.
5. In the Document Package Profile, click Messaging in the toolbar.
6. In the Messaging window, click New Thread.
7. When the window refreshes:
 - Click v in the To field to display the Address Book, and select the members of the document package you want to message.
 - (Optional) Click v in the CC field to display the Address Book, and select the members of the document package you want to copy on the message.
 - Enter the subject of the message in the Subject field.
 - Enter your message in the Content box.
 - (Optional) Use the toolbar to format your message.
 - (Optional) Click Attach Document to upload a document to the message.
 - In the Attach Document window, click on the document record to select it. To select multiple documents, hold down the CTRL key while clicking on document records.
 - Click Attach Selected Document.
 - Click Send.
 - Click x to close the Messaging window.

Replying to a Message

1. Click on Documents in the Navigation Toolbar. A program user can also reply to a message from the Document Packages screen in a Contract Profile. A company contact or external person can reply to a message from the Conga Contracts Portal.
2. In the Documents menu, click the Document Packages link.
3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
4. Click the package's document icon.
5. In the Document Package Profile, click Messaging in the toolbar.
6. In the Messaging window, locate the message you want to reply to, and click on the message to select it.
7. Click Reply.
8. When the window refreshes:

- (Optional) Click v in the To field to display the Address Book, and select additional members of the document package. The sender of the original message is automatically selected.
 - (Optional) Click v in the CC field to display the Address Book, and select the members of the document package you want to copy on the reply message.
 - Enter your message in the Content box, above the original message.
 - (Optional) Use the toolbar to format your message.
 - (Optional) Click Attach Document to upload a document to the reply message.
 - In the Attach Document window, click on the document record to select it. To select multiple documents, hold down the CTRL key while clicking on document records.
 - Click Attach Selected Document.
 - Click Send.
9. Click x to close the Messaging window.

Generating a Document Package Report

The Document Package Report allows you to generate an up-to-date summary of the activities that have taken place in a document package. The information in the report includes:

- Basic data (package name, description, members, status, and start date)
 - Package Documents section, which provides a history of document activity, including the date and time documents were checked in and out.
 - Messages section, which provides a summary of all the email correspondence for the document package.
1. Click on Documents in the Navigation Toolbar. You can also add generate a Document Package Report from the Document Packages screen in a Contract Profile.
 2. In the Documents menu, click the Document Packages link.
 3. In the Document Packages screen, locate the package by scrolling through the list, or typing the name of the package into the Search field and pressing the ENTER key on your keyboard.
 4. Click the package's document icon.
 5. In the Document Package Profile, click Document Package Report in the toolbar.

Refresh a Document Package Profile

In the event that your DocuSign or Adobe Sign package is stuck, you can refresh the connection between the eSignature Package and Conga Contacts.

- An example of this scenario is if your document package is fully signed and executed, but shows in Conga Contracts as Processing and does not update.
- In the Submitted tab a Refresh button becomes available. Click the refresh button to update your view.

eSignature Process

Conga Contracts obtains electronic signatures on a contract document using the Document Package Wizard and/or the eSignature Package Wizard, and the DocuSign or Adobe Sign solution, which adds signature fields to the contract and obtains electronic signatures in a secure online environment.

Overview of eSignature Process

Conga Contracts uses a three-stage process to obtain electronic signatures on a contract document. The first stage involves the Document Package Wizard and/or the eSignature Package Wizard. The second and third stages involve DocuSign or Adobe Sign, which are Digital Transaction Management solutions that allow you to insert Signature fields into the contract so that signatories know where to provide their electronic signatures.

The first stage is accomplished using two different methods, based on the status of your contract:

If your contract has been finalized and is ready for signature, use the eSignature Package Wizard to select the contract document you want to submit for electronic signature, as well as identify the signatories and any recipients for the email message that is sent, requesting the eSignature of one, or both, parties to the contract. The eSignature Package Wizard also allows you to add individuals who can act as administrators during the electronic signing process. The eSignature Wizard can be run using an Administrator-defined template, or without a template. In DocuSign, running the wizard without a template allows a signatory to be assigned as a witness in the electronic signing process.

If your contract needs to be negotiated, use the Document Package Wizard and the eSignature Package Wizard. The Document Package Wizard is used to create a document package, which allows the contract to be uploaded and negotiated in the package, where it can be checked out and revised by the members of the document package, and then checked back in, allowing several revisions to be made before the final version is submitted for eSignature to one or both parties. The eSignature Package Wizard is then run to identify the document, signatories, and any recipients for the electronic signing ceremony.

The second stage occurs in the eSignature Portal where Signature fields must be inserted into the contract to identify the locations where each signatory must provide their electronic signature. The contract containing the Signature fields becomes the body of the email message that is sent to the signatories, and is referred to as the envelope. Before submitting the contract for electronic signature, the envelope can be revised in the Portal as many times as needed.

- For Adobe Sign users, the document used in the eSignature Package Wizard can be tagged prior to running the Wizard so that users do not have to manually add signature and other tags to the document in the eSignature Portal.
- For those companies that require a witness to the electronic signing process, the eSignature Package Wizard allows you to add a witness by duplicating a signatory's email address. The signatory signs the document electronically upon receiving the first email request for their eSignature. When the signatory receives the second request for their eSignature, he/she Assigning a Witness (Reassign Signatory)reassigns the responsibility to the individual who will be witnessing the signatory's eSignature. However, the ability to add duplicate recipient email addresses in the "envelope" has applications other than witnessing a contract.

The third stage involves signing the contract document, which is accomplished from two different locations, depending on the version of the eSignature solution that is used by your company:

- If your company is using the native version of the eSignature solution, you will be able to access all the DocuSign/Adobe Sign features since the solution is available in the cloud. For DocuSign users, there are advanced actions that can be performed using Agent-Managed Envelopes.
- If your company is using the embedded version of the eSignature solution, you will be able to access some of the DocuSign/Adobe Sign features since the solution is working within the constraints of Conga Contracts.

After the envelope is submitted, a Conga Contracts user can still revise the envelope, and then resubmit it for signature.

It is recommended that you track the contract once it is submitted for eSignature to ensure both signatories have signed the document. When the electronic signing ceremony is completed successfully, all signatories and recipients receive an email message confirming the process is complete. The email contains a link that takes program users to the Document Packages screen in the document's Contract Profile where they can download a copy of the executed contract. The link takes those who participated in the eSignature process but do not have program credentials to the Portal. The email message also contains a PDF attachment of the executed document, which can be viewed online or downloaded.

During the eSignature process, it may become necessary to resend the email request for electronic signature or to reassign a signatory for the contract. It may even be necessary to halt the electronic signing processes by voiding the envelope.

DocuSign customers who want to disable the connection between DocuSign and Conga Contracts must log in to their DocuSign account and revoke the OAuth token from there since the token cannot be revoked from Conga Contracts.

Running the eSignature Package Wizard with a Template

The eSignature Package Wizard is used to obtain electronic signatures by identifying the document(s) for signature, selecting the signatories, and adding Signature tags to the document. Using a template defines the number of signatories on a contract and the number of individuals who are notified about the electronic signing process and/or receive a copy of the fully executed document.

The eSignature Package Wizard guides you through the process of obtaining electronic signatures using a three-step process:

- Step 1: Identify the documents that require an eSignature and identify the signatories for the documents, as well as any recipients that should acknowledge the signing or be copied on the envelope for the electronic signing ceremony. The envelope is the email message containing the document that is to be signed electronically, along with any instructions, which is sent to signatories and any recipients. You have the option of running the Wizard using a template or without a template. Using a template defines the number of signatories on a contract and the number of individuals who are notified about the electronic signing process and/or receive a copy of the fully executed document. While DocuSign can be run with or without a template, Adobe Sign can only be run without a template.
- Step 2: Add eSignature fields to the contract to indicate where each signatory needs to provide their electronic signature, and then submit the envelope for signature. Other tags, such as Initial and Date tags, can also be inserted to indicate the locations where a signatory needs to provide information.
- Step 3: Capture the signatory's electronic signature in Conga Contracts or in the DocuSign or Adobe Sign cloud.

When you run the eSignature Package Wizard, a document package is automatically created, if one does not already exist.

To launch the eSignature Package Wizard:

1. Open the Contract Profile containing the document that needs to be signed electronically.
2. Click on Wizard Tools in the Profile Toolbar, and select eSignature Package Wizard.
3. In the Document Selection section, select the check boxes for all the documents that require an eSignature.
 - If you are running the eSignature Package Wizard after running the Document Package Wizard, the Document Selection section is not present.
4. In the Template Selection section, select the check box to display a Template list, and select the template you want to use.
 - A template defines the number of signatories and also clearly identifies the role of the signer (Signer 1 is typically the counter-party and Signer 2 is typically the signatory for your company). There are two additional roles available in the wizard: Acknowledge Receipt, which requires an individual to acknowledge that the document has been signed electronically, and Receive a Copy, which allows an individual to receive a copy of the envelope (email message and electronically signed document). If your company is using advanced DocuSign actions (Agent-Managed Envelopes), there are three additional roles: Manage Envelope, Address Recipients, and Manage Recipients.
5. In the Role Selection section, enter the email address for the first signatory in the Email field, and then enter their first and last names. Leave the selection in the Action list set to Sign since this is the action that a signatory must perform in the electronic signing ceremony.
6. Enter the email addresses and first/last names for the other signatories and any recipients in the electronic signing process, and then select their role in the Action list.
7. (Optional) In the Additional Administrator Selection section, click V to display the Address Book and select other Administrators for the electronic signing process.
 - Administrators can not only perform user tasks, which include viewing and downloading documents during the eSignature process, but they can also reassign the responsibility of signing the document to another person, add and remove people from the recipient list for the "envelope," and void the envelope (stop the eSignature process). The envelope is the email message that contains the contract that is to be signed electronically and is sent to signatories and other recipients in a pre-defined order.
8. (Optional) Update the information in the Package Name, Email Message, and Package Description fields to customize the email subject line and message text of the envelope.
 - The Subject and Message will not be brought over from your DocuSign templates.
9. Click Save to display the eSignature Portal where you must add Signature fields before submitting the document for electronic signature.

Running the eSignature Package Wizard without a Template

The eSignature Package Wizard is used to obtain electronic signatures by identifying the document(s) for signature, selecting the signatories, and adding Signature fields to the document. Running the wizard without a template affords you greater flexibility in assigning the signatories and including additional recipients in the electronic signing ceremony, as well as controlling the order in which signatories and recipients receive the envelope.

The eSignature Package Wizard guides you through the process of obtaining electronic signatures using a three-step process:

- Step 1: Identify the documents that require an eSignature and adding the signatories for the documents, as well as any recipients that should acknowledge the signing or be copied on the envelope for the electronic signing ceremony. The envelope is the email message containing the document that is to be signed electronically, along with any instructions, which is sent to signatories and any recipients. You have the option of running the Wizard using a template or without a template. Running the wizard without a template affords you greater flexibility in assigning the signatories and including additional recipients in the electronic signing ceremony, as well as controlling the order in which signatories and recipients receive the envelope. While DocuSign can be run with or without a template, Adobe Sign can only be run without a template.
- Step 2: Add eSignature fields to the contract to indicate where each signatory needs to provide their electronic signature, and then submit the envelope for eSignature. Other tags, such as Initial and Date tags, can also be inserted to indicate the locations where a signatory needs to provide information.
- Step 3: Capture the signatory's electronic signature in Conga Contracts or in the DocuSign or Adobe Sign cloud.
- When you run the eSignature Package Wizard, an eSignature package is automatically created, if one does not already exist.

To launch the Wizard:

1. Open the Contract Profile containing the document that needs to be signed electronically.
2. Click Wizard Tools in the Profile Toolbar, and select eSignature Package Wizard in the menu.

3. In the Document Selection section of the wizard, select the check boxes for all the documents that require an eSignature.
 - a. If you are running the eSignature Package Wizard after running the Document Package Wizard, the Document Selection section is not present.
4. In the Recipient Selection section, any person who holds a responsibility for the contract and has signing authority automatically appears as a recipient.
 - a. Click Add Recipient to add another signatory or a recipient to the electronic signing process.
 - b. Populate the Email, First Name, and Last Name fields for the recipient.
5. Select the role/action the person will play in the eSignature process in the Action list.
 - a. Sign - recipient must sign the document. The Sign option is the only option available for Adobe Sign.
 - b. Acknowledge Receipt - recipient receives the final document(s), but does not need to sign, initial, date, or add information to any of the documents.
 - c. Receive a copy - recipient receives a copy of the email message requesting the electronic signatures.
6. Update the number in the Order column to identify the order in which the signatories and recipients receive the envelope.
7. If you are using Advanced DocuSign actions, there will be additional options in the Action list.
8. (Optional) In the Additional Administrator Selection section, click v to display the Address Book and select other Administrators for the electronic signing process.
 - a. Administrators can not only perform user tasks, which include viewing and downloading documents during the eSignature process, but they can also reassign the responsibility of signing the document to another person, add and remove people from the recipient list for the "envelope," and void the envelope (stop the eSignature process). The envelope is the email message that contains the contract that is to be signed electronically and is sent to signatories and other recipients in a pre-defined order.
9. (Optional) Update the information in the Package Name, Email Message, and Package Description fields to customize the email subject line and message text of the envelope.
10. Click Save to display the eSignature Portal where you must add Signature fields before submitting the document for electronic signature.

Advanced DocuSign Actions (Agent-Managed Envelopes)

For users who have access to the advanced features offered by DocuSign, there are Agent-Managed envelopes with additional actions, which allow those from both sides of a transaction to manage the signing process in DocuSign.

- In an Agent-Managed envelope, the sender creates the envelope and adds the person who will review the envelope as one of the recipients. This "reviewer recipient" can be assigned to a role associated with one of the following actions from the eSignature Package Wizard:
- Manage Envelope – recipient holding this role must have a DocuSign account. They have the same management and access rights to the envelope as the sender and can make changes to the envelope that mimic the Advanced Correct feature. This recipient can add name and email information, add or change the routing order, and set authentication options for the remaining recipients. Additionally, this recipient can edit tags for the remaining recipients, and must fill out the missing information for the remaining recipients before sending the envelope.
- Address Recipients – recipient holding this role can be any individual. This recipient can add name and email information for recipients that appear after them in the workflow order. The recipient must fill out the missing information for the remaining recipients before sending the envelope. However, the Address Recipients action is not available if document visibility is enabled.
- Manage Recipients – recipient holding this role can add name and email information for recipients at the same, or subsequent levels, in the routing order.

After adding a "reviewer" recipient (a recipient assigned to the action of Manage Envelope, Address Recipients, or Manage Recipients), the sender can add recipients without adding the name and email information for those recipients. If the sender leaves a recipient's name or email address blank, the sender must specify a role name for that recipient.

Important: The Address Recipients action should be used when the identity of the counterparty signer is unknown, but the identity (and email address) of a contact person at the signing company is known. When the individual with the Address Recipients role receives the envelope, he/she can edit the tagged document and provide the email address of the signatory (recipient) so that the envelope is sent to the signatory for electronic signature.

Tagging a Document for use in eSignature Process

When you use the eSignature Package Wizard to submit a contract document for electronic signature, and your company is using Adobe Sign to obtain signatures electronically, you can skip the tagging portion of the eSignature process by inserting tags directly into the document sent for eSignature. Adobe Sign text tags can be placed in any document type, including PDF, Microsoft Word, PowerPoint, Excel, and text files (.txt, .rtf).

Steps to tag a MS Word Non-Disclosure Agreement (NDA) that is sent to both parties are shown below, along with a screen shot of the tagged document. Tags have been inserted to

obtain the signatures of both parties, as well as the title and printed name of the counterparty signer, and the date the NDA was signed by each party. For additional tags that can be added to a contract document, including initials and price tags in the body of the document, visit https://helpx.adobe.com/sign/help/adobesign_text_tag_guide.html.

1. Open the document that needs the Adobe tags.
2. Position your cursor at the signature line for Signer 1, which is typically the other party signer, and enter `{{Sig_es_:signer1:signature}}`.
3. Position your cursor at the following locations for Signer 1:
 - Printed Name and enter `{{N_es_:signer1:fullname}}`.
 - Title and enter `{{*Ttl_es_:signer1:title}}`.
 - Date and enter `{{Dte_es_:signer1:date}}`.
 - Adobe Sign automatically populates the date field with the current date.
4. Position your cursor at the signature line for Signer 2, which is typically your signer, and enter `{{Sig_es_:signer2:signature}}`.
5. Position your cursor at the Date line for your signer, and enter `{{Dte_es_:signer2:date}}`.
6. Save the document and upload it to the appropriate Contract Profile.
7. In the Contract Profile screen, click Wizard Tools in the toolbar, and select eSignature Package Wizard.
8. Run the eSignature Package Wizard:
 - In the Document Selection section, select the check box of the tagged document.
 - In the Role Selection section:
 - Enter the email address for the first signatory in the Email field, and then enter their first and last names if the fields do not auto-populate.
 - Leave the selection in the Action list set to Sign since this is the action that a signatory must perform in the electronic signing ceremony.
 - Populate the Email, First Name, and Last Name fields for the second signatory.
 - Leave the selection in the Action list set to Sign.
 - Click Save.
9. When the eSignature Portal displays:
 - Scroll to the Signature block to verify all the tagged fields have been added to the correct locations for Signer 1. The default document display is for Signer 1, and the fields that will be populated by Signer 1 display with a light yellow background.
 - Change the selection in the RECIPIENTS list to the second signer, and then verify all the tagged fields have been added to the correct locations for Signer 2.
 - Click Send.

The first signatory receives an email message with a link to sign the document electronically. Once Signer 1 provides their electronic signature, the second signatory

receives an email message with a link to the document where they can provide their eSignature.

Adding an eSignature Field and Submitting the Envelope

After you run the eSignature Package Wizard, you are immediately directed to the eSignature Portal, which displays the "envelope" for the electronic signing ceremony. In the Portal, you must place signature fields in the proper location in the contract so that when each signatory inserts his/her electronic signature, the document is properly executed.

After you select the documents and recipients for the electronic signing process in the eSignature Package Wizard, you are immediately directed to the eSignature Portal, which displays the "envelope" for the electronic signing ceremony.

The envelope is the email message that is sent to signatories and recipients. The email contains the contract document(s) that must be signed electronically in the body of the message, as well as any instructions provided by the user who initiated the eSignature process using the Wizard.

In the eSignature Portal, you must place signature fields in the proper location in the contract so that when each signatory inserts his/her electronic signature, the document is properly executed. You must also ensure that other tags, such as Initial, Title, and Date fields are inserted in the proper locations to capture this information for each signer.

Depending on the eSignature solution you are using, the process of adding Signature fields to the contract will vary slightly. Currently, Conga Contracts supports DocuSign and Adobe Sign.

Adding an eSignature Field and Submitting a Document in DocuSign

1. Select the name of the person whose signature is required on the contract in the list above the Standard Fields section.
2. Navigate to the Signature Line for the signatory by scrolling through the document, or clicking on a numbered Document Page icon.
3. Click on the Signature icon in the Standard Fields section, and then drag-and-drop the icon above the Signature Line. The icon changes to a Sign tag and formatting options for the field display in the right-hand panel.

- Use the formatting options to control the display of information provided by the signatory in the document. For example, the Title field can be formatted so that when the signatory enters their title, the text is formatted using a specific font size and style. Additional display options are available, depending on the type of field you add to the document.
4. (Optional) Add additional fields to the document to capture required information for the signatory by dragging-and-dropping other fields from the Standard Fields section into the document, or by clicking on the wrench icon and merge icons to reveal custom and merge fields that can be added to the document.
 5. (Optional) Repeat Steps 1-4 to add Signature and other data-capturing fields for another signatory to the document.
 6. Click SEND to submit the document for electronic signature.

Click OTHER ACTIONS to display a menu with alternatives to submitting the envelope. Select Save and Close to save your work without submitting the envelope, and select Preview to view the envelope from the signatory's perspective.

Adding an eSignature Field and Submitting a Document in Adobe Sign

If the document selected in the eSignature Package Wizard has been tagged with Signature and other tags, you do not have to manually add tags to the document in the eSignature Portal. Verify the correct placement of the tags, and click Send.

1. Select the name of the person whose signature is required on the contract in the RECIPIENTS list.
2. Navigate to the Signature Line for the signatory by scrolling through the document, or using the arrow icons to page through the document.
3. Open the Signature Fields menu.
4. Click on Signature, and drag-and-drop the field above the Signature Line in the document.
 - Resize the field, as needed, to accommodate the length of the signature line.
 - Right-click on the field to delete it, display additional options for formatting the text, and set conditions/actions for the field.
5. (Optional) Add additional fields to the document to capture required information for the signatory by opening the Signer Info Fields, Data Fields, More Fields, and Transaction Fields menus to reveal additional fields, including standard/custom fields and hyperlinks.
6. (Optional) Repeat Steps 1-4 to add fields for another signatory to the document.
7. Click Send to submit the document for electronic signature.

To review and edit the envelope after submitting it, click the Save to document library check box, and click Send. In the prompt, click Save and Send.

Once the contract is submitted for electronic signature, you need to track the document to ensure the counter-party signs the contract electronically in Conga Contracts or the DocuSign/Adobe Sign cloud. When the electronic signing ceremony is completed successfully, all signatories and recipients receive an email message confirming the process is complete. The email contains a link that takes program users to the Document Packages screen in the document's Contract Profile where they can download a copy of the executed contract. The link takes those who participated in the eSignature process but do not have program credentials to the Portal. The email message also contains a PDF attachment of the executed document, which can be viewed online or downloaded.

If the contract is not signed in a timely manner by the counter-party, you may need to resubmit the request for electronic signature. Once the counter-party signs the contract, you need to ensure that your signatory electronically signs the document, or reassigns a signatory in his/her absence. In DocuSign, a witness can be added to validate the electronic signing of the contract.

Once the signing ceremony has begun and the email messages have been sent to the signatories and any recipients, a Void Envelope icon appears in the Document Packages Browse screen. If you want to halt the signing process, simply click the icon.

Editing and Discarding an Envelope Prior to Submission

The revisions that can be made include editing the message sent during the electronic signing process, changing the signatories and recipients, updating the document submitted for electronic signature, and performing advanced options, such as sending a private message to a signatory or recipient. The envelope can also be discarded if too many changes need to be made, allowing a new envelope to be created.

When the Document Package Wizard or the eSignature Package Wizard is run from a Contract Profile, a document package is created in the Profile, allowing one or more of the documents stored in the Profile to be used in the electronic signing ceremony. However, only the eSignature Package Wizard creates an "envelope," which is an email message that contains the contract that is to be signed electronically, and is routed to signatories and other recipients in a pre-defined order. Prior to submitting the envelope for eSignature, several types of changes can be made to the envelope in DocuSign.

Currently, Conga Contracts does not support editing an envelope in Adobe Sign.

Editing the Message

You can easily edit the subject line of the email message (envelope), as well as the default message sent to signatories and those copied on the electronic signing process.

1. In the Contract Profile screen, click the Document Pkgs link.
2. In the Document Packages browse screen, click the Current tab.
3. Locate the envelope whose message you want to edit, and click its envelope icon.
4. In the eSignature Portal, click OTHER ACTIONS, and select Edit Message.
5. In the Message to All Recipients window, edit the text message by clicking in the field and typing over the existing text. To edit the subject line for the message, click in the field and type over the existing text.
 - (Optional) Select the Custom email and language for each recipient check box to create a customized email message for each signatory and recipient.
6. Click Done.

Editing Recipients

You can add and edit the signatories and recipients for an envelope, change the signing order on the contract document, and update the role an individual plays in the electronic signing process. You can also send a private message to one of the signatories or recipients, and add access authorization for a recipient.

1. In the Contract Profile screen, click the Document Pkgs link.
2. In the Document Packages browse screen, click the Current tab.
3. Locate the package whose recipients you want to edit, and click its envelope icon.
4. In the eSignature Portal, click OTHER ACTIONS, and select Edit Recipients.
5. In the Edit Recipients window, you can:
 - Change the order in which signatories sign the document - select the Set signing order check box, and edit the number associated with each signatory.
 - Replace a signatory or recipient - click their address book icon. In the Contacts window, select the check box for the person who is the new signer or recipient. Click ADD SELECTED.
 - Change the role of a signatory or recipient - make a different selection in the list that defaults to the NEEDS TO SIGN option.
 - Specify Recipients - recipient can fill in the name and email address of the role recipients who are at their same position or later in the document signing order.
 - Update Recipients - recipient can edit recipient details for any remaining recipients in the document signing order.
 - Allow to Edit - recipient can make recipient and document changes to an In Process document. This recipient must have a valid DocuSign account.

- Add a signatory or recipient to the envelope - click Add Recipient. Enter their name and email address, and then select their role in the eSignature process using the list that defaults to the NEEDS TO SIGN option. Make a selection in the MORE list to add a private message or add access authentication.
 - Click the ADD FROM CONTACTS link if the new signer or recipient is in the Address Book. In the Contacts window, select the check box for the person who is the new signer or recipient. Click ADD SELECTED.
 - Add additional options for a signatory or recipient - make a selection in the MORE list.
 - Add a private message - displays a Private Message field to enter a message that is only viewable by the signatory or recipient. Click Done.
 - Add access authentication - displays Select access authentication fields. Enter the access code, click + ADD AUTHENTICATION, and click Done.
6. Click Done.

Editing Documents

You can view the document that is being sent for eSignature, add a document to the electronic signing process, replace or rename a document in the envelope, or delete a document from the envelope.

1. In the Contract Profile screen, click the Document Pkgs link.
2. In the Document Packages browse screen, click the Current tab.
3. Locate the package whose recipients you want to edit, and click its envelope icon.
4. In the eSignature Portal, click OTHER ACTIONS, and select Edit Documents.
5. In the Upload a Document window, you can:
 - View the document that will be sent for eSignature - hover over the Document graphic until the View Document link displays, and then click on the link to display the document in the eSignature Portal.
 - Click the three vertical dots to display a menu, and select an option:
 - Apply Templates - in the Select a Template window, select the check box of a template to apply it to the current document. Click UPDATE. Reset the Signature fields and other data-capturing fields in the document, if needed.
 - Replace Document - follow the onscreen prompts to upload a document from your computer and replace the existing document in the envelope.
 - Rename Document - in the Rename window, edit the name of the document that is being sent for electronic signature. Click RENAME.
 - Delete Document - in the Delete Document window, click DELETE.

- Upload an additional document for inclusion in the eSignature ceremony - click UPLOAD and follow the onscreen prompts to upload a document from your computer.
 - Apply a template to a document that was created without a template - click USE A TEMPLATE. In the Select a Template window, select the check box of a template to apply it to the current document. Click UPDATE. Reset the Signature fields and other data-capturing fields in the document, if needed.
 - Upload a document from a source other than your PC - click GET FROM CLOUD, select a link, and follow the onscreen prompts.
6. Click Done.

Performing Advanced Options

You can assign options to an envelope that set up reminder emails to be sent when the contract has not been signed in a timely manner. There is also an option that allows a signatory to reassign their responsibility for signing the contract to another person. The Sign on Paper option allows the signatory to print out the document, sign it, and then submit the completed document by fax, or by scanning it and uploading the file to the envelope.

1. In the Contract Profile screen, click the Document Packages link.
2. In the Document Packages browse screen, click the Current tab.
3. Locate the envelope whose message you want to edit, and click its envelope icon .
4. In the eSignature Portal, click OTHER ACTIONS, and select Advanced Options.
5. In the Advanced Options window, you can:
 - Allow signatories to download the document from the envelope, sign the document, and then upload a scanned version of the signed document back to the envelope - select the Allow recipients to sign on paper check box.
 - Allow signatories to reassign the responsibility of signing the document to another person - select the Allow recipients to change signing responsibility check box.
 - Set up automatic email reminders if the document is not signed in a timely manner - select the Send automatic reminders check box, and populate the Number of days fields for email reminders.
 - Set an expiration date for the envelope, after which time, a signatory can no longer provide their electronic signature - populate the Number of days fields for the expiration date and email warning date.
6. Click Done.

Discarding the Envelope

The discard option allows the envelope to be deleted by all signatories and recipients who can access the envelope. When the envelope is discarded, or deleted, the Go To envelope icon reappears in the Document Packages browse screen, allowing a user to restart the process of submitting a document for eSignature.

1. In the Contract Profile screen, click the Document Packages link.
2. In the Document Packages browse screen, click the Current tab.
3. Locate the envelope whose message you want to edit, and click its envelope icon .
4. In the eSignature Portal, click OTHER ACTIONS, and select DISCARD.
5. In the Discard Draft prompt, click DISCARD.

Editing an Envelope After Submission

The revisions that can be made after the envelope is submitted include editing the subject and body of the email message, changing the signatories and recipients, updating the document submitted for electronic signature, and performing advanced options, such as sending a private message to a signatory or recipient.

The "envelope" is the email message that contains the contract that is to be signed electronically, and is routed to signatories and other recipients in a pre-defined order. Once the "envelope" is sent to the signatories, as well as any recipients copied on the electronic signing ceremony, Conga Contracts users can still edit all the components of the envelope in DocuSign.

Currently, Conga Contracts does not support editing an envelope in Adobe Sign.

1. In the Contract Profile screen, click the Document Packages link.
2. In the Document Packages browse screen, click the Submitted tab.
3. Locate the envelope you want to edit, and click its pencil icon.
4. In the eSignature Portal, navigate to the section you want to edit:
 - a. Add Documents - add a document to the signing ceremony, replace or delete the current document, or rename the document.
 - b. Add Recipients - add/remove signatories and recipients, change the signing order, edit the role of a signatory or recipient, and apply/remove access authorization for a signatory or recipient.
 - c. Message to All Recipients - edit the message in the envelope and send a personalized message to a signatory or recipient.

- d. Advanced Options - set an expiration date for the envelope, and allow signatories to execute the document on paper and reassign the signing responsibility.
5. Click NEXT to display the document that will be sent for eSignature in the Portal.
6. Update the Signature fields and other data-capturing fields, as needed.
7. Click CORRECT.

Conga Contracts sends an email notification to the signatories and recipients containing a link to the corrected envelope.

Tracking a Document Submitted for eSignature

Conga Contracts allows you to track the progress of the signing ceremony to ensure the document is being executed in a timely manner.

1. Locate the eSignature Package containing the document you want to track in the eSignature Packages portlet in your Dashboard. You can also track an eSignature Package from the Submitted tab in the Document Packages browse screen in a Contract Profile or the Document Packages link in your Documents menu.
2. View the status of each Signer record in the package. The possible statuses include:
 - Completed - signatory has signed the document.
 - Pending Signature - signatory has not signed the document.
 - The Duration field shows the amount of time that has passed since the signatory received email notification, requesting their eSignature.
 - Waiting - second signatory is waiting for the first signatory to sign.

Resubmitting a Request for eSignature

In tracking a contract that has been submitted for electronic signature, you may decide to submit another request if too much time has passed without a response from a signatory.

1. Locate the eSignature Package containing the document you want to resubmit for eSignature in the eSignature Packages portlet in your Dashboard. You can also resubmit a request for eSignature from the Submitted tab in the Document Packages browse screen in a Contract Profile or the Document Packages link in your Documents menu.
2. Locate the document you want to resubmit for eSignature, and click the Go To envelope icon.
3. In the Resend Electronic Signature Request prompt, click Yes.
4. In the Electronic Signature Request Sent confirmation prompt, click OK.

Reassigning a Signatory

Once a document has been submitted for eSignature, you may find it necessary to reassign the duty of electronically signing the document to another person. A signatory can be reassigned from Conga Contracts, in the DocuSign cloud, and in the Adobe Sign cloud.

Reassigning a Signatory from Conga Contracts

1. Locate the eSignature Package with the signatory you want to assign in the eSignature Packages portlet in your Dashboard. You can also reassign a signatory from the Submitted tab in the Document Packages browse screen in a Contract Profile or the Document Packages link in your Documents menu.
2. Click the pencil icon to open the Reassign DocuSign Signer dialog box:
 - Select the current signatory in the Select the current signer you would like to replace list.
 - Select the new signatory in the Select the new signer you would like to assign list.
 - Click Save.

The new signatory will receive email notification, advising them that their eSignature is requested on a contract document.

Reassigning a Signatory in the DocuSign Cloud

1. Click the REVIEW DOCUMENT link in the email received from Conga Contracts to be directed to the DocuSign cloud.
2. Click OTHER ACTIONS to display a menu, and select Assign to Someone Else.
3. In the Assign to Someone Else window, enter the name and email address of the new signer, along with the reason for reassigning the responsibility.
4. Click ASSIGN TO SOMEONE ELSE.

The process of reassigning a signatory is also used if an individual is required to witness the signature of a signatory.

Reassigning a Signatory in the Adobe Sign Cloud

1. Click the REVIEW DOCUMENT link in the email received from Conga Contracts to be directed to the Adobe Sign cloud.
2. Click Alternative actions to display a menu, and select Someone else should sign.

3. In the Delegate this document window, enter the email address of the new signer, along with your message to the new signer.
4. Click DELEGATE.

Signing a Document Electronically in the Cloud

Once a contract document has been submitted for electronic signature, each individual designated as a signatory receives an email message with a link to the DocuSign or Adobe Sign cloud where they can provide their eSignature. The order in which signatories receive the email message is determined in the eSignature Package Wizard.

1. Click the REVIEW DOCUMENT link in the email message you receive from Conga Contracts.
2. In the DocuSign or Adobe Sign cloud, click START to jump to the location where your signature, or other input, is required in the document.
3. Follow the onscreen prompts to provide the requested information.
4. Complete the electronic signing process by clicking:
 - FINISH in DocuSign.
 - Click to Sign in Adobe Sign.

Based on the eSignature solution, additional functionality is available to signatories in DocuSign and Adobe Sign.

Functionality in the DocuSign Cloud

In addition to signing the document electronically, DocuSign allows the signatory to perform other actions, select the style used for their signature, and use icons to control the display and print the contract document.

Other Actions

Click OTHER ACTIONS to display a menu with alternative options:

- Finish Later - exits the cloud. Use the link in the email message to return to the electronic signing process.
- Print & Sign - provides the option of returning the signed documents by either upload or fax.
- Upload allows you to download the documents, complete them with pen on paper, scan them, then upload the scanned, signed documents in order to return them.
- Fax allows you to download the documents, complete them with pen on paper, and return them to the sender by following faxing instructions provided to you.

- Assign to Someone Else - displays a window where you provide the name and email address of the new signer, along with the reason for reassigning the responsibility.
- Decline to Sign - voids the envelope so that it is unavailable to other signers.
- View History - displays a history of the electronic signing process for the document.
- View Certificate (PDF) - displays a Certificate of Completion for the signed document, which can be saved and printed.

Signature Style

When you click on the Sign icon, an Adopt Your Signature window displays if you have not yet selected a style for your signature.

1. Update the information displayed in the Full Name and Initials fields, if needed.
2. Click ADOPT AND SIGN if the PREVIEW box showing your signature and initials is acceptable.
3. Click the Change Style link if you want to select a different signature style.
4. Click the Draw link if you want to draw your own signature.

Functionality in the Adobe Sign Cloud

In addition to signing the document electronically, Adobe Sign allows the signatory to perform alternative actions, create their signature, select the language for the document, and use icons to control the display and download a PDF version of the contract document.

Alternative Actions

Click Alternative actions to display a menu with alternative options:

- Someone else should sign - displays a window where you provide the email address of the new signer, along with your message to the new signer.
- I will not e-sign - displays a window where you provide the reason for not providing your electronic signature.
- Clear document data - clears all the information you have added to the document.

Signature Type

In the Click here to sign text box, click to display a window that allows you to type in your signature, draw your signature, or import an image file with your signature.

Preferred Language

The default language is English, but you can make another selection in the Language list to display the document text and screen instructions/components in the selected language.

When the document signing is complete, all members of the eSignature package receive an email message, notifying them that the electronic signing ceremony is complete. The email contains a link that takes program users to the Document Packages screen in the document's Contract Profile where they can download a copy of the executed contract. The link takes those who participated in the eSignature process but do not have program credentials to the Portal. The email also contains a PDF attachment of the fully executed contract document, which can be viewed online or downloaded.

Signing a Document Electronically in Conga Contracts - Embedded

Conga Contracts customers who use the embedded version of DocuSign or Adobe Sign provide eSignatures in Conga Contracts once a contract document has been submitted for electronic signature. A program user who is designated as a signatory on a contract receives an email message with a link to Conga Contracts, while an external party or company contact without Conga Contracts credentials receives an email message with a link to the Conga Contracts Portal.

Signing a Document Electronically in the Conga Contracts Program

1. Click the link in the email message requesting your eSignature to display the Conga Contracts Login screen.
2. After logging in, ensure you are in the Submitted view of the Document Package.
3. Locate your name, and click the checkmark icon for your Signer record.
4. In the eSignature Portal, click START to jump to the location where your signature, or other input, is required in the document. In providing your eSignature and other information, there is additional functionality available for DocuSign and Adobe Sign.
5. Follow the onscreen prompts to provide the requested information.
6. Complete the electronic signing process by clicking:
 - FINISH in DocuSign.
 - Click to Sign in Adobe Sign.

Signing a Document Electronically in the Conga Contracts Portal

1. Click the link in the email message requesting your eSignature to display the Conga Contracts Portal.
2. After logging in, you will be directed to the Completed tab in the Document Packages screen.
3. Click Sign Now to display the eSignature Portal.
4. Click Start to jump to the location where your signature, or other input, is required in the document. In providing your eSignature and other information, there is additional functionality available for DocuSign and Adobe Sign.
5. Follow the onscreen prompts to provide the requested information.
6. Complete the electronic signing process by clicking:
 - FINISH in DocuSign.
 - Click to Sign in Adobe Sign.

When the document signing is complete, all members of the eSignature package receive an email message, notifying them that the electronic signing ceremony is complete. The email contains a link that takes the member to the Document Packages screen once they login to Conga Contracts (users) or the Portal (external participants). The email also contains a PDF attachment of the fully executed contract document, which can be viewed online or downloaded.

Signing a Document Electronically in Conga Contracts - Native

Conga Contracts customers who use the native version of DocuSign can electronically sign the final version of a contract in Conga Contracts once the document has been submitted for electronic signature. A program user who is designated as a signatory on a contract receives an email message with a link to Conga Contracts, while an external party or company contact without Conga Contracts credentials receives an email message with a link to the the DocuSign cloud.

Important:

Conga Contracts customers who use DocuSign Native must have credentials (login name and password) for a DocuSign account in order to electronically sign a document in Conga Contracts. Initially, each program user who wants to provide

their eSignature in Conga Contracts must enter their company's DocuSign credentials. Afterwards, the user is able to bypass the DocuSign login and is immediately directed to the eSignature Portal in Conga Contracts.

1. Click the link in the email message requesting your eSignature to display the Conga Contracts Login screen.
2. After logging in, ensure you are in the Submitted view of the Document Package.
3. Locate your name, and click the checkmark icon for your Signer record.
 - Steps 4-7 are performed the first time you attempt to sign a document electronically in Conga Contracts.
4. (Optional) In the DocuSign log in prompt:
 - Enter the email address for your company's DocuSign account, and click CONTINUE.
 - Enter the password, and click LOG IN.
5. (Optional) In the DocuSign permission prompt, click ACCEPT.
6. (Optional) When the DocuSign OAuth Configuration Complete confirmation prompt displays in a new browser window, acknowledge the prompt, and then close the browser window.
7. (Optional) Return to the Submitted view of the Document Packages screen in Conga Contracts, and click the checkmark icon again.
8. In the eSignature Portal:
 - Click START to jump to the location where your signature, or other input, is required in the document.
 - Follow the onscreen prompts to provide the requested information.
 - Click FINISH to complete the electronic signing process.
9. (Optional) Click OTHER ACTIONS to display a menu with alternative options to signing the document.

Adding a Witness to the eSignature Process

If a company requires a person to witness a signature on a contract that is signed electronically, Conga Contracts accommodates this requirement by allowing a duplicate recipient email address to be added to the envelope and inserting a signature field for the witness in the contract document.

Your company may require a person to witness a signature on a contract that is signed electronically. Adding a witness to the eSignature process is accomplished using the eSignature Package Wizard, and involves adding a duplicate recipient email address to the

envelope for the signer whose company requires a witness, as well as inserting a signature field for the witness in the contract document.

The addition of a witness to a contract document is just one example of the way in which duplicate recipient email addresses can be used in the eSignature process. Currently, Conga Contracts supports duplicate recipient email addresses in DocuSign, but not Adobe Sign.

Once the eSignature Package Wizard is completed and the contract is submitted for electronic signature, the signatory receives an email request to sign the document. After the signatory provides their eSignature in the appropriate location in the document, the signatory receives a second email request to sign the document. Using the link in this second request, the signatory assigns this responsibility to an available witness.

1. Open the Contract Profile containing the document that needs to be signed electronically.
2. Click on Wizard Tools in the Profile Toolbar, and select eSignature Package Wizard.
 - The Wizard can also be launched by clicking the Go To envelope icon in the Document Packages browse screen in the Contract Profile.
3. In the Document Selection section, select the check boxes for all the documents that require an eSignature.
4. In the Role Selection section, enter the email address for the signatory that requires a witness in the Email field, and then enter their first and last names. Leave the selection in the Action list set to Sign since this is the action that a signatory must perform in the electronic signing ceremony.
5. Repeat Step 4 to add a duplicate recipient email for the signatory that requires a witness.
6. (Optional) Click Add Recipient to add another signatory or a recipient to the electronic signing process:
 - Populate the Email, First Name, and Last Name fields for the recipient.
 - Select the role/action the person will play in the eSignature process in the Action list.
 - Sign - recipient must sign the document. The Sign option is the only option available for Adobe Sign.
 - Acknowledge Receipt - recipient receives the final document(s), but does not need to sign, initial, date, or add information to any of the documents.
 - Receive a copy - recipient receives a copy of the email message requesting the electronic signatures.
 - Update the number in the Order column to identify the order in which the recipient receives the envelope.

- If you are using Advanced DocuSign actions, there will be additional options in the Action list.
7. (Optional) In the Additional Administrator Selection section, click v to display the Address Book and select other Administrators for the electronic signing process.
 8. (Optional) Update the information in the Package Name, Email Message, and Package Description fields if you want to customize the email subject line and message text for the envelope.
 9. Click Save to display the eSignature Portal where you must add Signature fields before submitting the document for electronic signature.

Adding Signature Fields for the Signatory and Witness

After you run the eSignature Package Wizard, you are immediately directed to the eSignature Portal, which displays the contents of the "envelope" for the electronic signing ceremony. The envelope is the email message that is sent to the signatories and recipients, and contains the document(s) that must be signed electronically.

1. Select the name of the signatory whose signature requires a witness in the list above the Standard Fields section.
2. Navigate to the Signature Line for the signatory by scrolling through the document, or clicking on a numbered Document Page icon.
3. Click on the Signature icon in the Standard Fields section, and then drag-and-drop the icon above the Signature Line. The icon changes to a Sign tag and formatting options for the field display in the right-hand panel.
4. (Optional) Add additional fields to the document to capture required information for the signatory by dragging-and-dropping other fields from the Standard Fields section into the document.
5. Select the second instance of the signatory's name in the list above the Standard Fields section.
6. Click on the Signature icon in the Standard Fields list, and then drag-and-drop the icon above the Witness Signature Line. The icon changes to a Sign tag and formatting options for the field display in the right-hand panel.
7. (Optional) Add additional fields to the document to capture required information for the witness by dragging-and-dropping other fields from the Standard Fields section into the document.
8. (Optional) Repeat Steps 1-4 to add Signature and other data-capturing fields for a second signatory to the document.
9. Click SEND to submit the document for electronic signature.

Click on OTHER ACTIONS to display a menu with alternatives to submitting the envelope. Select Save and Close to save your work without submitting the envelope, or select Preview to view the envelope from the signatory's perspective.

The signatory whose signature requires a witness will sign the contract once, and then reassign their second signature line (or Witness Signature Line) to another individual in the DocuSign cloud since the identity of the witness is subject to change, based on the availability of people who can fulfill this role at the time the signatory signs the contract. This feature not available in the embedded version of DocuSign.

Assigning a Witness (Reassign Signatory)

DocuSign allows you to reassign the responsibility of signing a document electronically to another individual. This feature is useful when a witness is required to authenticate a signatory's name on a document during the electronic signing process.

Using the eSignature Package Wizard, the signatory's email address is added to the envelope twice, allowing the signatory to sign the document when they receive the first request, and then reassign the second request for their signature to a witness. Currently, Conga Contracts supports duplicate recipient email addresses in DocuSign, but not Adobe Sign.

Once the eSignature Package wizard is completed, Conga Contracts generates an email request for signature, directing the signatory to the DocuSign cloud, where he/she will simply furnish their signature in the appropriate location in the document. Conga Contracts will then send a second email request for signature to the same signatory, who must then reassign this responsibility to a witness in DocuSign.

It is recommended that the witness is present when the signatory signs the document electronically, as well as when the signatory assigns the witness the responsibility of signing the document in DocuSign.

1. Click the REVIEW DOCUMENT link in the email received from Conga Contracts to be directed to the DocuSign cloud.
2. Click OTHER ACTIONS to display a menu, and select Assign to Someone Else.
3. In the Assign to Someone Else window, enter the email address and full name of the new signer, along with the reason for reassigning the responsibility.
4. Click ASSIGN TO SOMEONE ELSE.

Witnessing a Document

An individual that is selected to witness a signatory's electronic signature on a contract document receives email notification of this request. The request contains a hot link to the DocuSign cloud where the individual provides their signature and full name on the

document signed by the signatory, attesting to the fact that they have witnessed the signing.

The addition of a witness to a contract document is just one example of the way in which duplicate recipient email addresses can be used in the electronic signature process.

1. Click the REVIEW DOCUMENT link in the email message you receive from Conga Contracts.
2. In the DocuSign cloud, review the message in the PRIVATE MESSAGE field, and click CONTINUE.
3. Click Start to jump to the location where your signature, and other input, is required in the document.
4. Click on the Signature icon to display the Adopt Your Signature window.
 - Update the information displayed in the Full Name and Initials fields, if needed.
 - Click ADOPT AND SIGN if the PREVIEW box showing your signature and initials is acceptable.
 - Click the Change Style link if you want to select a different signature style.
 - Click the Draw link if you want to draw your own signature.
5. If present, click NEXT to jump to the text field and enter your full and legal name.
6. Click FINISH.
7. In the You're Done Signing window, click CONTINUE.

Voiding an Envelope (eSignature Package)

After a document has been submitted for electronic signature using the eSignature Package Wizard, you can still halt the process by voiding the envelope. In Conga Contracts, the envelope is the email message containing the document for eSignature, which is sent to the signatories and recipients of the electronic signing process.

1. Locate the envelope (eSignature Package) you want to void in the eSignature Packages portlet in your Dashboard. You can also void an envelope from the Submitted tab in the Document Packages browse screen in a Contract Profile or the Document Packages link in your Documents menu.
2. Click the - icon for the eSignature package.
3. In the Void Envelope dialog box, enter the reason for voiding the envelope, and click Submit.

Conga Contracts sends an email to all participants in the electronic signing process, notifying them that the envelope is voided.

Document Assembly

The Document Assembly feature uses a plug-in for MS Word that launches a browser window to Conga Contracts every time a document is opened in Word. Once the user provides their login name and password, the Conga Contracts Clause Library displays next to the Word document. Using drag-and-drop, clauses can be dragged from the Clause Library and dropped into the open document.

Document Assembly Overview

Document Assembly allows a MS Word document to be updated using clauses stored in the Clause Library without launching Conga Contracts. Using a plug-in, access to the Clause Library is available from MS Word where the open document displays on the left, and Conga Contracts runs in a miniature browser window on the right. Clauses can be located in the Clause Library, and then dragged-and-dropped directly into the Word document. The Conga Contracts environment that is used to access the Clause Library can be updated to accommodate customers who run multiple instances of the program, as well as customers who use the Single Sign-On (SSO) option.

There are four tasks associated with Document Assembly:

- [Download and install the Word plug-in](#)
- [Update a Word document using the Clause Library](#)
- [Searching the Clause Library](#)
- [Update the Settings \(URL\) for the Cause Library](#)

Important:

Users must have the Word-Add In Access permission to install the plug-in needed for Document Assembly.

Downloading and Installing the Word Plug-In

Prior to using the Document Assembly feature, a user with the Word Add-In Access permission must download and install the MS Word plug-in, which is available from the Clause Browse screen. The plug-in allows the Conga Contracts Clause Library to run inside the Word application so that clauses stored in the Library can be dragged-and-dropped into a Word document.

Important: Ensure the Microsoft Word application is not running when you install the plug-in.

1. Click Contracts in the Navigation Toolbar, and click the Clause Library link.
2. In the Clause Library screen, click + Word Add In in the toolbar. If the button is not present, contact your Administrator and request the Word Add-in Access permission.
3. In the Opening prompt, click Save File, and follow the on-screen prompts to select the location for the file.
4. From the file location, double-click on the CongaWordPlugin application file to install the plug-in.
5. (Optional) Launch Microsoft Word and open a document that needs to be updated using clauses from the Conga Contracts Clause Library.

Updating a Word Document Using the Clause Library

A MS Word document can be updated using clauses from the Clause Library without running Conga Contracts. A user with the Word Add-In Access permission, who has installed the plug-in, can use the Document Assembly feature to update a document in Word by dragging-and-dropping clauses directly from the Clause Library into the document.

1. Open the MS Word document that needs to be updated with clauses from the Clause Library.
2. In the Word Plugin section of the screen, enter your Conga Contracts login name and password, and click Login.
 - If the Plugin section of the screen is not displayed, click Word Plugin in the toolbar, and then click Hide/Show Clause Panel in the second toolbar.
3. When the Plugin section of the screen refreshes, click Allow.
4. When the Plugin section of the screen refreshes a second time, search for the clause you want to add to the document:
5. Enter a name, keyword, phrase, value, or text string in the Search field.
 - The search criteria can appear in the name or body of the clause, as well as in any of the program fields used to capture the clause, including the Description, Type, Category, and Security fields. The clause search is not case-sensitive, and quotes and the Pipe (|) symbol can be used to return specific results.
6. Press the ENTER key on your keyboard.
7. When the matches for your clause display, locate the clause you want to add to your document.
8. In the Word document, position your cursor in the location you want to insert the clause.
9. In the Conga Word Plugin section of the screen, click on the clause, drag it into the Word document, and drop it onto the cursor.

10. Click the Conga Contracts Word Plugin tab to display the action buttons for the plugin.
11. Hide/Show Clause Panel - toggles the display of the Word Plugin section of the screen.
 - Settings - updates the settings (URL) for the Clause Library.
 - Logout - logs you out of Conga Contracts.
12. Click Save to save your Word document.

Searching the Clause Library

The Search option in the Document Assembly feature is used to locate the clauses in the Clause Library that can be used to edit a MS Word document. You can search for a clause using a name, keyword, value, phrase, or text string. Searching a clause is not limited to the text in the body of the clause, but extends to the fields that are used to capture the clause: Clause Name, Description, Type, Category, and Security level. For example, entering "High Security" (in quotes) as the search criteria will display all clauses whose Clause Security field is populated with this term.

A user must have the Word Add-In Access permission to search the Clause Library, and the Word Plug-in must be installed before the Clause Library can be accessed and searched in MS Word.

1. Open the MS Word document that needs to be updated with clauses from the Clause Library.
2. In the Conga Word Plugin section of the screen, enter your Conga Contracts login name and password, and click Login.
3. (Optional) When the Plugin section of the screen refreshes, click Allow.
4. When the Plugin section of the screen refreshes a second time, search for the clause:
 - Enter a name, keyword, phrase, value, or text string in the Search field.
 - For example, enter Governing Law to locate any clause that contains both the words Governing and Law.
 - The search criteria can appear in the name or body of the clause, as well as in any of the program fields used to capture the clause. A clause search is not case-sensitive.
5. (Optional) Use quotes and the Pipe symbol (|) to return specific results. For example, enter:
 6. "Governing Law" to locate any clause with the phrase Governing Law.
 7. Governing | Law to locate any clause with the word Governing or the word Law.
8. Press the ENTER key on your keyboard.

9. When the matches for your clause display, locate the clause by scrolling through the list.
10. (Optional) Drag-and-drop the clause into the Word document using Steps 6-9 in [Updating a Word Document Using the Clause Library](#).

Updating the Settings (URL) for the Clause Library

The Clause Library you use to update a MS Word document may vary based on the Conga Contracts environment where the clauses are stored. For example, your company may run multiple instances of Conga Contracts, including Test, Sandbox, Preview, and Demo environments. Updating the URL for Document Assembly allows you to easily switch between Conga Contracts sites and eliminates the need to reinstall the Word plug-in every time you want to switch environments.

The Settings option for the Word Plug-in allows customers who use the Single Sign-On (SSO) feature to define their company's URL for the Document Assembly feature.

1. Launch MS Word and open a document.
2. Click the Conga Contracts Word Plugin tab, and click Settings.
3. In the Settings window:
4. Verify the URL is correct in the End Point URL list, or select a different URL in the list.
5. For Single Sign-On customers, click the Use SSO check box, and enter your company's Conga Contracts-provided URL in the SSO URL field. Click Save. If the correct URL is not entered, you will be prompted to enter the URL again.
6. Click Save.
7. (Optional) Update the document with the clauses stored in the selected environment.

Payments

Payment streams are used to track both outgoing payments made by your company in accordance with the terms of a contract, as well as the incoming payments it receives for goods or services provided to customers. A payment forecast can be generated for each payment stream, showing projected revenue, which can be useful in planning a budget.

Payments Overview

The Payments feature uses a payment stream to track both outgoing payments made by your company in accordance with the terms of a contract, and incoming payments, or monies your company receives for providing goods or services. A payment stream consists of individual payment records that capture information for a payment, such as the invoice number, date, and due date, and the payment date. A payment forecast can be generated

for each payment stream, showing projected revenue, which can be useful in planning a budget.

You can perform the following tasks related to payments streams and forecasts:

Payment Streams:

- [Review existing payment streams](#)
- [Locate a payment](#)
- [Add a payment stream](#)
- [Edit a payment stream](#)
- [Delete a payment stream](#)

Payment Forecasts:

- [Review Payment Forecast screens](#)
- [Review existing payment forecasts](#)
- [Generate a payment forecast](#)
- [Edit a payment forecast](#)
- [Delete a payment forecast](#)

Payments Screen

The Payments feature is used to track the exchange of money in accordance with the terms of a contract. Payments recorded in the Payments browse screen in a Contract Profile can be for monies received by your company for providing goods or services, or to track monies paid by your company for receiving goods or services.

To access the browse screen, open a Contract Profile.

Payments link	Click display the Payments browse screen.
Payment Stream	Locate a payment stream, whose name appears in a gray header. Each payment stream lists the individual records in the stream, and is expanded by default.
Payment records	Review the payment records in a payment stream. A payment record captures invoice and payment information, and any notes recorded for the payment.
Edit Payment icon	Click the edit icon to edit the payment stream.
Delete Payment icon	Click the delete icon to delete the payment stream.

Payment Forecasting icon	Click the calculator icon to review, generate, or edit a payment forecast for the payment stream.
Add Stream button	Click to add a new payment stream.
View Forecast button	Click to review payment forecasts for all payments streams.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize options	<ul style="list-style-type: none"> • To resize a column, mouse over the right or left border of the header until the resize icon appears. Then, click on the border and drag it until the column is the desired width. • To move a column to a different location in the browse screen, click on the column header and then drag it to the left or right, and drop it in the desired location. If you are successfully moving a column of data, the green checkmark icon displays during the move.

Locating a Payment

Incoming and outgoing payments are recorded in the Payments screen linked to a Contract Profile. Individual payments can be located by running a search query or by reviewing the entries in the Payments screen in a Contract Profile.

Payments Screen

1. Open the Contract Profile containing the payment records.
2. In the Links section of the Profile, click the Payments link.
3. In the Payments screen, locate a payment by scrolling through the list.

Search Query

A search query to find the contract payments that were made in the first quarter of 2018 is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set up the following hierarchy in the Result Type list to search for contract payments:
 - Company→Contract
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
4. In the Criteria section, set the search hierarchy for payments that were made on a specific date in the field list:
 - Company→Contract→Payment Stream→Payment→Payment Paid Date
 - Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.
 - Scroll through the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Payment Stream folder.
 - Scroll down and click the > icon to the left of the Payment folder.
 - Scroll down and click the Payment Paid Date sub-folder.
 - You can also search for a payment by the amount, invoice number/due date, reference number, the person who recorded the payment, and the date the payment was recorded. You can also search for payment streams and payment forecasts.
5. In the Criteria section, define two sets of criteria to identify the time frame:
 - Set the end of the time frame:
 - Select Before in the inclusion list.
 - Enter 03/31/2018 in the value list, or click calendar icon and use the calendar to select the date.
 - Click Search to set a second set of search criteria for the beginning of the time frame:
 - Select the same search hierarchy in the field list: Company→Contract→Payment Stream→Payment→Payment Paid Date.
 - Select After in the inclusion list.

- Enter 12/31/2017 in the value list, or click the calendar icon and use the calendar to select the date.
6. Click Execute in the toolbar to run the query.
 7. When the Results view of the screen displays, click a search record to be directed to the Contract Profile containing the payment.
 8. In the Links section of the Profile, click the Payments link.
 9. In the Payments screen, locate the payment record.

Adding a Payment Stream

A payment stream can be added to a Contract Profile to record income received in accordance with a contract's terms (sell side) or to track the periodic payments made to fulfill a contract's terms (buy side). The forecasting option in the Payments feature provides system-generated calculations to project income/payments over time, including any incremental increases or decreases.

A payment stream must include at least one payment record in order to be saved.

1. Open the Contract Profile that needs the payment stream.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, click Add Stream in the toolbar.
4. When the screen refreshes, enter a name for the payment stream in the Stream Name field.
5. Make a selection in the Stream Type list.
 - Select Outgoing to track payments made by your company.
 - Select Incoming to track payments due to your company.
6. Click Add Payment in the toolbar.
7. When a blank payment record displays, click inside each field and provide the requested information.
 - Click the calendar icon for a date field and use the calendar to enter the date.
8. (Optional) Remove the fields that you do not want to populate, keeping in mind the Created By and Created On fields are automatically populated by Conga Contracts.
 - Hover over any column heading until the column icon displays, and click on it to open the Sort/Column menu.
 - Click Columns to display a list of available fields, and remove the fields you do not want to populate by clearing the check box to the left of the field.
9. Click Save.

Editing a Payment Stream

A payment stream can be edited by updating the information captured for a payment record, adding another payment record to the stream, or deleting a record from the stream.

Tip: If you have created a payment forecast for a payment stream, regenerate the forecast whenever you update the payment stream by clicking the Generate Rows button after clicking the stream's calculator icon in the Payments screen.

1. Open the Contract Profile with the payment stream that requires editing.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, locate the payment stream, and click its pencil icon.
4. When the screen displays in edit mode, edit a record in the payment stream by clicking in a field to enable it.
 - The only fields that are not editable are Created By, Created On, and Stream, which are used in payment forecasting.
5. (Optional) Add a record to the stream by clicking the Add Payment button in the toolbar.
 - When a blank payment record displays, click inside each field and provide the requested information.
6. (Optional) Delete a record from the stream by clicking its - icon.
7. Click Save.

Deleting a Payment Stream

An entire payment stream, which includes the individual records in the stream, can be deleted from a Contract Profile. Alternatively, an individual payment record can be deleted from a payment stream.

1. Open the Contract Profile with the payment stream that needs to be deleted.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, locate the payment stream, and click its - icon.
4. In the Delete Stream confirmation prompt, click Yes.

Payment Forecast Screens

The Payments feature includes a forecasting option where projected payments are calculated for a payment stream in a Contract Profile. There are two ways to view a payment forecast: one view shows an individual forecast with start/end dates and

projected amounts, and the second view shows all generated and saved forecasts, along with additional information and calculations.

Individual Payment Forecast

You must generate at least one payment forecast before displaying the Individual Payment Forecast view.

1. Open the Contract Profile with the forecasted payment stream.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, locate the payment stream, and click its calculator icon.

Payment Forecast records	<p>Review the payment forecast for the selected stream, including the total value for the projected stream.</p> <p>The example shown above is a 5-year forecast projecting annual payments of \$1,550 with a 2% (.02) increment every year.</p>
Payment Forecast criteria fields	<p>Identify the fields used to generate the forecast: Start Date, No. of Payments, Frequency, Amount, Increment Interval, and Increment Percentage. Although the fields are populated in the screen shot, they are blank when viewing a saved forecast.</p>
Remove All button	<p>Click to remove the payment forecast records.</p> <p>Generate a new forecast by populating the criteria fields, and clicking Generate Rows.</p>
Generate Rows button	<p>Click to generate a new payment forecast after clicking Remove All and then populating the criteria fields.</p>
Add Item button	<ul style="list-style-type: none"> • Click to add a new payment forecast record. • Manually add a record to the forecast by populating the Start Date, End Date, Amount, and Forecast Notes fields.
Delete icon	<p>Click - to delete a payment forecast record.</p>
Sort button	<p>Click to return the payment forecast records to their default sort order (ascending order by start date).</p>

Save Payment Forecast button	Click to save changes made to the forecast.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize options	<ul style="list-style-type: none"> • To resize a column, mouse over the right or left border of the header until the resize icon appears. Then, click on the border and drag it until the column is the desired width. • To move a column to a different location in the browse screen, click on the column header and then drag it to the left or right, and drop it in the desired location. If you are successfully moving a column of data, the green checkmark icon displays during the move.
Cancel button	Click to return to the Payments screen.

All Payment Forecasts

The All Payment Forecasts view shows all payment forecasts generated for a contract and provides a higher level of detail than the individual view of a payment forecast. In addition to the information provided in the Individual Payment Forecast view, the All Forecasts view also provides totals for all relevant fields and calculates any differences between what has been paid/received and what is still due/owed.

You must generate at least one payment forecast before displaying the All Payment Forecasts view.

1. Open the Contract Profile with the forecasted payment stream.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, click View Forecast in the toolbar.

Payment Forecast Stream	<p>Locate a payment stream, identified by a gray header that includes the phrase Payment Stream, followed by the name of the stream.</p> <p>Tip: Each payment stream lists the individual records in the stream, and is expanded by default.</p>
Payment Forecast records	<p>Review the payment forecast for the selected stream, including the totals for the forecasted amount, the number of payments made, the monetary value of payments made, and the difference between the amount paid and the amount owed.</p>
Start Date and End Date fields	<p>Identify the frequency for a payment using the Start Date and End Date fields. A payment forecast can be generated on a monthly, quarterly, or annual basis.</p>
Forecasted Amount field	<p>Review the amount of the payment to be made/received each month, quarter, or year.</p>
Number of Payments field	<p>Identify whether or not a payment has been made/received, including the total number of payments made to date.</p> <ul style="list-style-type: none"> • A dash (-) indicates no payment has been received, and a number indicates the number of payments that have been received.
Total Payments field	<p>Review the amount of each payment made/received, including the total number of payments made to date.</p>
Difference field	<p>Identify the balance due (or owed) for each forecasted payment.</p> <p>Tip: The balance is the difference between the value in the Forecasted Amount field and the value in the Total Payments field for each payment record. If the payment is not yet due, the amount is displayed in green text. However, if the payment, or any portion of the payment, is past due, the amount is displayed in red text.</p>
Back button	<p>Click to return to the Payments browse screen.</p>

Reviewing Payment Forecasts

The Payments feature includes a forecasting option that projects the amount of money that is expected to be spent/received in accordance with a contract's payment terms. The forecasting option provides two views: Individual Payment Forecast view for a specific payment stream and an All Payment Forecasts view that provides all the payment forecasts generated for the contract. This expanded view includes all the information in the individual view, as well as totals for all relevant fields and a calculation that displays the difference between what has been paid/received and what is still due/owed. At least one payment forecast must be generated before accessing either forecast view.

Reviewing an Individual Payment Forecast

1. Open the Contract Profile with the forecasted payment stream.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, locate the payment stream, and click its calculator icon.
4. When the screen refreshes, review the forecast for the payment stream.

Reviewing All Payment Forecasts

1. Open the Contract Profile with the forecasted payment stream.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, click View Forecast in the toolbar.
4. When the screen refreshes, review the expanded forecast for all payment streams.

Generating a Payment Forecast

Payment Forecasting is an additional calculates future amounts due/received for a contract, including any percentage increase (or decrease) to the payment amount. The feature is available for every payment stream stored in the Contract Profile.

The steps and screen shot below show how a create a 5-year payment forecast for an annual payment of \$1,550 that will increase 2% every year over the next five years, commencing on January 1, 2018.

1. Open the Contract Profile with the payment stream that needs to be forecast.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, locate the payment stream, and click its calendar icon.
4. When the screen refreshes, click in the following fields:

- Start Date, and enter 01/01/2018 as the beginning date for the forecast.
 - Click the calendar icon to use the calendar to select the date.
 - No. of Payments, and enter 5 since it is a 5-year projection and payments are made once a year.
 - Frequency, and select Annual in the list since payments are made annually.
 - Amount, and enter 1550 since this is the beginning amount of the payment on the start date.
 - Increment Interval, and select Annual in the list since the yearly payment is going to be increased every year.
 - Incremental Percentage, and enter .02 since the yearly increase is 2%.
 - Enter a negative value to calculate a decrease, such as -.02.
5. Click Generate Rows in the top toolbar.
 - The Incremental Interval and Incremental Percentage fields do not have to be populated to generate a forecast.
 6. Review the records in the payment forecast, which include the amount of the payment for each year, along with a total for the 5-year projection.
 - a. To re-run the forecast with different information, click Remove All, update the information in any of the fields in Step 4, and click Generate Rows.
 7. Click Save Payment Forecast to save the forecast, or click Cancel to exit the forecast without saving it.

Editing a Payment Forecast

A payment forecast can be edited by updating the information in any of the forecast records, manually adding a record to the forecast, or deleting a forecast record.

Alternatively, the current forecast can be replaced with a new system-generated forecast.

1. Open the Contract Profile with the payment stream whose forecast requires editing.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, locate the payment stream, and click its calendar icon.
4. When the screen refreshes with the forecasted information:
 - Click in a forecast record field to enable it, and update the text or date.
 - (Optional) Add a record to the forecast by clicking the Add Item button in the toolbar.
 - When a blank forecast record displays, click inside each field and provide the requested information.
 - (Optional) Delete a record from the forecast by clicking its - icon.
5. (Optional) Replace the forecast with a new system-generated forecast:
 - Click - Remove All to clear the forecast records.

- Populate the criteria fields to generate a new forecast: Start Date, No. of Payments, Frequency, and Amount fields, as well as the Incremental interval and Incremental Percentage fields if the payment will increase over time.
 - Click Generate Rows in the top toolbar.
 - You can also manually add a forecast by clicking the Add Item button in the toolbar and providing the information for individual forecast records.
6. Click Save Payment Forecast in the toolbar.

Deleting a Payment Forecast

An entire payment forecast, which includes the individual records in the forecast, can be deleted from a Contract Profile. Alternatively, an individual forecast record can be deleted from a payment forecast.

1. Open the Contract Profile with the payment stream whose forecast needs to be deleted.
2. Click the Payments link in the Links section of the screen.
3. In the Payments screen, locate the payment stream, and click its calendar icon.
4. When the screen refreshes with the forecasted information, click - Remove All to clear the forecast records.
5. Click Save Payment Forecast in the toolbar.

Products

The Products feature allows information to be stored on the goods and/or services specified in a contract. The information captured includes price, quantity, description, product number, and product classification. The feature also provides a Product Grid, which is a window where all product information can be edited from a central location.

Products Overview

The Products feature allows the goods and/or services associated with a contract to be added to the Contract Profile. The information that can be captured for a product includes its price, quantity, description, and classification. A product's classification is assigned using a searchable list of standardized products and services, which is provided by Conga Contracts.

The Products feature also has a Product Grid option that allows product records to be viewed and managed from a central location. The Grid is useful when there are several

products associated with a contract and the information for each product must be recorded.

You can perform the following tasks related to products:

- [Review captured product information](#)
- [Review the Product Profile](#)
- [Add a product](#)
- [Edit product information](#)
- [Delete a product](#)
- [View product information from the Product Grid](#)
- [Add a product to the Grid](#)
- [Edit and delete products in the Grid](#)

Products Browse Screen

Information for the products covered by a contract can be captured and stored in the Products screen in the Contract Profile. This information can be used to track product pricing and quantity changes, or simply provide a central location where product information can be viewed.

To access the browse screen, open a Contract Profile.

You can also review the products stored in a Contract Profile from the Product Grid.

Products link	Click to display the Products browse screen.
Product records	View the list of products added to the Contract Profile. <ul style="list-style-type: none"> • Click on a product record to display its Product Profile where you can edit information for the product, or delete it.
New Product button	Click to add a product.
Edit Product Grid button	Click to manage the products in the Grid, including viewing all products, adding a product, editing product information, and deleting a product.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.

Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize options	<ul style="list-style-type: none"> • To resize a column, mouse over the right or left border of the header until the resize icon appears. Then, click on the border and drag it until the column is the desired width. • To move a column to a different location in the browse screen, click on the column header and then drag it to the left or right, and drop it in the desired location. If you are successfully moving a column of data, the green checkmark icon displays during the move.

Product Profile

The Product Profile stores additional information for each product listed in the Products browse screen, including a complete description of the product and detailed information on its classification (product category).

1. Open the Contract Profile that contains the product record(s).
2. Click the Products link in the Links section of the screen.
3. In the Products screen, locate the product record you want to review, and click on it to display its Product Profile.

Product fields	Review the information for the product, including the description, quantity, price, unit of measure, and its product number and classification.
Edit button	Click to edit the information for the product.
Delete button	Click to delete the product.
Back to Browse button	Click to return to the Products screen.

Adding a Product

Information for a product associated with a contract can be added to the Contract Profile so that it is easily accessible or to provide supplementary information not furnished in the contract.

If you add a product from the Products screen, it is also added to the Product Grid. Conversely, adding a product to the Grid will add it to the Products screen.

1. Open the Contract Profile that needs the product information.
2. Click the Products link in the Links section of the screen.
3. In the Products screen, click New Product in the toolbar.
4. When a blank product record displays, click inside each field and provide the requested information. Observe the following when populating three of the fields/lists:
 - Do not use a \$ sign in the Product Price field.
 - If the correct unit is not in the Product Unit of Measure list, type the new unit directly into the field to add it to the list.
 - In the Product Classification list:
 - Click in the field to activate it, and then click v to display a Product Classifications window.
 - (Optional) Click Search and clear the check box for Classification Code or Classification Name to filter the search by classification codes or names.
 - Enter a product classification code or name in the Search field, and click the magnifying glass.
 - In the filtered results, locate the correct classification code/name, and click on it to select it.
 - Remove a selected code/name by clicking its x icon in the Classification list box at the top of the window.
 - Click Submit to close the window and populate the field.
5. Click Save.

Editing Product Information

The information captured for a product can be edited by updating its pricing, quantity, description, unit price, and classification code and name.

1. Open the Contract Profile that needs edits to its product information.
 1. Click the Products link in the Links section of the screen.
 2. In the Products screen, locate the product, and click on it to display its Product Profile.

Product information can also be edited from the Product Grid.

1. In the Product Profile screen, click Edit in the toolbar.
2. When the screen displays in edit mode, make edits by clicking in a field and typing over the existing text, or making a different selection in a list:
 - Update the Product Classification field as follows:
 - Click v in the list to display a Product Classifications window.
 - Remove the existing classification by clicking its x icon in the Classification list box at the top of the window.
 - Search for a new product product by entering its name or code in the Search field, and clicking the magnifying glass.
 - In the filtered results, locate the correct classification name/code, and click on it to select it.
 - Click Submit.
3. Click Save.

Deleting a Product

A product can be deleted if it is no longer covered by the contract or if it has depreciated to a zero value before the contract expires.

1. Open the Contract Profile that needs edits to its product information.
 1. Click the Products link in the Links section of the screen.
 2. In the Products screen, locate the product, and click on it to display its Product Profile.

A product can also be deleted from the Product Grid.

1. In the Product Profile screen, click Delete in the toolbar.
2. Click Yes in the Remove Product? prompt.

Product Grid

The Product Grid allows you to manage all the products that have been added to a Contract Profile from a single screen, instead of accessing individual Product Profiles and/or the Products browse screen.

1. Open the Contract Profile that has stored product information.
2. Click the Products link in the Links section of the screen.
3. In the Products screen, click Edit Product Grid in the toolbar.

Product records	View the products stored in the profile. Edit a product in the grid by clicking in any product field to activate it.
Add Product button	Click to add a product to the grid.
Delete icon	Click - to delete a product from the grid.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column display	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize options	<ul style="list-style-type: none"> • To resize a column, mouse over the right or left border of the header until the resize icon appears. Then, click on the border and drag it until the column is the desired width. • To move a column to a different location in the browse screen, click on the column header and then drag it to the left or right, and drop it in the desired location. If you are successfully moving a column of data, the green checkmark icon displays during the move

Adding a Product to the Grid

A product can be added to a Contract Profile using the Product Grid, or from the Products browse screen. The benefit of adding a product from the Product Grid is that the information for all other products is readily visible to ensure duplicate products are not added.

If you add a product to the Product Grid, it is also added to the Products screen. Conversely, adding a product from the Products screen will also add it to the Grid.

1. Open the Contract Profile that needs the product information.
2. Click the Products link in the Links section of the screen.
3. In the Products screen, click Edit Product Grid in the toolbar.
4. When the screen refreshes, click Add Product in the toolbar.

5. When a blank record displays, click inside each field and provide the requested information. Observe the following when populating three of the fields/lists:
 - Do not use a \$ sign in the Product Price field.
 - If the correct unit is not in the Product Unit of Measure list, type the new unit directly into the field to add it to the list.
 - In the Product Classification list:
 - Click in the field to activate it, and then click v to display a Product Classifications window.
 - (Optional) Click Search and clear the check box for Classification Code or Classification Name to filter the search by classification codes or names.
 - Enter a product classification code or name in the Search field, and click the magnifying glass.
 - In the filtered results, locate the correct classification code/name, and click on it to select it.
 - Remove a selected code/name by clicking its x icon in the Classification list box at the top of the window.
 - Click Submit to close the window and populate the field.
6. Click Save.

Editing and Deleting Products in the Grid

The information for several products can be updated from a central location using the Product Grid. The sort option in the Grid allows every field, except Product Classifications, to be sorted in ascending or descending order, making it easy to locate the product that needs to be updated or deleted.

1. Open the Contract Profile that needs edits to its product information.
2. Click the Products link in the Links section of the screen.
3. In the Products screen, click Edit Product Grid in the toolbar.

You can also edit and delete products from the Products browse screen.

1. When the screen refreshes:
 - Edit a product field by clicking in it to activate it.
 - Type over existing text in a field or make a different selection in a list.
 - Update the Product Classification field as follows:
 - Click v in the list to display a Product Classifications window.
 - Remove the existing classification by clicking its x icon in the Classification list box at the top of the window.

- Search for a new product product by entering its name or code in the Search field, and clicking the magnifying glass.
- In the filtered results, locate the correct classification name/code, and click on it to select it.
- Click Submit.
- Delete a field by clicking its - icon, and then clicking Yes in the Remove Product? prompt.

Contract History Files

The Contract History feature records all of the changes made to the fields in the Contract Profile screen.

Reviewing a Contract Profile's History

The History feature records all of the changes made to the fields in the Contract Profile screen, including changes to the Contract Additional Fields that have been added by an Administrator. The History screen also records any contract flows that were invalidated.

1. Open the Contract Profile whose history you want to review.
2. Click the History link in the Links section of the screen.
3. In the History screen, identify the change to a field by comparing the information in its Updated Value column to that in the Original Value column.
4. If there is information in the Updated Value field, but the corresponding Original Value field is blank, the field was not populated when the Contract Profile was created.
5. (Optional) Customize the screen display:
 - Change the fields that display by hovering over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
 - Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
 - Move a column to a different location in the browse screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

6. (Optional) Locate any fields that display Invalidated Flow, and identify the user who invalidated the contract flow, and the date/time it was invalidated.
7. Click any link or button to exit the History screen.

Reviewing a Contract's Work Log History

The History screen in a Contract Profile contains a Work Log view that displays a work record whenever a user creates or edits an event, sends a message, captures or edits an additional form, or adds a workflow or document package to the profile. A work record is also created when a user downloads or edits a document; starts, edits, or completes a workflow step; completes a workflow or task; submits a document package for electronic signature; or closes a document package.

1. Open the Contract Profile whose history you want to review.
2. Click the History link in the Links section of the screen.
3. In the History screen, click the Work Log History tab.
4. When the screen refreshes:
 - Review all the activities that users have performed for the Contract Profile.
 - (Optional) Filter the activities by clicking on selected items in the Log Level list to clear them.
 - Viewed Record - removes users who have viewed the Contract Profile.
 - Created Record - removes documents, events, additional forms, tasks, messages, document packages, and workflows that have been created.
 - Edited Record or Deleted Record - removes documents, events, additional forms, tasks, messages, document packages, and workflows that have been edited or deleted.
 - Downloaded Records - removes documents that have been downloaded from the Contract Profile.
 - Completed Workflows - removes workflows that have been completed.
 - Started Workflow Step or Completed Workflow Step - removes workflow steps that have been started or completed.
 - Completed Tasks - removes tasks that have been completed.
 - Document Package Signatures Complete - removes document packages that were submitted for electronic signature.
 - Document Package Signed - removes document packages that are closed.
 - (Optional) Click on any workflow, event, document, task, message, or document package link to be directed to the program screen.
5. (Optional) Customize the screen display:

- Change the fields that display by hovering over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
 - Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
 - Move a column to a different location in the browse screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
6. Click any link or button to exit the History screen.

Reviewing a Contract's True-Up History

The History screen in a Contract Profile contains a True-Up History view that tracks the start and completion date/time for a true-up session. The history of a true-up session also records the original and updated value for any field in the Contract/Company Profile that was updated during True-Up.

1. Open the Contract Profile whose true-up history you want to review.
2. Click the History link in the Links section of the screen.
3. In the History screen, click the True-Up History tab.
4. When the screen refreshes:
 - Identify the records between the Completed True-Up session record and the Started True-Up session record to locate the fields that were updated during the session.
 - Review the change to a field by comparing the information in its Updated Value column to that in the Original Value column.
5. (Optional) Customize the screen display:
 - Change the fields that display by hovering over a column heading until the arrow icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.

- Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
 - Move a column to a different location in the browse screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired location.
6. Click any link or button to exit the History screen.

Contract Shared Features

The Contract Profile provides links to the features shared by companies and projects: Documents, Additional Forms, Flows, Workflows, Events, Tasks, Messaging, Projects, and History.

Shared Features Overview - Contract

The Contract and Company Profiles contain several of the same links since there are features that are available to both companies and contracts: Documents, Additional Forms, Events, Tasks, Messaging, Projects, and History. However, a browse screen in a Contract Profile contains different data than a browse in its Company Profile, and a few of the browse screens contain different components. For example, the History screen in a Contract Profile contains Work Log History and True-Up History tabs that are not present in the Company Profile.

The Workflow Wizard is also available from both the Contract Profile and Company Profile, and flows can be run on both Profiles.

The following shared browse screens are available from a Contract Profile:

- [Additional Forms](#)
- [Documents](#)
- [Events](#)
- [History](#)
- [Messaging](#)
- [Projects](#)
- [Scorecards](#)
- [Tasks](#)

The following shared features are available from a Contract Profile:

- [Flows](#)
- [Workflows](#)

Contract Additional Forms

An additional form is used to capture supplemental information for a Contract Profile that is not captured by the default fields in the profile. An additional form typically contains more than two fields, and the form is automatically available from a new profile if an Administrator has linked the form to the profile. If the Administrator designated the additional form as required, you will receive constant reminders from the Conga Contracts system that the required form is "missing" until you complete the form by providing the required information. If the form is optional, it will be available via the Additional Forms link in the Contract Profile, and you can complete the form, if appropriate.

An example of contract additional form would be a Milestone form that captures delivery dates, products/services delivered, and any notes if your company has several product/service contracts that call for regularly scheduled deliveries.

If additional forms exist for a Contract Profile, you can perform the following tasks:

- [View additional forms](#)
- [Locating an Additional Form \(Opening the Form Profile\)](#)
- [Add an additional form](#)
- [Copy an additional form](#)
- [Edit an additional form](#)
- [View the history of an additional form](#)
- [Delete an additional form](#)

Contract Documents

Documents can be uploaded and stored in a Contract Profile to provide quick and easy access to the documents needed to conduct business, and create, negotiate, and revise contracts. A document stored in a profile can also be downloaded for review and revision, and then uploaded back to the profile. The Conga Contracts system tracks and identifies the revisions to a document so that the most recent version is always readily apparent and available for use. While any type of document can be uploaded to a profile, the Conga Contracts system was designed to work with MS Word and Adobe PDF files in performing the several tasks that the system can perform.

The tasks that can be performed for a document are available from two locations: Documents browse screen, which displays a list of all the documents stored in the

Company, Contract, or Project Profile, and the Document Profile, which displays all the stored information on a single document.

You can perform the following tasks from the Documents browse screen:

- [View the documents stored in the Contract Profile](#), along with some summary information for each document
- [View a Document Profile](#)
- [Add a document](#)
- [Use the Multi-Print function](#) to print some or all of the documents listed in the browse screen

You can perform the following tasks from the individual Document Profiles:

- [View document information](#)
- [Edit basic document information](#)
- [Edit a MS Word document in Conga Contracts \(Direct Editing\)](#)
- [Delete a document](#)
- [Upload a document revision](#)
- [Compare document revisions](#)
- [Download a document](#)
- [Move a document](#)

Contract Events

A contract event is a key date in the life of a contract, such as the date on which a contract is set to renew or expire. An event can be created for a single occurrence, or an event series can be set up for an event that is repeated on a regular basis.

The Events feature is available from both the Contract Profile and the Company Profile. A contract event is a key date in the life of a contract, such as the date on which a contract is set to renew or expire. An event can be created for a single occurrence, or an event series can be set up for an event that is repeated on a regular basis (i.e., weekly, monthly, or yearly).

Once you create an event, the Conga Contracts system automatically sends an email message (i.e., event alert) to all the recipients you designate. The message is sent prior to the event date, and you determine the number of days prior to the event date that the message will be sent. If you choose to set up a reminder for the event, which is simply a follow-up email reminding recipients about the upcoming event, you can set the date the reminder email is sent out and also select the individuals who receive the follow-up email message about the event.

The Conga Contracts system will automatically generate weekly (or daily) Event Notification Reports and email the reports to the event owner, as well as those users who subscribe to the event. These reports are designed to help event owners in identifying the events that need to be completed or closed.

You can perform the following tasks from the Events browse screen:

- [View events](#)
- [View an Event Profile](#)

You can perform the following tasks from the individual Event Profiles:

- [Create an event](#)
- [Edit an event](#)
- [Subscribe or unsubscribe to an event](#)
- [Complete an event](#)
- [Close an event series](#)
- [Delete an event](#)
- [View an event's completion history](#)

Understanding the way in which events are managed in Conga Contracts will help you in setting up your event alerts.

Contract History

The History screen in a Contract Profile contains three views:

- History view records changes made to the default and additional fields in the Profile screen, and also tracks any flows that were set to run on the contract, but were invalidated by a user.
- Work Log History view displays a work record whenever a user creates or edits an event, sends a message, captures or edits an additional form, or adds a workflow to the profile. A work record is also created when a user downloads or edits a document; starts, edits, or completes a workflow step; completes a workflow or task; submits a document package for electronic signature; or closes a document package.
- True-Up History view tracks when a true-up session was begun and completed, and also records the original and updated value for any field in the Contract/Company Profile that was updated during the True-Up process.

Contract Messaging

The Messaging feature allows you to send and receive email messages from a Contract, Company, or Project Profile. The recipients for an email message can include individual program users, company contacts, and external participants, or an email message can be

sent to an entire distribution list. If you are a program user, you can also reply to a message stored in a Profile.

Email messages can be sent by selecting the Messaging link in a Contract Profile; however, messaging is also available in several other program features, including Events, Workflows, Tasks, Document Packages, Scorecards, and Scheduled Reports.

You can perform the following message-related tasks from a Contract Profile:

- [View the messages in a profile](#)
- [Send a new message](#)
- [Reply to a message](#)
- [Delete a message](#)

Contract Projects

When a project is created and an existing Contract Profile is added to the project, that information is displayed in the Projects screen in the Contract Profile. The information provided includes a description of the project, its status, the date on which it was created, and the person who created it. Any project listed in the Projects screen can be accessed by clicking its project record.

1. Open the Contract Profile whose history you want to review.
2. Click the Projects link in the Links section of the screen.
3. In the Projects screen, identify the projects currently using the Contract Profile.
 - Enter any of the words used in a project name or description in the Search field, and click the magnifying glass to locate the project.
4. (Optional) Click on a project record to display its Project Profile.
5. (Optional) Customize the screen display:
 - Change the fields that display by hovering over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
 - Sort the information in a column in ascending or descending order by clicking (toggling) on the column heading.
 - Resize a column by hovering over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width.
 - Move a column to a different location in the browse screen by clicking on the column heading and dragging it to the left or right, dropping it in the desired

location. When the green checkmark icon displays, you are successfully moving the column.

6. Click any link or button to exit the Projects screen.

Contract Scorecards

Scorecards is a feature that allows you to rate a contract's performance and/or value in several areas. Your Administrators create and link scorecards to specific Contract Profiles so that whenever you open a profile that is linked to a scorecard, and a scorecard has not yet been assigned, an Assign Scorecard dialogue box automatically displays. The dialogue box prompts you to select from a list of available scorecards and then select the users you want to complete the scorecard using the Address Book. You can assign the scorecard to yourself, as well as other users or a distribution list, and also choose the date on which you want to make the scorecard available to the selected users. On that date, the Conga Contracts system sends out an email message to each user, notifying him/her that they have been selected to complete the contract scorecard.

Once you have selected and assigned a scorecard for completion, the Assign Scorecard dialogue box does not automatically display when you open a profile. However, if there is more than one scorecard linked to the profile, you can click on the Scorecards link, and select the Add Scorecard button in the browse screen to display the dialogue box, which allows you to select another scorecard for completion.

The current scorecard rating for a contract is displayed numerically in a color-coded score box located in the upper right corner of the Contract Profile header. This rating is calculated by the Conga Contracts system and reflects the average of all the scorecard values listed in the Scorecards browse screen. Score boxes are color-coded, depending on the average rating of all scorecards completed: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.

The following tasks can be completed for a contract scorecard:

- [View scorecards](#)
- [View a Scorecard Profile](#)
- [Add a scorecard](#)
- [Complete a scorecard](#)
- [Change a scorecard's start date](#)
- [Add a member to a scorecard](#)
- [Edit a scorecard](#)
- [Archive and delete scorecards](#)

Contract Tasks

A task can be added to a Contract Profile and be assigned to a Conga Contracts program user for completion. Similarly, a Task List can be added to a profile to identify the steps that must be followed to accomplish a contract-related process or procedure. For example, a Task List can be created to standardize the process for negotiating a contract.

Workflows are enhanced Task Lists, which allow you to send messages from a step in the workflow. In addition, a workflow step can require one or more approvals before activating the next step. Therefore, it is recommended that you consider both Workflows and Task Lists and determine which option better suits your needs.

You can perform the following task-related activities:

- [View tasks](#)
- [Add a task](#)
- [Edit a task](#)
- [Complete a task](#)
- [View completed tasks](#)
- [Reopen completed and past due tasks](#)
- [Create a task list](#)

Contract Flows

The Flows feature is an automated version of the Workflows feature, which uses both stages and steps to delineate the processes or procedures that a contract must go through. In addition, the stages and steps in the flow automatically display at the top of the Contract Profile, and are "grayed out" as they are completed, so that you always know what action needs to be taken to move the flow to the next step or stage. Like workflows, your Administrators create flows and then link them to the appropriate Contract Profiles. Therefore, a flow may or may not display in a Contract Profile screen. A flow is like a road map you must follow to accomplish the tasks your Administrators want you to accomplish for a Contract Profile in the Conga Contracts system.

In working with a contract flow, you can perform the following tasks:

- [View flows in a Profile](#)
- [Receive email for a flow step](#)
- [Complete a flow step](#)
- [Reassign a flow step](#)
- [View flow activities](#)

- [View Flow Diagram](#)
- [Invalidate a flow](#)
- [Launch a flow for an existing profile](#)

Contract Workflows

The Workflows feature is run on a Contract Profile via the Workflow Wizard, which provides different templates that mirror your company's business processes using a series of steps that are assigned, completed, and tracked. The wizard allows you to select the template and the team members needed to accomplish the workflow. Once a workflow step is completed, you and the other team members are notified via email so that attention can be directed to the next step. Communication with members of the workflow team may also be available from a workflow step. Documents can be uploaded and stored in a workflow for review and editing by members of the team. If a workflow step requires approval, a single approver may be designated, or a routing table may be required for two or more approvers.

A Task List is a simplified version of a workflow in that messaging is not available for individual steps and none of the steps can be approved or declined. Therefore, it is recommended that you review both the Workflow and Task List features to determine which option better suits your needs.

You can perform the following tasks related to a contract workflow:

- [View Workflows](#)
- [Create a Workflow](#)
- [Receive Email for a Workflow Step](#)
- [Viewing Workflow Steps](#)
- [Manage Workflow Documents](#)
- [Send a Message for a Workflow Step](#)
- [Approve a Workflow Step](#)
- [Reassign a Workflow Step](#)
- [Complete a Workflow Step](#)
- [Close and Re-open Workflows](#)
- [Edit and Delete Workflows](#)

My Clauses

The Clauses link in the Tools menu displays the Clause Browse screen, which lists the contract clauses that are available to you, based on your security level. Clauses are grouped into categories to facilitate identification and retrieval.

My Clauses Overview

The Clause Library is a repository for substitute contract language. The clauses that you can access depends on the security level assigned to the clause and your user permissions. If the Clause Identification & Management feature is enabled, the Clause Library is also used to store both the negotiable and non-negotiable terms in your company's contracts.

The Clause Library is a repository for substitute contract language, and is also used in Document Clause Processing and Document Assembly. The clauses that you can access depends on the security level assigned to the clause and your user role(s).

Using the Clauses feature, you can:

- [Locate a contract clause](#)
- [Group clauses](#)
- [Remove the clause grouping option](#)
- [Add a contract clause](#)
- [Copy and paste clause language](#)
- [Review revisions to a clause](#)
- [Edit a clause's language](#)
- [Delete a contract clause](#)

Locating a Contract Clause

The contract clauses that can be accessed from your Clause Browse screen reflect the alternative language that is at your disposal when you create, manage, or negotiate your company's contracts. From the browse screen, you can view the text for a clause in its entirety, along with other key information, including the clause's type, description, and security level. The security level assigned to a clause (low, medium, or high security) determines the alternative contract language that is available to you based on your user role in Conga Contracts.

The default grouping of clauses in your clause library is by category, but you can change the way your clauses are grouped.

1. Click Contracts in the Navigation Toolbar to display the menu, and then click the Clause Library link.
2. In the Clauses screen, locate the clause using the available options:
 - Search for a clause by entering the clause name, or the first word in the body of the clause, in the Search field and clicking the magnifying glass.

- If you do not know the full name of the clause, add a leading wild card (asterisk) to your search criteria. For example, entering *performance in the Search field returns all clauses with the word "performance" in its name or the body of the clause.
 - To search for any clause containing a specific word or phrase, add a leading wild card to your search criteria. For example, entering *installment payments in the Search field returns all clauses containing this phrase in the body of the clause or in its name.
 - To perform a Boolean search and locate a specific clause, use two instances of a leading wild card and a word or name. For example, enter *Governing *Texas in the Search field returns only the clauses that deal with governing law for Texas.\
 - Group the clauses by clause name, type, or security level.
 - Scroll through the list.
3. Click the + icon for a clause to display its text. To hide the text, click the- icon. The icons are also used to display/hide a group of clauses.
 4. Click on the clause record to display the Clause Profile.
 5. (Optional) Manage the display of information in the screen:
 - a. Update the columns that display using the Sort/Column menu.
 - b. Group or remove the grouping option to display clauses
 - c. Reorder and resize the columns to manage the display of information in the browse screen.
 - d. Sort the data in a column by clicking (toggling) on a column heading.

Grouping Clauses

By default, clauses that display in your Clause Browse screen are grouped by category. Grouping can be changed so that clauses are grouped by clause type, security level, name, or even description.

You can change the default grouping of the clauses that display in your Clause Browse screen so that they are grouped by clause type, security level, name, or even description, rather than by category. When clauses are grouped, the selected grouping displays as a gray header in the Clause Browse screen and all the records in that grouping appear as second level entries under that heading. You can also display clauses so that they are not grouped.

1. Click Contracts in the Navigation Toolbar to display the menu, and then click the Clause Library link.
2. In the Clause Browse screen, locate the field you want to group by: Name, Description, Type, Clause Security, or Category. The default grouping is Category.

3. Hover over the column heading for the field until the column icon displays, and click on it to open the Sort/Column/Group menu.
4. In the menu, ensure the Show in Groups check box is selected, and click Group by this field.
5. (Optional) When the screen refreshes, change the columns of information that display in the browse screen based on the new grouping:
6. Hover over any column until the column icon displays, and click on it to open the Sort/Column/Group menu.
7. In the menu, click Columns to display a secondary menu listing the available fields.\
8. Select the check box for a field to add it as a column to the browse screen.

Since the default grouping of clauses is by Category, this information displays as a heading, rather than a column of information in the browse screen. When you change the default grouping, it is recommended that you add the Category field back into the browse screen.

Removing the Clause Grouping Option

The clause grouping option can be disabled so that clauses are simply displayed in ascending or descending order according to clause name, type, security level, category, or even description.

The default display in the Clause Browse screen is to group the clauses by categories, such as Business Terms, Legal Terms, and Payment Terms, so that they are organized and easy to locate. However, you can remove the grouping option so that clauses are simply displayed in ascending or descending order according to clause name, type, security level, category, or even description.

1. Click Contracts in the Navigation Toolbar to display the menu, and then click the Clauses link.
2. In the Clause Browse screen, hover over any column until the column icon displays, and click on it to open the Sort/Column/Group menu.
3. In the menu, clear the Show in Groups check box.
4. (Optional) When the screen refreshes, change the columns of information that display in the browse screen:
5. Hover over any column until the column icon displays, and click on it to open the Sort/Column/Group menu.
6. In the menu, click Columns to display a secondary menu listing the available fields.
7. Select the check box for a field to add it as a column to the browse screen.

Adding a Clause

If you have the Clause Admin permission, you can add a contract clause and also control its availability to other users using the security option. The clauses that a user can access depends on the security level of the clause and the Clause Security defined in their user role(s). For example, if a user is assigned a user role with a medium Clause Security level, they can access the clauses with a medium security level, as well as clauses with a lower security level. However the user would not be able to access clauses with a high security level.

1. Click Contracts in the Navigation Toolbar to display the menu, and then click the Clause Library link.
2. In the Clause Library screen, click New Clause in the toolbar.
3. In the Clause Profile Edit screen:
 - Enter a descriptive name for the clause in the Clause Name field.
 - (Optional) Enter a description of the clause in the Clause Description field.
 - Make a selection in the Clause Type list to identify the type of clause you are adding.
 - Make a selection in the Clause Category list to classify the clause.
 - (Optional) Make a selection in the Clause Security list to assign a level of security to the clause.
 - Clause security levels are linked to user roles. If you want all users to view the clause, select the lowest security level or do not make a selection in this list. If you want only power users and Administrators to view this clause, select a high security level.
 - Paste the text for the clause into the Clause Text field, or type the information directly into the field.
 - (Optional) Use the formatting options to bold, italicize, and underline clause text, as well as add bullets and numbering. The undo and redo icons are used to undo and redo changes to the text.
4. Click Save.

Copying and Pasting Clause Language

You can copy text directly from any of the clauses in your Clause Library, and paste the text into any document or application that supports the CTRL C and CTRL V (copy and paste) commands.

1. Locate the clause whose text you want to copy and paste.

- Click the + icon for the clause to display its text and verify you are copying the correct contract language.
2. Click on the clause record to display its profile.
3. In the Clause Profile screen, click Edit Clause in the toolbar.
4. When the screen refreshes:
 - Select the text you want to copy in the Clause Text field by shading the text.
 - Simultaneously press the CTRL key and the letter C key on your keyboard.
5. Open the document or application where you want to paste the text you just copied.
 - Position your cursor at the location where you want to paste the text.
 - Simultaneously press the CTRL key and the letter V key on your keyboard.
6. In the Clause Profile screen, click Cancel in the toolbar.

Editing Clause Language

If you have the Clause Admin permission, you can edit any of the clauses in your Clause Library. When you revise the text in a clause, a revision record is automatically generated and the changes can be viewed from the Clause Profile screen.

1. Locate the clause you want to edit.
 - Click the + icon for the clause to display its text and verify you are editing the correct clause.
2. Click on the clause record to display its profile.
3. In the Clause Profile screen, click Edit Clause in the toolbar.
4. When the screen redisplay in edit mode, update the information in the fields and lists, as needed.
 - If you updated the information in the Clause Text field, you can view the changes in the Revision History.
5. Click Save.

Reviewing Revisions to a Clause

A revision history record is automatically generated whenever an edit is made to the text for a clause. The default view in the Clause History screen is the current version of the clause, but you can also view previous versions, along with the name of the user who made the revision.

You can search and report on the text revisions that have been made to the clauses in your library.

1. Locate the clause whose revisions you want to review.

- Click the + icon for the clause to display its text and verify you are reviewing the correct clause.
2. Click on the clause record to display its profile.
3. In the Clause Profile screen, click View History in the toolbar for the Clause Text field.
4. When the screen refreshes, view the last revision(s) made to the clause.
 - Text that has been deleted displays with a pink background and contains the strike-through feature. Text that has been added displays with a light green background. The Current list displays the name of the person who made the last revision to the clause text, along with the revision date. The Previous list displays the name of the person who made the previous revision to the clause text, along with the revision date.
5. (Optional) Review previous revisions to the clause:
 - Select another person/date in the Previous list.
 - View the revisions made to the clause in the earlier version.
 - If there is more than one previous version of the clause, you can view the differences between the revisions by making the appropriate selections in the Previous and Current lists.
6. Click Hide History to close the history view.
7. Click Back to Browse in the toolbar to return to the Clause Browse screen.

Deleting a Clause

If you have the Clause Admin permission, you can delete a clause from your Clause Library if it is no longer valid.

1. Locate the clause you want to delete.
 - Click the + icon for the clause to display its text and verify you are deleting the correct clause.
2. Click the clause record to display its Profile.
3. In the Clause Profile screen, click Delete Clause in the toolbar.
4. In the confirmation prompt, click Yes.

Clause Library Overview

Conga's Clause Library is your ultimate clause repository. It contains sub-clauses, clause comparison, clause bundles, and more. To access the Clause Library, go to Contracts and select Clause Library from the dropdown menu.

- [Create a New Clause](#)
Create a new clause in your Clause Library.

- [Create a Clause Type](#)
Create a new Clause Type in your Clause Library.
- [Create a Clause Category](#)
Create a new Clause Category in the Clause Library.
- [Create a Clause Bundle](#)
Create a new Clause Bundle in the Clause Library.
- [View and Manage Clause Library Content](#)
You can view and manage your Clause Library content through several different methods.
- [Compare Clause Revisions](#)
Compare Clause Revisions in the Clause Library.

Create a New Clause

To create a new clause in your Clause Library, take the following steps:

1. From the top menu, click on Clauses.
2. Click New Clause.
3. Fill out the following assigned fields: Clause Name, Clause Type, Clause Category, Clause Security, and Clause Text. You also have the option to enter a Clause Description, or click a checkbox to Restrict to Alternate Clause.
4. Click Save at the top right of the screen. The following message displays: Clause successfully created. Your new Clause appears in alphabetical order on the left hand Clauses pane.

Create a Clause Type

To create a new clause type in your Clause Library, take the following steps:

1. From the top menu, click on the Clause Types tab.
2. Click New Type.
3. Enter the name of your new clause type.
4. Click Save at the top right of the screen. The following message displays: Clause type successfully saved.
5. Your new Clause Type appears in alphabetical order on the left hand Clause Types pane.

Create a Clause Category

To create a new clause category in your Clause Library, take the following steps:

1. From the top menu, click on Clause Categories.

2. Click New Category.
3. Enter the name of your new clause category.
4. Click Save at the top right of the screen. The following message displays: Clause category successfully saved. Your new Clause Category appears in alphabetical order on the left hand Clause Categories pane.

Create a Clause Bundle

Create a new Clause Bundle in the Clause Library.

1. From the top menu, click on Clause Bundles.
2. Click New Bundle.
3. Enter the name of your new clause bundle, and add an optional description.
4. Click Save at the top right of the screen. The following message displays: Clause Bundle successfully created. Your new Clause Bundle appears in alphabetical order on the left hand Clause Bundles pane.

View and Manage Clause Library Content

You can view and manage your Clause Library content through several different methods.

- To make edits or delete your content, navigate to the left hand pane, and click on the name of your Clause, Clause Type, Clause Category, or Clause Bundle to open the Details tab. Make your edits and click Save, or click Delete to delete the content.
- The Related tab allows you to view associated information like Sub Clauses, Alternate Clauses, and create a new Clause Configuration.

Compare Clause Revisions

Compare Clause Revisions in the Clause Library.

To compare clauses in your Clause Library, take the following steps:

1. On the left hand Clauses pane, click on the name of the Clause you want to compare.
2. Click on the Revisions tab.
3. Click Compare Revisions.
4. A side by side comparison of your clause versions appears. Under Compare Versions at the top, select the versions you want to compare from the dropdown menu.
5. From the View Menu, select Differences or Raw from the dropdown menu.
6. Click the X in the left hand corner to exit the comparison screen and return to your clause details screen.

Clause Configuration Overview

The Clause Library gives you the ability to create different clause configurations for each contract. Clause configurations give you the ability to associate several clauses together so that you can accommodate for different scenarios with your clause library. Using clause configurations you will only need to create each clause one time and associate clauses with different sub-clauses as to ensure that different clause configurations are ready to merged into documents according to the scenario present in the contract negotiation process.

- [How to Create a Clause Configuration](#)
Create a Clause Configuration in the Clause Library.
- [Manage your Clause Configurations](#)
How to manage your Clause Configurations.

How to Create a Clause Configuration

Create a Clause Configuration in the Clause Library.

To create a clause configuration, take the following steps:

1. Create a [New Clause](#).
2. On the Related Tab, click on New Configuration.
3. Give the Clause Configuration and Alias and option description, and click Save.
4. On the Related tab, select the Clause Configuration you want to edit from the Clause Configuration dropdown menu:
5. Click Select Clauses beside Sub Clauses or Alternate Clauses.
6. Click on + to add available clauses to your configuration. Once selected, these clauses display under Selected Clauses. You can also check the **Copy Clause Configuration** box to copy an existing Clause Configuration to modify.
7. Click Save. The following confirmation message displays: Clause configuration successfully updated.

Manage your Clause Configurations

You can edit an existing Clause Configuration by selecting it from the Clause Configuration dropdown menu and clicking Edit.

My Contract Approvals

The Contract Approvals permission allows you to approve/decline the contract requests made by other users who do not have the permission to create contracts. Contract requests can also come from Salesforce users who are linked to Conga Contracts via SalesConnect.

My Contract Approvals Overview

The Contract Approvals permission allows you to approve (or decline) the contract requests made by other users who do not have the permission to create contracts. Contract requests can also come from Salesforce users who do not have access to Conga Contracts.

The Approver permission allows you to review and either approve or decline the contract requests made by other users who do not have the permission to create Contract Profiles. Contract requests can also be made by Salesforce users who link to Conga Contracts so that the new contracts they negotiate can be managed in Conga Contracts once the terms of the contract are approved, a Contract Profile is created, and the final document is uploaded and stored in the Profile.

If you have the authority to approve contract requests, an Approvals link appears in your Contracts menu. Selecting the link displays your My Approvals screen, where you can filter contract requests by status, type, and creation date. Every contract request in your browse screen is accompanied by one or more icons, indicating the processing status of the request so that you can easily identify the pending requests from those that are being processed or were approved/declined.

From your My Approvals browse screen, you can:

- [View the contract requests awaiting approval](#), as well as those currently being processed
- [Locate a contract request awaiting approval](#)
- [Begin or resume processing a contract request](#)
- [Reassign a contract request to another approver](#)

My Contract Approvals Definitions

The contract requests that you can approve/decline display in your My Approvals browse screen.

If you have permission to approve any contract requests, these requests will be displayed in your My Approvals browse screen.

<p>Navigation Toolbar</p>	<p>Click Contracts to display the menu, and then click the Approvals link. If the link is not present, you do not have permission to approve contract requests.</p>
<p>Contract Request records</p>	<p>View the contract requests pending your approval.</p>
<p>Reassignable list</p>	<p>Select All Reassignable to view only the contract requests that you can assign to another individual. The default view, My Approvals Only, provides all the contract requests that you can approve.</p>
<p>Request Status multi-select list</p>	<p>Select one or more options in the list to change the default from all statuses (no selection) to requests that have a status of Submitted, Processing, Declined, Accepted, and/ or Draft. Tip: The contract requests that are awaiting your approval have a status of Submitted.</p>
<p>Request Type multi-select list</p>	<p>Filter the types of contract requests that display by changing the default from all (no selection) to one or more of the contract request types created by your Administrators, and used as a template when users make a contract request.</p> <ul style="list-style-type: none"> • Clear a selection by clicking on the selected item.
<p>Created Within list</p>	<p>Filter contract requests by changing the default timeframe from all (no selection) to Past Year, Past 30 Days, Past 90 Days, or Past Week.</p>
<p>Search list</p>	<p>Hover over the Search label until it turns blue, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.</p>

Search field	Locate a request by typing the first few letters of the company name or request type name in the Search field, and clicking the search glass icon. To clear the filter, click X. You can also search for a contract request using any of the other fields in the Search list. For example, if you wanted to search for a request by the request number, you would ensure Request Number is selected in the Search list, and using a wild card (*), enter *00298 in the Search field.
Begin Processing Approval icon	Click to begin processing a contract request. If the refresh icon is present, the contract request failed and is not available for review. Click the icon to resubmit the locked request for the user so that you can review it.
Continue Processing Approval icon	Click the pencil icon to continue processing a contract request that has not been completed. The icon is also used to designate a contract request for a specific approver. The icon displays only for that approver.
Reassign Approval icon	Click the envelope icon to reassign the contract request to another approver.
Delete icon	Click - to delete a contract request.
Decline Notes	Reasons are provided by an approver when a contract request is declined. However, an approver may allow a declined contract request to be resubmitted when the appropriate edits are made.
Contract request records display	Manage the display of information in the screen: <ul style="list-style-type: none"> • Update the columns that display using the Sort/Column menu. • Reorder and resize the columns to manage the display of information in the browse screen. • Sort the data in a column by clicking (toggling) on a column heading.

Locating a Contract Request Submitted for Approval

The contract requests that you can review are accessible from your My Approvals portlet in the Dashboard, and from the Approvals link in your Tools menu. An easy way to locate a

contract request is to search by the name of the company making the request and by the request's status: (1) Submitted - request is awaiting approval (2) Draft - request will probably be submitted for approval in the near future (3) Processing - request is under review by an approver (4) Accepted - request has been approved, resulting in a Contract Profile being created and the contract being uploaded to the Profile, and (5) Declined - request has been denied, but resubmission may be allowed if changes are made.

My Approvals Portlet

1. In the Dashboard, locate (or add) the My Approvals portlet.
2. In the portlet, locate the request submitted for approval using the available options:
 - a. Search for a request by entering the company name or the request type name into the Search field and pressing the ENTER key on your keyboard.
 - b. Filter requests by status using the Request Status multi-select list.
 - c. Select Submitted to view only the contract requests that are awaiting approval.
 - d. Scroll through the list.
3. (Optional) Manage the display of information in the portlet:
 - a. Update the columns that display using the Sort/Column menu.
 - b. Reorder and resize the columns to manage the display of information in the browse screen.
 - c. Sort the data in a column by clicking (toggling) on a column heading.

Tools

1. Click Tools in the Navigation Toolbar to display the menu, and then click the Approvals link.
2. In the My Approvals screen, locate the request using the available options:
3. Search for a request submitted for approval by entering the company name or the request type name into the Search field and pressing the ENTER key on your keyboard.
4. Filter requests by status using the Request Status multi-select list.
5. Select Submitted to view only the contract requests that are awaiting approval.
6. Filter requests by the timeframe in which the request was created using the Created within list.
7. Filter requests by the template used to create the request in the Request Type list.
8. Scroll through the list.

9. The default view of your My Approvals screen is My Approvals Only, but you can select All Reassignable in the Reassignable list to view only the contract requests that you can assign to another individual.
10. (Optional) Manage the display of information in the screen:
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

The icons for a submitted contract request are used to identify the status of the review process, as well as indicate whether a request has been approved:

- + Icon - Begins the processing of a contract request submitted for approval.
- Pencil Icon - Resumes the processing of a contract request at the point where you left off.
 - This icon is also used to designate a contract request for a specific approver. The icon displays only for that approver.
- Envelope Icon - Reassigns the review of a contract request to another approver. The icon displays only when All Reassignable is selected in the Reassignable list in the browse screen.
- Arrow Icon - Jump to the Contract Profile for an approved contract request, or a Self-Service request.
- - Icon - Delete a submitted contract request.
- Refresh Icon - Resubmit a locked (failed) contract request so that it can be reviewed.
 - When an approver declines a contract request, Decline Notes are provided for the request. However, an approver may allow a declined contract request to be resubmitted when the appropriate edits are made.

Processing a Contract Request

Processing a contract request involves reviewing the request, providing mandatory information for the contract, and assigning individual responsibilities associated with the contract. You can exit the contract approval process at any point prior to completing the process, and then resume the approval process at a later time.

When a contract request is approved, the user who made the request will receive an email message with the subject line Conga Contracts Contract Request Accepted and the email will contain links to the contract request and the Contract Profile.

The approval process shown below is for a contract request that was created using an enhanced mode template, which is similar, but not identical to the approval process for a contract request that was created using a legacy mode template.

1. Locate the contract request you want to process. Click + to initiate the process.
2. Click the pencil icon to resume the process that was initiated by you or another approver.
 - The pencil icon is also used to designate a contract request for a specific approver. The icon displays only for that approver.
3. If the refresh icon is present for any contract request, the request failed and is not available for review, but you have permission to refresh and resubmit the request. Click the icon to refresh the locked request.
4. When the screen refreshes, process the request:
 - No action is required in the Company Name section if the company name displays as a link since a Company Profile already exists for the company. It is recommended that you click on the link to display the Company Profile and review any existing contracts with this company. To return to the approval process, click the Back button on your browser.
 - (Optional) Click the Change Company link if the company for the contract needs to be changed.
5. In the Select Existing Company prompt, click in the Company Name field to display a list of all the companies stored in Conga Contracts. Search for the company, and then click on the correct company name to select it.
6. Enter the first few letters of the company name in the Search field, and press the ENTER key on your keyboard.
7. (Optional) Click the Create New Company link if the request is for a company that does not have a Company Profile in Conga Contracts. When the screen refreshes and the new Company Profile screen displays, populate the required fields, and click Save.
8. Review the contract information for accuracy and completeness.
9. The contract request is divided into sections with blue headers, which denote the primary data captured for the contract, as well as sections with gray headers, which denote additional data for the contract.
10. Review any documents that have been attached to the request by clicking the download icon to download the document.
11. Use the links to accept or decline the individual forms in the contract request.
12. Accept Request link:
 - Contract Profile is created. When the screen refreshes and the new Contract Profile screen displays, populate the required fields, and click Save. Any documents attached to this form will be uploaded to the Contract Profile and can be accessed by clicking the Documents link in the Profile.
13. Decline Request link:
 - Decline Request dialog box displays.

- Enter the reason(s) the request was not approved in the in the Decline Notes field.
 - (Optional) Select the Allow Resubmit check box to allow the user to resubmit the request after making the suggested changes.
 - Click Decline.
 - (Optional) Click the Decline All link to decline the entire request, without having to individually decline each form.
 - Use the Decline Request dialog box to provide the user with reasons for not approving the request, as well as the option to resubmit the request.
 - (Optional) Click the Cancel link to halt the review process before approving/declining the contract request.
14. Return to the request at a later time by selecting the pencil icon icon for the contract request in your My Approvals screen.
 15. Click Save.

Reassigning a Contract Request

From time to time, you may need to reassign the responsibility of reviewing a contract request to another user. Reassignment is necessary when you have already begun processing a contract request and are unable to finish it, and when you are the only approver for a specific type of contract request.

1. Click My Place in the Navigation Toolbar to display the menu, and then click the Approvals link.
2. In the My Approvals screen, select All Reassignable in the Reassignable list.
3. Locate the contract request you want to reassign, and click its envelope icon.
4. In the Reassign Request prompt:
 - a. Locate the new approver for the contract request in the Select the user... list, and click on their name to select them.
 - b. Click Reassign.

My Contract Requests

The Requests link in the Contracts menu displays wizard-like screens that allow users who do not have permissions to add a contract to Conga Contracts to make a request for a contract. Upon approval of the request, a Contract Profile is created and the contract document is automatically uploaded to the Profile.

My Contract Requests Overview

The Contract Request feature allows users who do not have permissions to add a contract to Conga Contracts to create and submit a request for a contract. A contract request is normally reviewed and approved (or declined) by a user who has approval authority. Once the request is approved, a Contract Profile is automatically created and any documents attached to the request are stored in the Profile.

A Self Service contract request is a special type of request that does not require approval. Therefore, a Self Service contract request automatically creates a Contract Profile as soon as it is submitted. Like other approved contract requests, any documents attached to the Self Service request are stored in the Profile.

Using the Contract Request feature, you can:

- [View the contract requests](#) you have made
- [Locate the contract requests](#) you have made, and monitor their status.
- Make an [enhanced](#) contract request or a [legacy](#) contract request. Typically, an enhanced request is comprised of more than one document, such as a Master Agreement with a Schedule, and a legacy request is comprised of a single document, or if the template used in making the contract request was created prior to Release 6.1.
- [Request a Self Service contract](#)
- [Copy a contract request](#)
- [Edit a contract request](#)
- [Cancel submission of a contract request](#)
- [Resubmit a contract request](#)
- [Delete a contract request](#)

My Contract Requests Definitions

If you have permission to make a contract request, the Requests link will be in your Tools menu and your My Requests portlet will display contract request records.

<p>Navigation Toolbar</p>	<p>Click My Place to display the menu, and then click the Requests link. If the link is not present, you do not have permission to approve contract requests.</p>
<p>Contract Request records</p>	<p>View the contract requests that you have made, along with their statuses.</p>

Request Status multi-select list	Select one or more options in the list to change the default from all statuses (no selection) to requests that have a status of Submitted, Processing, Declined, Accepted, and/or Draft.
Request Type multi-select list	Filter the types of contract requests that display by changing the default from all (no selection) to one or more of the contract request types you used as a template when you made a contract request. <ul style="list-style-type: none"> • Clear a selection by clicking on the selected item.
Created Within list	Filter contract requests by changing the default timeframe from all (no selection) to Past Year, Past 30 Days, Past 90 Days, or Past Week.
Search list	Hover over the Search label until it turns blue, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.
Search field	Locate a request by typing the first few letters of the company name or request type name in the Search field, and clicking the magnifying glass icon. To clear the filter, click x. You can also search for a contract request using any of the other fields in the Search list. For example, if you wanted to search for a request by the request number, you would ensure Request Number is selected in the Search list, and using a wild card (*), enter *00304 in the Search field.
Edit Draft icon	Click the green checkmark icon to edit a contract request that has not yet been submitted for approval.
Delete Request icon	Click x to cancel submission of an unprocessed contract request. Tip: If the approval process has begun, this icon will not be present.
Reopen Request icon	Click the pencil icon to edit a submitted request that is currently being processed. <ul style="list-style-type: none"> • This icon is also present when your contract request has been declined, but you are allowed to resubmit the request after making updates.

Jump to Contract Profile icon	Click the arrow icon to display the Contract Profile for an approved contract request, or a Self-Service request. If the refresh icon icon is present, the contract request failed and has not been submitted. Click the icon to resubmit the locked request.
Copy Contract Request icon	Click the copy icon to make a copy of the contract request.
Delete icon	Click - to delete a submitted contract request.
Contract request records display	<p>Manage the display of information in the screen:</p> <ul style="list-style-type: none"> • Update the columns that display using the Sort/Column menu. • Reorder and resize the columns to manage the display of information in the browse screen. • Sort the data in a column by clicking (toggling) on a column heading.

Locating a Contract Request

The My Requests browse screen contains a list of the contract requests you have made, along with their statuses. The information in this browse screen can be filtered in several ways so that you can quickly access your contract requests and view their progress.

A contract request is created from your My Requests browse screen, which is accessed from your Contracts menu. The information in this browse screen can be filtered in several ways so that you can quickly locate a particular request. You can also locate a request from the My Requests portlet in your Dashboard.

My Requests Portlet

1. In the Dashboard, locate (or add) the My Requests portlet.
2. In the portlet, locate the request using the available options:
 - Search for a request by entering the company name or the request type name into the Search field and pressing the ENTER key on your keyboard.
 - Filter requests by status using the Request Status multi-select list.
 - Scroll through the list.
3. (Optional) Manage the display of information in the portlet:
 - Update the columns that display using the Sort/Column menu.

- Reorder and resize the columns to manage the display of information in the browse screen.
- Sort the data in a column by clicking (toggling) on a column heading.

Contracts Menu

1. Click Contracts in the Navigation Toolbar to display the menu, and then click the Requests link.
2. In the My Requests screen, locate the request using the available options:
 - Search for a request by entering the company name or the request type name into the Search field and pressing the ENTER key on your keyboard.
 - Filter requests by the timeframe in which the request was created using the Created within list.
 - Filter requests by status using the Request Status multi-select list.
 - Filter requests by the template used to create the request in the Request Type list.
 - Scroll through the list.
3. (Optional) Manage the display of information in the screen:
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

The icons for a contract request are used to perform additional tasks or view additional information for the request:

- Checkmark Icon - Display a screen that allows you to edit the contract request and/or submit the request. This icon only appears if a contract request has a Draft status.
- X Icon - Cancel submission of the contract request. However, once the approval process has begun, this icon will not be present.
- Pencil Icon - Edit a submitted request that is currently being processed.
 - This icon is also present when your contract request has been declined, but you are allowed to resubmit the request after making updates.
- Arrow Icon - Jump to the Contract Profile for an approved contract request, or a Self-Service request.
 - When you view the Contract Profile, a flow may display at the top of the Profile. A flow contains the individual steps that must be completed to move your contract request through the stages needed to generate a fully executed and legal document.
- Clipboard Icon - Make a copy of the contract request.
- - Icon - Delete a submitted contract request.

- Refresh Icon - Click to unlock a contract request that failed when the initial request was made, and resubmit the request.

Requesting a Contract - Legacy

If you do not have permission to add a contract to Conga Contracts, you can make a contract request, which must be reviewed and approved by a designated approver. In completing a contract request, you will be required to supply all the requested information and upload any documents to support your request for the new contract. Depending on the type of contract you are requesting, the amount of information you need to provide will vary. If you must provide a great deal of information, you can complete the contract request over several login sessions since Conga Contracts stores your information between sessions, allowing you time to complete and review your contract request before actually submitting it for approval.

Conga Contracts also numbers contract requests for easy identification using a combination of the company name and a system-generated number. The numbering system also assigns a number to the individual forms in the request type so that you can easily locate a specific request type in your My Requests screen. For example, a contract request might have a number such as AARO-00929.

Typically, a Legacy contract request is made when the entire contract is comprised of a single document, or if the template used in making the contract request was created prior to Release 6.1. If the contract is comprised of more than one document, such as Master Agreement with a Schedule, an Enhanced contract request is being made.

1. Click Contracts in the Navigation Toolbar, and then click the Requests link.
2. In the My Requests screen, click New Request in the toolbar.
3. In the Select a Request Type window, locate the type of contract request you want to make, and click on it to select it.
4. If the screen above does not resemble your My Requests screen, you are making an enhanced contract request.
5. When the My Requests screen redisplay, a numbered contract request displays:
6. In the Company Information section, begin typing the first few letters of the company name into the blank field to display a list of possible matches. Click on a match to select it and populate the field. You can also click v in the list to display the Select a Company window to search all companies in Conga Contracts. Enter the first few characters of the company identifier in the Search field, and click the magnifying glass.
7. If the company is not listed, click the New Company radio button, and enter the full company name into the field to add the company.

8. In the Contract Information section, populate the fields.
9. If the Approver list is present, you have the option of selecting the person who will review your contract request.
10. Click Save.
11. (Optional) Return to the My Requests screen to verify your request has been sent if you do not want to attach any documents to the request.
12. A submitted request contains three icons: Copy copy, Cancel Submission, and Delete. If the Refresh icon is present, your request has not been submitted. Click the Refresh icon to resubmit the failed (locked) contract request.
13. (Optional) When the screen refreshes, click New Document in the Documents view of the Additional Data section of the screen to upload a document file to the request. When the screen refreshes a second time:
 14. If the Documents tab is not present, you cannot upload a document for this type of request.
 15. Select the type of document you are uploading in the Document Type list.
 16. Click Select Document and follow the onscreen prompts to upload the document.
 17. (Optional) Populate the optional fields.
 18. Click Save.
 - When the screen refreshes, you can perform all document-related tasks.
19. (Optional) In the Additional Data section, if the contract request requires you to provide additional information, one or more Additional Form tabs display. Click on a tab to capture the additional information for the contract request.
20. Click New [Form Name] in the toolbar.
21. Populate the fields in the form, and click Save.
 - If an Additional Form tab is displayed in red, you must click on the tab and provide the required information or you cannot submit the contract request.
22. Click Submit Request.
23. If you are not ready to submit the request, click Cancel and return to the request at a later time from your My Requests screen by clicking the checkmark icon. You can also monitor the progress of submitted request from your My Requests screen.

Requesting a Contract - Enhanced

If you do not have permission to add a contract to Conga Contracts, you can make a contract request, which must be reviewed and approved by a designated approver. In completing a contract request, you will be required to supply all the requested information and upload any documents to support your request for the new contract. Depending on the type of contract you are requesting, the amount of information you need to provide will vary and you may or may not have the option to upload a document. If you must provide a great deal of information, you can complete the contract request over several login

sessions since Conga Contracts stores your information between sessions, allowing you time to complete and review your contract request before actually submitting it for approval.

Conga Contracts also numbers contract requests for easy identification using a combination of the company name and a system-generated number. The numbering system also assigns a number to the individual forms in the request type so that you can easily locate a specific request type in your My Requests screen. For example, a contract request might have a number such as NOVA-00928, and if there are two forms in the request, they would be numbered NOVA-00928-001 and NOVA-00928-002.

An Enhanced contract request is made when the contract is comprised of more than one document, such as a Master Agreement with a Schedule. Typically, a Legacy request is made when the entire contract is comprised of a single document, or if the template used in making the contract request was created prior to Release 6.1.

1. Click Contracts in the Navigation Toolbar, and then click the Requests link.
2. In the My Requests screen, click New Request in the toolbar.
3. In the Select a Request Type window, locate the type of contract request you want to make, and click on it to select it.
4. When the My Requests screen redisplay, a numbered request with sections, sub-sections, and editable fields displays:
5. In the Company Name section, begin typing the first few letters of the company name into the blank field to display a list of possible matches. Click on a match to select it and populate the field. You can also click v in the list to display the Select a Company window to search all companies in Conga Contracts. Enter the first few characters of the company identifier in the Search field, and click the magnifying glass.
6. If the company is not listed in the Select a Company window, enter the full company name into the field to add the company.
7. In each request type form section, populate the fields.
8. If the Approver list is present, you have the option of selecting the person who will review your contract request.
9. (Optional) In the Documents sub-section of a request type form, click Select File to upload a document file to the request form.
10. If the sub-section is not present, you cannot upload a document for this type of request.
11. (Optional) If the contract request requires you to provide additional information, one or more fields display under a gray header that bears the name of the additional form linked to the contract request. Populate the required and optional fields.

12. (Optional) Click the Add Additional [Form Name] Form link to insert a duplicate copy of the additional form into the contract request, and populate the fields. This option allows you to provide information for a recurring contract provision or event.
13. Click Submit Request.
 - If you are not ready to submit the request, click Save as Draft and return to the request at a later time from your My Requests screen by clicking the checkmark icon. You can also monitor the progress of submitted request from your My Requests screen.
14. (Optional) Return to the My Requests screen to verify your request has been sent.
15. A submitted request contains three icons: Copy, Cancel Submission, and Delete. If the Refresh icon is present, your request has not been submitted. Click the Refresh icon to resubmit the failed (locked) contract request.

If the steps above do not resemble your My Requests screen, you may be making a legacy contract request.

Receiving a Response Email for a Contract Request

When you make a contract request, you receive a system email that advises you whether or not your request has been approved.

After you make a contract request in Conga Contracts, and the request has been reviewed, you will receive a system email that advises you whether or not your request has been accepted.

From the email message, you can:

1. View summary data for the contract request, including the advisory on whether the contract request was accepted or declined. The message will also contain information relevant to your request, including the name of the company, the name of the request, and the name of the person who reviewed your request.
2. If the request was approved, the email will contain a Go To Contract link to the Contract Profile screen where you can view the approved contract document, which is ready for the counter-party's signature. There is also a link to your My Requests screen.
3. If the request was declined, the email will contain notes on why your request was declined, as well as a Go To My Requests link to your My Requests screen where you can make the appropriate changes and resubmit the request, if allowed.
4. Click the Document Attachment link to download a copy of the contract request document.
5. Return to your My Requests browse screen and locate the contract request.

- a. If the contract request was approved, the request will have a status of Accepted. Select the the arrow icon for the request to display the Contract Profile screen, and view the captured information. Click the Documents link in the Profile to view the approved document(s) for your request. If there is a flow associated with the type of contract you just created, the first stage and first step in the flow display at the top of the Profile screen.
- b. If the contract request was declined, the request will have a status of Declined. View the Decline Notes for information on why the request was declined. If you can resubmit the contract request after making the updates suggested in the Decline Notes, the pencil icon will be present.

Requesting a Self-Service Contract

A self-service contract request is a special type of request, which does not require the approval of a Conga Contracts program user. You simply submit the request, and Conga Contracts automatically creates a Contract Profile for the request. If the self-service request type template is linked to the Creation Wizard, the wizard will generate the contract document once you provide the required information and submit the request, and the document will be added to the Contract Profile.

The procedure below outlines the steps for requesting a self-service contract using an enhanced template. The procedure is similar, but not identical, to the procedure for requesting a self-service contract using a legacy template.

1. Click Contracts in the Navigation Toolbar, and then click the Requests link.
2. In the My Requests screen, click New Request in the toolbar.
3. In the Select a Request Type window, locate the self-service contract request you want to make, and click on it to select it.
4. When the My Requests screen redisplay, a numbered self-service request with sections, sub-sections, and editable fields displays:
 - In the Company Name section, begin typing the first few letters of the company name into the blank field to display a list of possible matches. Click on a match to select it and populate the field. You can also click v in the list to display the Select a Company window to search all companies in Conga Contracts. Enter the first few characters of the company identifier in the Search field, and click the magnifying glass.
 - If the company is not listed, enter the full company name into the field to add the company.
 - In each request type form section, populate the fields.

- (Optional) In the Documents sub-section of a request type form, click Select File to upload a document file to the request form.
 - A self-service contract request is typically linked to the Creation Wizard so that the contract document is automatically generated using the information you provide. The generated contract is stored in the Contract Profile that is created once you submit the request.
 - (Optional) If the contract request requires you to provide additional information, one or more fields display under a gray header that bears the name of the additional form linked to the contract request. Populate the required and optional fields.
 - (Optional) Click the Add Additional [Form Name] Form link to insert a duplicate copy of the additional form into the contract request. This option allows you to provide information for a recurring contract provision or event.
5. Click Submit Request.
 - If you are not ready to submit the request, click Save as Draft (enhanced request) or Cancel (legacy request) and return to the contract request at a later time from your My Requests screen by clicking the green checkmark icon. You can also monitor the progress of submitted request from your My Requests screen.
 6. Return to the My Requests screen and locate the Self-Service request, which should have a status of Accepted.
 7. Select the arrow icon for the request to display the Contract Profile screen, and view the captured information.
 8. Click the Documents link in the Profile to view any documents that were created by the self-service request.
 9. If there is a flow associated with the type of contract you just created, the first stage and first step in the flow display at the top of the Profile screen.
 10. If the refresh icon displays 15 minutes after submitting the request, the contract request failed, but you have permission to refresh the locked request. Click the icon to refresh the locked request.

Copying a Contract Request

You can make a copy of an existing contract request instead of creating a new one, and then edit the variable information, such as company name, before submitting it for approval. This feature is useful if you are submitting several requests with the same contract terms for more than one company.

1. Locate the contract request you want to copy, and click its copy icon.
2. In the My Requests screen, make the necessary edits for the new enhanced request or legacy request.

3. Click Submit Request.

 **Tip:**

If you are not ready to submit the request, click Save as Draft (enhanced request) or Cancel (legacy request) and return to the contract request at a later time from your My Requests screen by clicking the checkmark icon. You can also monitor the progress of submitted request from your My Requests screen.

Editing a Contract Request

You can edit a contract request with a Draft status since the review process has not begun. You can also edit a contract request with a Declined status if the person who declined your contract request is allowing you to make revisions and then resubmit your request. You can edit a request with a Submitted status if an approver has not begun the approval process, or you can cancel the request.

The steps below show how to edit a contract request that was created using an enhanced template. The procedure is similar, but not identical, to the procedure for editing a contract request that was created using a legacy template.

1. Click Contracts in the Navigation Toolbar, and then click the Requests link.
2. In the My Requests screen, locate the contract request you want to edit.
3. Click one of the following icons, depending on the status of the contract request you are editing:
4. Green Checkmark - request has not been submitted (Draft status). A contract request with multiple forms will have a green checkmark icon for the entire request, as well as the individual forms in the request.
5. X - request has been submitted, but processing has not yet begun (Submitted status). If the refresh icon is present, the contract request failed and has not been submitted. Click the icon to resubmit the locked request.
6. Pencil Icon - request has been declined, but resubmitting the request is allowed (Declined status). If the request has more than one form, clicking the pencil icon may display a window bearing the name of the request form. Click Re-open Request in the toolbar.
7. When the My Requests screen redisplay, you can make any of the following edits:
8. In the Company Name section, change the company name by selecting and typing over the existing text to display a list of possible matches. Click on a match to select it and populate the field. You can also click V in the list to display the Select a Company window to search all companies in Conga Contracts. Enter the first few

characters of the company identifier in the Search field, and click the magnifying glass.

9. If the company is not listed in the Select a Company window, enter the full company name into the field to add the company.
10. In each request type form section, edit the fields.
11. If the Approver list is present, you have the option of selecting another person to review your contract request.
12. In the Documents sub-section of a request type form, click - to remove a document from the request, and click Select File to upload a document to the request form.
13. In an Additional Form sub-section, which displays with a gray header that bears the name of the additional form linked to the contract request, edit the fields.
14. To remove a linked additional form, click its - icon.
15. To add an additional form, click the Add Additional [Form Name] Form link to insert a duplicate copy of the form into the contract request and populate the fields.
16. Click Submit Request.

Canceling a Contract Request

You can cancel a contract request that you have submitted if you need to update the request. However, this option is only available if an approver has not yet begun processing your request. The cancel submission option is used to update a pending contract request that you have already submitted, while the delete option is used to permanently remove the contract request.

1. Locate the contract request you want to cancel, and click its x icon.
2. In the window that displays, bearing the name of the contract request type, click Cancel Submission in the toolbar.
 - If the window does not display, you are cancelling a legacy contract request.
3. In the My Requests screen, make the necessary edits for the enhanced or legacy contract request.
4. Click Submit Request.

Resubmitting a Contract Request

When you submit a contract request and that request is declined, you may have the ability to reopen the contract request and make the updates suggested by the individual who reviewed the request before re-submitting the contract request for approval. It is recommended that you review the information in Decline Notes in the My Requests browse screen to identify the suggested updates needed to ensure the resubmitted contract request is approved.

1. Locate the contract request you want to resubmit, and click its pencil icon.
 - A contract request with multiple forms will have a pencil icon for the entire request, as well as the individual forms in the request.
2. In the My Requests screen, make the necessary edits for the enhanced or legacy contract request.
3. Click Submit Request.
4. If the refresh icon is present, the contract request failed and has not been submitted. Click the icon to resubmit the locked request.

Deleting a Contract Request

You can easily delete a contract request with a Draft status since the review process has not begun. You can also delete a contract request with a Declined status, which indicates that an approver has declined your request for a contract. If a contract request has a Declined status, and the pencil icon is present, you can resubmit the request after making the edits indicated in Decline Notes instead of deleting the request.

1. Locate the contract request you want to delete, and click its - icon.
2. In the confirmation prompt, click Yes.

Projects

The Projects feature creates individual standalone projects that can store Company Profiles, Contract Profiles, and/or documents in a central location for review and edit, allowing users to effectively manage the project.

Projects Overview

The Projects feature is used to create an individual standalone project that can store one or more Company Profiles, Contract Profiles, and/or documents in a central location so that you can access and edit the profile information and files, allowing you to effectively complete the project.

The Projects feature is used to create an individual standalone project that can store one or more Company Profiles, Contract Profiles, and/or documents in a central location so that you can access and edit the information stored in the Profiles and document files, allowing you to efficiently complete the project. You can participate in a project whenever you are designated as a member of the Project Team, or you can create a project where you are the only responsible party.

Projects DO NOT automatically grant Project Team Members will access to the Company/ Contract profiles contained within the project. Team Members can only view the Contract/ Company Profiles in the Project to which they have permissions to view via their assigned Role(s).

Whether you create individual projects or work as a member of a Project Team, you will be able to perform tasks, complete workflow (and flow) steps, access documents, capture additional forms, send messages from the Project Profile, and fill out scorecards to rate various aspects of the project.

Once a Company or Contract Profile is added to a project, any changes made to the Profile from within the project are automatically reflected in the individual Company or Contract Profile in Conga Contracts. A project can be accessed from the individual Profiles of the companies and contracts stored in the project using the Projects link in the Company and Contract Profiles.

You can perform the following tasks related to your projects:

- [View My Projects](#)
- [Review the Project Profile](#)
- [Locate a Project](#)
- [Add a Project](#)
- [Run the Project Team Wizard](#)
- [Edit Project Information](#)
- [View a Project's History](#)
- [Delete a Project](#)
- [Manage Project Workflows](#)
- [Manage Project Flows](#)
- [Manage Project Documents](#)
- [Manage Project Additional Forms](#)
- [Manage Project Tasks](#)
- [Manage Project Scorecards](#)
- [Manage Project Messaging](#)

Projects Screen

The Projects screen displays a list of the projects that include you as a member of the Project Team. If you have been granted the Project Admin permission, the list of projects also includes those you have created.

The information that displays for each project, such as project name, description, and the project group, type, and status, can be customized to meet your at-a-glance viewing needs. The projects that display in the browse screen can also be filtered using the Search option.

<p>Navigation Toolbar</p>	<p>Click Contracts or Companies in the Navigation Toolbar to display the menu, and then click the Projects link to display your Projects browse screen.</p>
<p>Project record link</p>	<p>Click on a link for a project record to display its Project Profile.</p>
<p>Search option</p>	<ul style="list-style-type: none"> • Click Search to display a list of searchable fields, and then click in the check box to the left of the fields you want to search. • Enter a beginning keyword or value in the Search field, and click the magnifying glass. For example, if you wanted to search for a project that contained the word "build" or "building," you would enter *build* in the Search field. • Click c to clear the filter.
<p>New Project button</p>	<p>Click to create a new project. This button displays only if you have the Project Admin permission.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Column display</p>	<p>To customize the information in the screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Show Items list	To change the number of data records that display on each screen, change the default selection.
Jump to Page option	To view a specific page of company records, enter a value in the Page field and press the ENTER key on your keyboard.
Paging option	<ul style="list-style-type: none"> • To move forward or back one page, use the > and < icons. • To display the first or last page, use the >> and << icons.
Refresh option	To return the browse screen to the default view after a running a search or making changes to the display, click refresh.

Project Profile

The Project Profile provides basic information on a project, including the purpose of the project and the team (or individual) assigned to work on the project. The Profile also contains links to the documents uploaded to the profile, the additional forms used to capture supplementary information, and a history of the changes made to the project. From the Profile, you can add flows, workflows, and tasks to allocate responsibilities to yourself and other users, communicate with members of the team, and assign scorecards to rate various aspects of the project.

1. Click MyPlace in the Navigation Toolbar, and then click the Projects link in the menu.
2. In the Projects screen, locate a project and click a project record to display its Project Profile.

Project data	Review the basic data captured for the project, including its description and its start and end dates.
Project Additional Fields section	Expand the section to review any custom fields, which are designed to capture additional information for the project.

<p>Add Item button</p>	<p>Click to display a menu that allows you to add a Company Profile, a Contract Profile, or a folder to the project. Folders are used to organize the data in a project when several different Company and Contract Profiles are needed. Once you add a folder and name it, drag-and-drop the appropriate Company and/or Contract Profiles into the folder.</p>
<p>Company Profile links</p>	<p>Identify any Company Profiles in the project, which display the name of the company and contain the Company icon. Click on a link to display the Company Profile in a new tab.</p>
<p>Contract Profile links</p>	<p>Identify any Company Profiles in the project, which display the contract number and contain the Edit Project icon. Click on a link to display the Contract Profile in a new tab.</p>
<p>Folder icon</p>	<p>Identify any folders that have been added to the project, which display with a distinctive name and contain the folder icon. Click > to the left of a project folder to display its contents.</p>
<p>Project links</p>	<p>Use the links to add additional information to the project or review project data: Workflows, Documents, Tasks, Additional Forms, History, Scorecards, and Messaging.</p>
<p>Configure Icon</p>	<p>Click the gear icon to display a Configure Links prompt.</p> <ul style="list-style-type: none"> • Clear the check boxes for all the links you want to remove from the Links section of the Profile. • Click Submit. • You cannot remove the Workflows or the Additional Forms links from a Project Profile.
<p>Contract/Company Profile screen</p>	<p>Clicking on a Company or Contract Profile link in the Menu section of the screen displays the Profile in a separate tab in the Project Profile screen, and the tab reflects the company name or contract number.</p>
<p>Edit button</p>	<p>Click to edit the basic information for the project.</p>
<p>Delete button</p>	<p>Click to delete the project.</p>

Copy Project button	Click to make a copy of the project.
Start Flow button	Click to manually run a flow for the project.

Locating a Project

The Projects browse screen contains a list of projects that you have created, as well as the projects for which you have been named a member of the project team. As a member of a project team, you may be expected to add or complete tasks, participate in flows and workflows, communicate with members of the team, and rate the project using scorecards.

1. Click Contracts or Companies in the Navigation Toolbar, and then click the Projects link in the menu.
2. In the Projects screen, locate the project by:
3. Typing the project name, or other identifier, into the Search field and pressing the ENTER key on your keyboard. Click x to clear the filter.
4. To search only specific fields in the browse screen, click Search to display a list of searchable fields. Select the check boxes for the fields you want to search.
5. Scrolling through the list of projects, or using the navigation fields and icons to page through the list of projects.
6. (Optional) Manage the display of information in the screen:
7. Update the columns that display using the Sort/Column menu.
8. Reorder and resize the columns to manage the display of information in the browse screen.
9. Sort the data in a column by clicking (togglng) on a column heading.
10. Click on a project record to display the Project Profile.
11. From the Project Profile, you can copy a project, run the Project Team Wizard, edit project information, delete a project, and view a history of changes made to the project. You can also manage project documents, tasks, additional forms, scorecards, flows and workflows, as well as the messages sent from and received to the Profile.

Adding a Project

Users with the Project Admin permission can create projects that only they work on, or they can assign a team to the project. Users who do not have this permission cannot create projects, but they can access the projects that include them as a member of the Project Team.

1. Click Contracts or Companies in the Navigation Toolbar, and then click the Projects link in the menu.
2. In the Projects screen, click New Project in the toolbar.
3. In the Project screen:
 - Enter a name for the project in the Project Name field.
 - Provide a description of the project's purpose in the Project Description field.
 - Select one of the following radio buttons:
 - Use Project Group to indicate you are responsible for completing the project.
 - In the Project Group list, select the group that accurately describes project.
 - Use Project Team to identify the members of the team who are responsible for completing the project.
 - In the Project Team field, click the magnifying glass to launch the Project Team Wizard.
 - Select the members of the team and assign permissions to each team member.
 - Make a selection in the Project Status list to indicate the project's current status.
 - Make a selection in the Project Type list to indicate the type of project you are creating.
 - (Optional) Select the Override Start Date check box to override the start date for the project, which is the date on which the first task is assigned.
 - In the Project Start Date field, enter the new start date or click the calendar to select the date.
 - (Optional) Select the Override End Date check box to override the end date for the project, which is the date on which the last task is completed.
 - In the Project End Date field, enter the new end date or click the calendar to select the date.
4. Expand the Project Additional Fields section to populate any required additional fields that were added by an Administrator.
5. Click Save.

If a flow is associated with a project, the flow will display at the top of the Project Profile screen.

Running the Project Team Wizard

The Project Team Wizard is used to select the members of a Project Team and define their level of access to the information stored in the project. The wizard can be launched when you are adding a project or editing project information.

1. From the Project Profile screen, click the Use Project Team radio button.
 - If you are not in the Project Profile screen, click Contracts or Companies in the Navigation Toolbar, and then click the Projects link. In the Projects screen, locate the project that needs the Project Team, and click on its project record to display the Project Profile screen. Click Edit in the toolbar to display the Project Profile in edit mode.
2. In the Project Team field, click the magnifying glass icon to launch the Project Team Wizard.
3. In the Project Team Wizard, click Next in the Welcome step.
4. In the Team Member Selection step:
5. Click on a user's name in the Address Book to select them and display their name in the Team > Members list box.
6. To quickly locate a user, type the first few letters of their first or last name in the Search field, and click the magnifying glass icon. To clear the filter, click X.
7. (Optional) To remove a user from the team, click their X icon in the list box.
8. Click Next.
9. In the Team Member Permissions step:
10. Select the appropriate permission check boxes for each team member:
11. Modify - ability to modify the project, including updating basic information and managing tasks, workflows, additional forms, scorecards, and messages.
12. View Documents - ability to view the documents stored in the project.
13. Upload Documents - ability to upload documents to the Project Profile.
 - a. This permission does not allow the team member to upload documents to the Company and Contract Profiles stored in the Project Profile.
14. Click Next.
15. In the Create Project Team step, click Finish.

Copying a Project

If you need to create a project that is very similar to one that already exists, you can easily make a copy of the project so that many of the data fields are auto-populated and the stored data is transferred to the new project.

1. Click MyPlace in the Navigation Toolbar, and then click the Projects link in the menu.

2. In the Projects screen, locate the project you want to copy, and click on it to select it.
3. In the Project Profile screen, click Copy Project in the toolbar.
4. In the Copy Project Wizard, click Next in the Welcome step.
5. In the Additional Form Selection step:
 - Select the check boxes for all the additional forms you want copied to the new project.
 - Click Next.
6. In the Copy Project Wizard Completion step:
 - Verify the selected forms are being moved to the new project.
 - Click Finish.
7. When the new Project Profile screen displays:
 - Edit the name of the project in the Project Name field.
 - (Optional) Update the remaining information for the new project.
 - The information in the Project Additional Fields section is replicated to the new profile, as well as all of the Menu Items (Company and Contract Profiles) and their linked documents, workflows, flows, tasks, scorecards, messages, and any additional forms stored in the original profile are also copied to the new Project Profile.
8. Click Save.

Editing Project Information

The Project Profile includes system information and uploaded data, and both can be edited.

The Project Profile includes both system information and uploaded data. System information includes the project name, description, type, status, and start/stop dates, and also identifies the people who will be working on the project. Uploaded data includes the Company Profiles, Contract Profiles, and files that are added to the project. You can edit both system information and uploaded data.

Editing System Information

1. Click Contracts or Companies in the Navigation Toolbar, and then click the Projects link in the menu.
2. In the Projects screen, locate the project you want to edit, and click on it to select it.
3. In the Project Profile screen, click Edit in the toolbar.
4. When the screen displays in edit mode, update the information in the fields and lists, as needed.
5. Click Save.

If a flow is associated with a project, you can complete a step in the flow, manage flow documents, and invalidate the flow.

Editing Uploaded Data

1. Click Contracts or Companies in the Navigation Toolbar, and then click the Projects link in the menu.
2. In the Projects screen, locate the project you want to edit, and click on it to select it.
3. In the Project Profile screen, you can make the following edits to the uploaded data in the Menu section of the screen:
 - Add a Company or Contract Profile to the project, or a folder to organize the existing profiles.
 - Click Add Item in the Menu section, and select Add Company, Add Company, or Add Folder.
 - In the Selection window for contracts and companies, click on a profile to add it to the project. In the Create a Folder prompt, enter the name of the folder to be used to organize profiles, and click Submit.
 - Edit the information in a Contract or Company Profile by clicking on it to display a tab for the Profile to the right of the active Project tab.
 - Click a tab to display its Company or Contract Profile, and make the necessary edits.
 - Click - delete to close the tab.
 - Move a Contract or Company Profile (or folder) by clicking on it, and then dragging-and-dropping it to the new location.
 - Ensure the 1 selected mode message displays to successfully move the profile or folder.
 - You can drag a Contract Profile into a Company Profile (and vice versa), and also change the hierarchy of the profiles. To quickly change a Company or Contract Profile from the second tier to the first tier in a hierarchy, drag the profile to the top folder in the Menu section.
 - Delete a Contract or Company Profile (or folder) in the Menu section by right-clicking on it, and selecting delete.
4. Make the necessary edits to the project's workflows, flows, tasks, documents, additional forms, scorecards, and messages.
5. In a project flow, you can complete steps, manage flow documents, and invalidate the flow.

Reviewing a Project's History

The History feature records all of the changes made to the fields in the Project Profile screen, including changes to the fields in the Project Additional Fields section, which have been added by an Administrator. The History screen will also include a Flow Invalidated record if a user has invalidated a flow running on the Project Profile.

1. Click Contracts in the Navigation Toolbar, and then click the Projects link in the menu.
2. In the Projects screen, locate the project whose history you want to review, and click on it to select it.
3. In the Project Profile screen, click History in the Links section.
4. Review the history of the Project Profile.

A change has been made to a field if there is information in its Original Value column. The new value is displayed in the field's corresponding Updated Value column.

Deleting a Project

You can easily delete a project once it is completed, or if the project is no longer viable.

1. Click Companies in the Navigation Toolbar, and then click the Projects link in the menu.
2. In the Projects screen, locate the project you want to delete, and click on it to select it.
3. In the Project Profile screen, click Delete in the toolbar.
4. In the Delete Project confirmation prompt, click Yes.

Project Documents

Project documents include those documents that are automatically added to the project whenever a Company or Contract Profile that houses documents is added to the project, as well as the documents that you add to the project via the Documents link or the Workflows link in the Project screen.

Project documents include those documents that are automatically added to the project whenever any of the Company and/or Contract Profiles added to the project have existing documents stored in their Profile. A document that is specific to the project must be added from the Documents screen in the Project Profile, which displays when the Documents link is selected. Project documents can also be added to a workflow, which is accessed from the Workflows link in the Project Profile.

The tasks that can be performed for a document are available from two locations: Documents screen, which displays a list of all the documents stored in the Project Profile, and the Document Profile, which displays all the stored information on a single document.

You can perform the following tasks from the Documents screen:

- View the documents stored in the Project Profile, along with summary information for each document.
- Add a document. When adding a project document, the option window below displays since you can add a document to the Project Profile, as well as any of the Contract or Company Profiles housed in the project.

When you choose:

- Select a contract or company radio button, a window displays with a list of the Contract and Company Profiles contained in the project. Once you select a profile, the document you add to the Company or Contract Profile is not only added to the Profile in the project, it is also added to the Profile in Conga Contracts.
- Select the current project radio button, the document is limited to the Project Profile and only available to yourself and/or the members of your Project Team.

You can perform the following tasks from the individual Document Profile screens:

- [Use the Multi-Print function](#) to print some or all of the documents listed in the browse screen.
- [Review the information](#) for an uploaded document
- [Preview the document](#)
- [Edit basic document information](#)
- [Edit a MS Word document in Conga Contracts \(Direct Editing\)](#)
- [Delete a document](#)
- [Upload a document revision](#)
- [Compare document revisions](#)
- [Download a document](#)
- [Move a document](#)
- [Convert a document](#)

Project Additional Forms

An additional form is used to capture supplemental information for a project that is not captured by the default fields in the Project Profile. An additional form is automatically added to a Project Profile when any of the Company and/or Contract Profiles added to the project have existing additional forms stored in their Profile. An additional form that is specific to the project must be added from the Additional Forms screen in the Project Profile,

which displays when the Additional Forms link is selected. If any of the additional forms linked to the project type (or group) are required by an Administrator, the Additional Forms screen displays whenever the Project Profile is opened, until the required form is captured. The optional additional forms linked to a project type/group can be captured at the user's discretion.

You can perform the following activities related to a project additional form:

- [Review existing additional forms](#)
- [Review information for an additional form](#)
- [Locate an additional form](#)
- [Add an additional form](#)
- [Copy an additional form](#)
- [Edit an additional form](#)
- [View the history of an additional form](#)
- [Delete an additional form](#)

Project Tasks

A task assigns a single job to a user that must be accomplished by a specific date for a project. A task is automatically added to a Project Profile when any of the Company and/or Contract Profiles added to the project have existing tasks stored in their Profile. A task specific to the project is added from the Tasks screen in the Project Profile, which displays when the Tasks link is selected.

A task assigns a single job to a user that must be accomplished by a specific date for a project. A Task List is a series of single tasks that must be completed in a specific order and completed by one or more users on specified dates. A task is automatically added to a Project Profile when any of the Company and/or Contract Profiles added to the project have existing tasks stored in their Profile. A task that is specific to the project is added from the Tasks screen in the Project Profile, which displays when the Tasks link is selected.

Workflows are enhanced Task Lists, which allow you to send messages from a step in the workflow. In addition, a workflow step can require one or more approvals before activating the next step. Therefore, it is recommended that you consider both Workflows and Task Lists and determine which option better suits your needs.

You can perform the following activities related to a project task:

- [Review all tasks](#)
- [Review completed tasks](#)
- [Add a task](#)
- [Edit a task](#)

- [Complete a task](#)
- [Reopen completed and past due tasks](#)
- [Create a task list](#)

Project Scorecards

A scorecard is used to rate a project's performance and/or value. A scorecard is automatically added to a Project Profile when any of the Company and/or Contract Profiles added to the project have existing scorecards stored in their Profile. A scorecard that is specific to the project must be added from the Scorecards screen in the Project Profile, which displays when the Scorecards link is selected. A scorecard can be added to a project whenever the information in the Project Type and/or Project Group fields match the criteria defined in a scorecard designed by users with the Scorecard Admin permission.

The current scorecard rating for a project is displayed numerically in a color-coded score box located in the upper right corner of the Project Profile header. This rating is calculated by Conga Contracts and reflects the average of all the scorecard values listed in the Scorecards screen. Score boxes are color-coded, depending on the average rating of all scorecards completed: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.

You can perform the following activities related to a project scorecard:

- [View existing scorecards](#)
- [View a Scorecard Profile](#)
- [Locate a scorecard](#)
- [Add a scorecard](#)
- [Complete a scorecard](#)
- [Change a scorecard's start date](#)
- [Add a member to a scorecard](#)
- [Edit a scorecard](#)
- [Archive and delete scorecards](#)

Project Workflows

A workflow is used to conduct a process or procedure for a project using a series of consecutive steps, with each step assigned to a user and having a specific completion date. A workflow is automatically added to a Project Profile when any of the Company and/or Contract Profiles added to the project have existing workflows stored in their Profile. A workflow that is specific to the project must be added from the Workflows screen in the

Project Profile, which displays when the Workflows link is selected. A workflow is added to a project using the Workflow Wizard.

A Task List is a simplified version of a workflow in that messaging is not available for individual steps and none of the steps can be approved or declined. Therefore, it is recommended that you review both the Workflow and Task List features to determine which option better suits your needs.

You can perform the following activities related to a project workflow:

- [Review existing workflows](#)
- [Review Workflow Profile](#)
- [Locate a workflow](#)
- [Create a Workflow](#). When adding a project workflow, the option window below displays since you can add a workflow to the Project Profile, as well as any of the Contract or Company Profiles housed in the project. When you choose:
 - Select a contract or company radio button, a window displays with a list of the Contract and Company Profiles contained in the project. Once you select a profile, the workflow you add to the Company or Contract Profile is not only added to the Profile in the project, it is also added to the Profile in Conga Contracts.
 - Select the current project radio button, the workflow is limited to the Project Profile and only available to yourself and/or the members of your Project Team.
- [Receive Email for a Workflow Step](#)
- [Viewing Workflow Steps](#)
- [Manage Workflow Documents](#)
- [Send a Message for a Workflow Step](#)
- [Approve a Workflow Step](#)
- [Reassign a Workflow Step](#)
- [Complete a Workflow Step](#)
- [Close and Re-open Workflows](#)
- [Edit and Delete Workflows](#)

Project Flows

The Flows feature is an automated version of the Workflows feature, which uses both stages and steps to delineate the processes or procedures that a project must go through.

Flows is an automated version of the Workflows feature that uses both stages and steps to complete a process or procedure that a project must go through. A flow is like a road map you must follow to accomplish the tasks your Administrators want you to accomplish for a

project. A project flow automatically displays at the top of the Project Profile screen when the profile is created and the project matches the criteria defined for running the flow. However, a user with the Flow Admin permission can manually run a flow on a Project Profile.

A company and/or contract flow is automatically added to a Project Profile when any Company and/or Contract Profiles added to the project have existing flows running on their Profile.

You can perform the following tasks related to a project flow:

- [View a flow in a project](#)
- [Locate a flow](#)
- [Receive email for a flow step](#)
- [Complete an action flow step](#)
- [Approve a flow step](#)
- [Send a message for a flow step](#)
- [Reassign a flow step](#)
- [Review flow activities](#)
- [Review the Flow Diagram](#)
- [Manage flow documents](#)
- [Invalidate a flow](#)
- [Run a flow on an existing profile](#)

Project Messaging

The Messaging feature allows email messages to be sent, received, and stored in a Project Profile. Messages are automatically added to a Project Profile when any of the Company and/or Contract Profiles added to the project have messages stored in their Profile. A message that is specific to the project is sent using the Messaging window in the Project Profile, which displays when the Messaging link is selected.

The Messaging feature allows email messages to be sent, received, and stored in a Project Profile. Messages are automatically added to a Project Profile when any of the Company and/or Contract Profiles added to the project have messages stored in their Profile. A message that is specific to the project is sent using the Messaging window in the Project Profile, which displays when the Messaging link is selected. The recipients for a message can be individual program users, company contacts, external participants, or an entire distribution list.

Tip: Messaging is also available in several other program features, including Events, Workflows, Flows, Document Packages, Scorecards, and Scheduled Reports.

You can perform the following activities related to a project message:

- [Review the messages stored in a profile](#)
- [Send a new message](#)
- [Reply to a message](#)
- [Delete a message](#)

Documents

The tasks associated with documents uploaded to a Contract, Company, or Project Profile are performed from both the Documents screen and the Document Profile. Tasks include downloading and moving documents, comparing document revisions, converting document formats, and directly editing Word documents in Conga Contracts.

Documents Overview

The documents uploaded to a Contract, Company, or Project Profile are viewed in the Documents browse screen and individual documents are managed from their Document Profile screen. The browse screen displays a list of all the documents stored in the Profile, along with summary data that can meet your at-a-glance viewing needs. The Document Profile screen that displays information for a single document, and allows you to perform several tasks for that document.

Documents stored in a Contract Profile typically include the fully executed contract and any supporting documents, as well as previous versions of the final document if the contract was negotiated in a document package or submitted for electronic signature. The Company Profile typically stores documents such as insurance certificates and other certifications, financial data, and W-9 (Tax Identification Number) forms. Since the Project Profile can house both Contract and Company Profiles, the documents stored in these profiles are automatically added to the project when the profiles are added to the project. In addition, independent documents can be uploaded to the project, such as the fact sheets and financial data that serve as source materials in completing the project.

Although the linked tasks below were written for a contract document, the steps in each task also apply to a company document or a project document.

You can perform the following tasks from the Documents browse screen:

- [View a list of documents](#) stored in the Profile, along with summary information for each document
- [Locate a document](#)

- [Review a Document Profile](#)
- [Add a document](#)
- [Use the Multi-Print function](#) to print some or all of the documents listed in the browse screen

You can perform the following tasks from a Document Profile screen:

- [Edit basic document information](#)
- [Edit a MS Word document in Conga Contracts \(Direct Editing\)](#)
- [Preview a document](#)
- [Upload a document revision](#)
- [Compare document revisions](#)
- [Download a document](#)
- [Convert a document \(Word to PDF, and PDF to Word\)](#)
- [True-up the fields in the Contract Profile with a document](#)
- [Move a document](#)
- [Delete a document](#)

Documents Screen

A list of the documents stored in a Contract, Company, or Project Profile are viewed from the Documents screen. The information that displays in the screen, such as document type and effective date, can be customized to meet your at-a-glance viewing needs.

Although the Contract Profile is used in the screenshot below, the components are the same in the Documents screen in a Company Profile and Project Profile. If you view documents from a Company Profile, there are two additional tabs in the Documents screen:

Previous Company Documents. If you select to move documents using the Company Acquisition Wizard, the document is removed from Company A and included as a document on Company B. If you do not move the documents, the document remains on Company A, and appears under Previous Company Documents on Company B.

- Company Contract Documents displays a view of all the contract documents that have been uploaded to the Contract Profile, which is housed in the Company Profile.

To access the Documents screen, open a Contract, Company, or Project Profile.

Documents link	Click to display the Documents screen.
Document records	Review a list of the documents stored in the profile. Click on a document record to open its Document Profile.

<p>Revision number</p>	<p>View the number of copies of the document stored in the profile. For example, if there is a "3" in the Revision column, there are two revisions to the document, plus the original document.</p> <p>To view or download earlier versions of the document, click on the document record to display the Document Profile screen, and scroll down to the Revisions section of the screen.</p>
<p>Search option</p>	<p>To quickly locate a document, type the first few letters of the document name or other identifier in the Search field, and press the ENTER key on your keyboard. To clear the filter, click x.</p> <ul style="list-style-type: none"> • If you only know part of the document name or other identifier, use a leading and/or trailing wild card (denoted by an asterisk "*"). For example, if you wanted to search for the final contract document, which is a PDF file, you could enter *pdf* in the Search field. <p>The document fields that can be searched are Document Type, Document Type Group, File Name, File Type, Author, and Description. Use the Search filter to limit the fields that are searched by clicking Search to display a list of fields. Select only the check box(es) for the field(s) you want to search to guarantee accurate results.</p>
<p>Document Type list</p>	<p>Click in the field to activate the list, and change the document's type.</p>
<p>Download icon</p>	<p>Click the download icon to open the document in its default format or download the document.</p>
<p>New Document button</p>	<p>Click to add a document.</p>
<p>Multi-Print button</p>	<p>Click to use the multi-print feature, which allows you to print multiple documents simultaneously.</p>

<p>Document records display</p>	<ul style="list-style-type: none"> • To customize the information in a browse screen, hover over a column heading until the column icon displays, and click it to display the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field. • To sort the information in a column in ascending or descending order, click (toggle) on the column heading. • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
<p>Show Items list</p>	<p>Click v and make a different selection to change the number of data records that display on each screen.</p>
<p>Navigation options</p>	<p>Enter the page you want to view in the Page field and press the ENTER key on your keyboard. Or use the previous < and next > arrow icons to move forward or back one page, and the first page << and last page >> icons.</p>

Document Profile

The Document Profile contains basic information for the document, including a description of the document, as well as its effective date and revision number. If the document displayed in the Profile is a revision of an earlier document, it displays a number other than "1" in the File Revision field. The original document and all revisions are listed in the Revisions section of the Profile, where they can be downloaded for review.

The toolbar in the Document Profile contains several buttons that allow you to perform various tasks related to the document, such as editing, deleting, downloading, uploading revisions, and comparing revisions.

Open a Document Profile using the Elastic Search or launch it from the Documents screen in a Company, Contract, or Project Profile.

Although the Contract Profile is used in the screen shot below, the components are the same in the Document Profile screen in a Company Profile and Project Profile.

Document data fields	<p>Review the basic information captured for the document.</p> <ul style="list-style-type: none"> • If the File Revision field displays a number other than "1," there are previous versions of the document stored in the Revisions section of the Profile.
Revisions section	<p>Review the list of documents, which includes the original version and any revisions.</p> <ul style="list-style-type: none"> • The most current version of the document appears at the top of the list, and its information displays in the Profile screen. To change the active document, click on another document version.
Download icon	<p>Click the download icon to download a copy of the document.</p>
New Document button	<p>Click to add a new document to the Company, Contract, or Project Profile.</p> <ul style="list-style-type: none"> • To add a revision to the current document, click the Upload New Revision button.
Edit Document Information button	<p>Click to edit the document's information.</p>
Process Documents button	<p>If present, click to manually process the clauses in the document.</p>
Open in Word button	<p>Click to launch the document in MS Word from inside Conga Contracts, where you can edit and save the document.</p>
Download Document button	<p>Click to display a prompt that allows you to view or download the document.</p>
Upload New Revision button	<p>Click to upload a revision to the current document.</p>
Compare Revisions button	<p>Click to generate a comparison between two versions of the same document.</p>
Preview button	<p>Click to display the document in a Preview window.</p>

Compare to Profile button	If present, click to true-up the fields in the Contract Profile with the terms in a linked contract document.
Advanced menu	<p>Click to display a menu with buttons for additional document-related tasks:</p> <ul style="list-style-type: none"> • Delete Document - deletes the document. • Move Document - launches the Move Document Wizard, which steps you through the process of moving a contract document from one profile to another. • Convert to PDF/Word toggle button - converts a MS Word document to PDF, or converts a PDF document to MS Word. <p>If the Advanced menu is not present, click the three horizontal lines icon in the toolbar to display the menu.</p>
Back to Browse button	Click to return to the Documents screen.

Locating a Document

There are two ways to locate a document and display its Document Profile: (1) Search for the document using the Elastic Search, and (2) Search for the document in the Documents browse screen in a Company, Contract, or Project Profile.

There are two ways to locate a document and display its Document Profile:

- Search for the document using the Elastic Search.
- Search for the document in the Documents screen in a Company, Contract, or Project Profile.

Elastic Search

An elastic search will locate a document using the name of the document or a keyword/phrase that is stored in the Document Profile. The search will also locate text or values contained in a document file that has been uploaded to the Profile using OCR (Optical Character Recognition). An elastic search will return results for documents stored in Company, Contract, and Project Profiles.

1. Select Document in the elastic search list in the Navigation Toolbar. This list does not display if you are running a classic document search. A classic document search is run by clicking Search in the Navigation Toolbar, and selecting the Document Search link in the menu.

2. Enter all or part of the document name, or other identifier, in the Search field, and press the ENTER key on your keyboard.
3. Enter a leading asterisk (*) if the search criteria is NOT the leading characters of the document name, or other identifier.
4. In the Results screen, locate the document, and click on its Document link to display the Company, Contract, or Project Profile that houses the document.
5. To download a copy of the document, click the Actions icon, and click Download.
6. When the screen refreshes, scroll to the Links section at the bottom of the screen to view the Document Profile.

Documents Screen

The Documents screen displays a list of all the documents that are stored in the Company, Contract, or Project Profile, along with summary data for each document.

1. Open the Company, Contract, or Project Profile that contains the document.
2. In the Links section, located at the bottom of the screen, click the Documents link.
3. In the Documents screen, enter the name of the document, or other identifier, in the Search field, and press the ENTER key on your keyboard.
4. If the document list is not lengthy, locate a document by scrolling through the list or using the navigation icons.
5. The document fields that can be searched are Document Type, Document Type Group, File Name, File Type, Author, and Description. Use the Search filter to limit the fields that are searched by clicking Search to display a list of fields. Select only the check box(es) for the field(s) you want to search to guarantee accurate results.
6. Click on a document record to display its Document Profile.

Adding a Document

You can add a document to a Company, Contract, or Project Profile from the Documents screen or from the Document Profile screen. When adding a document from the Documents screen, you have the option of using the New Document button in the toolbar or dragging-and-dropping the document from your local system.

Tip: Documents stored in a Profile are secure and access is controlled through your user role(s).

Adding a Document Using the Action Button

Although the Contract Profile is used in the screen shot below, the same steps apply to adding a document in a Company Profile and Project Profile.

1. Open a Company, Contract, or Project Profile.
2. In the Links section of the screen, click the Documents link.
3. In the Documents screen, click New Document in the toolbar.
4. When the screen refreshes, select a document type in the Document Type list. Document types are added by your Administrator and displayed under categories for easy retrieval, such as Company, Contract, Global, and Project groups.
5. Click Select in the File field to display an upload window, navigate to the document you want to add, click on it to select it, and click Open.
6. (Optional) Populate the Author, Effective Date, Current Expiration Date, and Description fields.
7. Click Save.

The Document Profile screen displays, where you can perform a variety of tasks for the document:

- Preview the document
- Upload a revision to the document
- Compare the document to an earlier version
- Edit basic document information
- Edit the document in MS Word (Direct Editing)
- Convert the document (Word to PDF, and PDF to Word)
- Move the document
- Delete the document

Adding a Document Using Drag & Drop

1. Open a Company, Contract, or Project Profile.
2. In the Links section of the screen, click the Documents link to display the Documents screen.
3. Open Windows Explorer (or equivalent) and navigate to the directory containing the document file you want to add.
4. Minimize Conga Contracts and Windows Explorer so that you can access both programs simultaneously.

5. Click the document file in Windows Explorer to select it, drag it into the Conga Contracts Documents screen, and release your mouse.
 - Add more than one document by holding down the CTRL key while clicking additional files in Explorer.
6. Click in the Document Type field for the document record to enable it, and select a document type in the list. Document types are added by your Administrator and displayed under categories for easy retrieval, such as Company, Contract, Global, and Project groups.
7. Click the document record to display its Document Profile screen where you can perform a variety of tasks for the document.

Previewing a Document

A document stored in a Company, Contract, or Project Profile can be previewed in its Document Profile. In the Preview window, you can scroll through the document or click on a thumbnail to jump to a page in the document. You can also search the document to locate text or values, print and download the document, open the document in a new browser window, as well as open another document in the Preview window. Magnification icons allow you to increase or decrease the size of the document in the window.

Although the Contract Profile is used in the screen shots below, the same steps also apply to previewing documents in a Company Profile and Project Profile.

Warning:

The Document Preview may not display a 100% accurate version of the document.

1. Open the Document Profile for the company, contract, or project document you want to preview.
 - To preview an earlier version of a document, click on its document record in the Revisions section of the screen to make the revision active.
2. In the Document Profile screen, click Preview in the toolbar. If the Preview button is not present, click three horizontal bars icon in the toolbar to display additional action buttons.
3. In the Preview window, review the document using the scroll bar or click the thumbnail icon to display thumbnails of the document pages, and click on a thumbnail to jump to the page.
4. (Optional) Use the icons in the toolbar to perform additional tasks, such as printing and downloading the document.

- Click the magnifying glass to search the document for text or a value. Select the Highlight all check box to highlight all instances of the text or value in the document.
5. Click x to close the Preview window.

Using the Multi-Print Function

The Multi-Print function allows you to simultaneously print all of the documents stored in a Contract, Company or Project Profile by combining all selected document types (Word, PDF, and Excel) into a single PDF file. This is a time-saving feature since you no longer have to open and print each document separately.

Although the Contract Profile is used in the screen shot below, the same steps also apply to using the Multi-Print function in a Company Profile and Project Profile.

1. Open the Company, Contract, or Project Profile.
2. In the Links section, located at the bottom of the screen, click the Documents link.
3. In the Documents screen, click Multi-Print in the toolbar.
4. When the screen refreshes, click inside the check box of each document you want to print.
5. To select all documents, click the in the check box that is in line with the column headings.
6. If a document has a revision, both the original document and the revision will appear in the combined PDF file
7. Click Preview in the toolbar, and follow the onscreen prompts to download the PDF file containing the selected documents.
8. Based on the browser you are using, one of the following prompts will display:
 - Google Chrome - Click the multiprint PDF tab, located in the bottom left of the screen, to display the file in a new browser window where you can save, print, and rotate the file.
 - Firefox - In the Opening window, click OK to open the file in Adobe Reader (or Acrobat), or select the Save radio button to open a window that allows you to rename the file and navigate to the location on your PC where you want to save the file, and then click OK.
 - Internet Explorer - In the download bar, click Open to open the file in Adobe Reader (or Acrobat), or click Save → > Open Folder to open a Download window that allows you to navigate to the location on your PC where you want to save the file.

Downloading a Document

You can download any of the documents stored in a Contract Profile, Company Profile, or Project Profile, including the individual revisions for each document.

Although the Contract Profile is used in the screen shot below, the same steps also apply to downloading a document in a Company Profile and Project Profile.

1. Open the Document Profile for the company, contract, or project document you want to download.
2. In the Document Profile screen, click Download Document in the toolbar to download the latest version of the document.
 - To download a copy of the original document, or a revision to the original document, scroll down to the Revisions section of the screen, locate the document, and click its download icon.
3. Follow the onscreen prompts to download the document based on the browser you are using:
 - Google Chrome - Click the tab that bears the name of the document, located in the bottom left of the screen, to open the file in its default application.
 - Firefox - In the Opening window, click OK to open the file in its default application.
 - Internet Explorer - In the download bar, click Open to open the file in its default application.

Uploading a Document Revision

You can upload one or more revisions to a document stored in a Contract Profile, Company Profile, and Project Profile. Each revision is numbered and displayed as an individual document record in the Revisions section of the Document Profile.

Although the Contract Profile is used in the screen shot below, the same steps also apply to uploading a document revision in a Company Profile and Project Profile.

1. Open the Document Profile for the company, contract, or project document that needs the revision.
2. In the Document Profile screen, click Upload New Revision in the toolbar.
3. When the screen refreshes:
 - (Optional) Edit the selection in the Document Type list.
 - Click Select in the File field to display an upload window, navigate to the document you want to add, click on it to select it, and click Open.

- (Optional) Populate the Author, Effective Date, Current Expiration Date, and Description fields.
4. Click Save.

The Document Profile screen displays and the uploaded document replaces the previous version in the Profile screen. Both versions are now listed in the Revisions section at the bottom of the screen and are assigned a revision number.

Comparing Document Revisions

When more than one version of a document has been uploaded to a Contract Profile, Company Profile, or Project Profile, you can run a comparison between two of the documents.

Although the Contract Profile is used in the screen shot below, the same steps also apply to comparing documents in a Company Profile and Project Profile.

1. Open the Document Profile for the company, contract, or project document whose revisions you want to compare.
2. In the Document Profile screen, click Compare Revisions in the toolbar. If the Compare Revisions button is not present, click the three horizontal lines icon in the toolbar to display additional action buttons.
3. When the screen refreshes, select the check boxes for the two versions of the document you want to compare, and click Compare.
4. In the Preview window, locate the changes:
 - An addition to the document is indicated by red underlined text.
 - A document deletion is indicated by red text with the strikethrough effect.
 - To navigate the document, use the scroll bar or click the thumbnail icon to display thumbnails of the document pages, and click on a thumbnail to jump to the page.
5. (Optional) Use the icons in the toolbar to perform additional tasks, such as printing and downloading the document.
6. Click the magnifying glass to search the document for text or a value. Select the Highlight all check box to highlight all instances of the text or value in the document.
7. Click x to close the Preview window.

Converting a Document

You can change the format of a Microsoft Word or a PDF document that is stored in the Documents screen linked to a Contract Profile. A Word document, which has been saved as either a DOC or DOCX file, can be converted to a PDF file. Similarly, a PDF file can be

converted to a Microsoft Word document. However, an image-based PDF that is converted to Word cannot be edited in Word; only a text-based PDF file can be edited in Word after the conversion.

Currently, this feature is only available for documents stored in a Contract Profile.

1. Open the Document Profile for the contract document that needs to be converted to a different file format.
 - To convert an earlier version of a document, click on its document record in the Revisions section of the screen to make the revision active.
2. In the Document Profile screen, click Advanced in the toolbar, and select Convert to PDF or Convert to Word. The option that displays depends on the format of the document you are converting. If the Advanced button is not present, click the three horizontal lines icon in the toolbar to display additional action buttons.
3. Conga Contracts converts the document to a PDF file, or a DOCX file, and displays the document as the next document revision.

Editing a Word Document in Conga Contracts (Direct Editing)

Documents in Word format that are uploaded and stored in a Contract, Company, or Project Profile can be opened and edited in Conga Contracts and then saved back to Conga Contracts as the next document revision using the Direct Editing feature. Direct Editing is an efficient alternative to uploading a document revision every time a minor change is made to a document, and ensures users always have access to the most recent document since revisions are automatically numbered and clearly labeled.

Warning:

To ensure the proper functioning of Direct Editing, use one of the supported web browsers, operating systems, and applications.

Although the Contract Profile is used in the screen shots below, the same steps also apply to using the Direct Editing feature in a Company Profile and Project Profile.

1. Open the Document Profile for the company, contract, or project document you want to directly edit.
2. In the Document Profile screen, click Open in Word in the toolbar.
3. Follow the onscreen prompts, which differ based on the browser you are using.
4. When the document opens in Word, edit the document, and save it.

5. In the prompt that signals Conga Contracts that you are finished editing the document, click OK.
6. Verify your edits were saved and the document was stored as the next revision by:
 - Checking the number displayed in the File Revision field in the Document Profile or in the Revision column in the Revisions section.
 - Previewing the document.

Supported Browsers, Operating Systems, and Applications for Direct Editing

The most recent versions of the Chrome, Firefox, Safari, Edge, or the Internet Explorer (IE) 10+ browser should be used with Direct Editing. IE 9 and earlier versions were not tested with Direct Editing, and therefore, might not be supported.

The supported operating systems are:

- Windows 10 (Home, Pro, Education, and Enterprise editions) with support through 10/13/2020
- Version 8.1 (expires 1/10/2023)
- Version 7 SP2 (expires 1/14/2020)
- Mac OS X v10.12.6
- Oldest supported version is Mac OS X v10.11.6 (expires July 18, 2018).
 - Other v10.12 releases of Mac OS X may not work correctly with Direct Editing.
- Linux

The supported applications are:

- All MS Office versions
- Oldest supported MS Office for Windows version is MS Office 2010 SP2 (expires 10/13/2020).
- Windows and Mac OS X versions of MS Office (both 64-bit and 32-bit editions) that have an active extended support period.
- Oldest supported MS Office for Mac version is MS Office for Mac 2011 SP3 (expires 10/10/2017).

Editing a Document Profile

The Document Profile includes both system information and uploaded documents. System information includes the document type, file name and type, revision number, description, and its effective and expiration dates. The documents uploaded to the profile can be previewed, compared, downloaded, moved, deleted, directly edited in MS Word, converted

between Word and PDF formats, and a contract document can be used to true-up the fields in the Contract Profile.

Editing a Document Profile

The Document Profile includes both system information and uploaded documents. System information includes the document type, file name and type, revision number, description, and its effective and expiration dates. The documents uploaded to the profile can be previewed, compared, downloaded, moved, deleted, directly edited in MS Word, converted between Word and PDF formats, and a contract document can be used to true-up the fields in the Contract/Company Profiles.

1. Open the Document Profile for the company, contract, or project document whose information you want to edit.
2. In the Document Profile screen, click Edit Document Information in the toolbar.
3. When the screen displays in edit mode, you can edit the following fields and lists:
 - Document Type
 - Filename
 - Author
 - Effective Date
 - Click the calendar icon to use the pop-up calendar to select the date.
 - Current Expiration Date
 - Description
4. Click Save.

Moving a Document

You can move a document from one Contract Profile to another, and from one Company Profile to another using the Move Document Wizard. You can also move a document from a Contract to a Company Profile, and vice versa, which saves you the dual tasks of deleting a document from one profile, and uploading it to another profile. The Move Document Wizard is also available in a Project Profile, and is used to move documents among Contract and Company Profiles.

Although the Contract Profile is used in the screen shot below, the same steps also apply to previewing documents in a Company Profile and Project Profile.

1. Open the Document Profile for the company, contract, or project document you want to move.

2. To move an earlier version of a document, click on its document record in the Revisions section of the screen to make the revision active.
3. In the Document Profile screen, click Advanced in the toolbar, and select Move Document.
4. If the Advanced button is not present, click the three horizontal bars icon in the toolbar to display additional action buttons.
5. In the Move Document Wizard, provide the requested information to move the document to the correct Contract or Company Profile.

Deleting a Document

You can easily delete any of the documents that have been uploaded to a Contract, Company, or Project Profile if they are no longer needed. For example, earlier versions of a successfully negotiated contract can be deleted so that only the final version of the contract is kept, making the legally enforceable document easy to identify.

Although the Contract Profile is used in the screen shot below, the same steps also apply to deleting a document in a Company Profile and Project Profile.

1. Open the Document Profile for the company, contract, or project document you want to delete.
2. To delete an earlier version of a document, click on its document record in the Revisions section of the screen to make the revision active.
3. In the Document Profile screen, click Advanced in the toolbar, and select Delete Document. If the Advanced button is not present, click the three horizontal bars icon in the toolbar to display additional action buttons.
4. In the Delete confirmation prompt, click Yes.

My Document Packages

The Document Packages link in the Documents menu displays only when you have been invited to be a member of a document package. The link displays a Document Packages browse screen, which allows you to view information and perform tasks related to the package.

My Document and eSignature Packages Overview

The Document Packages link will be present in your My Place menu when you have been invited to be a member or Administrator of a document package, or when you are a signer, Administrator, or participant in an eSignature package.

A document package is created using the Document Package Wizard, and is typically used to create a package that stores the contract documents that need to be negotiated prior to finalizing a deal, while providing both program users and company contacts (and/or external people) access to the documents. If you are a member or an Administrator of a document package, the Document Packages link displays in your Documents menu. As a member/Administrator of a document package, you can participate in the activities for the package, which include checking a document out, making edits, and then uploading the revised document to the package as the newest version of the contract.

Similarly, if you are a member or Administrator of an eSignature package, the Document Packages link in your Documents menu will take you to the Document Packages screen, which houses both eSignature and Document Packages. An eSignature package is created using the eSignature Package Wizard, and is typically used to create a package that stores the final contract document, which is ready for electronic signature, while providing both program users and company contacts (and/or external people) access to the document.

For a document package, program users participate in the package from Conga Contracts, while company contacts and external parties participate in the document package from the Portal. For an eSignature package, program users can sign the document in Conga Contracts or in the DocuSign/Adobe Sign cloud, along with the company contacts/or and external parties for the contract.

Using the Document Package and eSignature Package features, you can:

- [Locate your Document Packages](#)
- [Locate your eSignature Packages](#)
- [Compare a Document Package to an eSignature Package](#)
- [Create a Portal account to access a document or eSignature package](#)
- [Participate in a document package from the Portal](#)
- [Sign a document electronically in the Portal](#)

Document and eSignature Package Comparison

A document package is used when a contract document needs to be negotiated; the package is created using the Document Package Wizard. An eSignature package is used when the final contract is ready for electronic signature; the package is created using the eSignature Package Wizard.

You can create a document package by running the Document Package Wizard, which allows you to monitor the status of the package as the documents in the package move through different stages: (1) draft version of the contract (Current status) (2) negotiation of

the contract (Checked Out/In statuses) (3) emailing of the contract to the signatory for electronic signature (Submitted status), and (4) distribution of the fully executed contract to all interested parties (Completed status).

Conga Contracts automatically creates a document package when a user runs the eSignature Package Wizard if one does not already exist. However, the Package Description is eSignature package rather than document package, even though it is stored in the Document Packages screen. There are two other differences between a document package and an eSignature package: (1) Three of the four possible statuses apply to an eSignature package (Current, Submitted, and Completed) since the Checked In/Out statuses are reserved for contracts that needs to be negotiated and the eSignature Package Wizard is only used for contracts that are ready for electronic signature. (2) Conga Contracts automatically moves the eSignature package through the Current, Submitted, and Completed statuses, and therefore, user input is not needed to change the status of an eSignature package.

The flow chart below summarizes the status changes for both a document package and an eSignature package.

Locating Your Document Packages

The document packages that include you as a member (or Administrator) will be accessible to you, and you can also perform tasks associated with the package from three locations: Document Packages portlet in your Dashboard, Documents menu, and Document Packages browse screen.

The document packages that include you as a member (or Administrator) will be accessible to you, and you can also perform tasks associated with the package from three locations:

- Document Packages portlet in your Dashboard
- Documents Menu
- Document Packages browse screen

Company contacts and external parties participate in a document package from the Conga Contracts Portal.

Document Packages Portlet

1. In the Dashboard, locate (or add) the Document Packages portlet.
2. In the portlet, locate the document package using the available options:
3. Search for a package by entering the company name or the package name into the Search field and pressing the ENTER key on your keyboard.

4. Click on a tab to view document packages by their status: Current, Checked Out, Submitted, Completed, All Packages, or All Completed
5. Scroll through the list.
6. (Optional) Manage the display of information in the portlet:
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

Documents Menu

1. Click Documents in the Navigation Toolbar to display the menu, and then click the Document Packages link.
2. In the Document Packages screen, locate the document package using the available options:
 - Search for a package by entering the company name or the package name in the Search field and clicking .
 - Click on a tab to view document packages by their status: Current, Checked Out, Submitted, Completed, All Packages, or All Completed
 - Scroll through the list.
3. (Optional) Manage the display of information in the screen:
 - Update the columns that display using the Sort/Column menu.
 - Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

Document Packages Screen

1. Open the Contract Profile containing the document package.
2. In the Links section, click the Document Pkgs link.
3. In the Document Packages screen, use the available icons to perform tasks for the document package.

Locating Your eSignature Packages

The eSignature packages that include you as a signer, Administrator, or participant will be accessible to you, and you can also perform tasks associated with the package from three locations: eSignature Packages portlet in your Dashboard, My Place menu, and Document Packages browse screen.

The eSignature packages that include you as a signer, Administrator, or participant will be accessible to you, and you can also perform tasks associated with the package from three locations:

- eSignature Packages portlet in your Dashboard
- Documents menu in the Navigation Toolbar
- Document Packages browse screen

 **Note:**

External parties and company contacts sign a document in an eSignature package from the DocuSign/Adobe Sign cloud.

eSignature Packages Portlet

1. In the Dashboard, locate (or add) the eSignature Packages portlet.
2. In the portlet, locate the eSignature package using the available options:
3. Search for a package by entering the company name or the package name into the Search field and pressing the ENTER key on your keyboard.
Click on a tab to view eSignature packages by their status: Current, Checked Out, Submitted, Completed, All Packages, or All Completed
4. Scroll through the list.
5. (Optional) Manage the display of information in the portlet:
 - Update the columns that display using the Sort/Column menu. Reorder and resize the columns to manage the display of information in the browse screen.
 - Sort the data in a column by clicking (toggling) on a column heading.

Documents Menu

1. Click Documents in the Navigation Toolbar to display the menu, and then click the Document Packages link.
2. In the Document Packages screen, locate the eSignature package using the available options:
 - Search for a package by entering the company name or the package name in the Search field and clicking the magnifying glass.
 - Click on a tab to view eSignature packages by their status: Current, Checked Out, Submitted, Completed, All Packages, or All Completed
 - Scroll through the list.
3. (Optional) Manage the display of information in the screen:

Update the columns that display using the Sort/Column menu.Reorder and resize the columns to manage the display of information in the browse screen. Sort the data in a column by clicking (toggling) on a column heading.

Document Packages Screen

1. Open the Contract Profile containing the eSignature package.
2. In the Links section, click the Document Packages link.
3. In the Document Packages screen, use the available icons to perform tasks for the eSignature package.

Conga Sign Reassignment Within in Conga Contracts

You can only reassign a signer this way if you are the original assigned signer, and you are logged in to Conga Contracts. To reassign a Conga Signer signer from within Conga Contracts, take the following steps:

1. Go to the Contract Profile
2. Select the Submitted tab.
3. In the Document Packages section, click on the pencil icon under Actions and click Reassign Signer to select another signer.

Conga Sign Reassignment Through Email

To reassign a Conga Signer signer through email, take the following steps:

1. In your Conga Contracts Electronic Signature Request email, click on the Sign or Reassign via Email link.
2. Enter the First Name, Last Name, and Email address of the signer you want to reassign, and click Save.

Conga Sign Default Email Reminders

Select a default for the number of days before Conga Contracts sends out email reminders for your Conga Sign eSignature Packages.

You can now select a default for the number of days before Contracts sends out email reminders for your Conga Sign eSignature Packages. To access this feature, take the following steps:

1. Go to the Gear Icon.

2. Click Systems Settings.
3. Beneath Integrations, click eSignature.
4. In the **Reminder Days** required field, enter the number of days you want the system to wait before your email reminder is sent. If set to 0, no email reminders are sent.

My Global Documents

The Global Documents link in the My Place menu displays the Global Documents screen, which lists all the documents you can view, print, download, and use in Conga Contracts.

My Global Documents Overview

Global documents are those that are shared by a Conga Contracts program user, making them available to all other program users. You can both view and download the global documents that are available to you for storage in a Company, Contract, or Project Profile or for use with a program feature, such as document packages, supplier registrations, contract requests, events, workflows, and simple messaging.

You can perform the following tasks related to global documents:

- [View your global documents](#)
- [Locate a global document](#)
- [Add a global document](#)
- [Export global documents to Excel](#)
- [Multi-print two or more global documents](#)

My Global Documents Screen

The Global Documents screen contains documents that are available to all users for viewing, downloading, and for use with many of the program features. The browse screen provides a central location to store the documents that need to be accessed by all users, such as a standard contract in draft form.

Locating a Global Document

You can quickly locate any of the global documents that have been shared with you using the Search option in the Global Documents browse screen.

1. Click My Place in the Navigation Toolbar to display the menu, and then click the Global Documents link.

2. (Optional) In the Global Documents screen, hover over the Search label until it turns blue Search, and then click on it to display a list of searchable fields. Click in the check box to the left of the fields you want to search.
3. In the Search field, enter the first few letters of the document name, or other identifier, and click the magnifying glass. To clear the filter, click x.
 - a. You can also search for a global document using any of the other fields in the Search list. To search for a name, word, value, or text string, that is not the leading text/value for any of the searchable fields for the document, precede your search criteria with the wild card symbol, the asterisk (*). For example, to search for all global MS Word documents, enter *msword in the Search field, and make sure File Type is selected in the Search list.
4. Click on the document record to display the Global Document Profile.

Adding a Global Document

You can share a document with other Conga Contracts program users by adding it as a global document, which makes it available for viewing, download, and use in several program features.

To add a global document take the following steps:

1. Go to the Documents the Navigation Toolbar to display the menu.
2. In the Global Documents screen, click New Document in the toolbar.
3. In the New Global Document screen:
 - Make a selection in the Document Type list.
 - Click Select in the File field to display an upload window, navigate to the document you want to add, click on it to select it, and click Open.
4. (Optional) Populate the Author, Effective Date, Current Expiration Date, and Description fields.
5. Click Save.

Exporting Global Documents to Excel

The list of documents stored in your Global Documents screen can be exported to an Excel spreadsheet. You can customize the information that displays in the spreadsheet by managing the fields that display in the Global Documents screen. The available fields are Author, Current Expiration Date, Description, Document Type, Document Type Group, Effective Date, Revision, Uploaded On, Uploaded By, File Name, File Type, and File Size.

1. Click Documents in the Navigation Toolbar to display the menu.

2. (Optional) In the Global Documents screen, manage the displayed information to ensure only key data will be exported to the spreadsheet:
 - Update the columns that display using the Sort/Column menu.
 - Sort the data in a column by clicking (toggling) on a column heading.
 - Click Export to Excel in the toolbar. When the Progress Bar disappears, click the download prompt, or follow the onscreen instructions for the prompt based on the browser you are using:
 - Excel tab (Chrome) - Click the tab to launch the Excel application and display the contents of the Global Documents screen in a spreadsheet.
 - Open or Save bar (Internet Explorer) - Click the Open button to open the file in Excel, or click the Save → Open Folder buttons to open a Download window where you can navigate to the location where you want to save the file.
 - Opening window (Firefox) - Click OK to open the file in Excel, or select the Save File radio button to open a window where you can rename the file and navigate to the location where you want to save it. Click OK.

Multi-Printing Global Documents

The Multi-Print option combines all selected document types (MS Word document, PDF document, and Excel spreadsheet) into a single PDF file so that it can be printed as one continuous document.

The Multi-Print option allows you to simultaneously print all of your global documents. This is a time-saving feature since you no longer have to open and print each document separately.

The Multi-Print feature combines all selected document types (MS Word document, PDF document, and Excel spreadsheet) into a single PDF file.

1. Click Documents in the Navigation Toolbar to display the menu.
2. In the Global Documents screen, click Multi-Print in the toolbar.
3. When the screen refreshes, click inside the check box of each document you want to print.
 - To select all documents, click in the check box that is in line with the column headings.
4. Click Preview in the toolbar. When the Progress Bar disappears, click the download prompt, or follow the onscreen instructions for the prompt based on the browser you are using:
 - PDF tab (Chrome) - Click the tab to open a new browser window and display the selected documents as a PDF document.
 - Open or Save bar (Internet Explorer) - Click the Open button to open the file in Adobe Reader (or Acrobat), or click the Save → Open Folder buttons to open

- a Download window where you can navigate to the location where you want to save the file.
- Opening window (Firefox) - Click OK to open the file in Adobe Reader (or Acrobat), or select the Save radio button to open a window where you can rename the file and navigate to the location where you want to save it. Click OK.

Truing Up a Contract/Company Profile with a Document

Users with the True-Up Access permission can select the fields in the Contract and Company Profile screens that they want to update using the variable information pulled from any version of a contract document linked to the Profile. If the contract document being used in true-up modifies the information captured by an additional form in the Contract or Company Profile, the field in the additional form can be updated so that it matches the information in the document.

If the contract document used in true-up modifies the information captured by an additional form in the Contract or Company Profile, the field in the form can also be updated so that it matches the information in the document. In a later version of True-up, users will be able to highlight any special terms in a negotiated contract by storing the modified clauses in the Clauses screen in the Contract Profile.

Important:

The True up option is only available if the contract was originally created using the Creation Wizard. Revisions to the original document can be created by uploading modified MS Word files or by using direct editing.

1. Open the Contract Profile whose fields you want to true-up.
2. In the Links section of the screen, click the Documents link.
3. In the Documents screen, locate the contract document you want to use, and click on it to select it.
 - a. The Filename must reflect a system-generated contract to ensure it was created by the Creation Wizard, and typically includes the contract number, followed by the name of the template used in the wizard. For example, IND-GRA-13698-License.docx.

4. In the Document Profile screen, click True-Up in the toolbar. If the button is not present, click the three horizontal bars icon in the toolbar to display additional buttons.
5. In the Modal window, select the document version you want to true-up in the Document list.
6. In the Preview window:
 - (Optional) Identify the fields in Conga Contracts program screens that differ from the variable information in the document, indicated by the yellow caution icon. Fields with matching information contain the green checkmark icon.
 - Click the yellow caution icon for a field to true-up the information:
 - In the Field [Name] prompt, click Save to update the information in the Contract/Company Profile field, or the additional form field, with the information in the document. Verify the yellow caution icon changes to a green checkmark, indicating the change has been made in the Profile.
 - Verify the yellow caution icon changes to a green checkmark, indicating the change has been made in the Profile.
 - Click Save And Continue to automate the display of prompts for both matching and mismatched fields.
 - Click Skip to leave the information in the Profile unchanged.
7. (Optional) Use the toolbar to perform additional tasks, such as paging through a document and zooming in on text.
 - Click the Search icon for text or a value in the document. Select the Highlight all check box to highlight all instances of the text or value in the document.
8. Click Back to Document Profile, located at the top of the screen, to exit the Preview window.

Events

The Events feature sends out email messages for key events in the life of a contract, as well as important company dates. An event can be created for a single contract or company date, or an event series can be set up for an event that is repeated on a regular basis.

Events Overview

The Events feature is available from both the Contract and Company Profiles and is used to set up email alerts for key events in the life of a contract or important dates for a company. For example, a contract event could be the date on which a contract is set to renew or expire, while a company event could be the date on which financial information

must be updated or an insurance certificate expires. An event can be created for a single occurrence, or an event series can be set up for an event that is repeated on a regular basis.

Once an event is created, Conga Contracts sends an email message, or event alert, to the designated recipients. The message is sent prior to the event date, and the user who creates the event determines the number of days prior to the event date that the message is sent. A reminder for the event can also be set during the event creation process to send a follow-up email reminding recipients about the upcoming event if the event has not been closed by the event alert date.

Conga Contracts automatically generates weekly (or daily) Event Alert Notification Reports and emails the reports to the event owner, as well as those users who subscribe to the event. These reports are designed to help event owners in identifying the events that need to be completed or closed.

Tip: Understanding the way in which events are managed in Conga Contracts will help you in setting up your event alerts.

You can perform the following tasks from the Events browse screen:

- [Locate an event](#)
- [Review the events](#) for a company or contract
- [Review an Event Profile](#)

You can perform the following tasks from an Event Profile:

- [Create an event](#)
- [Edit an event](#)
- [Subscribe or unsubscribe to an event](#)
- [Complete an event](#)
- [Close an event series](#)
- [Delete an event](#)
- [View an event's completion history](#)

Event Management

In Conga Contracts, an event alert (email notification for an open event) can be sent on a recurring basis, or a single alert can be sent for a key contract or company date.

Single Event

As an example, if a contract expires on December 31 then system sends out an event alert on November 1, which is 60 days prior to the expiration date.

Event with Notice

As an example, if a contract expires on September 1 and requires that a 30-day written notice be given prior to the expiration date, then an event alert is sent on June 1, providing a 60-day notice that the contract is going to expire, and a second event alert is sent on August 1 advising that a 30-day written notice is needed to either renew or terminate the contract.

Event Status

Event Alerts are assigned a status based on their relationship to key contract dates and can be reported on:

- Scheduled - Event Alert Date has not yet reached the Notification Date (Event Date - Number of Warn Days); therefore the event alert (email message) for the event has not yet been sent out.
- Due - Event Alert Date has reached the Notification Date, and therefore, the event alert (email message) for the event has been sent out. However, the Event Date has not yet been reached.
- Escalated - Both the Event Alert Date and the Reminder Date (Event Date - Number of Reminder Days) have passed, but the Event Date has not been reached.
- Past Due - Event Date has passed without any action having been taken on the Event Alert.
- Closed - Event has been completed (individual event) or closed (event series) by the Event Owner, and it is no longer active.

Events Screen

A list of the events that have been created for a contract or company are displayed in the Events browse screen in a Contract Profile or Company Profile. The status of an email alert for an event can be Scheduled, Due, Escalated, Past Due, and Closed. Contracts continues to send out emails messages for all events, except closed events, unless an end date was stipulated.

A list of the events that have been created for a contract or company are displayed in the Events screen in a Contract Profile or Company Profile. The information that displays in the screen, such as event date and status, can be customized to meet your at-a-glance viewing needs. The status of an email alert for an event can be Scheduled, Due, Escalated, Past Due, and Closed. Contracts continues to send out emails messages for all events, except closed events, unless an end date was stipulated.

The events for which you will receive an email alert are displayed in the Upcoming Events portlet in your dashboard. The events you have created are displayed in your My Events screen, which is accessed by selecting the Events link in your Tools menu.

To access the Events screen, open a Contract or Company Profile.

Although the Contract Profile is used in the screen shot below, the components are the same in a Company Profile.

Events link	Click to display the Events screen.
Event records	<ul style="list-style-type: none"> • View a list of the events for the contract or company. • Click on an event record to open its Event Profile where you can edit the event, complete it, close it if it is part of an event series, view its completion history, delete it, and subscribe (or unsubscribe) to the event. <p>Tip: Events may also have attached documents, which can be viewed from the Profile.</p>
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.
Column Display option	To customize the information in a browse screen, hover over a column heading until the v icon displays, and click it to display the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
Reorder and Resize Column options	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize window icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Navigation options	Enter the page you want to view in the Page field and press the ENTER key on your keyboard. Or use the previous << and next > arrow icons to move forward or back one page, and the first page << and last page >> icons.
New Event button	Click to add an event.

Event Profile

The Event Profile contains a description of the event, along with the notification and event dates, and the list of those notified about the event. Documents stored in the Event Profile are sent as attachments when the event alert (email message) is sent to the individuals on the notification list.

The toolbar in the Event Profile contains several buttons for performing tasks related to the event, such as editing, completing or closing, subscribing to, and deleting the event.

To access an Event Profile, locate the Contract Profile or Company Profile for the event, and click the Events link.

Although the Contract Profile is used in the screen shot below, the components are the same in a Company Profile.

Event Name and Description fields	Review the event name and a description of the event.
Event Date field	Identify the date the event must be completed. The status of an event is displayed in the Events screen.
Warn Days field	Identify the number of days prior to the Event Date that Conga Contracts will send an event alert (email message) for the upcoming event.
Notification Date field	Field is auto-populated using the values in the Warn Days and Event Date fields (Notification Date = Event Date - Number of Warn Days).
Notification List	Identify the individuals who will receive an event alert for the event. The event owner may assign a person on the list the task associated with completing the event.

Notification Message field	Review the message the event owner sent to those on the Notification List.
Frequency fields	Identify how often the event will occur, which is also how often Conga Contracts will generate event alerts to those on the Notification List.
End Date field	If populated, identify the last date on which an event alert is sent to those on the Notification List.
Event Owner	Identify the person who created the event and is responsible for completing the event or closing the event series.
Set Reminder check box	<p>If selected, review the information in the fields used to send a reminder event alert for the event.</p> <p>Reminder Days - identify the number of days prior to the Event Date that Conga Contracts will send a reminder event alert when the event is still open.</p> <ul style="list-style-type: none"> • Reminder Date - field is auto-populated based on the values in the Reminder Days and Event Date field (Reminder Date = Event Date - Number of Reminder Days). • Reminder List - identify the individuals who will receive a reminder event alert for the upcoming event. • Reminder Message - review the message sent to those on the Reminder List.
Attached Documents section	View the documents that will be sent as attachments when event alerts (and reminder event alerts) are sent to the notification and reminder lists.
Download icon	Click the arrow icon to download the document attached to the event alert.
Subscribe toggle button	Click to subscribe (or unsubscribe) to an event. Tip: Subscribing to an event entitles you to receive periodic Event Alert Notification Reports for the event.

Mark Complete button	Click to complete an event.
Close Event Series button	Click to close an event series (event that occurs on a regularly scheduled basis).
Completion History button	Click to review a completion history of the event.
Edit Event button	Click to edit the event.
Delete Event button	Click to delete the event.
Back to Browse button	Click to return to the Events screen.

Locating an Event

The events that you create can be viewed and accessed from your Tools menu. The events in the Upcoming Events portlet in your Dashboard are the events for which you will receive an event alert (email message) and are expected to play some part in completing the task(s) associated with the event. Other events can be located by running a search query or accessing the Events screen in a Company or Contract Profile.

Tools Menu

1. Click Tools in the Navigation Toolbar.
2. Click Events.
3. Click an event record to link to the Contract or Company Profile containing the event.
4. In the Links section of the Profile, click the Events link.
5. In the Events screen, click an event record to display its Event Profile.

Upcoming Events Portlet

The events for which you will receive an email alert are displayed in the Upcoming Events portlet in your Dashboard.

1. From the Upcoming Events portlet, locate the event by scrolling through the list.
2. Click the gear icon to display a Time Span prompt to change the number of days prior to the current date when displaying events that are due for completion.
3. (Optional) Customize the information in the portlet by hovering over a column heading until the v icon displays, and then click it to display the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want

displayed by clicking in the check box to the left of the field. The events with a status of Scheduled are those that will generate an email message (event alert) to you and any others on the Notification list for the event.

4. Click an event record to link to the Contract or Company Profile containing the event.
5. In the Links section of the Profile, click the Events link.
6. In the Events screen, click an event record to display its Event Profile.
7. Events Screen
8. Open the Company or Contract Profile containing the event.
9. In the Links section of the Profile, click the Events link.
10. In the Events screen, click an event record to display its Event Profile.

Search Query

A search query to locate a upcoming contract or company events is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set one of the following hierarchies in the Result Type list to search for a company or contract event:
 - Company
 - Click in the list to display the hierarchy, and click the Company folder.
 - Company→Contract
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
4. In the Criteria section, set one of the following hierarchies for the company or contract event in the field list:
 - Company→Event→Event Date
 - Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Event folder.
 - Click the Event Date sub-folder.
 - Company→Contract→Event→Event Date
 - Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.

- Scroll through the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Event folder.
 - Click the Event Date sub-folder.
 - You can also search for an event by its name, description, other dates related to the event, number of warning days, owner of the event, as well as completed events.
5. In the Criteria section, define the operator and value(s) for the search:
 - Select After in the inclusion list.
 - Click calendar in the value list and select Today in the calendar.
 6. Click Execute in the toolbar to run the query.
 7. When the Results view of the screen displays, click a search record to display its Contract or Company Profile.
 8. In the Links section of the Profile, click the Events link.
 9. In the Events screen, click an event record to display its Event Profile.

Creating an Event

You can create an event for a contract or company to ensure users, company contacts, external parties, or an email distribution list are notified about the upcoming event. The information for the event is stored in the Contract or Company Profile for reference and in case updates need to be made. On the notification date, Contracts sends out an event alert, or email message that notifies the selected recipients about the event. The event alert may include a document attachment from the Company or Contract Profile, or a global document. From the event alert, you can link directly to the event's Contract and/or Company Profile.

A special type of event is created for a contract's Original Expiration Date by clicking the clock icon in the Original Exp Date field in the Term and Renewal section of a Contract Profile when the Profile is in edit mode.

Although the Contract Profile is used in the screen shot below, the same steps apply to creating an event in a Company Profile.

1. Open a Company or Contract Profile.
2. In the Links section of the screen, click the Events link.
3. In the Events screen, click New Event in the toolbar.
4. In the Contract or Company Event screen, populate the fields for the event alert:
 - Event Name - provide a concise but descriptive name for the event.
 - (Optional) Event Template - make a selection in the list if a template name matches the purpose of your event. Selecting a template automatically populates the Event Description, Warn Days, and Notification Message fields.

- Event Description - enter the text you want displayed in the body of the email message to advise recipients of the purpose of the event (if the field is not auto-populated by an event template).
- (Optional) Event Owner - select another user to assign someone else the responsibility of completing the event.
- Event Date - enter the date, or click the calendar icon to use the calendar.
- Warn Days - enter a number equal to the number of days prior to the event date that you want Conga Contracts to send an email alert for the event (if the field is not auto-populated by an event template). Enter a number greater than 1 since email messages for events are sent from Conga Contracts daily, and not immediately.
- Event Frequency - make a selection in the list to identify the frequency of event alerts:
 - Single - generates one event alert.
 - Monthly or Yearly - generates a series of event alerts and displays a Frequency field.
 - Enter a value in the Frequency field to indicate how often the event alert should be repeated, which will auto-populate the Event Repeat field. For example, selecting Monthly in the Event Frequency list and entering 6 in the Frequency field will cause Conga Contracts to send an event alert (email message) twice a year, and auto-populate the Event Repeat field with Event will repeat every 6 months.
 - (Optional) End Date - enter the date on which you want event alerts to stop for this event, or click the calendar icon to use the calendar.
- Notification Date - field is auto-populated when you populate the Event Date and Warn Days fields (Notification Date = Event Date - Number of Warn Days).
- To - select the recipients for the event alert using one of the following options:
 - Click v to use the Address Book to select recipients and/or an email distribution list.
 - Begin typing an email address into the field to display a drop-down list of possible matches, and click an address to select it.
- Notification Message - enter the text you want displayed in the body of the email message to advise recipients of the action(s) to be taken for the event (if the field is not auto-populated by an event template).
- (Optional) Set a reminder event alert for the event by selecting the Set Reminder check box and populating the fields that display:

✓ **Tip:**

If an event template is used, the Reminder Days and Reminder Message field may be populated.

- Reminder Days - enter the number of days after the Notification Date (Event Date - Number of Warn Days) that the reminder email alert is sent if the event has not been completed.
 - Reminder Date - field is auto-populated based on the number of days entered in the Reminder Days and Event Date fields (Reminder Date = Event Date - Number of Reminder Days).
 - Reminder List - select the recipients for the reminder alert using one of the following options:
 - Click v to use the Address Book to select recipients and/or an email distribution list.
 - Begin typing an email address into the field to display a drop-down list of possible matches, and click an address to select it.
 - Reminder Message - enter the text you want displayed in the body of the email message to remind recipients about the event.
5. (Optional) Attach a document to the event alert (email message):
- In the Available Documents section, locate the document in the default view (Contract Documents).
 - Click the Company Documents or Global Documents tab if the document is not listed in the default view.
 - Click a document's + icon to add it to the Attached Documents section.
 - Remove a document as an attachment by selecting its - icon in the Attached Documents section.
6. Click Save.

Editing an Event

There are two types of events that can be edited: Event for a contract's original expiration date, and an event for a contract or company created from its Profile.

You can edit a event by updating the date on which it is scheduled to occur, changing the lead time between the event date and the date on which email notifications are sent for the event, changing the frequency of the event, designating a different person as the event owner, updating the list of people who are notified about the event, and adding/removing a reminder for the event.

There are two types of events that can be edited:

- Event for a contract's original expiration date
- Event for a contract or company created from its Profile

Event for a Contract's Original Expiration Date

1. Locate the Contract Profile with the expiration date event that needs to be edited.
2. Click Edit Contract in the toolbar.
3. When the screen refreshes, click the clock icon in the Original Exp Date field in the Term and Renewal section.
4. In the Original Exp Date window:
5. Update the information in the fields and lists, as needed.
6. To delete the event, clear the Create Event check box.
7. Click OK.
8. Click Save in the toolbar of the Contract Profile screen.

Event for a Company or Contract

1. Open the Company or Contract Profile with the event that needs to be edited.
2. In the Links section of the screen, click the Events link.
3. In the Events screen, locate the event, and click it to select it.
4. In the Event Profile screen, click Edit Event in the toolbar.
5. When the screen refreshes, update the information in the fields and lists, as needed.
6. Click Save.

Receiving Email Notification for an Event

When a user creates an event in a Contract Profile or Company Profile, or sets up an event for a contract's original expiration date, they select the individuals who should be notified of the upcoming event. Contracts send an email message (event alert) to each of these individuals on the notification date, advising them of the event. Conga Contracts calculates the notification date using the information provided in the Event Date and Warn Days fields during the creation process, such that the Notification Date = Event Date - Number of Warn Days.

If you were selected to be notified of the event, you will receive an event alert that contains the date of the event, its description, and a message from the program user who created the event. The email will be from Conga Contracts Event and the subject line will reflect the name of the company or contract event.

1. Review the event information provided in the email message.
2. Click the Go To Event link in the message to be directed to the contract or company event once you log in to Contracts.
3. (Optional) Click the Go to Contract and/or Go To Company links in the message to review additional information in the Contract and/or Company Profiles for the event.
4. The email message also contains the event date, which is color-coded based on its status. Green = Scheduled, Yellow = Due, Orange = Escalated, and Red = Past Due.

Subscribing and Unsubscribing to Events

When you subscribe to an event, periodic Event Alert Notification Reports are emailed to you. These reports provide basic information for the event, along with its current status, and links to the event's Contract and/or Company Profile. Conga Contracts typically sends out a weekly email message containing the Event Notification Report, but you may receive daily reports if there are frequent updates to the events to which you subscribe. If you no longer want to receive the Event Notification Reports for an event, you can unsubscribe from the event.

Subscribing to an Event

1. Locate the event you want to subscribe to in your Upcoming Events portlet, Tools Menu, or the Events screen in a Contract or Company Profile.
2. Click the event record to display its Event Profile.
3. In the Event Profile screen, click the Subscribe toggle button in the toolbar.
4. You will not receive a confirmation message, but verification that you have subscribed to the event is evidenced by the Subscribe toggle button changing to Unsubscribe.
5. Click Browse Events to return to the Events screen.

Unsubscribing from an Event

1. Locate the event you want to unsubscribe from in your Upcoming Events portlet, Tools, or the Events screen in a Contract or Company Profile.
2. Click the event record to display its Event Profile.
3. In the Event Profile screen, click the Unsubscribe toggle button in the toolbar.
4. You will not receive a confirmation message, but verification that you have unsubscribed from the event is evidenced by the Unsubscribe toggle button changing to Subscribe.
5. Click Browse Events to return to the Events screen.

Completing an Event

Once the task associated with an event is completed, you must mark the event as complete to ensure Conga Contracts does not continue sending email notifications for the event. However, marking an event as complete will only stop notifications if the frequency of the event is Single, indicating the event occurred only once. For events with a frequency of Monthly or Yearly, marking the event as complete will complete the most recent occurrence of the event, but Contracts will continue to send email notifications for future occurrences of the event. To stop all email notifications for monthly and yearly events, you must close the entire series.

1. Locate the event you want to complete in your Upcoming Events portlet, Tools Menu, or the Events screen in a Contract or Company Profile.
2. Click the event record to display its Event Profile.
3. In the Event Profile screen, click Mark Completed in the toolbar.
 - For recurring events, marking the event as complete closes only the instance shown in the Event Profile. The remaining events remain open, and therefore, Conga Contracts will generate email notifications for future events.
4. In the Event Completion prompt:
 - Enter information on completing the event in the Event Completion Notes field.
 - Click Submit.
5. After completing an event, you can view its completion history.

Closing an Event Series

An event series is a set of recurring individual events that occur on a monthly or yearly basis, and generate email notifications for each event in the series. An event series can be closed after the last occurrence of the event has taken place, or any time before the last occurrence of the event. Closing an event series ensures that Conga Contracts does not continue sending email notifications for future events in the series. To close only one event in a series, mark the event as complete so that Conga Contracts continues sending email notifications for future events.

1. Locate the event series you want to close in your Upcoming Events portlet, Tools Menu, or the Events screen in a Contract or Company Profile.
2. Click the event record to display its Event Profile.
3. In the Event Profile screen, click Close Event Series in the toolbar.
4. To close a single event in a series, or to close an event with only once occurrence, use the mark as complete option.

5. In the Close Event Series prompt, click Yes.
6. In the Event Completion prompt:
7. Enter information on completing the series in the Event Completion Notes field.
8. Click Submit.
9. After closing an event series, you can view its completion history.

Reviewing an Event's Completion History

Once an event has been completed or an event series has been closed, you can view the information that was recorded for the completion or closure.

1. Locate the event whose completion history you want to review in your in your Upcoming Events portlet, Tools Menu, or the Events screen in a Contract or Company Profile.
2. Click the event record to display its Event Profile.
3. In the Event Profile screen, click Completion History in the toolbar.
4. When the screen refreshes, review the information, which includes the name of the user who completed/closed the event/series, the date, and the notes provided by the user who closed the event or series.
5. Click Back to Event to return to the Event Profile.
6. Click Browse Events to return to the Events screen in the Contract or Company Profile.

Deleting an Event

Once a single event is completed, or an event series is closed, you can delete the event if you no longer want it displayed in the Events screen, and you do not need to track its completion history. In addition to events with a Closed status, you can also delete an event with a status of Scheduled, Due, Escalated, or Past Due.

1. Locate the event you want to delete in Upcoming Events portlet, Tools Menu, or the Events screen in a Contract or Company Profile.
2. Click the event record to display its Event Profile.
3. In the Event Profile screen, click Delete Event in the toolbar. The buttons in the toolbar will vary based on the status of the event.
4. In the Delete Event prompt, click Yes.

Event Alert Notification Reports

Event Alert Notification Reports are automatically generated by Contracts and emailed to any user who is an event owner of a contract or company event that has not

been completed or any series that has not been closed. Other users can opt to receive these reports for a contract or company event by subscribing to the event.

An event owner typically receives a weekly Event Alert Notifications Summary on Monday morning if any of the events that he/she owns are due in the next seven (7) days. During that week, if an event is still not completed or closed, the event owner receives a second Event Alert Notifications Summary on the day of the event to notify them that the event needs to be completed by end-of-day, or rescheduled. Otherwise, the event's status will become Past Due.

Event Alert Notifications Weekly Summary

Contracts emails an Event Alert Notifications Weekly Summary report to every user who is designated as an owner of a Scheduled event that is due to be completed in the upcoming week. The report also includes the owner's events that have a status of Due, Escalated, or Past Due. The weekly report is also sent to any user who subscribed to one or more of these events.

The email contains summarized information for each event, including a color-coded event date, to ensure the owner is aware of the event's status. Event dates are coded using the following color scheme: Green = Scheduled, Yellow = Due, Orange = Escalated, and Red = Past Due.

The email also lists all the key event fields from the Contract and/or Company Profiles, as well as any documents attached to the event. In addition, there are hot links in the body of the email message so that event owners can quickly access the Contract (Go To Contract), Company (Go To Company), and Event (Go To Event) Profiles.

Event Alert Notifications Daily Summary

When an event is due (Event Date = today's date), Contracts sends an Event Alert Notifications Daily Summary email to the event owner to ensure the event date is not missed. If other users also subscribe to the event, they too will receive the email.

Tasks

The Tasks feature is used to assign individuals to the duties that must be performed for the companies, contracts, and projects added to Conga Contracts. The feature also allows a task list to be created for multi-step policies and procedures.

Tasks Overview

The Tasks feature is used to assign an activity for individual companies, contracts, or projects. When a task is added to a Contract, Company, or Project Profile, the action to complete the task is defined and a program user is assigned to complete the task by a specified date. A Task List is created by an Administrator to identify the steps that must be followed to accomplish a standard procedure for a company, contract, or project, and is added to a Profile by users. For example, a Task List can be created to standardize the process for renewing a contract, obtaining a company's current insurance certificate, or achieving a project goal.

Workflows are enhanced Task Lists that allow you to send messages and obtain one or more approvals for a step. Therefore, it is recommended that you consider both Workflows and Task Lists to determine which option better suits your needs.

You can perform the following task-related activities:

- [Review tasks in a Contract, Company, or Project Profile](#)
- [Locate a task](#)
- [Add a task](#)
- [Create a task list](#)
- [Edit a task](#)
- [Receive Email Notification for a task](#)
- [Complete a task](#)
- [Reopen a completed task](#)
- [Reschedule a past due task](#)

Tasks Screen

A list of the tasks that have been added to a Contract, Company, or Project Profile are displayed in the Tasks screen in the Profile. There are two views available in the screen: Open Tasks and Open & Completed Tasks.

 **Important:**

Important: The tasks for which you will receive an email notification are displayed in the Upcoming Tasks portlet in your Dashboard, along with any tasks you created.

Open Tasks

To access the Tasks screen, open a Contract, Company, or Project Profile.

Tasks link	Click to display the Tasks screen.
Pending Task records	Review the pending tasks for the contract, company, or project.
Past Due Task records	Identify any tasks in red text, which indicates they are past their due date.
Task List records	Identify any task lists in the Profile. A task in a task list is usually assigned a number to ensure each task is performed in a specific order.
New Task record	Populate the Task Subject, Start Date, Due Date, and Task Owner fields to add a new task.
Add Task button	Click to add a task after populating the fields in a new task record .
Task field	Click in a task field to edit it, and type over the existing text or date.
Calendar icon	Hover over a date field until the calendar icon displays, and click it to reschedule the task by selecting a new date.
Complete icon	Click a task's complete icon to complete it, or reschedule it. This icon only displays if you are the task owner (person responsible for completing the task), or the person who created the task.
Add Task List button	Click to create a task list.
Sort option	To sort the information in a column in ascending or descending order, click (toggle) on the column heading.

Column Display option	To customize the information in a browse screen, hover over a column heading until the column icon displays, and click it to display the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.
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Open and Completed Tasks

To access the Tasks screen, open a Contract, Company, or Project Profile.

Tasks link	Click to display the Tasks screen.
Show Completed button	Click to change the view in the screen from open tasks to open and completed tasks.
Completed Task records	Review the completed tasks, which display with strikethrough text and contain Closure Notes.
Closure Notes	Review the information provided by the user who completed the task, along with their name and the date they completed the task.
Reopen icon	Click the reopen icon for a completed task to reopen it. This icon only displays if you are the task owner (person responsible for completing the task), or the person who created the task.
Hide Completed button	Click to return to the default view, which displays only open tasks.

Locating a Task

The tasks you create for a company, contract, or project, as well as the tasks that another user assigns to you, are viewed from the Upcoming Tasks portlet in your Dashboard. Other tasks can be located by running a search query or accessing the Tasks screen in their Company, Contract, or Project Profile.

Upcoming Tasks Portlet

The tasks for which you will receive an email notification are displayed in the portlet, along with those you created and assigned to yourself or another user.

1. From the Upcoming Tasks portlet, locate the task by scrolling through the list or sorting the tasks.
 - Click Show Completed in the toolbar to display completed tasks.
 - A completed task displays in strikethrough text, and includes the reopen icon and any Closure Notes.
2. (Optional) Click a task record to link to the Company, Contract, or Project Profile containing the task.
 - In the Links section of the Profile, ensure the Tasks link is selected.
 - In the Tasks screen, locate the task you want to complete, reopen, reschedule, or edit.

Tasks Screen

1. Open the Company, Contract, or Project Profile containing the task.
2. In the Links section of the Profile, click the Tasks link.
3. In the Tasks screen, locate the task by scrolling through the list or sorting the tasks.
4. Click Show Completed in the toolbar to display completed tasks.

A completed task displays in strikethrough text, and includes the reopen icon and any Closure Notes.

Search Query

A search query to locate all open (incomplete) contract and company tasks for a specific user is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set up the following hierarchy in the Result Type list to search for contract tasks:
 - Company→Contract
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.

- Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
4. Select the All top entity records check box to search for both company and contract tasks.
 5. In the Criteria section, set the search hierarchy to identify open tasks in the field list:
 - Company→Contract→Task→Task Complete
 - Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.
 - Scroll through the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Tasks folder.
 - Click the Task Complete sub-folder.
 6. In the Criteria section, define the operator and value(s) for the search:
 - Select False in the inclusion list.
 - Select True to search for completed tasks.
 - The True, False, Not Empty, Null, and Not Null operators in the inclusion list do not require a value.
 7. Click Search to set a second set of search criteria to identify the task owner:
 - Set the Company→Contract→Task→Task Owner hierarchy in the field list.
 - Select In in the inclusion list.
 - Enter the user's first or last name in the value list, and click their name when a list of possible matches displays.
 8. Click Execute in the toolbar to run the query.
 9. When the Results view of the screen displays, click a search record to be directed to the Contract or Company Profile containing the task.
 10. In the Links section of the Profile, click the Tasks link.
 11. In the Tasks screen, locate the task by scrolling through the list or sorting the tasks.

Adding a Task

A task reflects an activity that needs to be performed for a contract, company, or project. You can add a task to a Contract, Company, or Project Profile to record and monitor the task's progress and ensure it is completed in a timely manner. Once you create the task, the task owner will receive an email notification, advising them that a task is awaiting their completion.

Although the Contract Profile is used in the screen shot below, the same components are present in the Company Profile and Project Profile.

1. Open the Contract, Company, or Project Profile that needs the task.

2. In the Links section of the screen, click the Tasks link.
3. In the Tasks screen, a blank task record is automatically displayed with the Start Date and Due Date fields set to the current date.
4. Click in the Task Subject field, and enter the name of the task.
5. (Optional) Click in the Start Date field and enter a new start date, or click the calendar icon to use the calendar to select the date.
6. Click in the Due Date field and enter a new due date, or click the calendar icon to use the calendar to select the date.
7. Click v in the Task Owner field to display the list, and click a user's name to assign them to the task.
8. Click + Add Task.
9. After adding a task, the information you entered displays as a new record, but also remains the fields that were originally blank. To add another task, you must type over the existing information in the Task Subject field, the existing dates in the Start Date and End Date fields, and make another selection in the Task Owner field.
10. If a task contains the checkmark icon, you are the individual who created the task. As the creator, you can edit, complete, reschedule, and reopen a task, even if you are not the task owner (person responsible for completing the task).

Creating a Task List

The Tasks feature has a Task List option that allows you to record the completion of one of your company's standard procedures for a contract, company, or project using a template that contains a series of steps. Once the task list is created, the owner of each task in the list will receive an email notification, advising them that a task is awaiting their completion.

A Task List a simplified version of the workflow that does not support messaging or allow a task to be approved. Therefore, it is recommended that you consider both Workflows and Task Lists to determine which option better suits your needs.

1. Open the Contract, Company, or Project Profile that needs the task list.
2. In the Links section of the screen, click the Tasks link.
3. In the Tasks screen, click Add Task List in the toolbar.
4. In the Add Task List prompt:
 - Select a template in the Task List list that best describes the procedure you want the task list to accomplish.
 - Click Add.
5. When the screen refreshes with the tasks in the list:

- Tasks in a task list are usually numbered to identify the sequence in which they need to be completed.
- Click in the Start Date field for each task in the list and enter the task's start date, or click the calendar icon to use the calendar to select the date.
- Click in the Due Date field for each task in the list and enter the date the task must be completed, or click the calendar icon to use the calendar to select the date.
- The Task Owner list is not editable because it is set by the Task List template.

6. Click Save.

The tasks in a list are completed, edited, reopened , and rescheduled in the same way as individual tasks.

Completing a Task

An individual task, as well as a task in a task list, are both completed in the same way. When you complete a task, you can provide notes on how and when the task was completed to capture a history of the tasks associated with a contract, company, or project.

A task can be completed from the Upcoming Tasks portlet in your Dashboard or from the Tasks screen in a Contract, Company, or Project Profile, which is accessed by logging in to the program, or by clicking the Go To Task link in a task email notification and then logging in to the program.

Upcoming Tasks Portlet

1. Locate the task you want to complete by scrolling through the list or sorting the tasks.
2. Click the task's checkmark icon to display a Task Completion prompt.
3. In the prompt:
 - Enter information on completing the task in the Notes field.
 - Click Submit.
4. (Optional) Click Show Completed in the toolbar and locate the task to verify it has been completed.
5. A completed task displays in strikethrough text, and includes the reopen icon and any Closure Notes.

Email Notification

1. Click the Go To Task link in the email notification for the task you want to complete, and then log in to the program.
2. In the Company, Contract, or Project Profile, ensure the Tasks link is selected in the Links section of the screen.
3. In the Tasks screen, locate the task by scrolling through the list or sorting the tasks.
4. Click the task's checkmark icon to display a Task Completion prompt.
5. In the prompt:
 - Enter information on completing the task in the Notes field.
 - Click Submit.
6. (Optional) Click Show Completed in the toolbar and locate the task to verify it has been completed.
 - A completed task displays in strikethrough text, and includes the reopen icon and any Closure Notes.

Tasks Screen

1. Open the Company, Contract, or Project Profile containing the task you want to complete.
2. In the Links section of the Profile, click the Tasks link.
3. Follow Steps 3-6 in Email Notification above.

Editing a Task

You can edit a task by changing the task's description and updating the start date and/or due date. However, you cannot change the task owner (person originally assigned the responsibility of completing the task). As a workaround, the original task can be completed by the person who created the task, and then they could create a new task.

 **Tip:**

You can also edit a task by clicking a task record in the Upcoming Tasks portlet in your Dashboard, which will direct you to the Tasks screen in the Company, Contract, or Project Profile.

1. Open the Company, Contract, or Project Profile with the task that needs to be edited.
2. In the Links section of the Profile, click the Tasks link.

3. In the Tasks screen, locate the task by scrolling through the list or sorting the tasks.
4. Update the information in any of the following fields for an existing task:
 - Task Subject - click in the field and type over the existing text.
 - Start Date and Due Date fields - click in the field and type over the existing date, or click the calendar icon to use the calendar to select the new date.
 - The Task Owner, Task Created By, and Task Created On fields are not editable.
5. (Optional) Edit the tasks for a company, contract, or project by:
 - Adding a task
 - Adding a task list
 - Completing a task
 - Reopening a task
 - Rescheduling a task

Receiving Email Notification for a Task

When a user creates a task for a company, contract, or project and assigns the responsibility for completing the task to another user, the user responsible for completing the task receives an email notification, which includes a description of the task and its expected due date. The email message shows Contracts Task as the sender.

1. Review the task information provided in the email message.
2. Click the Go To Task link in the message to be directed to the Company, Contract, or Project Profile containing the task once you log in to Conga Contracts.
3. (Optional) Click the Go to Contract, Go To Company, or Go to Project link in the message to review additional information in the task's Profile.

Reopening a Completed Task

You can reopen a task that you completed or a task that you created and assigned to another user for completion.

A task can be reopened from the Upcoming Tasks portlet in your Dashboard or from the Tasks screen in a Contract, Company, or Project Profile, which is accessed by logging in to the program, or by clicking the Go To Task link in a task email notification and then logging in to the program.

Upcoming Tasks Portlet

1. From the portlet, click Show Completed in the toolbar.

2. Locate the completed task by scrolling through the list or sorting the tasks. A completed task displays in strikethrough text, and includes the reopen icon and any Closure Notes.
3. Click the task's reopen icon.
4. (Optional) Verify the reopen icon changes to the checkmark icon, indicating the task has been reopened.

Email Notification

1. Click the Go To Task link in the email notification for the task you want to reopen, and then log in to the program.
2. In the Company, Contract, or Project Profile, ensure the Tasks link is selected in the Links section of the screen.
3. In the Tasks screen, click Show Completed in the toolbar.
4. Locate the completed task by scrolling through the list or sorting the tasks. A completed task displays in strikethrough text, and includes the reopen icon and any Closure Notes.
5. Click the task's reopen icon.
6. (Optional) Verify the reopen icon changes to the checkmark icon, indicating the task has been reopened.

Tasks Screen

1. Open the Company, Contract, or Project Profile containing the task you want to reopen.
2. In the Links section of the Profile, click the Tasks link.
3. Follow Steps 3-6 in Email Notification above.

Rescheduling a Past Due Task

You can reschedule a task that has been assigned to you or a task that you created and assigned to another user if it has passed its due date.

A task can be rescheduled from the Upcoming Tasks portlet in your Dashboard or from the Tasks screen in a Contract, Company, or Project Profile, which is accessed by logging in to the program, or by clicking the Go To Task link in a task email notification and then logging in to the program.

Upcoming Tasks Portlet

1. Locate the task you want to reschedule by scrolling through the list or sorting the tasks. A past due task is displayed in red text.
2. Click a task record to link to the Company, Contract, or Project Profile containing the task.
3. In the Links section of the Profile, ensure the Tasks link is selected.
4. In the Tasks screen, locate the task you want to reschedule, and click in its Due Date field.
5. Enter a new date by typing over the existing date, or clicking the calendar icon to use the calendar to select the new date.
6. Verify the text changes from red to black, verifying the task is no longer past due.

Email Notification

1. Click the Go To Task link in the email notification for the task you want to reschedule, and then log in to the program.
2. In the Company, Contract, or Project Profile, ensure the Tasks link is selected in the Links section of the screen.
3. In the Tasks screen, locate the task you want to reschedule, and click in its Due Date field. A past due task is displayed in red text.
4. Enter a new date by typing over the existing date, or clicking the calendar icon to use the calendar to select the new date.
5. Verify the text changes from red to black, verifying the task is no longer past due.

Tasks Screen

1. Open the Company, Contract, or Project Profile containing the task you want to reschedule.
2. In the Links section of the Profile, click the Tasks link.
3. Follow Steps 3-6 in Email Notification above.

Messaging

The Messaging feature allows you to send and receive email messages from a Company, Contract, or Project Profile. Messaging is also available in other program features, including Events, Workflows, Tasks, Document Packages, Scorecards, and Scheduled Reports.

Messaging Overview

The Messaging feature is used to send email messages from a Contract, Company, or Project Profile and store responses to the message in the Profile. A recipient for an email message can be a program user, company contact, external person, or an entire distribution list. Replies to messages sent to recipients who are not Conga Contracts users can be made from other email services such as Outlook, Gmail, and Yahoo.

The Messaging feature is used to send email messages from a Contract, Company, or Project Profile and store responses to the message in the Profile. A recipient for an email message can be a program user, company contact, external person, or an entire distribution list. Replies to messages sent to recipients who are not Conga Contracts users can be made from other email services such as Outlook, Gmail, and Yahoo.

An email message is sent by selecting the Messaging link in a Company, Contract, or Project Profile; however, messaging is also available in several other program features, including Events, Workflows, Tasks, Document Packages, Scorecards, and Scheduled Reports.

You can perform the following message-related tasks:

- [Identify components of Messaging Window](#)
- [Locate a message in a Profile](#)
- [Send a message](#)
- [Reply to a message](#)
- [Delete a message](#)

Messaging Window

The Messaging window has two views: (1) Input screen used to create and send an email message from a Company, Contract, or Project Profile, along with any document attachments. (2) Browse screen that displays all messages sent from the Profile, as well as the reply emails received from Conga Contracts or other email services like Outlook, Gmail, and Yahoo.

The Messaging window has two views: (1) Input screen used to create and send an email message from a Company, Contract, or Project Profile, along with any document attachments. (2) Browse screen that displays all messages sent from the Profile, as well as the reply emails received from Conga Contracts or other email services like Outlook, Gmail,

and Yahoo. The original message and replies to the message are stored in a hierarchy and include summary information for easy identification.

You can view the messages that included you as a recipient from the Recent Messages portlet in your Dashboard. Each message is linked to the Messaging window in its corresponding Company, Contract, or Project Profile.

Messaging Window - Browse View

Open the Messaging window by: (1) clicking a message record in the Recent Messages portlet in your Dashboard, or (2) clicking the Messaging link in the Links section of a Contract, Company, or Project Profile.

<p>Message hierarchy</p>	<ul style="list-style-type: none"> • Review the messages that have been sent from the Profile, which display at the top level of the hierarchy. • Review the responses to a message, which display as indented entries at a lower level in the hierarchy. • Click the expand + and collapse - icons to display/ hide threads for a message.
<p>Message list display</p>	<ul style="list-style-type: none"> • To expand the list of viewable messages, hover over the bottom border of the list until the resize icon displays. Click the icon and drag the border downward. • To resize the Subject, Created On, From, and Content columns, hover over the left or right border until the resize icon displays. Click the icon and drag the border to resize the column. • The Content column displays the beginning text from the body of the email message.
<p>Message records</p>	<p>Click on a message record to display the message in the bottom of the window, along with the email addresses of the recipients.</p>
<p>Attachments link</p>	<p>Click a document link to download a copy of the document attached to the email message.</p>
<p>Reply button</p>	<p>Click to reply Replying to a Message to the sender of the message.</p>

Reply All button	Click to reply Replying to a Message to the sender of the message, along with the others who were copied on the message.
Delete Thread button	Click to delete the original message and all replies.
New Thread button	Click to create and send a new email message.

Messaging Window - Input View

Open the Messaging window by clicking the Messaging link in the Links section of a Contract, Company, or Project Profile, and then click New Thread in the toolbar.

Message To field	<p>Populate the field using one of the following options: Click v to use the Address Book to select recipients and/or an email distribution list.</p> <p>Begin typing an email address into the field to display a drop-down list of possible matches, and click an address to select it.</p>
Message Cc field	Populate the field using the same options available in the Message To field.
Subject field	Enter a subject for the email message.
Content text box	Type your message into the text box, or use the Copy & Paste functions to quickly populate the field with text from another program or application.

Formatting toolbar	<ul style="list-style-type: none"> • Use the text buttons to bold, italicize, and underline text. • Use the lists to change font size, text color, and background color. • Use the alignment options to center text, right-justify, left-justify, or fully justify the text. • Use bullets and numbering to organize text. • Use the indent buttons to increase or decrease text indentations. • Use the redo arrows to undo or redo the previous action.
Attach Document button	Click to display the Attach Document view of the window and attach a document to the message.
Send button	Click to send the email message.

Messaging Window - Attach Document View

When creating a new message, the Messaging window displays an Attach Document button in the toolbar. When the button is clicked, the window refreshes and displays as the Attach Document window.

Revision hierarchy	Review the list of documents that are stored in the Profile. The number 1 indicates there is only one version of a document. If there are two or more versions, the most recent document is displayed and a number other than 1 appears in the Revision column. Click a document's + icon to display older versions of the document.
Document record	Click on a document record to add it as an attachment. <ul style="list-style-type: none"> • Hold down the CTRL key on your keyboard to select more than one document.
Contract Documents tab	Click to display the contract documents linked to the Profile if the document needed is not in the default view.
Company Documents tab	Click to display the company documents linked to the Profile if the document needed is not in the default view.

Global Documents tab	Click to display the available global documents if the document needed is not in the default view.
Attach Selected Document button	Click to attach the document to the email and redisplay the Input view of the Messaging window.

Locating a Message

Email messages sent from a Company, Contract, or Project Profile are stored in the Messaging window in the Profile. The Recent Messages portlet in your Dashboard provides access to the email messages you sent, as well as those that include you as a recipient. A search query can be run to locate a specific message or all messages that share a common element.

Email messages sent from a Company, Contract, or Project Profile are stored in the Messaging window in the Profile. The original email message and the replies to the message are stored in a hierarchy so that the individual messages can be identified easily. The Recent Messages portlet in your Dashboard provides access to the email messages you sent, as well as those that include you as a recipient. A search query can be run to locate a specific message or all messages that share a common element.

Recent Messages Portlet

1. From the Recent Messages portlet, locate the message by scrolling through the list.
2. Click a message record to link to the Messaging window in its Company, Contract, or Project Profile.
3. In the Messaging window, read the message displayed in the bottom portion of the screen.
4. (Optional) Edit the display of information in the Messaging window:
 - Expand the list of viewable messages in the top portion of the screen by hovering over the bottom border of the list until the resize icon displays. Click the icon and drag the border downward.
 - Resize the Subject, Created On, From, and Content columns by hovering over the left or right border until the resize icon displays. Click the icon and drag the border to resize the column.
 - Display/hide threads for a message by clicking the expand + and collapse - icons.

- (Optional) Create a new message, reply to the message, or delete the entire message thread.

Profile Screen

1. Open the Company, Contract, or Project Profile that contains the message.
2. In the Links section, located at the bottom of the screen, click the Messaging link.
3. In the Messaging window, locate the message using the information in the Subject, Created On, From, and Content fields.
 - Expand the list of viewable messages by hovering over the bottom border of the list until the resize icon displays. Click the icon and drag the border downward.
 - Resize the Subject, Created On, From, and Content columns by hovering over the left or right border until the resize displays. Click the icon and drag the border to resize the column.
 - Display/hide threads for a message by clicking the expand + and collapse - icons.
4. Click a messaging record to display the entire message in the bottom of the window.
5. (Optional) Create a new message, reply to the message, or delete the entire message thread.

Search Query

A search query to locate a message sent from a Contract or Company Profile by a specific person is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set one of the following hierarchies in the Result Type list to search for a message sent from a Company, Contract, or Project Profile:
 - Company
 - Click in the list to display the hierarchy, and click the Company folder.
 - Company→Contract
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
 - Project
 - Click in the list to display the hierarchy, and click the Project folder.
4. In the Criteria section, select the search hierarchy for the person who sent the message in the field list:

- Instructions for setting the hierarchy for a contract message are provided since it is the most complicated. The same principle applies to setting the hierarchy for a company and project message.
- Company→Message→From Person
- Company→Contract→Message→From Person
 - Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.
 - Scroll through the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Message folder.
 - Click the From Person sub-folder.
 - Project→Message→From Person
 - You can also search for a message by its subject or a keyword, phrase, or text string in the message.
 - In the Criteria section, define the operator and value(s) for the search:
 - Select In in the inclusion list.
 - Click v in the value list to use the Address Book to select the sender's email address.
 - Enter the first few letters of the sender's first or last name in the Search field and click the magnifying glass.
 - Click the sender's name to select him/her.
 - Click Submit.
- 5. Click Execute in the toolbar to run the query.
- 6. When the Results view of the screen displays, click a search record to display its Contract or Company Profile.
- 7. In the Links section of the Profile, click the Messaging link.
- 8. In the Messaging window, locate the message using the information in the From field.

Sending a Message

You can send an email message from a Company, Contract, or Project Profile, or from the Recent Messages portlet in your Dashboard. The Messaging option is also available from other program features, including Events, Workflows, Tasks, Document Packages, Scorecards, and Scheduled Reports.

1. Access the Messaging window using one of the following options:
2. Open the Company, Contract, or Project Profile that will be the source location for the message. In the Links section of the Profile, click the Messaging link.

3. From the Recent Messages portlet in your Dashboard, click a message record for the Company, Contract, or Project Profile that will be the source location for the message.
4. In the Messaging window, click New Thread.
5. When the screen refreshes:
 - Populate the Message To field using one of the following options:
 - Click the calendar icon to use the Address Book to select recipients and/or an email distribution list.
 - Begin typing an email address into the field to display a drop-down list of possible matches, and click an address to select it.
 - Populate the Message Cc field using the same options available in the Message To field.
 - Your name automatically appears in the field if your Administrator has enabled the Automatically CC Email Sender system setting.
 - Enter a subject for the email message in the Subject field.
 - Type your message in the Content text box, or use the Copy & Paste functions to quickly populate the field with text from another program or application.
6. (Optional) Use the Formatting toolbar to enhance the text in your message.
7. (Optional) Click Attach Document in the toolbar of the Messaging window to attach a document to the message:
8. When the Attach Document view of the window displays, click a document record to select it.
9. Hold down the CTRL key on your keyboard while clicking additional document records to select more than one document.
10. Click the Company Documents or Global Documents tab if the document is not listed in the default view. The tabs will differ for a Company Profile and Project Profile.
11. Click Attach Selected > Document to attach the document and redisplay the Messaging window.
12. Click Send.

Replying to a Message

You can reply to a message from a Company, Contract, or Project Profile using the Messaging link, or from an email service such as Outlook, Gmail, or Yahoo since Conga Contracts not only stores a copy of the original message in the Messaging window, but also sends a copy to the email address that you use to log into Conga Contracts. You can also reply to a message from the Recent Messages Portlet in your Dashboard by clicking the message record, which will link you to the Messaging window in the corresponding Company, Contract, or Project Profile.

Replying to a Message from an Email Service

1. Open the email and read the message, which appears under the Conga Contracts header box.
2. Use the Reply or Reply To All option in your email service to respond to the message. Based on the protocols of the email service you use and whether or not the Automatically CC Email Sender system setting is enabled in Conga Contracts, the Reply To All option will populate the To and CC fields differently and the same email address may appear in both fields, causing duplicate emails to be generated.
3. (Optional) Click the Go To Message link in the email message to view your reply in the Contract, Company, or Project Profile.

Replying to a Message from the Recent Messages Portlet

1. From the Recent Messages portlet, locate the message by scrolling through the list.
2. Click the message record to link to the Messaging window in its Company, Contract, or Project Profile.
3. In the Messaging window, click Reply or Reply All in the toolbar.

Note:

The Reply button auto-populates the Message To field with the email address of the sender and the Message Cc field with your email address if your Administrator has enabled the Automatically CC Email Sender system setting. The Reply All button auto-populates the Message To field with the email address of the sender and any recipient that appeared in the Message To field of the original message. The Message Cc field is populated with your email address and the email address of any recipient that was copied on the original message. If your Administrator has enabled the Automatically CC Email Sender system setting, the sender of the original message also appears in the Message Cc field.

4. (Optional) Add additional recipients to the Message To and/or Message Cc fields using one of the following options:
5. Click the calendar icon to use the Address Book to select recipients and/or an email distribution list.

6. Begin typing an email address into the field to display a drop-down list of possible matches, and click an address to select it.
7. Enter your message in the Content text box, above the Original Message divider.
8. Use the Copy & Paste functions to quickly populate the field with text from another program or application.
9. (Optional) Use the Formatting toolbar to enhance the text in your message.
10. (Optional) Click Attach Document in the toolbar to attach a document to the message:
11. In the Attach Document window, click on a document record to select it.
 - Hold down the CTRL key to select more than one document.
 - Click the Company Documents or Global Documents tab if the document is not listed in the default view. The tabs will differ for a Company Profile and Project Profile.
 - Click Attach Selected > Document to attach the document and redisplay the Messaging window.
 - Click Send.

Replying to a Message from a Profile

1. Open the Company, Contract, or Project Profile that contains the message that requires the response.
2. In the Links section of the Profile, click the Messaging link.
3. In the Messaging window, locate the message, and click on it to select it.
4. Follow Steps 3-8 in Replying to a Message from the Recent Messages Portlet.

Deleting a Message

You can delete an email message from the Messaging window of a Company, Contract, or Project Profile, or from the Recent Messages portlet in your Dashboard. If you delete an original message with replies, or delete one of the replies to a message, all the messages in the thread will be deleted.

Deleting a Message from a Profile

1. Open the Company, Contract, or Project Profile that contains the message you want to delete.
2. In the Links section of the Profile, click the Messaging link.
3. In the Messaging window, locate the message, and click on it to select it.

4. When the message displays in the bottom of the screen, click Delete Thread in the toolbar.
5. Click Yes in the Delete entire thread confirmation prompt.

Deleting a Message from the Recent Messages Portlet

1. From the Recent Messages portlet, locate the message by scrolling through the list.
2. Click a message record to link to the Messaging window in its Company, Contract, or Project Profile.
3. Locate the message you want to delete, and click on it to select it.
4. When the message displays in the bottom of the screen, click Delete Thread in the toolbar.
5. Click Yes in the Delete entire thread confirmation prompt.

Additional Forms

The Additional Forms feature is used to capture information for companies, contracts, and projects that is not captured in the default Company, Contract, and Project Profile screens.

Additional Forms Overview

An additional form is used to capture supplemental information for a company, contract, or project that is not captured in the default Profile. An additional form typically contains two or more fields, and you can add the form to a Company, Contract, or Project Profile by providing the information requested by the form. If an additional form is required, you will receive constant reminders that the form is "missing" until you complete it by providing the required information. If the form is optional, it can be accessed by clicking on the Additional Forms link in the Company, Contract, or Project Profile.

An example of contract additional form would be a Milestone form that captures the date on which a milestone was completed and identifies the contract milestone. An example of a company additional form would be a Certification form that captures the type of certification awarded and the expiration date for the certification.

If additional forms exist for a Contract, Company, or Project Profile, you can perform the following tasks:

- [View additional forms linked to a profile](#)
- [Review an Additional Form Profile](#)
- [Locate an additional form](#)

- [Add an additional form](#)
- [Copy an additional form](#)
- [Edit an additional form](#)
- [Review the history of an additional form](#)
- [Delete an additional form](#)

Additional Forms Screen

A list of the additional forms that can be added to a Contract, Company, or Project Profile are available from their Additional Forms screen. The screen contains both optional forms (displayed with a white background) and required forms (displayed with a pink background). The number of times a form has been added to the Profile is also displayed in the screen.

A list of the additional forms that can be added to a Contract, Company, or Project Profile are available from their Additional Forms screen. The screen contains both optional forms (displayed with a white background) and required forms (displayed with a pink background). The number of times a form has been added to the Profile is also displayed in the screen.

To access the Additional Forms screen, open a Contract, Company, or Project Profile.

Although the Contract Profile is used in the screen shot below, the same components are also present in a Company Profile and Project Profile.

Additional Forms link	<p>Click to display the Additional Forms screen.</p> <p>If there are required additional forms that have not been captured, the Additional Forms screen automatically displays.</p>
Optional additional form records	<p>Review a list of the additional forms that can be added to the Profile to capture additional information.</p> <ul style="list-style-type: none"> • Click an additional form record to open the browse screen for the form, which shows each instance of the captured form. • From the browse screen, click an instance of an additional form to display its Additional Form Profile.

<p>Required additional form records</p>	<p>Identify the additional forms that must be captured at least once.</p> <ul style="list-style-type: none"> • A required form displays with a pink background until the form is captured.
<p>Forms Captured field</p>	<p>Review the number of times a form has been captured. A required form must be captured at least once, or the Additional Forms screen will continue to display every time the Profile is opened, instead of the default Contract Family screen.</p>
<p>Sort option</p>	<p>To sort the information in a column in ascending or descending order, click (toggle) on the column heading.</p>
<p>Column display</p>	<p>To customize the information in a browse screen, hover over a column heading until the v icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field.</p>
<p>Reorder and Resize Columns</p>	<ul style="list-style-type: none"> • To resize a column, hover over the right or left border of the column heading until the resize icon with two bars and opposite pointing arrows appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.

Additional Form Browse Screen

Each additional form that can be added to a Contract, Company, or Project Profile has its own browse screen since an additional form can be added to the Profile more than once. Since every additional form is created and named by an Administrator, the name of the form and the fields in the form will vary.

To access the Additional Forms browse screen for an additional form:

1. Open a Contract, Company, or Project Profile.
2. In the Links section of the Profile, click the Additional Forms link.

3. In the Additional Forms screen, locate a form by scrolling through the list, or clicking on the Form Name or Form Description header to change the sort order of the information.
4. Click an additional form record to display its browse screen, which contains a record of each instance the form was captured.

Additional Form records	Click an additional form record to display its Additional Form Profile.
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Additional Form Profile

The Additional Form Profile contains the captured information for an additional form. Since an additional form can be captured more than once, there may be several Additional Form Profiles for the same additional form.

To access an Additional Form Profile:

1. Open a Contract, Company, or Project Profile that contains a captured additional form.
2. In the Links section of the Profile, click the Additional Forms link.
3. Locate a captured form, which displays a number other than "0" in the Forms Captured field.
4. Click the captured form record to display its browse screen.
5. Click on an instance of a captured form to display its Additional Form Profile.

Although the Contract Profile is used in the screen shot below, the components are the same in the Additional Form Profile screen in a Company Profile and Project Profile.

Additional Form Profile Name	Ensure the Profile for the correct form is displayed.
Additional Form fields and lists	Review the Profile, including the information captured by the form.
Edit button	Click to edit the information in the fields and/or lists. If the Profile displays only Save and Cancel buttons, it is a single-use form, which means it can be captured only once.
Copy button	Click to make a copy of the additional form with the captured information.
History button	Click to review a history of the changes that have been made to the additional form.

<p>Back to Browse button</p>	<p>Click to return to the browse screen for this additional form.</p> <ul style="list-style-type: none"> • Click the Back to Browse button in this screen to return to the Additional Forms screen.
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Locating an Additional Form

The additional forms you can use to capture supplemental information for a Contract, Company, or Project Profile are stored in the Additional Forms screen in the Profile. You can locate an additional form in this screen or by running a search query. The additional forms you can access depends on your user role since security can be applied to a form.

The additional forms you can access depends on your user role since security can be applied to a form.

1. Open the Company, Contract, or Project Profile to identify the additional forms that you can add to the Profile.
2. In the Links section of the screen, click the Additional Forms link. If a required form has not been captured (added), the Additional Forms browse screen automatically displays every time the Profile is opened until the form is captured. A Missing Required Additional Forms heading appears at the top of the browse screen and the required form displays with a pink background.
3. In the Additional Forms screen, locate a form by scrolling through the list, or clicking on the Form Name or Form Description header to change the sort order of the information.
4. To locate the additional forms that have already been added to the Profile, change the sort order to descending in the Forms Captured column so that forms with a number greater than "0" display at the top of the list. A form that displays a "2" in the Forms Captured column indicates the form has been added to the Profile twice. The ability to capture the same type of data more than once is beneficial if you were tracking the progression of an event or occurrence for a Company, Contract, or Project Profile.
5. Click an additional form record to display its browse screen, which contains a record of each instance the form was captured.
6. Click on an instance of a captured form to display its Additional Form Profile.

Search Query

A search query to locate the company, contract, or project profiles that have captured a specific additional form is shown below. To search for an additional form, you must know the name of the form.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set up one of the following hierarchies in the Result Type list to search for a company, contract, or project form:
4. Company
 - a. Click in the list to display the hierarchy, and click the Company folder.
5. Company→Contract
 - a. Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - b. Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
6. Project
 - a. Click in the list to display the hierarchy, and click the Project folder.
 - b. In the Criteria section, set the search hierarchy for the company, contract, or project form in the field list:
 - c. Instructions for setting the hierarchy for a contract additional form are provided since it is the most complicated. The same principle applies to setting the hierarchy for a company and project additional form.
7. Company→[Additional Form]→Dynamic Object History→History Field
8. Company→Contract→[Additional Form]→Dynamic Object History→History Field
 - a. Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - b. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.
 - c. Scroll through the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the folder with the name of the contract additional form.
 - d. Click the > icon to the left of the Dynamic Object History folder for the additional form.
 - e. Click the History Field sub-folder.
9. Project→[Additional Form]→Dynamic Object History→History Field
You can also search an additional form using any of the Administrator-defined fields in the form.
10. In the Criteria section, define the operator and value(s) for the search:

11. Select Not Empty in the inclusion list since any form that has been captured has a history.
12. The Not Empty, Null, Not Null, True, and False operators in the inclusion list do not require a value.
13. Click Execute in the toolbar to run the query.
14. When the Results view of the screen displays, click a search record to display its Company, Contract, or Project Profile.
15. In the Links section of the Profile, click the Additional Forms link.
16. In the Additional Forms screen, click a form record to display the form's Profile.

Adding an Additional Form

An additional form contains fields designed to capture information that is not captured in default Conga Contracts program screens, but your company deems as important information for a contract, company, or project. An additional form can be optional or required, and a prompt will continue to display in a Company, Contract, or Project Profile until a required form is captured by adding it to the profile. An additional form can be added to a profile more than once, unless it is a single-use form, which only allows the form to be captured once.

Although the Contract Profile is used in the screen shots below, the same components are present in the Company Profile and Project Profile.

1. Open the Contract, Company, or Project Profile that needs the additional form.
2. In the Links section of the screen, click the Additional Forms link. If a required form has not been captured (added), the Additional Forms browse screen automatically displays every time the profile is opened until the form is captured.
3. Locate the additional form you want to capture, and click on it to select it.
4. If a completed Additional Form Profile displays instead of the browse screen, it is a single-use form that has already been captured, and therefore, you cannot capture the form a second time. However, you can edit the form, and view and history of changes made to the form.
5. In the Additional Forms browse screen, click New [Form Name] in the toolbar.
6. If you are adding a single-use form, the Additional [Form Name] Profile screen displays, instead of the browse screen.
7. In the Additional [Form Name] Profile screen:
8. Populate the required fields.
9. (Optional) Populate the optional fields.
10. Click Save

Copying an Additional Form

You have the option of copying an existing additional form, instead of adding a new form to the profile, when the form you are adding contains information that is similar to an existing form. Once you copy the form, you can edit the new form, as needed, before saving it. However, you cannot copy a single-use form.

Although the Contract Profile is used in the steps below, the same steps also apply to copying an additional form in a Company Profile and Project Profile.

1. Locate the additional form you want to copy, and display its Profile screen.
2. Click Copy in the toolbar.
3. When the screen refreshes, update the information in the fields and lists for the new additional form.
4. Click Save.

Editing an Additional Form for a Contract, Company, or Project Profile

You can edit the information captured for any of the additional forms added to a Contract Profile, Company Profile, or Project Profile. However, an additional form can only be edited if the form has been captured at least once, as indicated by the presence of a number other than "0" in the Forms Captured column.

Although the Contract Profile is used in the steps below, the same steps also apply to editing an additional form in a Company Profile and Project Profile.

1. Locate the additional form you want to edit, and display its Profile screen.
2. Click Edit in the toolbar.
3. When the screen refreshes, update the information in the fields and lists, as needed.
4. Click Save.

Reviewing an Additional Form's History

You can view a history of the changes made to any of the additional forms that were added to a Contract, Company, or Project Profile. However, the history of an additional form can only be viewed if the form has been captured at least once, as indicated by the presence of a number other than "0" in the Forms Captured column.

Although the Contract Profile is used in the steps below, the same steps also apply to viewing the history of an additional form in a Company Profile and Project Profile.

1. Locate the additional form whose history you want to view, and display its Profile screen.
2. Click History in the toolbar.
3. When the screen refreshes, review a history of the changes made to the additional form. A change has been made if there is information in the Original Value column for a field. The new value for the field is displayed in the corresponding Updated Value column.
4. Click Back, and then click Back To Browse to return to the Additional Forms browse screen.

Deleting an Additional Form

Any of the additional forms that have been added to a Contract, Company, or Project Profile can be deleted.

Although the Contract Profile is used in the steps below, the same steps also apply to deleting an additional form in a Company Profile and Project Profile.

1. Locate the additional form you want to delete, and display its Profile screen.
2. Click Edit in the toolbar.
3. When the screen refreshes, click Delete in the toolbar.
4. In the Confirm Delete prompt, click Yes.

Flows

A Flow is an automated version of a Workflow whose steps are automatically displayed at the top of a new Contract, Company, or Project Profile screen. As users complete steps, they are grayed out in the Profile so that users always know what action needs to be taken next.

Flows Overview

A Flow is an automated version of a Workflow since you do not have to add a flow to a Contract, Company, or Project Profile. Instead, the steps in the flow automatically display when you add a new profile to Conga Contracts. A flow also uses stages to clearly identify the phases that the contract, company, or project must go through. The stages and steps in

a flow display at the top of the profile, and are "grayed out" as they are completed, so that you always know what action

The Flows feature is an automated version of Workflows since you do not have to add a flow to a Contract, Company, or Project Profile. Instead, the steps in the flow automatically display when you add a new profile that matches the conditions defined by the flow. In addition to steps, a flow also uses stages to clearly identify the phases of the process or procedure for the contract, company, or project. The stages and steps in a flow display at the top of the profile, and are grayed out as they are completed, so that you always know what action needs to be taken to move the flow to the next step or stage. To get an overview of the entire flow process, you can display a profile's Flow Diagram, which provides a graphical representation of the flow.

A flow can contain up to four types of steps: (1) Action, which requires you to accomplish a task before completing the step (2) Communication, which requires you to send an email message before completing the step (3) Approval, which requires you to approve/decline the step in order to complete it, and (4) Launch Workflow, which runs the Workflow Wizard, allowing you to select the team to complete the steps in a pre-defined workflow that is then added to the profile.

A contract flow can contain two additional types of steps: (1) Create, which runs the Creation Wizard, allowing you to select the template to use in creating the contract, which is then stored in the Documents screen in the Profile, and (2) Launch eSignature, which runs the eSignature Package Wizard, allowing you to send a document for electronic signature. You can manually start a flow in an existing Contract, Company, or Project profile if you have the Flow Administrator permission.

In working with a contract, company, or project flow, you can perform the following tasks:

- [Review flow stages and steps in a Profile](#)
- [Locate a flow](#)
- [Complete an action flow step](#)
- [Approve a flow step](#)
- [Send a message for a flow step](#)
- [Reassign a flow step](#)
- [Run a flow on an existing profile](#)
- [Manage flow documents](#)
- [Invalidate a flow](#)
- [Review activities for a flow](#)
- [Review a flow diagram](#)

Flow Stages and Steps in a Profile

A Contract, Company, or Project Profile displays a flow comprised of stages and steps at the top of the screen whenever a flow has been associated with the Profile. Users must complete the steps in the flow to accomplish a process or procedure that is required for the contract, company, or project. If a flow incorporates an existing workflow, a Launch Workflow button displays in the flow, which runs the Workflow Wizard and then adds the workflow to the Profile.

Although the Contract Profile is used in the example below, the same components also apply to a flow in a Company Profile and Project Profile, except for the Creation Template and eSignature steps.

Create button	Click Create to run the Creation Wizard, which allows you to select a template for the wizard and create a contract using the information in the Contract Profile screen and any captured additional forms.
Complete Step button	Click Complete to complete the step after you have performed the task associated with the action step.
Override button	Click Override to skip any step in the flow, and proceed to the next step.
Reassign button	Click Reassign to reassign the step to another user. The button is only present when the step is assigned to a specific user and they are allowed to reassign the step.
Notes button	Click Notes prior to completing, overriding, or reassigning a step to provide information on your completion of the step or reason for skipping/reassigning the step.
Send button	<ul style="list-style-type: none"> • Click Send to compose and send an email message for the step. • Click Complete after sending the message, or Override to skip the step.
Completed Action Step	Review the action steps that have been completed for the flow, which are displayed in grayed out text.

<p>Completed Approval Step</p>	<ul style="list-style-type: none"> • Review the approval steps that have been completed for the flow. • Hover over the green checkmark icon to display a pop-up with a description of the step that was approved or declined. • Identify an approved step, which includes a checkmark, from a declined step, which includes a red x..
<p>Incomplete Approval Step</p>	<p>Click Approve to approve the step, Decline to decline approval of the step, or Override. to skip the step.</p> <ul style="list-style-type: none"> • Click Notes prior to approving/declining/overriding the step to provide information on your approval/declination, or to provide a reason for skipping the step.
<p>Flow Step Note window</p>	<p>Click Notes to display the Flow Step Note window and provide notes on approving/declining (or completing) the step.</p> <ul style="list-style-type: none"> • Enter your information in the text box. • Click Submit.
<p>Notes icon</p>	<p>Click the yellow notes icon to display the Flow Step Note window and review the notes provided by the user who completed the step, or hover over the icon to display a pop-up with the user's notes.</p>
<p>Closed Stage</p>	<p>Identify the closed stages for the flow, which display with a green background.</p>
<p>Active Stage</p>	<p>Identify the active stage for the flow, which displays with a gray background.</p>
<p>Active Action Step</p>	<p>Identify the step that is currently active for the flow, which is displayed in black text. An action step has three buttons: Complete Step, Override, and Notes, and may include a Reassign button. If the active step is an approval step, it will have four buttons: Approve, Decline, Override, and Notes, and may include a Reassign button.</p>

<p>Properties icon and Flow menu</p>	<p>Click the cog icon to display a menu with four options for the flow:</p> <ul style="list-style-type: none"> • Invalidate Flow - cancels the flow and removes it from the Profile • Show Activity Grid - displays the Flow Activities window, which provides information on the steps in the flow • Show Flow Diagram - displays the flow as a diagram with separate views for each stage of the flow • Manage Flow Documents - attach contract, company, project, and global documents to a flow for use in flow steps • The Invalidate Flow option is not available when a flow has been completed.
<p>eSignature step</p>	<p>Click Launch eSignature to run the eSignature Package Wizard.</p> <p>When the wizard is run, the step will display a Waiting on eSignature to Complete message until the document is signed, and then Conga Contracts will complete the step and move the flow to the next step.</p>
<p>Stage Header toggle bars</p>	<p>Click on any stage header to hide/display the steps in the flows.</p>

Locating a Flow

There are three ways to locate a flow:

- Search the Active Workflow Items portlet in your Dashboard.
- Search the Flows view of the Workflows section of the Workflow Profile in a Company or Contract Profile, or the Workflows screen in a Project Profile.
- Create a search query.

Active Workflow Items Portlet

Using the two flow views in the portlet, you can locate the flow steps that have been assigned to you, as well as the pending steps of flows for contracts that include you as a

responsible person. When you are assigned to a flow step, you are the step owner and you must complete the step, or reassign it, if permitted.

1. From the Active Workflow Items portlet, click the My Flow Steps tab.
2. Locate the step you want to review and/or complete, and click on it to be directed to the Contract, Company, or Project Profile screen containing the flow.
3. (Optional) Click the MyContracts Flow tab to display the pending flow steps for any contracts that include you as a responsible person
4. Click on a flow step record to be directed to the Contract Profile screen containing the flow.

Workflow Profile or Workflows Screen

Although the latest flow is the only one that displays in the Contract, Company, and Project Profile screen, you can view any completed or invalidated flows that were run prior to the current flow.

1. Open the Company, Contract, or Project Profile containing the flow.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract and company Workflow Profile, click the Flows tab.
4. In the Project Profile, click the Flows tab in the Workflows screen.
5. Locate the flow whose information you want to review, and click on it to refresh the screen and display the activities for the flow, as well as those for the steps in the flow.

Search Query

A search query to locate completed contract, company, or project flows is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set up one of the following hierarchies in the Result Type list to search for a company, contract, or project workflow:
 - Company
 - Click in the list to display the hierarchy, and click the Company folder.
 - Company→Contract
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.

- Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
 - Project
 - i. Click in the list to display the hierarchy, and click the Project folder.
 - ii. You can also drill down one level, expand the Flow Template hierarchy, and click Flow Stage to search a flow stage. Expand the Flow Stage hierarchy and select Flow Step Data to search for information on a step, or expand the Flow Step Activity hierarchy to search for approved steps.
4. In the Criteria section, set one of the following hierarchies for the company, contract, or project flow in the field list:
- a. Company→Flow→Flow Complete
 - i. Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - ii. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Flow folder.
 - iii. Click the Flow Complete sub-folder.
 - b. Company→Contract→Flow→Flow Complete
 - i. Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - ii. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.
 - iii. Scroll through the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Flow folder.
 - iv. Click the Flow Complete sub-folder.
 - c. Project→Company→Flow→Flow Complete to search for completed company flows in the project, OR
 - i. Click in the field list to display the hierarchy, and click the > icon to the left of the Project folder.
 - ii. Click the > icon to the left of the Company folder.
 - iii. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Flow folder.
 - iv. Click the Flow Complete sub-folder.
 - d. Project→Contract→Flow→Flow Complete to search for completed contract workflows in the project:
 - i. Click in the field list to display the hierarchy, and click the > icon to the left of the Project folder.
 - ii. Click the > icon to the left of the Contract folder.
 - iii. Scroll past the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Flow folder.

- iv. Click the Flow Complete sub-folder.
 - v. You can also search for flow stages, flows with skipped steps, invalidated flows, and dates related to the flow. For flow steps, you can search for steps that have been approved and reassigned.
5. In the Criteria section, define the operator and value(s) for the search:
 - Select True in the inclusion list.
 - Select False to search for incomplete (active) flows.
6. The True, False, Not Empty, Null, and Not Null operators in the inclusion list do not require a value.
7. Click Execute in the toolbar to run the query.
8. When the Results view of the screen displays, click a search record to be directed to the Contract, Company, or Project Profile containing the flow.

Completing an Action Flow Step

There are two types of action steps in all flows: (1) Generic Action step, which is defined by an Administrator and requires you to take some type of action before completing the step, and (2) Launch Workflow, which runs the Workflow Wizard, allowing you to select the team to complete the steps in a pre-defined workflow that is then added to the profile.

There are two additional types of actions steps in a contract flow: (1) Create, which runs the Creation Wizard, allowing you to select the template to use in creating the contract, which is then stored in the Documents screen in the Profile, and (2) Launch eSignature, which runs the eSignature Package Wizard, allowing you to send a document for electronic signature.

A flow step can be completed from three locations: Email from Conga Contracts, Active Workflow Items Portlet, and Profile screen.

Email Message

In the email message sent from Conga Contracts Flow:

1. (Optional) Review additional information before completing the step using the Go To Contract, Go To Company, or Go To Project link.
2. Click the Complete link.
3. When the reply email message displays with Complete Flow Step as the subject, and Complete in the body of the email message, click Send.
4. (Optional) Add notes on completing the step to the body of the email message by positioning your cursor under the word "Complete" and entering your text. Do not

remove the word "Complete" from the message or the email will not be sent successfully, and the step will not be completed.

Active Workflow Items Portlet

From the Active Workflow Items portlet in your Dashboard:

1. Click the My Flow Steps tab, and locate the step you want to complete.
2. Click on the step to display the Profile screen for the flow.
3. Follow Step 3 in Contract, Company, or Project Profile below.
4. Contract, Company, or Project Profile
5. Open the Contract, Company, or Project Profile containing the flow step you want to complete.
6. (Optional) Review the completed steps:
 - Action step is displayed in grayed out text.
 - Approval step is displayed as a check mark Approval when it has been approved, and a red x Approval when it has been declined.
 - Hover over the yellow notes icon icon to display notes provided by the user who completed the step.
 - Hover over the green checkmark icon to display a description of the approval step. If no steps are displayed, click on the Stage header, which is a toggle bar to hide/display the steps in the stage.
 - Click the appropriate button(s) to complete the step:
 - Notes - provide notes on completing a step prior to completing the step.
 - Complete - completes an action step.
 - Override - skips the step.
 - Reassign - displays the Address Book and allows you to reassign the step to another user.
 - Launch Workflow - runs the Workflow Wizard and allows you to select the Workflow Team that will complete the steps in a pre-defined workflow, which is then added to the profile.
 - Create - runs the Creation Wizard and is used only in contract flows.
 - Launch eSignature - runs the eSignature Package Wizard and is used only in contract flows.

Approving a Flow Step

A flow step that needs to be approved may require the approval of a specific user, a user who holds one or more functions in Conga Contracts, or any program user. If the step is

approved, the flow continues to the next step. If the step is declined, the flow returns to a previous step or is halted. Based on the reason(s) the user provides for declining the step, adjustments can be made, allowing the step to be resubmitted for approval.

A flow step can be completed from three locations: Email from Conga Contracts, Active Workflow Items Portlet, and Profile screen.

Email Message

In the email message sent from Conga Contracts Flow:

1. (Optional) Review additional information before completing the step using the Go To Contract, Go To Company, or Go To Project link.
2. Click the Approve or Decline link.
3. If you select the Approve link, a reply email message displays with Approve Flow Step as the subject, and Approved in the body of the email message. Click Send.
4. (Optional) Add notes on approving the step to the body of the email message by positioning your cursor under the word "Approved" and entering your text. Do not remove the word "Approved" from the message or the email will not be sent successfully, and the step will not be approved.
5. If you select the Decline link, a reply email message displays with Decline Flow Step as the subject, and Declined in the body of the email message. Click Send.
6. (Optional) Add your reason(s) for declining to approve the step to the body of the email message by positioning your cursor under the word "Declined" and entering your text. Do not remove the word "Declined" from the message or the email will not be sent successfully, and the step will not be declined.

Active Workflow Items Portlet

From the Active Workflow Items portlet in your Dashboard:

1. Click the My Flow Steps tab, and locate the step that needs approval.
2. Click on the step to display the Profile screen for the flow.
3. Follow Step 3 in Contract, Company, or Project Profile below.
4. Contract, Company, or Project Profile
5. Open the Contract, Company, or Project Profile containing the flow step that needs to be approved.
6. (Optional) Review the completed steps:
 - Action step is displayed in grayed out text.
 - Approval step is displayed as Approval when it has been approved, and Approval when it has been declined.

- Hover over the Note icon to display notes provided by the user who completed the step.
- Hover over the Approval icon to display a description of the approval step.
- If no steps are displayed, click on the Stage header, which is a toggle bar to hide/display the steps in the stage.
- Click the appropriate button(s) to complete the step:
- Notes - provide notes on completing a step prior to completing it by selecting one of the following.
- Approve Flow - approves a step that requires authorization to complete.
- Decline Flow - declines a step that requires authorization to complete.
- Override - skips the step.
- Reassign - displays the Address Book and allows the step to be reassigned to another user.

Sending a Message for a Flow Step

A flow step that allows an email message to be sent directly from the step is a communication, or messaging step. The email message can be sent to any person listed in the Address Book. After the message is sent, the step must be completed in Conga Contracts.

A flow step can be completed from three locations: Email from Conga Contracts, Active Workflow Items Portlet, and Profile screen.

Email Message

In the email message from Conga Contracts:

1. Click the Go To Contract, Go To Company, or Go To Project link.
2. (Optional) Review the completed steps:
3. Action step is displayed in grayed out text.
4. Approval step is displayed as Approval when it has been approved, and Declined Approval when it has been declined.
5. Hover over the notepad icon to display notes provided by the user who completed the step.
6. Hover over the Approve icon to display a description of the approval step.
7. If no steps are displayed, click on the Stage header, which is a toggle bar to hide/display the steps in the stage.
8. In the Profile screen, click Send.

9. In the Messaging window, compose and send the message.
10. In the Profile screen, click Complete Step to complete the step.
11. (Optional) Click Override to skip the step.

Active Workflow Items Portlet

From the Active Workflow Items portlet in your Dashboard:

1. Click the My Flow Steps tab, and locate the step you want to complete.
2. Click on the step to display the Profile screen for the flow.
3. Follow Steps 2-5 above in Email Message.
4. Contract, Company, or Project Profile
5. Open the Contract, Company, or Project Profile containing the flow step you want to complete.
6. Follow Steps 2-5 above in Email Message.

Reassigning a Flow Step

A flow step owner can reassign the step to another user if they are unable to complete the task associated with the step. Once the flow step is reassigned, Conga Contracts sends an email to the new step owner, asking them to complete the task associated with the step.

If you receive an email request to complete a flow step, you can reassign your responsibility to complete the the step by forwarding the email to a person who is qualified to complete the step. A qualified person may be a program user, a company contact, or an external person. Alternatively, you can reply to the person who manually started the flow, or caused the flow to run by creating the Contract, Company or Project Profile that auto-launched the flow and generated the email message.

Reassignment is only available when the assignment is to a person.

1. 1. In the Flow Action Required email message that you receive for a flow step, click the Go To Contract link.
2. Clicking the link in the email message directs you to the Conga Contracts Login screen. Once you log in, you are immediately directed to the Contract Profile screen.
3. 2. In the Contract Profile screen, click Reassign for the flow step.
4. 3. Using the Address Book, select the person who should complete the flow step.
5. Click on a person's record to select them, and display their name in the Selected field.
6. To quickly locate a person, enter the first few letters of their first or last name in the Search field and click the magnifying glass . Click x to clear the filter.
7. Click Submit.

8. The person selected will receive a Flow Action Required email message with a Go To Contract link. Once they log in to Conga Contracts, they can complete the step or reassign it to another user.

Running a Flow on an Existing Profile

Users with the Flow Admin permission can run a flow on an existing Contract, Company, or Project Profile if the profile was created before the flow was developed. A flow can be run on the same profile more than once, if needed.

1. Open the Contract, Company, or Project Profile that needs the flow.
2. In the Profile screen, click Start Flow in the toolbar.
3. In the Published Flow Templates window:
4. Locate the flow template you want to run, and click on it to select it.
5. Click Start Flow in the toolbar.
6. When the window closes and the profile refreshes, complete the steps in the flow.
7. (Optional) Click the gear icon to display a menu that allows you to perform tasks related to the flow:
 - a. Show Flow Diagram
 - b. Manage Flow Documents
 - c. Show Activity Grid
 - d. Invalidate Flow

Managing Flow Documents

A document can be attached to a flow if a user wants to provide those who view the flow with a file that explains or verifies completion of an individual flow step, a stage in the flow, or the entire flow. The documents that can be attached to a flow include all the documents uploaded to the Company, Contract, or Project Profile for the flow, and any global documents that are available to the user who attaches the document to the flow.

1. Open the Contract, Company, or Project Profile containing the flow that needs the document attachment.
2. Click the gear icon, located to the right of the flow in the Profile screen, and select Manage Flow Documents in the menu.
3. In the Flow Document Manager window, which can be resized and moved onscreen:
 - Locate the document in the Available Documents section, and click its + icon to add it to the Attached Documents section.

- If the document you need is not listed in the default view, click the Company Documents or Global Documents tab to display a list of the company or global documents available.
- (Optional) Manage, resize, and reorder the columns that display in the Attached Documents and/or Available Documents sections.
- Click Save.

Reviewing the Flow Diagram

You can view a diagram of the flow that is being applied to a Contract, Company, or Project Profile. The diagram reveals future stages and steps, and also gives you an overview of all the stages in a flow. To further promote your understanding of the flow process that is being applied to the profile, it is recommended that you review the way in which the steps are linked together, as well as the alternate paths that can be followed for a step.

Open the Contract, Company, or Project Profile containing the flow whose diagram you want to review.

1. Click the gear icon, located to the right of the flow in the Profile screen, and select Show Flow Diagram in the menu.
2. In the Flow Diagram window, which can be resized and moved onscreen:
 - View the steps in the first stage of the flow, along with the links between steps and any alternate paths that can be followed.
 - If present, click on other tabs to display the diagrams for other stages in the flow.
3. Click x to close the window.

Reviewing Flow Activities

You can view a summary of the activities for all the stages and steps in a flow while the flow is still displayed in the Contract, Company, or Project Profile screen. The Flow Activities window provides key information, including the name of each step, its description, the dates on which the step was opened and completed, its duration and outcome, and the name of the person who completed the step, along with any notes they provided for the step. If a flow step was reassigned, that information is also available.

For flows that are no longer displayed at the top of a Contract, Company, or Project Profile screen, open the Workflows screen, and click the Flows tab. Locate the flow you want to review, and click on it to refresh the screen and display the activities for the flow.

1. Open the Contract, Company, or Project Profile containing the flow whose activities you want to review.
2. Click the gear icon, located to the right of the flow in the Profile screen, and select Show Activity Grid in the menu.
3. In the Flow Activities window, which can be resized and moved onscreen:
4. Review the information for each flow step, including its disposition in the Outcome column.
5. If present, click Reassigned for a step to display its Reassignment History window, which provides information on the reassignment of the step. Click x to close the window.
6. (Optional) Manage, resize, and reorder the columns that display in the window.
7. Click x to close the window.

Invalidating a Flow

A flow automatically displays when you add a Contract, Company, or Project Profile to Conga Contracts and an Administrator has linked a flow to the type of profile you are adding. However, you can invalidate an active flow so that it is removed from the profile.

If any of the steps in the flow were completed before the flow was inactivated, you can view the step's activities by opening the Workflows screen, and clicking the Flows tab. Locate the invalidated flow, and click on it to refresh the screen and display the activities for the completed step(s).

1. Open the Contract, Company, or Project Profile containing the flow you want to invalidate.
2. Click the cog icon located to the right of the flow in the Profile screen, and select Invalidate Flow in the menu.
3. In the Invalidate Flow confirmation prompt, click Yes.

Workflows for Conga Contracts

The Workflows feature allows you to follow your company's standard business practices for contracts, companies, and projects using a wizard and templates that define the steps in the business practice.

- [Workflows for Conga Contracts Overview](#)
- [Locating a Workflow](#)
- [Creating a Workflow \(Workflow Wizard\)](#)
- [Receiving Email for a Workflow Step](#)

- [Completing an Action Workflow Step](#)
- [Approving a Workflow Step](#)
- [Sending a Message for a Workflow Step](#)
- [Managing Workflow Documents](#)
- [Reassigning a Workflow Step](#)
- [Closing and Reopening Workflows](#)
- [Editing and Deleting Workflows](#)

Workflows for Conga Contracts Overview

Using the Workflow Wizard, you can add a workflow to a Contract, Company, or Project Profile by selecting the appropriate template and then choosing a workflow team. The template identifies the steps in the business practice and the team is comprised of individuals who have the ability to perform the tasks defined in the workflow steps.

The Workflows feature allows you to follow your company's standard business practices using a wizard and individual templates that define the steps in a business practice.

Using the Workflow Wizard, you can add a workflow to a Contract, Company, or Project Profile by selecting the appropriate template and then choosing a workflow team. The template identifies the steps in the business practice and the team is comprised of individuals who have the ability to perform the tasks defined in the steps.

The team member assigned to the first step in a workflow is notified by email that they are required to complete the step. Once the team member completes the step, Conga Contracts sends an email to the "owner" of the next step, and the process continues until all workflow steps have been completed. Once the workflow is completed, Conga Contracts moves the workflow from the Active view in the Workflows browse screen to the Completed view.

A workflow may contain up to three types of steps: (1) Action Item, which requires the step owner to complete a task (2) Communication, which requires the step owner to send an email message before completing the step (3) Approval, which requires the step owner(s) to approve/decline the step in order to complete it. An approval step may require the consent of a single approver, or the approval of more than one user may be necessary using a routing table.

A workflow may require documents to be uploaded to the Contract, Company, or Project Profile, and these documents are available for use with any workflow step from the Documents view of the Workflows browse screen.

Tip: A Task List is a simplified version of a workflow in that messaging is not available for individual steps and none of the steps can be approved. Therefore, it is recommended that

you review both the Workflow and Task List features to determine which option better suits your needs.

You can perform the following tasks related to a contract, company, and project workflow:

- [Locate a workflow](#)
- [Create a workflow](#)
- [Review the Workflow Profile/Browse screen](#)
- [Receive email for a workflow step](#)
- [Complete an action for a workflow step](#)
- [Approve a workflow step](#)
- [Send a message for a workflow step](#)
- [Manage workflow documents](#)
- [Reassign a workflow step](#)
- [Send a reminder email message to a workflow step owner](#)
- [Close and reopen workflows](#)
- [Edit and delete workflows](#)

Locating a Workflow

There are three ways to locate a workflow: (1) Search the Active Workflow Items portlet in your Dashboard (2) Search the Workflows section of the Workflow Profile in a Company or Contract Profile, or the Workflows screen in a Project Profile, or (3) Run a search query.

There are three ways to locate a workflow:

- Search the Active Workflow Items portlet in your Dashboard to identify the workflows that name you as a member of the Workflow Team.
- Search the Workflows section of the Workflow Profile in a Company or Contract Profile, or the Workflows screen in a Project Profile.
- Create a search query.

Active Workflow Items Portlet

Using the four workflow views in the portlet, you can locate the workflows you have created, as well as those that include you as a team member. You can also locate the workflow steps that have been assigned to you for completion, and link to the Profile containing workflow. When you are assigned to a workflow step, you are the step owner and you must complete the step, or reassign it, if permitted.

1. From the Active Workflow Items portlet, locate the workflow steps you are responsible for completing by scrolling through the list. The default view is My Steps, but you can click the My Team Workflows, My Workflows, or the My Workflow Steps tab. The My Workflows view shows the workflows that you have created, and the My Team Workflows view shows the workflows that include you as a team member. The My Workflow Steps tab shows the workflow steps that you assigned to yourself when you created a workflow.
2. Click Go To envelope to link to the Profile containing the workflow associated with the step.

Workflow Profile or Workflows Screen

1. Open the Company, Contract, or Project Profile containing the workflow.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract and company Workflow Profile, click on a workflow record to refresh the screen and display the steps in the workflow. In the Project Profile, click on the workflow in the Workflows screen.
 - From the Active Workflows (default) view, you can send a message for a step, approve or decline a step, complete a step, reassign a step to another user, send a reminder email message for the step, and close the workflow.
 - From the Completed Workflows view, you can review the workflows that have been completed for the contract, company, or project.
 - From the Documents view, you can associate documents outside the profile with the workflow.

Search Query

A search query to locate the contract, company, or project workflows created by a specific user is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set up one of the following hierarchies in the Result Type list to search for a company, contract, or project workflow:
 - Company
 - Click in the list to display the hierarchy, and click the Company folder.
 - Company→Contract
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.

- Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
 - Project
 - Click in the list to display the hierarchy, and click the Project folder.
 - You can also drill down one more level and search for information on a workflow step, or drill down two more levels and search the activity for a flow step.
4. In the Criteria section, set one of the following hierarchies for the company, contract, or project workflow in the field list:
 - a. Company→Workflow→Workflow Owner
 - b. Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - c. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Workflow folder.
 5. Scroll down and click the Workflow Owner sub-folder.
 - a. Company→Contract→Workflow→Workflow Owner
 - i. Click in the field list to display the hierarchy, and click the . icon to the left of the Company folder.
 - ii. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.
 - iii. Scroll through the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Workflow folder.
 - iv. Scroll down and click the Workflow Owner sub-folder.
 - b. Project→Company→Workflow→Workflow Owner to search for company workflows in the project, OR
 - i. Click in the field list to display the hierarchy, and click the > icon to the left of the Project folder.
 - ii. Click the > icon to the left of the Company folder.
 - iii. Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Workflow folder.
 - iv. Scroll down and click the Workflow Owner sub-folder.
 - c. Project→Contract→Workflow→Workflow Owner to search for contract workflows in the project:
 - i. Click in the field list to display the hierarchy, and click the > icon to the left of the Project folder.
 - ii. Click the > icon to the left of the Contract folder.
 - d. Scroll past the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Workflow folder.

- e. Scroll down and click the Workflow Owner sub-folder. You can also search for a workflow by its name, description, and dates related to the workflow, as well as locate both active and completed workflows. For workflow steps, you can search by name, description, type, and several workflow activities, including status and completion information.
6. In the Criteria section, define the operator and value(s) for the search:
7. Select In in the inclusion list.
8. Click v in the value list to use the Address Book to select the user's (owner's) email address.
9. Enter the first few letters of the user's first or last name in the Search field and click the magnifying glass.
10. Click the user's name to select him/her.
11. Click Submit.
12. Click Execute in the toolbar to run the query.
13. When the Results view of the screen displays, click a search record to be directed to the Contract, Company, or Project Profile containing the workflow.
14. Click Workflows in the toolbar of the Contract or Company Profile, or the Workflows link in the Project Profile, to displays the workflow(s) for the Profile.

Creating a Workflow (Workflow Wizard)

A workflow is added to a Company, Contract, or Project Profile using the Workflow Wizard. The wizard guides you through the process of creating a workflow once you select a template and a workflow team. If a step in the workflow requires the approval of more than one user, you will also be prompted to select a routing table. The Workflow Wizard is also used to edit a workflow.

1. Open the Company, Contract, or Project Profile that needs the workflow.
2. In the Contract or Company Profile, click Workflows in the toolbar.
3. In the Project Profile, click the Workflows link.
4. In the Workflows section of the contract and company Workflow Profile, click New Workflow.
5. In the Project Profile, click New Workflow in the Workflows screen.
6. In the Workflow Wizard, click Next.
7. In the Workflow Template Selection panel, make a selection in the Workflow Template list, and click Next.
8. In the Workflow Information panel, review the information for the workflow template to ensure you made the right selection, and then click Next.
9. (Optional) Relinquish your responsibility for the managing the workflow by making a different selection in the Workflow Owner list.

10. (Optional) Select the CC Workflow Owner check box to ensure the workflow owner receives an email message whenever a change is made to the workflow.
11. The Workflow Owner can complete, reassign, and approve any step in the workflow, as well manage workflow documents, and edit, close, and delete the workflow.
12. (Optional) In the Routing Table Selection panel, select the appropriate table in the Routing Table list, and click Next.
 - A routing table consists of two or more users who have the authority to approve/decline a workflow step that requires approval. If none of the steps in the workflow require a routing table, this panel will not display.
13. In the Workflow Team Selection panel, select the appropriate team in the Workflow Teams list, and click Next.
14. (Optional) Click Add Team Member to launch the Address Book to add another member or a distribution list to the team.
15. Click on a person/distribution list record to select it, and add the person/list to the Workflow Team list box.
16. To quickly locate a person/list, enter the first few letters of the person's first or last name, or the name of the list, in the Search field, and click the magnifying glass. To clear the filter, click x.
17. Click Submit to select the team members and close the Address Book.
18. (Optional) Click x to remove a team member.
19. In the Workflow Step Owner Selection panel, assign an owner for each step by selecting their name in the Owner list, and then click Next.
20. (Optional) For a step that is divided into sub-steps, such as 4.1 and 4.2, select different step owners since this division indicates an approval step with a routing table, which means the step must be approved by more than one user.
21. The list of people available for each step is based on the functions that each person holds in Conga Contracts. If only one person is qualified to complete the step, their name is automatically displayed in the Owner field.
22. In the Workflow Wizard Completion panel, click Finish.
23. After running the wizard, the workflow is displayed as a record in the Workflows section of the Workflow Profile. When you click on a workflow record, the screen refreshes and displays the individual steps in the workflow. From this screen, you can view and monitor each step to ensure it is completed since Conga Contracts sends an email notification to the owner of each workflow step, informing him/her that they need to complete the step.

Workflow Profile/Browse Screen

The Workflow Profile contains basic information for the Contract, Company, or Project associated with the workflow, as well as a Workflows section with links to the individual workflows that have been added to the Profile.

Workflow Profile/Browse Screen

The Workflow Profile contains basic information for the Contract, Company, or Project associated with the workflow, as well as a Workflows section with links to the individual workflows that have been added to the Profile.

Although the Workflow Profile for a contract is used in the example below, the components are the same in the Workflow Profile screen for a company and project.

Open a Contract Profile that contains a workflow, and click Workflows in the toolbar. You can also display a contract Workflow Profile by clicking Go To envelope in the Active Workflow Items portlet in your Dashboard, and then clicking Workflows in the Profile toolbar.

Workflow records	Locate the workflow whose steps you want to view, and click on it to refresh the screen.
Active Workflows tab	Ensure the tab is selected to view the active workflows for the Profile.
Workflow steps	Review the numbered steps in the workflow, as well information provided for each step. A step that is divided into sub-steps, such as 4.1 and 4.2, is an approval step that requires the approval of more than one person, as defined in the routing table selected in the Workflow Wizard.
Action Step - Completed	Review the Completion Notes for a completed action step by clicking +. <ul style="list-style-type: none"> Identify the person who completed the step, along with the date and time the step was completed.

<p>Approval Step - Completed</p>	<p>Review the Completion Notes for a completed approval step by clicking +.</p> <ul style="list-style-type: none"> • Identify the person who approved the step, along with the date and time the step was approved. • A completed approval step includes an approve or decline icon.
<p>Approval Step - Incomplete</p>	<p>Complete an approval step using the available icons:</p> <ul style="list-style-type: none"> • Checkmark icon - Approve step. • X icon - Decline step. • Pencil icon - Reassign step to another user. • Envelope icon - generate an email message to the step owner, reminding them that they need to approve/decline the step.
<p>Communication Step - Completed</p>	<p>Review the email message for a completed communication step by clicking +.</p> <ul style="list-style-type: none"> • Identify the person who sent the message, along with the date and time the message was sent.
<p>Action and Communication Steps - Incomplete</p>	<p>Complete an action or communication step using the available icons:</p> <ul style="list-style-type: none"> • Checkmark and Clock icon - Complete step. This is only present if you are a workflow owner. • Pencil icon - Reassign step to another user. • Envelope icon - generate an email message to the step owner, reminding them that they need to approve/decline the step.
<p>Documents tab</p>	<p>Click to view the list of documents that have been uploaded to the Company, Contract, or Project Profile and are available to be sent as an attachment to an email message sent from a Communication step.</p>
<p>Documents button</p>	<p>Click to display a screen where you can manage the documents for this workflow.</p>
<p>Close Workflow toggle button</p>	<p>Click to close the workflow.</p> <ul style="list-style-type: none"> • To reopen the workflow, click the Re-open Workflow button, which displays as soon as you close the workflow.

Completed Workflows tab	Click to view the workflows that have been completed for this Profile.
Flows button	Click to view the flows associated with the profile.
Browse Workflows button	Click to return to the Workflows screen.

Receiving Email for a Workflow Step

Once a workflow is created using the Workflow Wizard, Conga Contracts sends an email to the owner of each workflow step to let them know they are responsible for completing the step. The email contains a link that allows the step own to complete (or approve/decline) the step from the message, as well as links to the Workflow, Contract, and Company Profiles in Conga Contracts. The workflow steps that you need to complete can also be accessed by selecting the My Steps tab in the Active Workflow Items portlet in your Dashboard.

1. Review the workflow information provided in the email message sent from Conga Contracts Workflow.
2. (Optional) From the email message, click any of the following links to obtain additional information before completing or approving the workflow step once you log in to Conga Contracts:
 3. Go To Workflow - displays the Workflow Profile and the individual steps in the workflow.
 4. Go To Contract - displays the Contract Profile with links to other information, including uploaded documents.
 5. Go to Company - displays the Company Profile with links to other information, including company contacts.
6. From the email message, complete the step by clicking:
 7. Complete link for an action or a communication step.
 8. Approve or Decline link for an approval step.

Completing an Action Workflow Step

The user who is assigned to a workflow step is the step owner and is responsible for completing the step. The user who created the workflow can complete any of the steps as the workflow owner.

There are three types of steps in a workflow: (1) Action step, which requires the step owner to complete a task or take some type of action, and then complete the step in Conga

Contracts or from an email sent from Conga Contracts so that the workflow can proceed to the next step. (2) Communication step, which allows the step owner to send an email message from Conga Contracts to the appropriate parties, notifying them about an action or task associated with the step. The step must also be completed in Conga Contracts. (3) Approval step, which requires the step owner to approve the action or situation described in the step, or decline approval, which will redirect or halt the workflow. An approval step must be completed in Conga Contracts, or from an email message sent from Conga Contracts. An approval step may require the approval of one user, or two or more users.

If more than one person is assigned to an approval step, but only one person's approval is needed to complete the step, Conga Contracts sends an email to the other approvers, advising them that the step has already been completed.

Once all the steps in a workflow are completed, Conga Contracts moves the workflow from the Active Workflows view to the Completed Workflows view in the Workflows section of the Workflow Profile screen.

A workflow step can be completed from three locations: Email Message from Conga Contracts, Active Workflow Items Portlet, and Workflow Profile (Workflows) screen.

Email Message

In the email message sent from Conga Contracts Workflow:

1. (Optional) Review additional information before completing the step using the Go To Workflow, Go To Contract, and/or Go To Company links.
2. Click the Complete link.
3. When the reply email message displays with Complete Workflow Step as the subject, and Completed in the body of the email message, click Send.
4. (Optional) Add notes on completing the step to the body of the email message by positioning your cursor under the word "Completed" and entering your text. Do not remove the word "Completed" from the message or the email will not be sent successfully, and the step will not be completed.

Active Workflow Items Portlet

From the Active Workflow Items portlet in your Dashboard:

1. Click the My Steps or My Workflow Steps tab, and locate the step you want to complete.

2. (Optional) Review additional information for the workflow by clicking on the step record to access the Workflow Profile.
3. Click the step's checkmark and clock icon.
4. In the Item Complete prompt, enter your notes on completing the step, and click Submit.

Workflow Profile or Workflows Screen

1. Open the Contract, Company, or Project Profile containing the workflow with the step you want to complete.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, locate the workflow containing the step you want to complete, and click on it to refresh the screen and display all steps in the workflow.
 - In the Project Profile, click on the workflow in the Workflows screen.
4. Locate the step you want to complete, and click its + icon to verify it is an action step.
 - If a Send Message button is present, it is a communication step, and you have the option of sending a message for the step before completing it.
 - If the approve and decline icons are present, it is an approval step, which is completed by approving or declining the step.
5. Click the step's checkmark and clock icon.
6. In the Item Complete prompt, enter your notes on completing the step, and click Submit.

Other options for a workflow step include reassigning the step by clicking the pencil icon and sending a reminder email to the step owner by clicking the envelope icon when they have not completed the step in a timely manner.

Approving a Workflow Step

A workflow step that needs to be approved may require the approval of a single individual or more than one person. If the step is approved, the workflow continues to the next step. If the step is declined, the workflow returns to a previous step or is halted. Based on the reason(s) the user provides for declining the step, adjustments can be made, allowing the step to be resubmitted for approval.

If more than one person is assigned to an approval step, but only one person's approval is needed to complete the step, Conga Contracts sends an email to the other approvers, advising them that the step has already been completed.

A workflow step can be approved (or declined) from three locations: Email Message from Conga Contracts, Active Workflow Items Portlet, and Workflow Profile (Workflows) screen.

Email Message

In the email message sent from Conga Contracts Workflow:

1. (Optional) Review additional information before approving the step using the Go To Workflow, Go To Contract, and/or Go To Company links.
2. Click the Approve or Decline link.
3. If you select the Approve link, a reply email message displays with Approve Workflow Step as the subject, and Approved in the body of the email message. Click Send.
 - (Optional) Add notes on approving the step to the body of the email message by positioning your cursor under the word "Approved" and entering your text. Do not remove the word "Approved" from the message or the email will not be sent successfully, and the step will not be approved.
 - If you select the Decline link, a reply email message displays with Decline Workflow Step as the subject, and Declined in the body of the email message. Click Send.
 - (Optional) Add your reason(s) for declining to approve the step to the body of the email message by positioning your cursor under the word "Declined" and entering your text. Do not remove the word "Declined" from the message or the email will not be sent successfully, and the step will not be declined.

Active Workflow Items Portlet

From the Active Workflow Items portlet in your Dashboard:

1. Click the My Workflow Steps, My Flow Steps, or MyContracts Flows tab, and locate the step that needs to be approved.
2. (Optional) Review additional information for the workflow by clicking on the step record to access the Workflow Profile.
3. Click the step's green checkmark icon to approve the step, or click decline to decline the step.
 - If you click approve, the Item Complete prompt displays with the word "Approved" in the Step Completion Notes field. Click Submit.
 - (Optional) Supplement the Approved text in the Step Completion Notes field by clicking in the field, positioning your cursor under the existing text, and entering your information. Do not remove the word "Approved" from the field, or the step will not be approved.

- If you click decline, the Item Complete prompt displays. Enter your reason(s) for declining to approve the step in the Step Completion Notes field. Click Submit.

Workflow Profile or Workflows Screen

1. Open the Contract, Company, or Project Profile containing the workflow with the step that needs your approval.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, locate the workflow containing the approval step, and click on it to refresh the screen and display all steps in the workflow.
 - In the Project Profile, click on the workflow in the Workflows screen.
4. Locate the step that needs your approval, and click the step's approve icon to approve the step, or click decline to decline the step.
 - If you click approve, the Item Complete prompt displays with the word "Approved" in the Step Completion Notes field. Click Submit.
 - (Optional) Supplement the Approved text in the Step Completion Notes field by clicking in the field, positioning your cursor under the existing text, and entering your information. Do not remove the word "Approved" from the field, or the step will not be approved.
 - If you click decline, the Item Complete prompt displays. Enter your reason(s) for declining to approve the step in the Step Completion Notes field. Click Submit.

Sending a Message for a Workflow Step

A workflow step that allows an email message to be sent directly from the step is a communication, or messaging step. The email message can be sent to any person listed in the Address Book. After the message is sent, the step must be completed in Conga Contracts.

There are two other types of workflow steps: (1) Action step, which the step owner completes by clicking the checkmark and clock icon after they have accomplished the action or task named in the step, and (2) Approval step, which the step owner completes by clicking approve or decline to approve or decline the step. Once all the steps in a workflow are completed, Conga Contracts moves the workflow from the Active Workflows view to the Completed Workflows view in the Workflows section of the Workflow Profile screen.

A communication step can be completed from three locations: Active Workflow Items Portlet, Workflow Profile (Workflows) screen, and Email Message from Conga Contracts.

Active Workflow Items Portlet

From the Active Workflow Items portlet in your Dashboard:

1. Click the My Steps or My Workflow Steps tab, and locate the communication step.
2. (Optional) Review additional information for the workflow by clicking on the step record to access the Workflow Profile.
3. Click the step's + icon to display the Send Message button and the icon used to complete the step.
4. Click Send Message.
5. In the Messaging window, compose a message for the step, and click Send.
 - Use the Address Book to select recipients and those copied on the message.
 - (Optional) Use the formatting options to enhance the text in your message.
 - (Optional) Attach a document to the message for the step.
 - (Optional) Click the step's + icon to display the sent message.
6. When the portlet refreshes, click the step's checkmark and clock icon.
7. In the Item Complete prompt, enter your notes on completing the step, and click Submit.

Workflow Profile or Workflows Screen

1. Open the Contract, Company, or Project Profile containing the workflow with the communication step.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, locate the workflow containing the communication step, and click on it to refresh the screen and display all steps in the workflow.
 - In the Project Profile, click on the workflow in the Workflows screen.
4. Locate the step that needs the message, and click its + icon.
5. Click Send Message.
6. In the Messaging window, compose a message for the step, and click Send.
 - Use the Address Book to select recipients and those copied on the message.
 - (Optional) Use the formatting options to enhance the text in your message.
 - (Optional) Attach a document to the message for the step.
 - (Optional) Click the step's + icon to display the sent message.
7. When the screen refreshes, click the step's checkmark and clock icon.

8. In the Item Complete prompt, enter your notes on completing the step, and click Submit.
9. Other options for a workflow step include reassigning the step by clicking the pencil icon and sending a reminder email to the step owner by clicking the envelope icon when they have not completed the step in a timely manner.

Email Message

When completing a communication step from an email message, you do not have the option of sending an email message prior to completing the step. Therefore, if an email message is required for the step, it is recommended that you use the Active Workflow Items portlet or the Workflow Profile/Workflows screens in the Contract, Company, or Project Profile.

In the email message sent from Conga Contracts Workflow:

1. (Optional) Review additional information before completing the step using the Go To Workflow, Go To Contract, and/or Go To Company links.
2. Click the Complete link.
3. When the reply email message displays with Complete Workflow Step as the subject, and Completed in the body of the email message, click Send.
4. (Optional) Add notes on completing the step to the body of the email message by positioning your cursor under the word "Completed" and entering your text. Do not remove the word "Completed" from the message or the email will not be sent successfully, and the step will not be completed.

Managing Workflow Documents

A workflow may require the use of documents to complete an action, communication, or approval step. Prior to completing a workflow step, the needed document(s) must be added or attached to the workflow using one of the following methods:

- Add a document from the Documents tab in the Workflow Profile. Adding a document to a workflow is necessary if there is not a document stored in Conga Contracts that meets the needs of the workflow.
- Attach a Contract, Company, Project, or Global document from the Documents button in the Workflow Profile. A Profile or Global document stored in Conga Contracts can be attached to the workflow.

Attaching a Document to a Workflow

In identifying the documents that need to be attached to the workflow, it is recommended that you review the name and descriptions of the steps in the workflow. The Completion Notes for a step, which are accessed by clicking its + icon, can also be useful in identifying the documents that need to be attached to a workflow.

1. Open the Contract, Company, or Project Profile containing the workflow that needs the document attachment.
2. In the Contract or Company Profile, click Workflows in the toolbar.
3. In the Project Profile, click the Workflows link.
4. In the Workflows section of the contract or company Workflow Profile screen, locate the workflow, and click on it to refresh the screen and display all steps in the workflow.
5. In the Project Profile, click on the workflow in the Workflows screen.
6. Click Documents in the toolbar.
7. When the screen refreshes, click Edit Workflow Documents in toolbar.
8. Any documents that have been attached to the workflow display and contain a download icon, which is used to download a copy of the document.
9. When the screen refreshes, review the contract documents that can be attached to the workflow in the Available Documents section of the screen.
10. Click + for a contract document in the Available Documents section to move it to the Attached Documents section, making it an available document for the workflow's communication steps.
11. (Optional) Click the Company Documents tab to review the available company documents, and click + for a document to make it available as an attachment for a communication step.
12. (Optional) Click the Global Documents tab to review the available global documents, and click + to make the document available for a communication step.
13. Click the Project Documents tab to review the available project documents, and click + to make the document available for a communication step.
 - The default view in the Available Documents section depends on whether the workflow is added to a Contract, Company, or Project Profile.
14. (Optional) Customize the display of information in the Available Documents and Attached Documents sections by selecting the columns of information that display, sorting information, resizing columns, and reordering columns of information.
15. Click Save.

Adding a Document to a Workflow

You can add a document for a workflow if that document has not already been uploaded to Conga Contracts.

Important: Once you add the document, you must attach it to the workflow.

1. Open the Contract, Company, or Project Profile containing the workflow that needs the document.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, click the Documents tab.
 - In the Project Profile, click the Documents tab in the Workflows screen.
4. When the screen refreshes, click New Document in the toolbar.
5. When the screen refreshes:
 - Make a selection in the Document Type list.
 - Click Select in the File field to display an upload window, navigate to the document you want to add, click on it to select it, and click Open.
 - (Optional) Populate the Author, Effective Date, Current Expiration Date, and Description fields.
 - Click Save.
6. Attach the document to the workflow.

Reassigning a Workflow Step

If you are designated as a step owner for a workflow, and are unable to complete the step, you can reassign it to another member of the Workflow Team. Conga Contracts will send an email to the new step owner, advising them that you have selected them as the new step owner. The email message will contain any notes that you provide during the reassignment process. The ability to reassign a workflow step guarantees that the workflow continues, uninterrupted.

A workflow step can be reassigned from two locations: Active Workflow Items portlet and Workflow Profile (Workflows) screen.

Active Workflow Items Portlet

From the Active Workflow Items portlet in your Dashboard:

1. Click the My Steps or My Workflow Steps tab, and locate the step you want to reassign.

2. (Optional) Review additional information for the workflow by clicking on the step record to access the Workflow Profile.
3. Click the step's pencil icon.
4. In the Reassign Step Owner dialog box:
 - Select the new owner of the workflow step in the list.
 - Enter a message for the person to whom you are reassigning the workflow step in the list box.
 - Click Reassign.

Workflow Profile or Workflows Screen

1. Open the Contract, Company, or Project Profile containing the workflow with the step you want to reassign.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, locate the workflow containing the step you want to reassign, and click on it to refresh the screen and display all steps in the workflow.
 - In the Project Profile, click on the workflow in the Workflows screen.
4. Locate the step you want to reassign, and click its pencil icon.
5. In the Reassign Step Owner dialog box:
 - a. Select the new owner of the workflow step in the list.
 - b. Enter a message for the person to whom you are reassigning the workflow step in the list box.
 - c. Click Reassign.

Closing and Reopening Workflows

A user who is a member of the Workflow Team can close a workflow before all of the steps have been completed. Conversely, a closed workflow with incomplete steps can easily be re-opened by any team member.

A workflow can be closed from two locations: Workflow Profile (or Workflows) screen and the Active Workflow Items portlet. However, a workflow can only be reopened from the Workflow Profile (or Workflows) screen.

Closing a Workflow

A workflow can also be closed from the Active Workflow Items portlet by clicking on any open step in the workflow to display the Workflow Profile screen for a company or contract, or the Workflows screen for a Project Profile, and clicking Close Workflow in the toolbar.

1. Open the Contract, Company, or Project Profile containing the workflow you want to close.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Active Workflows view in the Workflows section of the Workflow Profile screen, locate the workflow you want to close, and click on it to refresh the screen and display all steps in the workflow.
 - In the Project Profile, click on the workflow in the Workflows screen.
4. Click Close Workflow in the toolbar.
5. When the Completed Workflows view of the screen displays, verify that the workflow is now listed as closed.

Reopening a Workflow

You can only re-open a workflow that was closed before all the steps in the workflow were completed.

1. Open the Contract, Company, or Project Profile containing the workflow you want to re-open.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. Click the Completed Workflows tab.
4. In the Completed Workflows view, locate the workflow you want to re-open, and click on it to select it.
5. Click Re-open Workflow in the toolbar.

Editing and Deleting Workflows

A workflow is edited using the Workflow Wizard, which allows you to update the name and description of the workflow, update the Workflow Team, and change the owners of the individual steps. A workflow that has been completed can be deleted to permanently remove it from the Contract, Company, or Project Profile. An active workflow can also be deleted even if all of the steps have not been completed.

Editing a Workflow

1. Open the Contract, Company, or Project Profile containing the workflow you want to edit.
2. Click Workflows in the Contract or Company toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, locate the workflow you want to edit, and click its pencil icon to launch the Workflow Wizard.
 - In the Project Profile, locate the workflow in the Workflows screen, and click its icon.
4. Step through the wizard, which allows you to edit:
 - Workflow Name
 - Workflow Description
 - Workflow Owner
 - CC Workflow Owner option
 - Workflow Team, including adding and deleting individual team members
 - Workflow Step Owners
 - Deleting a Workflow

You can delete a completed workflow from the Completed Workflows view of the Workflow Profile, as well as an active workflow from the Active Workflows view of the Profile.

Deleting an Active Workflow

1. Open the Contract, Company, or Project Profile containing the workflow you want to delete.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, locate the workflow you want to delete, and click its - icon.
 - In the Project Profile, locate the workflow in the Workflows screen, and click its - icon.
 - In the Delete Workflow prompt, click Yes.

Deleting a Completed Workflow

1. Open the Contract, Company, or Project Profile containing the workflow you want to delete.
2. In the Contract or Company Profile, click Workflows in the toolbar.
 - In the Project Profile, click the Workflows link.
3. In the Workflows section of the contract or company Workflow Profile screen, click the Completed Workflows tab.
 - In the Project Profile, click the Completed Workflows tab in the Workflows screen.
4. Locate the workflow you want to delete, and click its - icon.
5. In the Delete Workflow prompt, click Yes.

Scorecards for Conga Contracts

Scorecards are used to rate the performance of companies, contracts, and projects. Scorecards are added by users and completed by individuals who are notified via email that their input is requested. Scorecard ratings are compiled and displayed as color-coded ratings in a Contract, Company, or Project Profile screen.

Scorecards for Conga Contracts Overview

The Scorecards feature polls users on the performance of a contract, company, or project. Administrators with the Scorecard Admin permission can create and link a scorecard to specific Contract, Company, or Project Profile types and/or groups, so that when a user adds a Contract, Company, or Project Profile and assigns it to a type or group that is linked to a scorecard, the scorecard is available to be added to the Profile.

A user can assign an available scorecard to anyone in the Address Book. The user can also choose the date the scorecard is made available. On the selected date, Conga Contracts sends out an email message to each person, notifying him/her that they have been selected to complete the scorecard. The email message contains a link to the Conga Contracts Portal where they can complete the scorecard.

The current scorecard rating for a Contract, Company, or Project Profile is displayed numerically in a color-coded score box located in the upper right corner of the Profile header. This rating is calculated by Conga Contracts and reflects the average of all the scorecard values listed in the Scorecards screen. Score boxes are color-coded, depending on

the average rating of all completed scorecards: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.

The following tasks and informational topics are available for a contract, company, and project scorecard:

- [Scorecards browse screen](#)
- [Scorecard Profile](#)
- [Locate a scorecard](#)
- [Add a scorecard](#)
- [Complete a scorecard](#)
- [Change a scorecard's start date](#)
- [Add a member to a scorecard](#)
- [Edit a scorecard](#)
- [Archive and delete scorecards](#)

Scorecards Screen

The Scorecards browse screen in a Contract, Company, or Project Profile displays a listing of all the pending and completed scorecards, along with the their averaged scores.

Although the Contract Profile is used in the example below, the components are the same in the Scorecards screen in a Company Profile and Project Profile.

Open a Contract Profile to review the scorecards that have been added to the profile.

Scorecards link	Click to display the Scorecards browse screen.
Scorecard records	Review the scorecards that have been added to the profile. Click on a scorecard record to display its Profile.
Score field	Identify the averaged score for the scorecard, which is calculated by adding all the scorecard totals and dividing the grand total by the number of people who completed the scorecard. Tip: If only one person completes a scorecard, that person's score appears in the field. If a scorecard has no value in the Score field, none of the people assigned to the scorecard have completed it.

Ratings box	<p>View the current scorecard rating for the contract, company, or project.</p> <p>The ratings box is color-coded based on the rating: 81-100 = green, 61-80 = yellow, 41-60 = orange, and 0-40 = red.</p>
Scorecard records display	<ul style="list-style-type: none"> • To customize the information in a browse screen, hover over a column heading until the column icon displays, and click on it to open the Sort/Column menu. Click Columns to display a list of available fields, and select the fields you want displayed by clicking in the check box to the left of the field. To sort the information in a column in ascending or descending order, click (toggle) on the column heading. • To resize a column, hover over the right or left border of the column heading until the resize icon appears. Then, click and drag the border to the desired width. • To move a column to a different location in the browse screen, click on the column heading and drag it to the left or right, dropping it in the desired location. When the green checkmark icon displays, you are successfully moving the column.
Add Scorecard button	Click to add a scorecard to the profile.

Scorecard Profile

The Scorecard Profile provides basic information on the scorecard, including the members who have been assigned to complete it, and the date on which it was made available to members. The profile also allows you to view the responses each member has made to the scorecard questions.

Although the Contract Profile is used in the example below, the same components apply to a Scorecard Profile in a Company Profile and Project Profile.

Open a Scorecard Profile by clicking on a record in the Scorecards screen.

Scorecard data fields	Review the basic information for the scorecard.
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<p>Member records</p>	<p>Review the list of people who were assigned to complete the scorecard. Click on a member record to display the responses that the person made to each of the scorecard questions.</p>
<p>Scorecard questions, responses, and values</p>	<p>Review the scorecard questions and the person's responses, along with the numeric value assigned to each response.</p> <ul style="list-style-type: none"> • A 1-5 rating system is used for all questions, and Conga Contracts translates the sum of these values into a percentage rating. In the example shown, the calculation for the Customer Service category was 68 based on responses to the five (5) questions, Product Evaluation was 100 since all four responses received the highest rating (5), and Product Comparison was 75, for an average score of 82 $(68 + 100 + 75 / 3)$.
<p>Score field</p>	<p>Identify the score assigned to each person, which is calculated based on their responses to scorecard questions.</p> <p>Tip: If there is no value in the Score field, the person has not yet completed the scorecard.</p>
<p>Go To icon</p>	<p>Click the arrow and envelope icon to be directed to the Conga Contracts Portal where you can complete the scorecard. This icon only displays if you have not yet completed a scorecard that was assigned to you.</p>
<p>Delete icon</p>	<p>Click - to delete a pending or completed scorecard. This icon only displays for the user assigned to the scorecard, and the user who created and assigned the scorecard.</p>
<p>Add Scorecard Member button</p>	<p>Click to assign the scorecard to another person for completion.</p>
<p>Change Scorecard Start Date button</p>	<p>Click to change the date on which the scorecard will be emailed to the people selected to complete the scorecard.</p>

Archive Object Scorecard button	Click to archive the scorecard so that it is no longer available to users.
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Locating a Scorecard for Conga Contracts

The scorecards that have been added to a Contract, Company, or Project Profile are stored in the Scorecards screen, which is linked to the Profile. This screen displays both completed and pending scorecards, and also provides the current rating for the contract, company, or project as a percentage (0-100%). You can locate a scorecard in this screen or by running a search query.

1. Open the Company, Contract, or Project Profile to view the pending and completed scorecards that have been added to the Profile. Pending scorecards have no value in the Score field, while a scorecard that has been completed by at least one person displays a value in the field.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, locate a scorecard by scrolling through the list, or clicking on the Name, Description, or Score header to change the sort order of the information.
4. Click a scorecard record to display its Profile screen.

Search Query

A search query to locate all company, contract, or project scorecards with a calculated score is shown below.

1. Click Search in the Navigation Toolbar, and select the Search Query link in the menu.
2. In the Query Info view of the screen, click New in the toolbar.
3. When the screen refreshes, set one of the following hierarchies in the Result Type list to search for a company, contract, or project scorecard:
 - Company
 - Click in the list to display the hierarchy, and click the Company folder.
 - Company→Contract
 - Click in the list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the Contract folder.
 - Project
 - Click in the list to display the hierarchy, and click the Project folder.
 - In the Criteria section, set the search hierarchy for the company, contract, or project scorecard in the field list:

- Instructions for setting the hierarchy for a contract scorecard are provided since it is the most complicated. The same principle applies to setting the hierarchy for a company and project scorecard. Company→Object Scorecard→Calculated Score
 - Company→Contract→Object Scorecard→Calculated Score
 - Click in the field list to display the hierarchy, and click the > icon to the left of the Company folder.
 - Scroll past the alphabetical listing of fields in the Company Profile, and click the > icon to the left of the Contract folder.
 - Scroll past the alphabetical listing of fields in the Contract Profile, and click the > icon to the left of the Object Scorecard folder.
 - Click the Calculated Score sub-folder.
 - Project→Object Scorecard→Calculated Score
 - In the Criteria section, define the operator and value(s) for the search:
 - Select Less Than in the inclusion list.
 - Enter 100 in the value list to search for scorecards that received a rating that was less than 100%.
 - Click Or to add another criteria set that will identify scorecards that received a 100% rating.
4. In the second criteria set:
 - Set up another Company→Contract→Object Scorecard→Calculated Score hierarchy in the field list.
 - Select Equals in the inclusion list.
 - Enter 100 in the value list.
 - You can also search for a scorecard using the date it was first available for completion (Scorecard Start Date).
 5. Click Execute in the toolbar to run the query.
 6. When the Results view of the screen displays, click a search record to display its Company, Contract, or Project Profile.
 7. In the Links section of the Profile, click the Scorecards link.
 8. In the Scorecards screen, click a scorecard to display its Profile.

Adding a Scorecard for Conga Contracts

A user with the appropriate permissions can add a scorecard to a Contract, Company, or Project Profile to capture performance in one or more areas. Once a scorecard is added to a profile, a record displays in the Scorecards screen. On the date provided, Conga Contracts sends an email to the people selected, asking them to complete the scorecard by clicking a link in the email, which directs them to the Conga Contracts Portal. As individuals complete

the scorecard, the Score field in the record will automatically be populated. The field will continue to be updated based on an averaged calculation of all completed scorecards.

Although the Contract Profile is used in the example below, the same steps also apply to adding a scorecard in a Company Profile and Project Profile.

1. Open the Contract Profile that needs the scorecard.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, click Add Scorecard in the toolbar.
4. In the Assign Scorecard dialog box:
 - Make a selection in the Scorecard list.
 - Enter the date you want the scorecard to be available for completion in the Start Date field, or click the calendar icon and use the pop-up calendar.
 - Click v in the Members field to display the Address Book.
 - Select those you want to complete the scorecard, including individual users, company people, external people, and distribution lists.
 - Use the Search option to locate a person or distribution list, or scroll/page through the Address Book.
 - Click Submit.
5. Click Save.

Completing a Scorecard for Conga Contracts

When you are selected to complete a Contract, Company, or Project scorecard, you will receive an email notification from Conga Contracts.

1. The email message for a Contract Scorecard contains three links: (1) Fill Out Scorecard link that takes you directly to the scorecard, which is displayed in a Portal screen that does not require any login credentials. (2) Go To Company Profile link that takes you to the Company Profile in case you want to review any of the company information before completing the scorecard. (3) Go To Contract Profile link that takes you to the Contract Profile if you want to review the contract document before completing the scorecard.
2. The email message for a Company Scorecard contains two links: Fill Out Scorecard and Go To Company Profile. Similarly, the email for a Project Scorecard also contains two links: Fill Out Scorecard and Go To Project Profile.
 - Conga Contracts users can also complete a scorecard from the Contract Profile, Company Profile, or Project Profile by clicking the Scorecards link to display the Scorecards browse screen. In the browse screen, click on the scorecard you want to complete to display its Profile screen. In the Profile screen, click the arrow icon in the By Members section of the screen to jump to the Portal containing the scorecard questions.

3. From the email notification, click the Fill Out Scorecard link. The subject of the email message is Conga Contracts Contract Manager Scorecard Request.
4. In the Conga Contracts Portal, click inside the radio button to select your response to each question.
5. (Optional) Review the instruction or information displayed in gray text directly beneath each question if you need assistance with a question (or statement).
6. (Optional) Enter information to support, or explain, your response in the corresponding Notes field.
7. Click Submit.
8. Click Cancel to complete the scorecard at a later date.
9. Reopen the scorecard from the Fill Out Scorecard link in your email message or by logging into Conga Contracts. However, any responses you make are not saved between sessions.

Changing a Scorecard's Start Date

A user with the appropriate permissions can adjust the start date for a scorecard, which determines when the email message is sent out, notifying members that they have been selected to complete a scorecard.

Although the Contract Profile is used in the example below, the same steps also apply to changing a scorecard's start date in a Company Profile and Project Profile.

1. Open the Contract Profile containing the scorecard whose start date you want to change.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, locate the scorecard, and click on it to display its Profile screen.
4. In the Scorecard Profile screen, click Change Scorecard Start Date in the toolbar.
5. In the Change Scorecard Start Date prompt:
 - Enter the date you want the scorecard to be available for completion in the New Start Date field, or click the calendar icon and use the pop-up calendar.
 - Click Submit.

Adding a Member to a Scorecard

A user with the appropriate permissions can assign additional people to complete a scorecard, which will affect the overall rating for the contract, company, or project. A user

can also add themselves as a scorecard member in the event they were not initially included.

Before assigning another person the responsibility of completing a scorecard, it is recommended that you change the scorecard's start date. Otherwise, the email request to complete the scorecard will not be sent to the new member if the original start date has already passed.

Although the Contract Profile is used in the example below, the same steps also apply to adding a member to a scorecard in a Company Profile and Project Profile.

1. Open the Contract Profile containing the scorecard that needs a new member.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, locate the scorecard, and click on it to display its Profile screen.
4. In the Scorecard Profile screen, click Add Scorecard Member in the toolbar.
5. In the Address Book:
 - Select the additional member(s) you want to complete the scorecard. Members may be users, company people, external people, or a distribution list.
 - Use the Search option to locate a person or distribution list, or scroll/page through the Address Book.
6. Click Submit.

Removing a Scorecard Member

A user with the appropriate permissions can remove a member who has been assigned to complete a scorecard. However, the member can only be removed if they have not yet completed the scorecard.

Although the Contract Profile is used in the example below, the same steps also apply to adding a member to a scorecard in a Company Profile and Project Profile.

1. Open the Contract Profile containing the scorecard that needs a new member.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, locate the scorecard, and click on it to display its Profile screen.
4. In the Scorecard Profile screen, locate the member you want to remove in the By Members section of the screen, and click their - icon.
 - If there is a value in their Score field, you cannot remove the member because they have already completed the scorecard.
5. In the Delete Member confirmation prompt, click Yes.

Editing a Completed Scorecard

You can change the responses you made to any of the questions in a scorecard even if you have already submitted it. This option is useful if you neglected to complete all the questions or if you want to change a response based on new information. However, you must re-answer all the questions since the new scorecard contains none of your previous answers. Conga Contracts will re-calculate the score in the Contract, Company, or Project Profile using your updated answers to scorecard questions. It is recommended that you review your original answers from the Scorecard Profile in the Contract, Company, or Project Profile before making any updates to your scorecard.

Edits to a scorecard can be made from Conga Contracts or from the email message you received, advising you that you were selected to complete the scorecard.

Editing a Scorecard from the Email Message

1. From the email notification, click the Fill Out Scorecard link.
2. In the Conga Contracts Portal, click inside the radio button to select your response to each question.
3. (Optional) Review the instruction or information displayed in gray text directly beneath each question if you need assistance with a question (or statement).
4. (Optional) Enter information to support, or explain, your response in the corresponding Notes field.
5. Click Submit.

Editing a Scorecard from Conga Contracts

Although the Contract Profile is used in the example below, the same steps also apply to editing a scorecard in a Company Profile and Project Profile.

1. Open the Contract Profile containing the scorecard you want to change.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, locate the scorecard, and click on it to display its Profile screen.
4. In the Scorecard Profile screen, click the arrow icon in the By Members section of the screen to jump to the Portal containing the scorecard questions.
5. In the Portal, click inside the radio button to select your response to each question.
6. (Optional) Review the instruction or information displayed in gray text directly beneath each question if you need assistance with a question (or statement).

7. (Optional) Enter information to support, or explain, your response in the corresponding Notes field.
8. Click Submit.

Archiving and Deleting Scorecards

You can delete the scorecard assigned to an individual or archive a scorecard that has been completed by several people. Deleted and archived scorecards are removed from the Scorecards browse screen in a Contract, Company, or Project Profile.

Deleting a Scorecard

Deleting a scorecard will affect the rating displayed in the color-coded ratings box in a Contract, Company, or Project Profile.

Although the Contract Profile is used in the example below, the same steps also apply to deleting a scorecard from a Company Profile and Project Profile.

1. Open the Contract Profile containing the scorecard you want to delete.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, locate the scorecard, and click on it to display its Profile screen.
4. In the Scorecard Profile screen, locate the person's scorecard you want to delete in the By Members section of the screen, and click their - icon.

Archiving a Scorecard

When a scorecard is archived and more than one person has been assigned to complete the scorecard, all instances of the completed (and pending) scorecard will be removed from the Scorecards screen. Archiving a scorecard will not affect the rating displayed in the color-coded ratings box in a Contract, Company, or Project Profile.

Although the Contract Profile is used in the example below, the same steps also apply to archiving a scorecard for a Company Profile and Project Profile.

1. Open the Contract Profile containing the scorecard you want to delete.
2. In the Links section of the Profile screen, click the Scorecards link.
3. In the Scorecards screen, locate the scorecard, and click on it to display its Profile screen.
4. In the Scorecard Profile screen, click Archive Object Scorecard in the toolbar.
5. In the Archive Object Scorecard prompt, click Yes.

Clause ID and Management for Conga Contracts

The Clause ID and Management (CIM) feature provides users with a comparison match between the clause language in a document that is added to a Contract Profile and the Conga Contracts Model, which defines the standard language for contract clauses. CIM is run on specific document types added through document uploads, approved contract requests, the Creation, eSignature, and Document Package Wizards, as well as revisions to existing documents stored in the Contract Profile.

Getting Started with Clause ID and Management

Clause Identification and Management (CIM) is activated when a user chooses to process the clauses in a document they upload to a Contract Profile. CIM also runs when a document is added to a Profile from an approved contract request, or as the result of running the Creation Wizard, eSignature Wizard, or Document Package Wizard. Processing the clauses in a document involves selecting a match between each clause in the document and a list of possible matches identified by the Conga Contracts Model.

- [Getting Started - Clause Identification and Management](#)

The Clause Identification and Management (CIM) feature provides users with a comparison match between the clause language in a document that is added to a Contract Profile and the Conga Contracts Model, which is the standard against which individual clauses in an uploaded document are measured.

Getting Started - Clause Identification and Management

The Clause Identification and Management (CIM) feature provides users with a comparison match between the clause language in a document that is added to a Contract Profile and the Conga Contracts Model, which is the standard against which individual clauses in an uploaded document are measured.

The Clause Identification and Management (CIM) feature provides users with a comparison match between the clause language in a document they upload to a Contract Profile and the Conga Contracts Model, which is the standard against which individual clauses in an uploaded document are measured. CIM is also activated when a document is added to a

Contract Profile from an approved contract request, a revision to an existing document is uploaded, or when a document is added after running the Creation Wizard, eSignature Package Wizard, or Document Package Wizard. CIM even runs when an existing document in a Contract Profile is edited and its document type is changed to a type that has been identified for clause analysis.

Users are able to "train" the Conga Contracts Model using the Document Clause Processing option, which is activated whenever a document is added to a Contract Profile and its document type is subject to CIM analysis. Document Clause Processing employs an interactive Document Clauses window that displays each clause in the document and a corresponding drop-down list with possible matches for the clause type. When a possible match is appended by a percentage (%), this signals a system match between the clause language in the document and the current Conga Contracts Model. If the user selects a clause type that includes a percentage, the percentage match for that clause will be increased in the Conga Contracts Model during the nightly batch process. However, if the user selects a clause type that does not include a percentage match, the language for this clause type will be used to train the Conga Contracts Model and be used in future clause processing.

The new Clauses link in the Contract Profile displays a Clauses screen where users can view a record of the clauses that were automatically processed by Conga Contracts, as well as those that were manually processed by users during Document Clause Processing. The Clauses screen not only displays the clause types that were "trained" during automatic and manual processing, but also indicates whether or not a trained clause is the "standard." The appearance of a number in the Clause Rev column for a standard clause shows how many other documents containing this same standard clause are present in your Conga Contracts database.

The Search & Report features can be used to identify and run reports on the clauses processed in the documents added to Contract Profiles. For example, you can run a report on documents using non-standard clauses, as well as a report that identifies all documents containing a specific clause.

Running Clause ID and Management

The Clause ID and Management (CIM) feature is available to select users whenever they upload a document to a Contract Profile, or cause a document to be added by approving a contract request or running the Creation, eSignature, or Document Package Wizard, and the document's type matches one that has been identified for clause analysis.

The Clause ID and Management (CIM) feature is available to select users whenever they upload a document to a Contract Profile, or cause a document to be added by

approving a contract request or running the Creation, eSignature, or Document Package Wizard, and the document's type matches one that has been identified for clause analysis.

- [Processing Document Clauses](#)

Processing a document clause involves selecting a match between a clause in your uploaded document and an existing clause type stored in Conga Contracts.. When you select a match, the language in the existing clause is updated in accordance with the clause language in your uploaded document.

- [Identifying and Reviewing Processed Clauses](#)

After processing the clauses in a document, you can identify the clauses that contain "standard" language, as defined by Conga Contracts and the Clause Library, and also review any changes that have been made to the language in the processed clauses.

Processing Document Clauses

Processing a document clause involves selecting a match between a clause in your uploaded document and an existing clause type stored in Conga Contracts.. When you select a match, the language in the existing clause is updated in accordance with the clause language in your uploaded document.

Processing a document clause involves selecting a match between a clause in a document added to a Contract Profile and an existing clause type stored in the Conga Contracts Model. When you select a match, the language in the Model is updated in accordance with the clause language in your contract document.

Clause processing can be activated when a document is uploaded, document is added upon approval of a contract request, document is created using the Creation Wizard, document is added to the eSignature or Document Package Wizard, and when an existing document in the a Contract Profile has its document type changed to one of those identified for clause analysis.

When a document is added to a Contract Profile, and its document type matches one of those selected for clause analysis, the following message displays if you have permission to process the clauses in the document.

1. Click OK.
2. Click on Click here to process.
3. Locate the clause you want to process, and hover over it to display the clause text against a blue background.
4. Click in the blue background to display a clause type list, and select the correct match. If Conga Contracts detects a match between the clause language in your

document and the language stored in Conga Contracts, a clause type is appended with a percentage match. If an 80% or better match is detected, Conga Contracts automatically selects the clause type for you and displays "System Added Description."

5. 5. If the clause contains more than one paragraph of text, and you want to process the paragraphs individually, click Break Apart.
6. 6. Process the individual paragraphs in the clause.
7. 7. Click Save.

View your processed clauses by clicking on the Clauses link in the Contract Profile.

Identifying and Reviewing Processed Clauses

After processing the clauses in a document, you can identify the clauses that contain "standard" language, as defined by Conga Contracts and the Clause Library, and also review any changes that have been made to the language in the processed clauses.

After processing the clauses in a document, you can identify the clauses that contain standard language, as defined by the Clause Library, and also review any changes that have been made to the language in processed clauses.

1. Click on the Clauses link in a Contract Profile.
2. Locate the clauses with a "Y" in the Standard column to identify the clauses that contain standard contract language.
3. Click the clock icon for a clause with a "N" in the Standard column to display its Clause Type window.
4. Identify the changes that have been made to the clause language. Additions are displayed with a green background, and deletions are displayed with a pink background and text with a strikethrough effect.
5. Use the Previous and Current lists to compare different versions of the contract language.
6. Click Cancel.

Reporting on Document Clauses

The Reporting feature can be used to create a report that identifies the non-standard clauses that are used in the CIM-processed documents stored in Conga Contracts. A report can also be used to identify the processed documents that contain a specific clause.

- [Reporting on Non-Standard Clauses](#)

The Report Wizard can generate reports to identify the contract documents that have

been run through clause processing and contain non-standard clauses. Another use case is to search for all processed contract documents that contain a specific clause.

- [Reporting on Specific Document Clauses](#)

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Reporting on Non-Standard Clauses

The Report Wizard can generate reports to identify the contract documents that have been run through clause processing and contain non-standard clauses. Another use case is to search for all contract documents that contain a specific clause.

1. Launch the Report Wizard.
2. Select Contract in the Primary list and Clauses in the Secondary list.
3. Enter a name for the report, and click Next.
4. Double-click on the clause fields you want included in the report, as well as any company, contract, and document fields.
5. Select a field for grouping data, such as Company Name.
6. Step through the wizard to the Report Filters screen.
7. Select Is Standard in the Field list, Is in the Condition list, and False in the Value list.
8. Finish the Report Wizard.

When the Report Browse screen redisplay, click on the report's Microsoft Excel icon to display it as an Excel spreadsheet or its Adobe Acrobat icon to display it as a PDF file.

Reporting on Specific Document Clauses

The Report Wizard can generate reports to locate the contract documents that have been run through clause processing and contain a specific clause. Another use case is to identify the processed contract documents that use non-standard clauses.

1. Launch the Report Wizard.
2. Select Contract in the Primary list and Clauses in the Secondary list.
3. Enter a name for the report, and click Next.
4. Double-click on the clause fields you want included in the report, as well as any company, contract, and document fields.
5. Select a field for grouping data, such as Company Name.
6. Step through the wizard to the Report Filters screen.
7. Select Clause Type in the Field list, Is in the Condition list, and the clause type you want to report upon in the Value list.
8. Finish the Report Wizard.

When the Report Browse screen redisplay, click on the report's Microsoft Excel icon to display it as an Excel spreadsheet or its Adobe Acrobat icon to display it as a PDF file.

SalesConnect for Conga Contracts

Conga Contracts work in conjunction with the Salesforce application to provide additional functionality by allowing salespeople to create contract requests when a deal has been reached with a new business opportunity or an existing account, and then submit these requests to Conga Contracts for approval.

SalesConnect Overview

SalesConnect is an application that links Salesforce and Conga Contracts by allowing Salesforce users to create a contract request for an account or opportunity, and then submit the request to Conga Contracts for approval. Approved contract requests result in the generation of a Conga Contracts Company Profile and a Contract Profile that houses the stored document, which can then be negotiated and/or sent for electronic signature.

SalesConnect allows users to manage their contract requests and monitor the status of each request in real time. The SalesConnect Administrator can configure a Conga Contracts contract type to allow users access to the documents associated with their contract requests, including the final signed contract.

Creating a SalesConnect Contract Request

A contract request can be made for a Salesforce Account or an Opportunity.

1. Log in to Salesforce.
2. In the App selection list, located in the upper right corner of the screen, change the default selection from Sales to Conga Contracts.

3. Click the Conga Contracts tab.
4. Click New.
5. Populate the required fields:
 - Contract Name - enter a descriptive name for the contract request.
 - Conga Contracts Contract Type - click the magnifying glass to open a Lookup window. Locate the contract type, and click on it to select it.
 - Account Name - click the magnifying glass, locate the account for the request, and click on it to select it.
 - If the contract request is for an Opportunity (or Lead) that arose from an existing Account, click the magnifying glass in the Opportunity field, locate the opportunity, and click on it to select it.
 - Term Type - select Auto-Renew, Fixed, or Perpetual.
6. Populate the known optional fields.
7. Do Not populate the fields in the Conga Contracts Request and Contract Statuses section since these fields are auto-populated by SalesConnect.
8. Click Save.
9. (Optional) When the screen refreshes, attach a document to your request:
10. Scroll down to the Notes and Attachments section, and click Attach File.
11. In the Attach File to Contract screen, follow the instructions to attach a file to the contract request.
12. Click Submit Request.

Once the contract is submitted, Conga Contracts updates the contract's status as it goes through the approval process. You can monitor your request from the Conga Contracts Home page. The status of a request (Draft, Submitted, Pending, Accepted, or Declined) depends not only on the Contract Request type, but also its standing in the approval process. Depending on your Salesforce user permissions, you can edit a request with a status of Draft or Submitted if the approval process has not yet begun.

Customizing Salesforce Tabs for SalesConnect

Your Salesforce CRM (Customer Relationship Management) platform contains default tabs, which allow you to quickly access program data. You can change the default tabs that display so that the information that is most relevant to you is readily accessible.

The Home tab is selected when you log in to Salesforce, and this tab displays your Home page, which includes quick access to your Chatter (email), an overview of recent activities, your pending tasks, and your daily calendar.

1. Log in to Salesforce.

2. In the App selection list, located in the upper right corner of the screen, ensure the application whose tabs you want to customize is selected. Tabs can be customized for each application that you use.
3. Click the All Tabs + icon, which is located to the right of the last tab.
4. In the All Tabs screen, click Customize My Tabs.
5. In the Customize My Tabs screen:
 - Add a tab by clicking on the tab name in the Available Tabs list box, and clicking Add.
 - To select more than one tab, hold down the CTRL key on your keyboard, and click on another tab. Use the same procedure to de-select a selected tab.
 - Remove a tab by clicking on the tab name in the Selected Tabs list box, and clicking Remove.
 - Change the order in which tabs display by clicking on the tab name in the Selected Tabs list box, and clicking Up or Down.
6. Click Save.

Conga Contracts Troubleshooting

Select one of the following topics for more information:

- [Additional \(Dynamic\) Forms - Unable to View, Add, or Edit](#)
- [Analytics - Unable to Access Feature](#)
- [Browse Screen Filters Not Working](#)
- [Browse Screen Loading Time is Excessive or Times Out](#)
- [Clause Management - Unable to Access Feature](#)
- [Company Group Missing From List](#)
- [Contract Group Missing From List](#)
- [Direct Editing \(Open in Word\) - Updated Document Not Saved as Revision](#)
- [Document Download Interrupted or Slow](#)
- [Document Type Missing From List](#)
- [Duplicate Emails, Event Alerts, and Scheduled Reports](#)
- [eSignature - Unable to Access Feature](#)
- [Login Issue - Blue Screen](#)
- [Permissions Error](#)
- [Portlet - Cannot Move or Resize](#)
- [Portlet Displays No Data](#)
- [Project Group Missing From List](#)
- [Re-authenticating to Adobe Sign](#)
- [Report Errors](#)
- [SalesConnect - Cannot Map Custom Fields](#)
- [SalesConnect - Cannot Submit Contract Request](#)
- [Sandbox - Make Environment Permanent](#)
- [Screen is Frozen](#)
- [Search Results are Incomplete or Incorrect](#)
- [Single Sign On \(SSO\) Login Issue](#)
- [Add the Conga Contracts Word Plug-In as a trusted location in Word](#)

Additional (Dynamic) Forms - Unable to View, Add, or Edit

Unable to view, add, or edit a dynamic form in a Company, Contract, or Project Profile.

Question or Problem

Unable to view, add, or edit an additional (dynamic) form in a Company, Contract, or Project Profile.

Solution and/or Cause

Security can be applied to an additional (dynamic) form, allowing Administrators to restrict individual users from viewing, editing, and/or adding the form to a Profile. Contact your System Administrator, who can grant you access to view, edit, and/or add a specific additional (dynamic) form to a Company, Contract, or Project Profile through your user role.

Analytics - Unable to Access Feature

The Analytics check box is selected in the Permission Types section of the Role Profile screen, and the role is assigned to a user, but the user cannot access the Analytics feature.

Question or Problem

The Analytics check box is selected in the Permission Types section of the Role Profile screen, and the role is assigned to a user, but the user cannot access the Analytics feature.

Solution and/or Cause

Analytics is an Add-On Module that is enabled after it is added to the customer's contract with Conga Contracts.

Browse Screen Filters Not Working

Changing the selection in the Status list in a browse screen does not update the records in the All Contracts, All Companies, My Requests, My Approvals, Person, and Users screens.

Question or Problem

Changing the selection in the Status list in a browse screen does not update the records in the All Contracts, All Companies, My Requests, My Approvals, Person, and Users screens.

Solution and/or Cause

Clear the screen state by clicking in an area of the screen to "activate" it. Simultaneously hold down the CTRL+ALT+C keys on your keyboard, and release. Follow the onscreen prompts.

Browse Screen Loading Time is Excessive or Times Out

Browse screens take a long time to load, a timeout message displays, or not all records display in the screen.

Question or Problem

Browse screens take a long time to load, a timeout message displays, or not all records display in the screen.

Solution and/or Cause

Clear the cache for your browser, going back to the earliest timeframe available.

Clause Management - Unable to Access Feature

Troubleshooting for Clause Management

Question or Problem

How do you turn on the Clause Management feature?

Solution and/or Cause

Clause Management is an Add-On Module that is enabled after it is added to the customer's contract with Conga Contracts.

Company Group Missing From List

The Company Group list in the Company Profile screen doesn't contain the correct grouping for the company being added or edited.

Question or Problem

The Company Group list in the Company Profile screen doesn't contain the correct grouping for the company being added or edited.

Solution and/or Cause

Security is applied to companies based on their "group." If you do not have permissions to a company group, this group will not appear as a selection in the Company Group list in a Company Profile. Contact your System Administrator, who can grant you viewing permissions to a company group through your user role.

Contract Group Missing From List

The Contract Group list in the Contract Profile screen doesn't contain the correct grouping for the contract being added or edited.

Question or Problem

The Contract Group list in the Contract Profile screen doesn't contain the correct grouping for the contract being added or edited.

Solution and/or Cause

Security is applied to contracts based on their "group." If you do not have permissions to a contract group, this group will not appear as a selection in the Contract Group list in a Contract Profile. Contact your System Administrator, who can grant you viewing permissions to a contract group through your user role.

Direct Editing (Open in Word) - Updated Document Not Saved as Revision

After selecting the Open in Word button in a Document Profile, Word launches in Conga Contracts and I can update the document, but when I save it, the revised document is not saved as a document revision. Alternatively, selecting the Open in Word button in a Document Profile launches Word in Conga Contracts but the document is in Read Only mode.

Question or Problem

After selecting the Open in Word button in a Document Profile, MS Word launches inside Conga Contracts and I can update the document, but when I click the Save button, the revised document is not being saved as the next version of the document in Conga Contracts.

Alternatively, selecting the Open in Word button in a Document Profile launches MS Word inside Conga Contracts, but the document is in Read Only mode. Therefore, I can only edit the document if I save it as a new document. When I update the new document and save it, it is not saved as the next version of the document in Conga Contracts

Solution and/or Cause

- If you are running MS Word 2010, or an earlier version of Word, Direct Editing will not work as intended because these versions of Word are not supported by the manufacturer. Conga Contracts recommends updating your version of Windows and Microsoft Word.
- If you are running a supported version of Windows and Microsoft Word and are still having issues, Conga Contracts recommends the following actions, in the following order:

1. Ensure all updates available for your Operating System (OS) and MS Word program are installed.

- In your Control Panel, click Windows Update, and ensure the following message displays: You're set to automatically install updates. If not, click the Change Settings link, and select Install updates automatically in the Important Updates list.2. Repair your installation of Microsoft Word. In your Control Panel, click Add/Remove Programs (or Programs and Features), select Microsoft [Word], and click Uninstall/Change (or Change/Repair). Select the Full Repair option, which is sometimes worded as Online Repair.3. Have your System Administrator check for system network issues in your local network. For example, a Firewall or other security setting may be preventing Direct Editing from working properly.

Document Download Interrupted or Slow

When downloading a document from Conga Contracts, the process takes an unusually long time, or it is interrupted and not completed.

Question or Problem

When downloading a document from Conga Contracts, the process takes an unusually long time, or it is interrupted and not completed.

Solution and/or Cause

Clear the cache for your browser, going back to the earliest timeframe available.

Document Type Missing From List

When adding a document to a Company, Contract, or Project Profile, the Document Type list in the Document Profile doesn't contain the correct type of document.

Question or Problem

- When adding a document to a Company, Contract, or Project Profile, the Document Type list in the Document Profile doesn't contain the correct type of document.
- When editing a document from the Documents screen in a Company, Contract, or Project Profile, the Document Type list doesn't contain the correct type of document.
Solution and/or Cause

Security can be applied to individual document types. If you do not have permissions to a document type, it will not appear as a selection in the Document Type list in a Document Profile. Contact your System Administrator, who can grant you viewing permissions to a document type through your user role.

Duplicate Emails, Event Alerts, and Scheduled Reports

Conga Contracts is generating duplicate email messages, event alerts, and scheduled reports.

Question or Problem

Conga Contracts is generating duplicate email messages, event alerts, and scheduled reports.

Solution and/or Cause

Typically, this occurs when the customer has an active stage system, or previously had a stage system. Disabling the stage system should correct the issue.

eSignature - Unable to Access Feature

The eSignature Admin check box is selected in the Permission Types section of the Role Profile screen, and the role is assigned to a user, but the user cannot access the eSignature feature.

Question or Problem

The eSignature Admin check box is selected in the Permission Types section of the Role Profile screen, and the role is assigned to a user, but the user cannot access the eSignature feature.

Solution and/or Cause

eSignature is an Add-On Module that is enabled after it is added to the customer's contract with Conga Contracts.

Login Issue - Blue Screen

Blue screen displays when accessing Conga Contracts, and the Login Name and Password fields do not display.

Question or Problem

Blue screen displays when accessing Conga Contracts, and the Login Name and Password fields do not display.

Solution and/or Cause

Clear the cache for your browser, going back to the earliest timeframe available.

- [Login ID/Password Not Recognized](#)

An error message displays when logging in to Conga Contracts. For example, Invalid Password, No Account Exists, or User is Disabled.

Login ID/Password Not Recognized

An error message displays when logging in to Conga Contracts. For example, Invalid Password, No Account Exists, or User is Disabled.

Question or Problem

An error message displays when logging in to Conga Contracts. For example, Invalid Password, No Account Exists, or User is Disabled.

Solution and/or Cause

Contact your System Administrator who can reset your password or reactivate you as a user.

Permissions Error

An Insufficient Permissions error displays when attempting to access information or perform a task.

Question or Problem

An Insufficient Permissions error displays when attempting to access information or perform a task.

Solution and/or Cause

This error message typically involves a newly-added security group to which you do not have permission. Contact your System Administrator, who can edit the role assigned to you by turning on the permission.

Portlet - Cannot Move or Resize

Cannot move or resize the portlet.

Question or Problem

Cannot move or resize the portlet.

Solution and/or Cause

Clear the screen state by clicking in an area of the screen to "activate" it. Simultaneously hold down the CTRL+ALT+C keys on your keyboard, and release. Follow the onscreen prompts. Note: When applying this fix in the Dashboard, all portlets will be removed.

Portlet Displays No Data



No data displays in the portlet.

Question or Problem

No data displays in the portlet.

Solution and/or Cause

Clear the screen state by clicking in an area of the screen to "activate" it. Simultaneously hold down the CTRL+ALT+C keys on your keyboard, and release. Follow the onscreen prompts. Note: When applying this fix in the Dashboard, all portlets will be removed.

- ✔ The Search Query portlet displays no data until you load a query by clicking the  icon in the portlet header and following the onscreen prompts. Similarly, the Charting portlet displays no charts until you click the  icon and follow the onscreen prompts, which include selecting a chart type and loading a search query.

Project Group Missing From List

The Project Group list in the Project Profile doesn't contain the correct group for the project being added or edited.

Question or Problem

The Project Group list in the Project Profile doesn't contain the correct group for the project being added or edited.

Solution and/or Cause

Security is applied to projects based on their "group." If you do not have permissions to a project group, this group will not appear as a selection in the Project Group list in a Project Profile. Contact your System Administrator, who can grant you viewing permissions to a project group through your user role.

Re-authenticating to Adobe Sign

Conga Contracts has migrated from SOAP API to REST API, and this change has affected some of the application's integrations. Customers using Adobe Sign will need to re-authenticate their connection to continue using this integration.

Important:

- This change will not affect any in-flight eSignature packages, but you must re-authenticate for these packages to finish processing.
- You will not be able to send or receive any new eSignature packages until you re-authenticate.

To re-authenticate your Conga Contracts connection with Adobe Sign, take the following steps :

1. From Conga Contracts, click the Gear Icon and then click System Settings from the dropdown menu.
2. Under the Integrations section on the left navigation menu, click eSignature.
3. Click the Connect to Adobe Sign button.
4. On the Adobe Sign login page, sign in with your Administrator credentials and click Sign In. You may receive a window listing permissions that Conga Contracts is requesting to access, click OK to accept. The following confirmation message displays upon successful completion: "Adobe Sign Auth Complete. Please close this window."

Your re-authentication is complete and your eSignature packages will now work as expected.

Report Errors

An error displays when generating a report. For example, runtime exceptions, illegal argument exceptions, timeouts, and progress bar failure.

Question or Problem

An error displays when generating a report. For example, runtime exceptions, illegal argument exceptions, timeouts, and progress bar failure.

Causes or Possible Causes

Conga Contracts is aware that some of the fields available for reports, as well as certain filter configurations, may cause errors to be generated, and we are working to identify and correct these issues.

Workarounds

- Remove elements of the report, such as the Secondary entity and individual report fields, modify the grouping and ordering of fields, ensure filters are correctly configured, and then run the report again.
- Export the report to a different file format.
- Replicate the report as a Search Query and compare results to identify any issues.

SalesConnect - Cannot Map Custom Fields

Custom fields added to the Conga Contracts Contract Type page in Salesforce cannot be mapped to Conga Contracts fields because the fields are not visible in the Conga Contracts Integration Settings screen.

Question or Problem

Custom fields added to a Conga Contracts page in Salesforce cannot be mapped to fields in Conga Contracts because the fields are not visible in the Salesforce Field Mapping window in the Conga Contracts Integration Settings screen.

Solution and/or Cause

Ensure your connection user1 has an Administrator Profile with field level access to any custom fields that are added to a Conga Contracts page in Salesforce and need to be mapped to fields in Conga Contracts program screens. It is recommended that the connection user has a System Admin Profile and that you verify the profile has field level access to ensure custom fields can be added in Salesforce and mapped to fields in Conga Contracts.

A connection user is the person who establishes the connection between Conga Contracts and Salesforce, and then logs into Salesforce, making that individual the API connection user. The connection user must have all the available rights and permissions to perform their administrative duties.

Tip: If another Salesforce user is logged in using the same browser when the connection user clicks the Connect to Salesforce button in the Conga Contracts Integration Settings screen, then the application will attempt to log in as that user, and will not give the connection user the option to select their credentials, identifying them as the connection user.

SalesConnect - Cannot Submit Contract Request

When I click the Submit to Conga Contracts button in a Conga Contracts record in Salesforce, an error message displays.

Question or Problem

When I click the Submit to Conga Contracts button in Contract record in Salesforce, an error message displays.

Solution and/or Cause

There are two items that could cause the error and cause the submission of the contract request to fail. Follow the steps below to successfully submit a contract request:

1. Ensure the Contract Type template you are using for your request is synched to Conga Contracts:
 - Select Conga Contracts in the Apps list from any Salesforce page.
 - Click on the Contract Types tab.
 - Locate the template you used in the Contract Type Name field.
 - In the Status field for the contract type, verify the status is Synched. The Status Image field displays a Salesforce icon icon, indicating an active status. Proceed to Step 2.If the contract type is not synched:
 - Click on the contract type link in the Contract Type Name field to display the contract type in edit mode.
 - In the Document Options list, change the selection to any other option, and click Save.
 - When the screen refreshes, the Status Image field displays a Salesforce icon, indicating a pending status.

- Refresh the page and verify the Status is now Synched and the Status Image is Salesforce icon. Even if Error displays in the Status field, proceed to Step 2.
2. Ensure there is a field set for the Contract Type template you are using for your request:
 - Click on the Setup link, located adjacent to your name in the top right of any Salesforce screen.
 - In the left navigation pane, scroll down to the Build category, and click Create > the directional arrow icon > Objects.
 - In the Custom Objects page, locate the Contract link, and click on it.
 - In the Contract (Managed) page, locate the Field Sets link, located in the cluster of links under the page name at the top of the screen, and click on it.
 - In the Field Sets section of the page, ensure the name of the contract type you are using for your contract request is listed in either the API Name column or the Field Label column. If the field set is not listed for the Contract Type, add the field set:
 - Click New.
 - In the New Field Set page, populate the required fields, which are case-sensitive:
 - Field Set Label - Enter the contract type name with no spaces, and no brackets. For example, Real_Estate_Lease. Field Set Name - This field is auto-populated with the information from the Field Set Label.
 - Where is this used? - Enter Field Set for contract type: followed by the contract type name with no spaces, and no brackets.
 - Click Save.
 - When the screen refreshes, click on the Account label in the list box, and drag-and-drop it into the designated area (In the Field Set list box).
 - Click Save.
 3. Resubmit your contract request.

Sandbox - Make Environment Permanent

How do you obtain a permanent Sandbox environment for a tie-in product like Salesforce?

Question or Problem

How do you obtain a permanent Sandbox environment for a tie-in product like Salesforce?

Solution and/or Cause

Permanent Sandboxes are available at an additional charge. Contact your Conga Contracts Account Manager.

Screen is Frozen

Clicks (selections) are not registering in program screens.

Question or Problem

Clicks (selections) are not registering in program screens.

Solution and/or Cause

Clear the screen state by clicking in an area of the screen to "activate" it. Simultaneously hold down the CTRL+ALT+C keys on your keyboard, and release. Follow the onscreen prompts.

Search Results are Incomplete or Incorrect

Running a search generates incomplete or incorrect results.

Question or Problem (required)

Running a search generates incomplete or incorrect results.

Solution and/or Cause

Clear the cache for your browser, going back to the earliest timeframe available.

Single Sign On (SSO) Login Issue

Cannot log in to Conga Contracts using our SSO.

Question or Problem

Cannot log in to Conga Contracts using our SSO.

Solution/Cause

Contact Customer Support at support@conga.com or 866.502.3334.

Tip: Using Mozilla Firefox, download the SAML Tracer add-on, which is a tool that collects logs of the SSO login request and provides valuable troubleshooting information.

Add the Conga Contracts Word Plug-In as a trusted location in Word

Add the Conga Contracts Word Plug-In as a trusted location in Word.

Question or Problem

My Conga Contracts Word-Plugin is not displaying in Microsoft Word.

Solution and/or Cause

You must add the Conga Contracts Word Plug-In as a trusted location within Word with the following steps:

1. Open Word
2. Navigate to File
3. Options
4. Click Trust Center
5. Trust Center Settings
6. Trusted Locations
7. Click the Add New Location button. Add the following URL: <https://novatuscontracts.com/Contracts/dav/> and also check Subfolders of this location are also trusted and click OK
8. Also check Allow trusted locations on my network
9. Click OK

Conga Contracts for API Developers

Select one of the following topics for more information:

- [Conga Contracts for REST API Developers](#)
- [\(Deprecated\) Conga Contracts for SOAP API Developers](#)

Conga Contracts for REST API Developers

Select one of the following topics for more information:

- [Getting Started as a Developer for REST API](#)
- [REST API Reference](#)

Getting Started as a Developer for REST API

For information on getting started with Conga Contracts API, see the following topics:

- [Creating a Session for REST API](#)
- [Introduction](#)
- [Limitations](#)
- [NQL](#)
- [Using Webhooks to Retrieve Contract Data for REST API](#)
- [Additional Field Dynamics and Contract Ids](#)

Creating a Session for REST API

The following is an example of how to create a session to retrieve contract fields using REST API.

```
1 package example;  
2  
3 import com.mashape.unirest.http.JsonNode;  
4 import com.mashape.unirest.http.Unirest;  
5 import org.slf4j.Logger;  
6 import org.slf4j.LoggerFactory;  
7  
8 public class APISessionExample {
```

```

9      static final Logger LOG =
    LoggerFactory.getLogger(APISessionExample.class);
10     static final String USERNAME = "username";
11     static final String PASSWORD = "password";
12     static final String APIBASE = "https://
    app1.congacontracts.com/Contracts/rest/v1";
13
14     static final String SESSION_ENDPOINT = APIBASE + "/
    session";
15     static final String CONTRACT_ENDPOINT = APIBASE + "/
    contract/?q=&pageSize=1&page=0";
16
17     public static void main(final String[] args) throws
    Exception {
18         final String sessionId =
    Unirest.post(SESSION_ENDPOINT).field("username",
    USERNAME).field("password", PASSWORD).asString().getBody();
19
20         final JsonNode contract =
    Unirest.get(CONTRACT_ENDPOINT).header("Cookie", "NOVATUSSID="
    + sessionId).asJson().getBody();
21
22         LOG.info("Retrieved data: " + contract.toString());
23     }
24 }

```

For more information, see the Session section of [REST API Version 2.0](#) or [REST API Version 1.0](#).

Introduction

The Contracts Public API provides a set of web services for users to create and modify data in the system. The current version uses REST and SOAP (deprecated) which allows the creation and modification of Companies, Contracts, Documents, Forms, Payments, Company Persons, Projects, and Users. Each of these entities has a service which provides create, update, and query methods. The Document service has an additional `getDocumentContents` method to obtain the file contents, and the Contract service has `getAdditionalParties` and `setAdditionalParties` methods to create and modify contract additional parties.

Keep in mind that the product was named Novatus until the summer of 2018, as a result many of the calls continue to reference the old name. The name of the product has been updated to reflect the new name of Conga Contracts, but the API calls retain the Novatus name.

Limitations

Conga Contracts has the following limitations:

- There is a limit of 1000 calls within a five minute window for a single IP.

NQL

NQL is a subset of SQL that is used to write queries in the API. All NQL queries are select queries, so a query such as "select * from Company where name=AAA Software Company" does not need the beginning part and would be written as "name=AAA Software Company." Each object has its own set of fields that can be queried against; these fields are listed below in their respective objects. Objects that support dynamic additional fields (Company, Contract, DynamicForm) can also query against these additional fields. For more information about the fields' contents, see the section for the object description. NQL supports the SQL comparison operators (=, <, >, <>, like), wildcard (%), set comparison in (), Boolean operators (and, or, not), and ordering statements (order by x asc/desc), as shown in the following examples:

```

1  status = 'Active' and description like '%manufacturer%'
2  category in ( 'Supplier' , 'Customer' ) order by name
3  country not in ( 'Australia' , 'New Zealand' )

```

Using Webhooks to Retrieve Contract Data for REST API

- The webhooks will send out information based on the save event of a contract, company, and/or project profile.
- The webhooks must first be initially configured in the application; go to Admin >> System Settings >> API Settings (See screenshot below)
- Default Media Type
- Sends out data in either XML or JSON format
- Default Secret
- A secret that can be used to later verify that the data coming over is from Contracts; this information will come over in the header of the XML/JSON data

- Default URL
- Sends data to this URL
- Hook Type
- After Save – Data will be sent after the save action on a company/contract/project object
- Before Save – Data is sent over before the save action happens to allow data to be verified before the save happens
- It is important to note that the data being sent over will be the same for the before and after save action. The key difference is that with Before Save you can check the data coming over before the object is saved

- Once these are set click *New* to create a new hook. If you leave the URL, Media Type, and Secret fields empty they will use the defaults.
- Once the hook is set up the application will send out data to whichever URL you specified.
- Once the webhooks are configured you will have to set up a servlet so that you can receive that data. (see the below code)
- Your filename will be in the URL for example the below code is named posttest.java so you would set your default URL to localhost:8080/posttest

```

1  import java.io.IOException;
2  import java.nio.charset.StandardCharsets;
3  import java.util.Enumeration;
4  import javax.crypto.Mac;
5  import javax.crypto.spec.SecretKeySpec;
6  import javax.servlet.ServletException;
7  import javax.servlet.http.HttpServlet;
8  import javax.servlet.http.HttpServletRequest;
9  import javax.servlet.http.HttpServletResponse;
10

```

```

11 public class WebhookServletExample extends HttpServlet {
12
13     private static final org.slf4j.Logger log =
org.slf4j.LoggerFactory.getLogger(WebhookServletExample.class);
14     private static final String SECRET = "ExampleSecret";
15
16     private boolean verifySecret( final String message,
final String signature) throws Exception {
17         final Mac mac = Mac.getInstance( "HmacSHA512" );
18         mac.init( new
SecretKeySpec(SECRET.getBytes(StandardCharsets.UTF_8),
"HmacSHA512" ));
19         final byte [] bytes =
mac.doFinal(message.getBytes(StandardCharsets.UTF_8));
20         return Hex.encodeHexString(bytes).equals(signature);
21     }
22
23     @Override
24     protected void doPost( final HttpServletRequest request,
final HttpServletResponse response) throws IOException,
ServletException {
25         for ( final Enumeration<String> headers =
request.getHeaderNames(); headers.hasMoreElements(); ) {
26             final String headerName = headers.nextElement();
27             log.info(headerName + " : " +
request.getHeader(headerName));
28         }
29         log.info( "--- Data ---" );
30         final String data =
IOUtils.toString(request.getInputStream());
31         log.info(data);
32         final boolean validSignature;
33         try {
34             validSignature = verifySecret(data, request.getHeader( "
signature" ));
35         } catch ( final Exception e) {
36             throw new RuntimeException( "Error reading
signature" , e);
37         }
38         log.info( "Signature is valid? " + validSignature);
39         response.getOutputStream().print( "{\"success\": true,
\"message\": \"json message\"}" );
40     }

```


Additional Field Dynamics and Contract Ids

Obtain the API ID

1. Within your Contracts instance:
 - Click Admin->Dynamic Form
 - Double-click the Field or Form you need
 - On a box on your right, you will see a field labeled **API Code**...this is your API ID
2. You can change this ID to something more descriptive but this ID won't change unless you change it.

REST API Reference

Select one of the following topics for more information:

- [REST API Version 2.0](#)
- [REST API Version 1.0](#)

REST API Version 2.0

See [Getting Started as a Developer for REST API](#) for information on how to get started.

(Open API documentation is only available to view online)

REST API Version 1.0

See [Getting Started as a Developer for REST API](#) for information on how to get started.

(Open API documentation is only available to view online)

(Deprecated) Conga Contracts for SOAP API Developers

 SOAP API is deprecated for Conga Contracts.


The Contracts Public API provides a set of web services for users to create and modify data in the system. The current version uses REST and SOAP (deprecated) which allows the creation and modification of Companies, Contracts, Documents, Forms, Payments, Company Persons, Projects, and Users. Each of these entities has a service which provides create, update, and query methods. The Document service has an additional `getDocumentContents` method to obtain the file contents, and the Contract service has `getAdditionalParties` and `setAdditionalParties` methods to create and modify contract additional parties.

Keep in mind that the product was named Novatus until the summer of 2018, as a result many of the calls continue to reference the old name. The name of the product has been updated to reflect the new name of Conga Contracts, but the API calls retain the Novatus name.

Select one of the following topics for more information:

- [Getting Started as a Developer for SOAP API](#)
- [SOAP API Reference](#)

Getting Started as a Developer for SOAP API

 SOAP API is deprecated for Conga Contracts.

See the following topics for more information:

- [API Standards and Developmental Platforms](#)
- [Authentication](#)
- [Integration with External Conga Systems](#)
- [Using Webhooks to Retrieve Contract Data for SOAP API](#)
- [Object Methods](#)
- [Pulling Data from Multi-Select Dynamic Fields](#)
- [Contract Documents Links](#)
- [Gregorian Calendar Converter](#)

API Standards and Developmental Platforms

Standards

Name	Reference
Simple Object Access Protocol (SOAP) 1.1	http://www.w3.org/TR/2000/NOTE-SOAP-20000508
Web Service Description Language (WSDL) 1.1	http://www.w3.org/TR/2001/NOTE-wsdl-20010315
WS-I Basic Profile 1.1	http://www.ws-i.org/Profiles/BasicProfile-1.1-2004-08-24.html

Development Platforms

Conga Contracts SOAP API works with standard SOAP development environments.

Authentication

The following authentication types are available for Conga Contracts API:

- [Traditional](#)
- [WS-Security](#)
- [Proxy Service](#)

Traditional

A session can be created and bound to a service using an application username and password by using the Session service and the `setSession` method shown. The session will be restricted to the permissions of the account used to create it.

```

1  String sessionId =
2      new SessionService().getNovatusSessionServicePort()
3          .login(username, password);
4  public static void setSession(Object client, String
sessionId) {
5      BindingProvider bp = (BindingProvider)client;
6      Map<String, List<String>> headers =
7          CastUtils.cast((Map<?,?>)bp.getRequestContext()
8              .get( "javax.xml.ws.http.request.headers" ));
9      if (headers == null ) {
10         headers = new HashMap<String, List<String>>();

```

```

11     bp.getRequestContext()
12         .put( "javax.xml.ws.http.request.headers" , headers);
13     }
14     List<String> cookies =
15         Arrays.asList( new String[] { "NOVATUSSID=" +sessionId});
16     headers.put( "Cookie" , cookies);
17 }

```

Then, to create and bind the session:

```

1     NovatusCompanyService companyService =
2         new CompanyService().getNovatusCompanyServicePort();
3     setSession(companyService, sessionId);

```

WS-Security

The services can be accessed using WS-Security, with full permissions of the system user. An example WSSUtil class can bind the session to a service object:

```

1     public class WSSUtil implements CallbackHandler {
2         private static String keyAlias = "testkey" ;
3         private static String keyPassword = "Password1" ;
4         private static String userCompanyUuid = "058fc186-
5         be30-4828-83db-c909e24954b1" ;
6         public void setWSS(Object clientOb) {
7             Client client =
8             org.apache.cxf.frontend.ClientProxy.getClient(clientOb);
9             Endpoint cxfEndpoint = client.getEndpoint();
10            Map<String, Object> outProps = new HashMap<String,
11            Object>();
12            outProps.put( "action" , "UsernameToken Signature" );
13            outProps.put( "passwordType" , "PasswordNone" );
14            outProps.put( "passwordCallbackClass" , WSSUtil.class.getName());
15            outProps.put( "user" , userCompanyUuid);
16            outProps.put( "signatureUser" , keyAlias);
17            outProps.put( "signaturePropFile" ,
18            "client_sign.properties" );
19            outProps.put( "signatureKeyIdentifier" , "DirectReference" )
20            ;

```

```

16     }
17     WSS4JOutInterceptor wssOut = new
WSS4JOutInterceptor(outProps);
18     cxfEndpoint.getOutInterceptors().add(wssOut);
19 }
20 @Override
21 public void handle(Callback[] callbacks) throws IOException,
22     UnsupportedCallbackException {
23     WSPasswordCallback pc = (WSPasswordCallback) callbacks[ 0 ];
24     pc.setPassword(keyPassword);

```

The clientsign.properties file contains configuration information and is included on the classpath. The private store key must be generated using the command prompt and navigating to where the keytool file is. This file is normally under Program Files > Java > JDK > bin, while in that folder in the command prompt run:

```

1 keytool -genkey -keyalg RSA -alias selfsigned -keystore
keystore.jks -storepass password -validity 360 .

```

This will create a public key that should download to your Users > user folder named "keystore.jks" this key must be placed in your project with the clientsign.properties file.

```

1 org.apache.ws.security.crypto.provider=org.apache.ws.security.comp
onents.crypto.Merlin
2 org.apache.ws.security.crypto.merlin.keystore.type=jks
3 org.apache.ws.security.crypto.merlin.keystore.password=Password
4 org.apache.ws.security.crypto.merlin.keystore.alias=testkey
5 org.apache.ws.security.crypto.merlin.keystore.file=privatestore.jk
s

```

The services can then be bound:

```

1 NovatusCompanyService companyService = new
2 CompanyService().getNovatusCompanyServicePort();
3 new WSSUtil().setWSS(companyService);

```

It is important to note that anyone authenticated will have default System Admin permissions which cannot be changed. Any changes made to the system with this method will be done as "SYSTEM ACCOUNT".

For more information on configuring WS-Security, see <http://cxf.apache.org/docs/ws-security.html>.

Proxy Service

It is possible to use the API through a proxy; add this code to the session verification:

```

1  public static void proxyConfigurePort(Object port) {
2      org.apache.cxf.endpoint.Client client =
ClientProxy.getClient(port);
3      HTTPConduit http = (HTTPConduit) client.getConduit();
4      http.getClient().setProxyServer( "proxy.com" );
5      http.getClient().setProxyServerPort( 8080 );
6      http.getProxyAuthorization().setUserName( "username" );
7      http.getProxyAuthorization().setPassword( "password" );
8  }
```

And this must called with before every instance where the session port is called:

```

1  proxyConfigurePort(sessionPort);
```

Integration with External Conga Systems

How to Obtain the Web Service Definition Language (WSDL)

An example of how to find the below links is to go to the ContractService.java file under Contract.

1. Production Server:
 - a. Contract Service : <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Contract?WsdL>
 - b. Company Service: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Company?WsdL>
 - c. Project Service: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Project?WsdL>

- d. User Service: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/User?Wsd>
 - e. Dynamic Form Service: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/DynamicForm?Wsd>
 - f. Document Service: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Document?Wsd>
 - g. Payment Service: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Payment?Wsd>
 - h. Person Service: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Person?Wsd>
2. For the Demo Server, replace `apl` with `demo`.

Using Webhooks to Retrieve Contract Data for SOAP API

- The webhooks will send out information based on the save event of a contract, company, and/or project profile.
- The webhooks must first be initially configured in the application; go to Admin >> System Settings >> API Settings (See screenshot below)
- Default Media Type
- Sends out data in either XML or JSON format
- Default Secret
- A secret that can be used to later verify that the data coming over is from Contracts; this information will come over in the header of the XML/JSON data
- Default URL
- Sends data to this URL
- Hook Type
- After Save – Data will be sent after the save action on a company/contract/project object
- Before Save – Data is sent over before the save action happens to allow data to be verified before the save happens
- It is important to note that the data being sent over will be the same for the before and after save action. The key difference is that with Before Save you can check the data coming over before the object is saved

- Once these are set click *New* to create a new hook. If you leave the URL, Media Type, and Secret fields empty they will use the defaults.
- Once the hook is set up the application will send out data to whichever URL you specified.
- Once the webhooks are configured you will have to set up a servlet so that you can receive that data. (see the below code)
- Your filename will be in the URL for example the below code is named posttest.java so you would set your default URL to localhost:8080/posttest

```

1  import java.io.IOException;
2  import java.util.Enumeration;
3
4  import javax.servlet.ServletException;
5  import javax.servlet.http.HttpServlet;
6  import javax.servlet.http.HttpServletRequest;
7  import javax.servlet.http.HttpServletResponse;
8
9  import org.apache.commons.io.IOUtils;
10
11 public class PostTest extends HttpServlet {
12     private static final org.slf4j.Logger log =
13     org.slf4j.LoggerFactory.getLogger(PostTest.class);
14
15     protected void doPost(HttpServletRequest request,
16     HttpServletResponse response)
17         throws ServletException, IOException {
18         for (Enumeration<String> headers =
19         request.getHeaderNames(); headers.hasMoreElements();) {
20             String headerName = headers.nextElement();

```



```

18         // log.info(headerName + " : "+
request.getHeader(headerName));
19     }
20     log.info( "--- Data ---" );
21     String data = IOUtils.toString(request.getInputStream());
22     log.info(data);
23     // response.getOutputStream().print("{\"success\": true,
\"message\":
24     // \"json message\"}");
25
response.getOutputStream().print( "<response><success>true</
success><message>xml message</message></response>" );
26     }
27
28     protected void doGet(HttpServletRequest request,
HttpServletRequest response)
29         throws ServletException, IOException {
30     }
31 }

```

Object Methods

- Each service with a unique production WSDL provides a create, update, and query method.
- These methods work identically with the exception of Additional Form queries, the creation of Documents, and the submission of Requests.

The contract service also provides additional methods for handling additional parties. In each of these examples, the service has been created beforehand and named ~service."

Create a New Entity

This will create a new entity on the server from an object that has been instantiated on the client side. The method returns the ID of the newly created object.

```

1     NovatusCompany company = new NovatusCompany();
2     company.setName( "API created company" );
3     company.setGroup( "Primary" )
4         company.setStatus( "Active" );
5     String companyId = service.create(company);

```

For documents, the create method also requires a byte array with the contents of the file:

```

1 NovatusDocument document = new NovatusDocument();
2 // ... fill in document information with NovatusDocument setters
3 byte [] fileContents = Files.readAllBytes(Paths.get( "path//to//
  file" ));
4 service.create(document, fileContents);
  
```

Query an Object

The query method will return a list of entities that match the query given. The signature of the method is:

```

query(String query, int pageSize, int page);
  
```

and it can be used for every object other than Additional Forms. For Additional Forms, a configuration ID that corresponds to the form type is also required:

```

1 query(String query, String configId, int pageSize, int page);
  
```

where query is a string that conforms to the NQL description contained in this document, pageSize is the number of results to return for each call, and page is where the results should start, beginning with 0 (i.e., if there are 100 entities that match the query and a page size of 10 is used, page 0 will return the first 10 results, page 1 will return the next 10 results, and so on.) The maximum page size is 500. The query returns an object (called CompanyQueryResult, ContractQueryResult, etc.) that contains a list of objects and a total count (getTotalCount()).

A table of the objects is shown below:

Object	Result Object Class	Object List Method
Company	CompanyQueryResult	getCompanyList
Contract	ContractQueryResult	getContractList
Document	DocumentQueryResult	getDocumentList

Object	Result Object Class	Object List Method
Forms	FormQueryResult	getFormList
Payment	PaymentQueryResult	getPaymentList

For example, to obtain the company "AAA Software Company," ensuring that the company exists and there are no duplicates:

```

1  public NovatusCompany getMyCompany() {
2      CompanyQueryResult cqr = service.query( "name='AAA Software
Company'" , 1 , 0 );
3      if (cqr.getTotalCount() != 1 ) {
4          throw new RuntimeException( "Company was not found." );
5      }
6      else {
7          return cqr.getCompanyList().get( 0 );
8      }
9  }
10

```

Furthermore, to include a query on a contract page when one is associating a contract with a company, then:

```

1  NovatusCompanyService companyPort =
portCreators.company(sessionId);
2  NovatusContractService contractPort =
portCreators.contract(sessionId);
3
4  CompanyQueryResult companies = companyPort.query( "name='Company
Name'" , 25 , 0 );
5  NovatusCompany dbCompany = companies.getCompanyList().get( 0 );
6
7  NovatusContract contract = new NovatusContract();
8  NovatusCompany company = new NovatusCompany();
9  company.setId(dbCompany.getId());
10
11 contract.setCompany(company);

```

Update Objects

The update method works identically to the create method, with the difference that the objects passed into the update method MUST have been obtained via a query from the server and NOT created on the client side. Using the `getMyCompany()` method above, we can change something in the company and update it on the server:

```

1 NovatusCompany aaa = getMyCompany();
2 aaa.setGroup( "Customers" );
3 service.update(aaa);

```

How to Query on Date Fields

Important notes on setting up queries for date fields:

- It is recommended to use constraints instead of the = sign. This is because the = will look for the exact time stamp in which the document was uploaded (down to the millisecond)
- Use the standard SQL date format 'YYYY-MM-DD'

```

1 DocumentQueryResult documents = documentPort.query( "createdon <
'2016-01-22' and createdon > '2016-01-20'" , 25 , 0 );

```

Pulling Data from Multi-Select Dynamic Fields

```

1 for ( Entry e : contract.getDynamics().getEntry()){
2     if (e.getValue() == null || "" .equals(e.getValue()))
3         continue ;
4     if (e.getValue() instanceof StringArray) {
5         for (String str : ((StringArray)e.getValue()).getItem())
6         {
7             if ( "API Name" .equals(e.getKey())) {
8                 System.out.println(e.getKey() + ": " + str);
9             }
10        }
11    }
12 }

```

The above code is an example of how to draw information out of a specific multi-select dynamic field. "API Name" must be replaced with the api name of the specific field. This

information can be seen under Admin > Dynamic Forms of the UI. Comment out the first if statement to see all of the values in the field and not just ones that have been selected.

It must also be noted that one must query a specific Contract or Company Profile first.

Contract Documents Links

- To obtain the link for the documents tab on a contract profile the contract must be queried. (See the contract section at page 8 for more information on how to query contracts)
- Once the Id is obtained simply place that into this link for app1: <https://app1.novatuscontracts.com/Contracts/#contract/INSERTUUIDHERE/documents> and here: <https://demo.novatuscontracts.com/Contracts/#contract/INSERTUUIDHERE/documents> for demo systems.
- It must be noted that in order to view this URL one must have proper log in credentials and permissions to see the documents / contract in general.

Gregorian Calendar Converter

```

1  public XMLGregorianCalendar DateToXmlGregorianCalendar(Date d) {
2      GregorianCalendar gc = new GregorianCalendar();
3      gc.setTime(d);
4      return new XMLGregorianCalendarImpl(gc);
5  }
6
7  public Date xmlGregorianCalendarToDate(XMLGregorianCalendar
8  xgc) {
9      return xgc.toGregorianCalendar().getTime();
10 }

```

The above code can be used to call the Gregorian Calendar Converter which should be placed in the .util package.

```

1  document.setExpirationDate(XMLGregorianCalendarConverter.DateToXmlGregoria
2  nCalendar( new Date( 1 , 0 , 0 )));

```

Once the Converter is called this code can be used to set the actual time; it is worth noting that the base date is Jan, 1 1899. It may take some trial and error to get the dates correct.

SOAP API Reference

⚠ SOAP API is deprecated for Conga Contracts.

General Considerations

Each class has an id field, which is defined as the UUID of a specific object. When creating new objects, this field must be blank and it will be generated by the server. When modifying an object retrieved via a query, it must not be changed in order to have an update function correctly. However, setting the id to null and using create on the object is a convenient way to either duplicate objects, or use existing objects as a template for creating new ones.

- [Company Service](#)
- [Contract Service](#)
- [Document Service](#)
- [Request Service](#)
- [Dynamic Form Service](#)
- [Payment Service](#)
- [User Service](#)
- [Company Person Service](#)
- [Project Service](#)
- [Person Service](#)
- [Event Service](#)
- [List Admin Service](#)
- [Creation Template API](#)

Company Service

NovatusCompany Object

- The NovatusCompany class mirrors what is seen on the Company Profile of the Contracts application.
- When creating a Company, the name, group, and status are required; thus failing to set these with the `company.setName` (as an example) will lead to an error.
- Furthermore, when inserting string values for dropdown menus, such as company status, the string must be an exact match for the dropdown menu value.

```

1  public List<NovatusListComboItem> getListAdminByName(String
2  group) {
3      List<NovatusListComboItem> listAdmins =
4  session.getListAdminPort().getList(group);
5      return listAdmins;
6  }
7  public NovatusCompany addCompany(String name, String group,
8  String status) {
9      NovatusCompany company = new NovatusCompany();
10     company.setName(name);
11     company.setGroup(group);
12     company.setStatus(status);

```

As you can see in the above example to facilitate the process the three required fields are defined in the function which are defined in the main method. Above that call the list admin service (described in more detail later in this document) to create a check for the group field. A similar method can also be used to print that data to the screen so that users will have an easier time knowing what groups are available.

Production WSDL: <https://appl.novatuscontracts.com/Contracts/wsapi/v1/Company?WsdL>

Field Name	Type	Description	Queryable	Required
id	String	A unique identifier for the company	Yes	-
name	String	Company Name	Yes	Yes
number	String	Company Number	Yes	-
group	String	Company Group	Yes	Yes
taxId	String	Company Tax ID	Yes	-
status	String	Company Status	Yes	Yes
dunsNumber	String	DUNS number	Yes	-

type	String	Company Type	Yes	-
category	String	Company Category	Yes	-
url	String	Company URL	Yes	-
address1	String	Primary Address Line	Yes	-
address2	String	Primary Address Line 2	Yes	-
city	String	Primary Address City	-	-
state	String	Primary Address State	Yes	-
postalCode	String	Primary Address ZIP Code	Yes	-
country	String	Primary Address Country	Yes	-
phoneAreaCode	String	Phone Area Code	-	-
phoneCountryCode	String	Phone Country Code	-	-
phoneExtension	String	Phone Extension	-	-
phoneNumber	String	Phone Number	-	-
faxAreaCode	String	Fax Area Code	-	-
faxCountryCode	String	Fax Country Code	-	-
faxExtension	String	Fax Extension	-	-
faxNumber	String	Fax Number	-	-
description	String	Company Description	Yes	-
dynamics	Map<String, Object>	A map of dynamic object type ID's to their values	-	-

NovatusCompany Object Methods

The methods listed below are the means by which changes can be made to the company itself; below is a quick example of how to use these methods.

```

1  String companyId = session.getCompanyPort().create(company);
2      CompanyQueryResult test =
session.getCompanyPort().query( "id = '" + companyId + "'", 10 ,
    0 );
3      //CompanyQueryResult company =
companyPort.query("name='Example Company'", 25, 0);
4      return test.getCompanyList().get( 0 );
    
```

- [Creating a Company](#)
- [Retrieving Company Names](#)
- [Retrieving Company Locations](#)
- [Retrieving Company Relationships](#)
- [Querying a Company](#)
- [Setting Company Names](#)
- [Setting Company Locations](#)
- [Setting Company Relationships](#)
- [Updating a Company](#)

NovatusCompany NSQL Methods

These are list of items that can be placed into an NQL statement to filter Company queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

Filter Name	Description
id	A unique identifier for the company
name	Company Name
number	Company Number

group	Company Group
taxid	Company Tax ID
status	Company Status
duns	DUNS number
type	Company Type
category	Company Category
url	Company URL
address1	Primary Address Line 1
address2	Primary Address Line 2
city	Primary Address City
state	Primary Address State
postal	Primary Address ZIP Code
country	Primary Address Country
description	Company Description
lastupdatedon	Last date and time the company was updated

Creating a Company

Field Name	Description
create	Creates the company

Retrieving Company Names

Field Name	Description
getAdditionalNames	Calls additional names

Retrieving Company Locations

Field Name	Description
getLocations	Calls Locations

Retrieving Company Relationships

Field Name	Description
getRelationships	Calls relationships

Querying a Company

Field Name	Description
query	Queries the Company

Setting Company Names

Field Name	Description
setAdditionalNames	Sets Additional Names

Setting Company Locations

Field Name	Description
setLocations	Sets locations

Setting Company Relationships

Field Name	Description
setRelationships	Sets Relationships

Updating a Company

Field Name	Description
update	Updates the Company

Contract Service

NovatusContract Object

- The NovatusContract class mirrors what is seen on the Contract Profile of the Contracts application.
- When creating a Contract, the company, group, agreementType, contractType, legalEntity, status, and termType fields are required. If the termType is not perpetual, originalExpirationDate are required.
- If the contract is a child contract (Amendment, Addendum, etc) then agreementLink is also required and the parent contractId must be queried and set into the function.

The below is an example if you already have the UUID of the master and the familyId, the alternative would be to query it and set that Master ContractId to the variable.

```

1 Contract.setAgreementType("Amendment");
2 Contract.setFamilyId("FamilyContractUUIDString - highest contract
  in the family");
3 Contract.setParentContractId("ParentContractUUIDString");

```

The types field is the contract type tree value. It is a list of strings, such that a contract type represented in the application as "License / Software / Server" would be represented as: When creating a child contract the id of the parent is a required field. Auto-renewing term types also require renewalInterval.

```
1 contract.getTypes().addAll((Arrays.asList( new String[]
{"License", "Software", "Server"})));
```

or as

```
1 contract.getTypes().add("Distribution Agreement");
```

The latter is to be used if only one value is being set into the multi-select field.

When updating or creating a contract, only the id field of the company object is used - other company fields will not be updated on the server. This can be done with a basic query before setting the contract values.

Production WSDL: <https://appl.novatuscontracts.com/Contracts/wsapi/v1/Contract?Wsd>

Field Name	Type	Description	Queryable	Required?
Company	NovatusCompany	The company object for the ID	Yes	Yes, if a standalone contract
id	String	A unique identifier of this contract	Yes	-
group	String	Contract Group	Yes	Yes
number	String	Contract Number	Yes	-
value	BigDecimal	Contract Value	-	-
agreementType	String	Agreement Type	Yes	Yes
proposedValue	BigDecimal	Proposed Value	-	-
types	List<String>	Contract Type	Yes	Yes
location	String	Contract Location	-	-
purpose	String	Contract Purpose	Yes	Yes

legalEntity	String	Legal Entity Name	Yes	Yes
originalExpirationDate	XML Gregorian Calendar Date	Original Expiration Date	-	Yes, if termType is not perpetual
effectiveDate	XML Gregorian Calendar Date	Effective Date	-	-
currentExpirationDate	XML Gregorian Calendar Date	Current Expiration Date	-	-
noticeDate	XML Gregorian Calendar Date	Notice Date	-	-
renewalInterval	Integer	Renewal Interval	-	Yes, if termType is Auto Renewal
noticePeriod	Integer	Notice Period	-	-
termType	String	Term Type	Yes	Yes
status	String	Contract Status	Yes	Yes
currency	String	Currency Type	Yes	
parentContractId	String	ID of the parent contract for amendments, etc.	-	Yes, if a child contract
originalCompany	String	Name of the original company of this contract	Yes	-
description	String	Contract Description	Yes	-
dynamics	Map<String, Object>	A map of dynamic object type ID's to their values	-	-

familyId	String	An ID that is the same for every contract in this family	-	Yes, if a child contract
-----------------	--------	--	---	--------------------------

NovatusContract Object Methods

The methods listed below are the means by which changes can be made to the contract(s) itself; below is a quick example of how to use these methods.

```

1 String contractId = contractPort.create(contract);
2 ContractQueryResult result = contractPort.query("id=" +
contractId + "'", 1, 0);
    
```

- [Assigning a Contract](#)
- [Creating a Contract](#)
- [Retrieving Contract Names](#)
- [Retrieving Additional Contract Parties](#)
- [Retrieving Contracts](#)
- [Retrieving Contract Locations](#)
- [Retrieving Contract Relationships](#)
- [Retrieving Contract Responsibilities](#)
- [Querying a Contract](#)
- [Creating Contract Names](#)
- [Setting Contract Locations](#)
- [Setting Contract Relationships](#)
- [Setting Contract Responsibilites](#)
- [Setting Additional Contract Parties](#)
- [Updating a Contract](#)

NovatusContract NQL Statements

These are list of items that can be placed into an NQL statement to filter Contract queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

```

1 ContractQueryResult contracts = contractPort.query("number = 'EXA-
0010 -MAS'", 10, 0);
    
```

Filter Name	Description
id	A unique identifier for the contract
companyname	Name of the company that the contract is associated with
number	Contract Number
group	Contract Group
companyid	Id of the company that the contract is associated with
status	Contract Status
value	Contract Value
type	Contract Type
proposedValue	Contract Proposed Value
legalentity	Contract Legal Entity
originalcompany	Original company that the contract was created under
agreementtype	Contract Agreement Type
currency	Contract Currency
termtype	Contract Term Type
lastupdatedon	Last date that the contract profile was updated on
createdon	Date that the contract profile was created
lastUpdatedBy	Person that last updated the contract profile
createdBy	Person that created the contract profile

description	Contract Description
effectivedate	Contract Effective Date
originalexpirationdate	Contract original expiration date
currentexpirationdate	Contract current expiration date

Assigning a Contract

Field Name	Description
assignContract	

Creating a Contract

Field Name	Description
create	Creates the Contract

Retrieving Contract Names

Field Name	Description
getAdditionalNames	Gets additional names

Retrieving Additional Contract Parties

The contract service has two additional methods to get and set the additional parties. These methods work on lists of AdditionalParty objects, which contains the following fields:

Field Name	Type	Description
company	NovatusCompany	A complete NovatusCompany object
notes	String	Notes that are displayed as a description of the additional party

effectiveDate	XML Gregorian Calendar Date	The date that the additional party becomes effective
expirationDate	XML Gregorian Calendar Date	The date that the additional party expires

The additional parties for a contract can be obtained with `getAdditionalParties(String contractId)` where `contractId` is the ID of the contract, or set on a contract with `setAdditionalParties(String contractId, List<AdditionalParty> parties)`. As with contracts, when updating or creating an additional party, only the `id` field of the `NovatusCompany` object is used; other fields will be ignored. So, to add AAA Software Company to a contract:

```
NovatusCompany aaa = getMyCompany();
String contractId = "2da3438b-81f1-4c95-8b4e-0171179d1606";
AdditionalParty newParty = new AdditionalParty();
newParty.setCompany(aaa);
service.setAdditionalParties(
    contractId,
    service.getAdditionalParties(contractId).add(newParty)
);
```

Retrieving Contracts

Field Name	Description
<code>getContracts</code>	

Retrieving Contract Locations

Field Name	Description
<code>getLocations</code>	Gets locations

Retrieving Contract Relationships

Field Name	Description
getRelationships	Gets Relationships

Retrieving Contract Responsibilities

Field Name	Description
getResponsibilities	

Querying a Contract

Field Name	Description
query	Queries the Contract

Creating Contract Names

Field Name	Description
setAdditionalNames	Sets the additional names

Setting Contract Locations

Field	Description
setLocations	Sets the Location

Setting Contract Relationships

Field Name	Description
setRelationships	Sets Relationships

Setting Contract Responsibilities

Field Name	Description
setResponsibilities	

Setting Additional Contract Parties

See [Retrieving Additional Contract Parties](#).

Updating a Contract

Field Name	Description
update	Updates the Contract

Document Service

NovatusDocument Object

- The NovatusDocument class contains the metadata for a document.
- The id of the document can be used to retrieve the actual file through the Document service's getDocumentContents method.
- One id is required in objects, which is the object to link the document to (Company, Contract, etc.)

Production WSDL: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Document?WsdL>

Field Name	Type	Description	Queryable	Required
id	String	A unique identifier of this document	Yes	-
type	String	Document Type	Yes	Yes
familyId	String	A unique identifier for this document family	Yes	-

revisionNumber	int	Revision Number	Yes	-
fileName	String	File Name	Yes	-
fileType	String	File Type (MIME)	Yes	-
fileSize	int	File Size (bytes)	Yes	-
author	String	Author Name	Yes	-
description	String	Document Description	Yes	-
effectiveDate	XML Gregorian Calendar Date	Effective Date	Yes	-
expirationDate	XML Gregorian Calendar Date	Expiration Date	Yes	-
objects	List<String>	The object IDs that the document is linked to	-	Yes, must be a get call
createdOn	XML Gregorian Calendar Date	Date that document was originally uploaded	Yes	-
createdBy	String	Person that uploaded the document originally	Yes	-
lastUpdatedOn	XML Gregorian Calendar Date	Most recent date the document profile was changed	Yes	-
lastUpdatedBy	String	Person that made the most recent changes to the document profile	Yes	-

NovatusDocument Object Methods

- [Creating a Document](#)
- [Retrieving Document Contents](#)
- [Querying a Document](#)

- [Retrieving a Document](#)
- [Updating a Document](#)

NovatusDocument NQL Statements

These are list of items that can be placed into an NQL statement to filter Document queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

Filter Name	Description
id	A unique identifier for the document
companygroup	Group of the company that the document is associated with
contractgroup	Group of the contract that the document is associated with
filename	Filename of the document
filesize	File size of the document
author	Document Author
revision	Document Revision Number
type	Document Type
filetype	Document File Type
familyid	Document Family Id
lastupdatedBy	Last person that updated the Document
lastupdatedOn	Last date that the document profile was updated on
createdon	Date that the document was created/uploaded
createdby	Person that uploaded the document originally

description	Document Description
effectivedate	Document Effective Date
expirationdate	Document Expiration Date
objectid	UUID of the object (contract or company) that the document is associated with

Creating a Document

Field Name	Description
create	Creates the Document

Retrieving Document Contents

Field Name	Description
getDocumentContents	Gets the document contents

Querying a Document

Field Name	Description
query	Queries the document

Retrieving a Document

Field Name	Description
getDocument	

Updating a Document

Field Name	Description
update	Updates the document

Request Service

NovatusRequestBundle Object

The NovatusRequestBundle includes a collection of NovatusRequest objects, as well as information about the requester and company the requests are associated with. Only one of the companyId or companyName should be set – the companyId is a reference to an existing company and companyName is the name of a new company. The ID must not be included when creating a new bundle, and must be included when resubmitting a bundle.

Field Name	Type	Description
id	String	The unique identifier of the bundle
requests	List<NovatusRequest>	Collection of requests in the bundle
requestBundleConfigName	String	The name of the request bundle type (from Admin > Contract Request Types in application)
companyId	String	The unique identifier of the company
companyName	String	The name of the company
requesterName	String	The name of the person making the request
requesterEmail	String	The email address of the person making the request

NovatusRequest Object

The NovatusRequest includes a NovatusCompany object, a NovatusContract object, and collections of document identifiers, NovatusContractResponsibility objects, and NovatusDynamicForm objects. These contain the data about the objects that will be created when the request is approved. In the NovatusDynamicForm collection, only the configId and dynamics fields are used. The requestDocuments field contains the identifiers of documents that have previously been uploaded to the system through the Request API's addDocument method.

Field Name	Type	Description
requestConfigName	String	The name of the request type (In the application, the title of the tab in the bundle)
company	NovatusCompany	Company data to include in the request
contract	NovatusContract	Contract data to include in the request
responsibility	List<NovatusContractResponsibility>	Responsibilities to include on the contract
dynamicForms	List<NovatusDynamicForm>	Dynamic forms to include with the request
requestDocuments	List<String>	Unique identifiers of unattached documents to include with the request

Request Service

The request service behaves somewhat differently than other services. The create method creates a new request. When the request is created it is the responsibility of the client to store the returned ID for resubmission through the update method. Also included is an addDocument method that uploads a document unattached to an object for inclusion into a NovatusRequest object. The addDocument method otherwise is identical to that in the Document service.

- [Creating a Request](#)
- [Updating a Request](#)
- [Adding a Document to a Request](#)

Creating a Request

Field Name	Description
create	Creates a request

Updating a Request

Field Name	Description
update	Updates a request

Adding a Document to a Request

Field Name	Description
addDocument	Adds a document to a request

Dynamic Form Service

NovatusDynamicForm Object

- The NovatusDynamicForm class contains additional forms that can be attached to Company or Contract profiles.
- The configId and objectId fields are required. These two fields are obtained from the Admin > Dynamic Forms area of the UI. These two fields can be found under a specific Dynamic Form.
- configId is the name of the form itself
- objectId is the name of the field on the form
- These values default to a do_.... string, and these strings can be changed to something else, but it should be noted that if the API code is already written, then changing these values will cause errors in the API.

- Additional fields on the contract/company profile cannot be created. They must first be created within the app then queried in the API.

Production WSDL: <https://appl.novatuscontracts.com/Contracts/wsapi/v1/DynamicForm?WsdL>

Field Name	Type	Description	Queryable
id	String	The unique identifier of the form	Yes
configId	String	A unique identifier of the form itself	-
objectId	String	The ID of the field on the form	Yes
dynamics	Map<String,Object>	A map of dynamic object type ID's to their values	-

NovatusDynamicForm Object Methods

- [Creating a Dynamic Form](#)
- [Retrieving Dynamic Forms](#)
- [Querying a Dynamic Form](#)
- [Updating a Dynamic Form](#)

Creating a Dynamic Form

Field Name	Description
create	Creates the Dynamic Form

Retrieving Dynamic Forms

Field Name	Description
getDynamicIdForm	

Querying a Dynamic Form

Field Name	Description
query	Queries the dynamic form

Updating a Dynamic Form

Field Name	Description
update	Updates the Dynamic Form

Payment Service

NovatusPayment Object

- The NovatusPayment class contains payments which appear on a Contract Profile.
- To create a new payment in an existing payment stream, either the streamId field or both the streamName and contractId fields are required.
- To create a new payment stream use the streamName, streamType, and contractId fields.
- For streamType use 1 for incoming streams and 2 for outgoing streams

Production WSDL: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Payment?WsdL>

Field Name	Type	Description	Queryable	Required
id	String	A unique identifier of this Novatus Payment	Yes	-
invoiceNumber	String	Invoice Number	Yes	-
invoiceDate	XML Gregorian Calendar Date	Invoice Date	Yes	-
invoiceDueDate	XML Gregorian Calendar Date	Invoice Due Date	Yes	-

paidDate	XML Gregorian Calendar Date	Paid Date	Yes	-
paidAmount	BigDecimal	Paid Amount	Yes	-
referenceNumber	String	Reference Number	Yes	-
transactionId	String	Transaction ID	Yes	-
notes	String	Notes	Yes	-
streamType	Integer	1 = incoming, 2 = outgoing	Yes	Yes
streamId	String	A unique identifier of the payment stream	Yes	-
contractId	String	The ID of a contract that contains the payment	Yes	Yes
streamName	String	The name of the payment stream	Yes	Yes

NovatusPayment Object Methods

- [Creating a Payment Service](#)
- [Retrieving a Payment Service](#)
- [Querying a Payment](#)
- [Updating a Payment](#)

NovatusPayment NQL Statements

These are list of items that can be placed into an NQL statement to filter Payment queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

Field Name	Description
id	A unique identifier of this Novatus Payment

invoicenum	Invoice Number
invoicedate	Invoice Date
invoiceduedate	Invoice Due Date
paiddatetime	Paid Date
paidamount	Paid Amount
referencenum	Reference Number
transactionid	Transaction ID
notes	Notes
streamtype	1 = incoming, 2 = outgoing
streamid	A unique identifier of the payment stream
contractid	The ID of a contract that contains the payment
streamname	The name of the payment stream

Creating a Payment Service

Field Name	Description
create	Creates the payment

Retrieving a Payment Service

Field Name	Description
getPayment	

Querying a Payment

Field Name	Description
query	Queries the Payment

Updating a Payment

Field Name	Description
update	Updates the payment

User Service

NovatusUser Object

- The NovatusUser class contains information about system internal users.
- When creating a user, the emailAddress, loginName, password, firstName, and lastName fields are required.
- Also, functions must have at least one entry. The password field can be used to change a user's password, but for security reasons, the field is blank when a NovatusUser is retrieved from the server.

Production WSDL: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/User?WSDL>

Field Name	Type	Description	Queryable	Required
id	String	A unique identifier of this Contracts User	Yes	-
roles	List<String>	List of system roles for this user	Yes	Yes
prefix	String	Person Name Prefix	Yes	-
firstName	String	Person First Name	Yes	Yes
middleName	String	Person Middle Name	Yes	-

lastName	String	Person Last Name	Yes	Yes
title	String	Person Title	Yes	-
addressLine1	String	Address Line 1	Yes	-
addressLine2	String	Address Line 2	Yes	-
mailStop	String	Mail Stop	Yes	-
city	String	City	Yes	-
state	String	State	Yes	-
postalCode	String	Postal Code	Yes	-
country	String	Country	Yes	-
emailAddress	String	Email Address	Yes	
workCountryCode	String	Work Phone Number Country Code	-	-
workAreaCode	String	Work Phone Number Area Code	-	-
workNumber	String	Work Phone Number	Yes	-
workExtension	String	Work Phone Number Extension	-	-
cellCountryCode	String	Cell Phone Number Country Code	-	-
cellAreaCode	String	Cell Phone Number Area Code	-	-
cellNumber	String	Cell Phone Number	Yes	-

cellExtension	String	Cell Phone Number Extension	-	-
homeCountryCode	String	Home Phone Number Country Code	-	-
homeAreaCode	String	Home Phone Number Area Code	-	-
homeNumber	String	Home Phone Number	Yes	-
homeExtension	String	Home Phone Number Extension	-	-
faxCountryCode	String	Fax Number Country Code	-	-
faxAreaCode	String	Fax Number Area Code	-	-
faxNumber	String	Fax Number	Yes	-
faxExtension	String	Fax Number Extension	-	-
notes	String	Notes	Yes	-
functions	List<String>	List of system person functions	Yes	Yes
organization	String	User Organization	Yes	-
loginName	String	User Login Name	-	Yes
password	String	User Password	-	Yes
forcePasswordChange	Boolean	Set "true" to force password change on next login	-	-
disabled	Boolean	User is disabled	-	-

NovatusUser Object Methods

- [Creating a User](#)

- [Retrieving a User by Username](#)
- [Retrieving User Types](#)
- [Querying a User](#)
- [Updating a User](#)

NovatusUser NQL Statements

These are list of items that can be placed into an NQL statement to filter User queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

Field Name	Description
id	A unique identifier of this Contracts User
roles	List of system roles for this user
prefix	Person Name Prefix
firstname	Person First Name
middlename	Person Middle Name
lastname	Person Last Name
title	Person Title
address1	Address Line 1
address2	Address Line 2
mailstop	Mail Stop
city	City
state	State
postal	Postal Code
country	Country

email	Email Address
personid	The UUID of the person associated with the user
work	Work Phone Number
cell	Cell Phone Number
home	Home Phone Number
fax	Fax Number
notes	Notes
functions	List of system person functions
organization	User Organization

Creating a User

Field Name	Description
create	Creates the user

Retrieving a User by Username

Field Name	Description
getByLogin	Gets the user by Login name

Retrieving User Types

Field Name	Description
getUserType	

Querying a User

Field Name	Description
query	Queries the User

Updating a User

Field Name	Description
update	Updates the user

Company Person Service

NovatusCompanyPerson Object

- The NovatusCompanyPerson class contains information about Company persons.
- When creating a Company Person, the firstName and lastName fields are required.
- The company field is only for reference, the create/update methods only use the companyId field to determine what company the person belongs to.

Production WSDL: <https://appl.novatuscontracts.com/Contracts/wsapi/v1/CompanyPerson?WSDL>

Field Name	Type	Description	Queryable	Required
id	String	A unique identifier of this Company Person	Yes	-
prefix	String	Person Name Prefix	Yes	-
firstName	String	Person First Name	Yes	Yes
middleName	String	Person Middle Name	-	-
lastName	String	Person Last Name	Yes	Yes

title	String	Person Title	Yes	-
addressLine1	String	Address Line 1	Yes	-
addressLine2	String	Address Line 2	Yes	-
mailStop	String	Mail Stop	Yes	-
city	String	City	Yes	-
state	String	State	Yes	-
postalCode	String	Postal Code	Yes	-
country	String	Country	Yes	-
emailAddress	String	Email Address	Yes	Yes
organization	String	Person Organization	Yes	-
workCountryCode	String	Work Phone Number Country Code	-	-
workAreaCode	String	Work Phone Number Area Code	-	-
workNumber	String	Work Phone Number	Yes	-
workExtension	String	Work Phone Number Extension	-	-
cellCountryCode	String	Cell Phone Number Country Code	-	-
cellAreaCode	String	Cell Phone Number Area Code	-	-
cellNumber	String	Cell Phone Number	Yes	-
cellExtension	String	Cell Phone Number Extension	-	-

homeCountryCode	String	Home Phone Number Country Code	-	-
homeAreaCode	String	Home Phone Number Area Code	-	-
homeNumber	String	Home Phone Number	Yes	-
homeExtension	String	Home Phone Number Extension	-	-
faxCountryCode	String	Fax Number Country Code	-	-
faxAreaCode	String	Fax Number Area Code	-	-
faxNumber	String	Fax Number	Yes	-
faxExtension	String	Fax Number Extension	-	-
notes	String	Notes	Yes	-
company	NovatusCompany	Company Data for this person	Yes	-
companyId	String	The ID for this user's company	Yes	Yes

NovatusCompanyPerson Object Methods

- [Creating a Company Person](#)
- [Querying a Company Person](#)
- [Updating a Company Person](#)

NovatusCompanyPerson NQL Statements

These are list of items that can be placed into an NQL statement to filter Company Person queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

Field Name	Description
id	A unique identifier of this Company Person
prefix	Person Name Prefix
firstname	Person First Name
middlename	Person Middle Name
lastname	Person Last Name
title	Person Title
address1	Address Line 1
address2	Address Line 2
mailstop	Mail Stop
city	City
state	State
postal	Postal Code
country	Country
email	Email Address
organization	Person Organization
work	Work Phone Number
cell	Cell Phone Number
home	Home Phone Number
faxNumber	Fax Number
notes	Notes

companyname	Company this person is associated with
companyld	The ID for this user's company

Creating a Company Person

Field Name	Description
create	Creates the Company Person

Querying a Company Person

Field Name	Description
query	Queries the company person

Updating a Company Person

Field Name	Description
update	Updates the company person

Project Service

NovatusProject Object

- The NovatusProject class contains information about Projects.
- The class itself does not contain project items, but rather the data for the project itself. To access the Project menu of Contracts, Companies, etc., the getProjectMenu and setProjectMenu methods are provided (see next section for more details).
- Project Team Members are described by the NovatusProjectTeamMember class, and Project Menu Items are described by the NovatusProjectMenuItem class.

Field Name	Type	Description	Queryable	Required
------------	------	-------------	-----------	----------

id	String	A unique identifier of this Project	Yes	-
name	String	Project Name	Yes	Yes
description	String	Project Description	Yes	Yes
status	String	Project Status	Yes	Yes
group	String	Project Group	Yes	-
type	String	Project Type	Yes	Yes
startDate	XML Gregorian Calendar Date	Project Start Date	Yes	-
endDate	XML Gregorian Calendar Date	Project End Date	Yes	-
teamMembers	List<NovatusProjectTeamMember>	List of team members	-	Yes, if using team instead of group
dynamics	Map<String,Object>	A map of dynamic object type ID's to their values	-	-

NovatusProjectMenuItem

- The NovatusProjectMenuItem class controls what contracts and companies certain projects are associated with.
- Because the project has to be queried first there are no queries for the project menu itself.
- This class can be used to associate contracts or companies with projects
- This class uses the getProjectMenuItem and setProjectMenuItem to first get the project menu and then set companies / contracts / folders to the project menu.

Field Name	Type	Description	Required
objectId	String	The unique identifier of the company/contract referred to	Yes

objectType	Int	The type of object the project is to be associated with: 0 = automatic, 1 = Company, 2 = Contract, 3 = folder	-
orderIndex	Int	The order of this node in the tree under its parent	-
nodeId	String	A unique identifier for the menu item	-
parentId	String	The nodeId of this menu item's parent (empty if root)	Yes, if placing the company / contract / folder under an existing folder
folderName		The displayed name if this is a folder	Yes, if the menu item being created is a folder.

NovatusProject Object and NovatusProjectMenuItem Methods

- [Creating a Project](#)
- [Retrieving a Project Menu Item](#)
- [Querying a Project](#)
- [Setting the Project Menu](#)
- [Updating a Project](#)
- [Retrieving a Project Menu](#)
- [Setting up a Project Menu Item](#)

NovatusProject NQL Statements

These are list of items that can be placed into an NQL statement to filter Project queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

Field Name	Description
id	A unique identifier of this Project
name	Project Name

description	Project Description
status	Project Status
group	Project Group
type	Project Type
startDate	Project Start Date
endDate	Project End Date
lastupdatedon	The last date in which the project was last updated
createdon	The date in which the project was created

Creating a Project

Field Name	Description
create	Creates the Project

Retrieving a Project Menu Item

Field Name	Description
getProjectMenuItem	Gets a project menu item

Querying a Project

Field Name	Description
query	Queries the project

Setting the Project Menu

Field Name	Description
setProjectMenu	Sets the protect menu

Updating a Project

Field name	Description
update	Updates the project

Retrieving a Project Menu

Field Name	Description
getProjectMenu	Gets the project menu

Setting up a Project Menu Item

Field Name	Description
setProjectMenuitem	Set a project menu item

Person Service

NovatusPerson

- The NovatusPerson object is a means by which External Persons can be created, updated, and queried.
- The type of person must always be set to "External"
- Though emailAddress is not required in the API it is highly recommended that this field be filled in as well.
- The purpose of an external person is to allow messaging from Contracts to that person and allow them to reply so that the reply can be captured in Contracts.

Production WSDL: <https://appl.novatuscontracts.com/Contracts/wsapi/v1/Person?WSDL>

Field Name	Type	Description	Queryable	Required
id	String	A unique identifier of this Contracts Person	Yes	-
prefix	String	Person Name Prefix	Yes	-
type	String	The type of person	Yes	Yes
firstName	String	Person First Name	Yes	Yes
middleName	String	Person Middle Name	Yes	-
lastName	String	Person Last Name	Yes	Yes
title	String	Person Title	Yes	-
addressLine1	String	Address Line 1	Yes	-
addressLine2	String	Address Line 2	Yes	-
mailStop	String	Mail Stop	Yes	-
city	String	City	Yes	-
state	String	State	Yes	-
postalCode	String	Postal Code	Yes	-
country	String	Country	Yes	-
emailAddress	String	Email Address	Yes	-
workCountryCode	String	Work Phone Number Country Code	-	-
workAreaCode	String	Work Phone Number Area Code	-	-

workNumber	String	Work Phone Number	Yes	-
workExtension	String	Work Phone Number Extension	-	-
cellCountryCode	String	Cell Phone Number Country Code	-	-
cellAreaCode	String	Cell Phone Number Area Code	-	-
cellNumber	String	Cell Phone Number	Yes	-
cellExtension	String	Cell Phone Number Extension	-	-
homeCountryCode	String	Home Phone Number Country Code	-	-
homeAreaCode	String	Home Phone Number Area Code	-	-
homeNumber	String	Home Phone Number	Yes	-
homeExtension	String	Home Phone Number Extension	-	-
faxCountryCode	String	Fax Number Country Code	-	-
faxAreaCode	String	Fax Number Area Code	-	-
faxNumber	String	Fax Number	Yes	-
faxExtension	String	Fax Number Extension	-	-
notes	String	Notes	Yes	-
organization	String	User Organization	Yes	-

NovatusPerson Object Methods

The methods listed below are the means by which changes can be made to the person(s) themselves; below is a quick example of how to use these methods:

```

1  String personId = session.getPersonPort().create(person);
2      PersonQueryResult test =
session.getPersonPort().query( "id = '" + personId + "'", 10 ,
0 );
3      // PersonQueryResult person =
personPort.query("lastname='Doe'", 25, 0);
4      return test.get Person List().get( 0 );

```

- [Creating an External Contact](#)
- [Retrieving Contact by Id](#)
- [Querying an External Contact](#)
- [Updating an External Contact](#)

NovatusPerson NQL Statements

These are list of items that can be placed into an NQL statement to filter Person queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

```

1  PersonQueryResult persons = personPort.query("firstname = 'John'", 1
0 , 0 );

```

Field Name	Description
id	A unique identifier of this Contracts User
roles	List of system roles for this user
prefix	Person Name Prefix
firstname	Person First Name

middlename	Person Middle Name
lastname	Person Last Name
title	Person Title
address1	Address Line 1
address2	Address Line 2
mailstop	Mail Stop
city	City
state	State
postal	Postal Code
country	Country
email	Email Address
personid	The UUID of the person associated with the person
work	Work Phone Number
cell	Cell Phone Number
home	Home Phone Number
fax	Fax Number
notes	Notes
organization	User Organization

Creating an External Contact

Field Name	Description
create	Creates the Person

Retrieving Contact by Id

Field Name	Description
getById	

Querying an External Contact

Field Name	Description
query	Queries the person

Updating an External Contact

Field Name	Description
update	Updates the person

Event Service

NovatusEvent Object

- The NovatusEvent object is a means by which Events can be created, updated, and queried.
- The "column" field can be null or "originalexpirationdate". When the value is null, the event will only appear in the Events tab of the profile. If the value is "originalexpirationdate" on a Contract Event, it will be used as the renewal event that appears in the "Term and Renewal" section of the contract profile. Only one event per contract can be used as the renewal event.

Production WSDL: <https://apl.novatuscontracts.com/Contracts/wsapi/v1/Event?WsdL>

Field Name	Type	Description	Queryable	Required
id	String	A unique identifier of this Contracts Event	Yes	-
column	String	The column to attach the event (see above)	Yes	-
date	XML Gregorian Calendar Date	Date of the event	Yes	Yes
description	String	Description of the Event	Yes	-
documentIds	String	IDs of the documents attached to the Event	Only	-
endDate	XML Gregorian Calendar Date	If a frequency is set, then the date that the event will end	Yes	Yes
frequency	Integer	If a frequency type is set then the number of times the event will go out	Yes	Yes, if frequency type is set to monthly or yearly
frequencyType	String	Single, Monthly, or Yearly	Yes	Yes
name	String	Name of the Event	Yes	Yes
notificationMessage	String	Body of the notification message	Yes	-
notificationIds	String	Person IDs of the notification list	Only	-
objectId	String	ID of the contact the event is on	Yes	Yes

ownerId	String	Person ID of the Event Owner	Yes	Yes
reminder	Boolean	If reminder exists	Yes	-
reminderDays	Integer	Number of reminder days	Yes	-
reminderMessage	String	Body of the reminder message	Yes	-
status	String	Event Status	Yes	Yes
reminderIds	String	Person IDs of the reminder list	Only	-
warnDays	Integer	Number of Warn Days	Yes	-

NovatusEvent Object Methods

The methods listed below are the means by which changes can be made to the event(s) themselves; below is a quick example of how to use these methods:

```

1  String eventId = session.getEventPort().create(event);
2      EventQueryResult test = session.getEventPort().query( "id
= '" + eventId + "'", 10, 0 );
3      // EventQueryResult event = eventPort.query("name='Event
1'", 25, 0);
4      return test.getEventList().get( 0 );

```

- [Creating an Event - API](#)
- [Querying an Event](#)
- [Updating an Event](#)

NovatusEvent NQL Statements

These are list of items that can be placed into an NQL statement to filter Event queries. This is different from the above chart in that these are not methods that can return data but rather NQL statements that can allow you to filter query results.

```
1 EventQueryResult events = eventPort.query("name = 'Event 1 '", 10 ,
;

```

Field Name	Description
id	A unique identifier of this Contracts Event
date	Date of the Event
description	Event Description
endDate	End Date of the Event if frequency is set to monthly or yearly
notificationids	Person IDs of the notification list
frequencyType	Single, Monthly, or Yearly
name	Name of the Event
notificationmessage	Body of the notification message
objectId	Contract ID that the Event belongs to
ownerId	Event owner person ID
reminder	Boolean value to determine if reminder exists
reminderdays	Number of reminder days
reminderids	Person ID's of the reminder list
documentids	IDs of the documents attached to the Event
remindermessage	Body of the reminder message

Creating an Event - API

Field Name	Description
create	Creates the event

Querying an Event

Field Name	Description
query	Queries the event

Updating an Event

Field Name	Description
update	Updates the event

List Admin Service

NovatusListComboltem

The NovatusListComboltem class contains the data for items from the List Admin service. The List Admin service does not work like the other services, instead it provides `getList` and `setList` methods. This is a recursive type via `treeltems` for values which are trees.

Field Name	Type	Description
id	String	A unique identifier for this list item
name	String	The display name for this list item
description	String	A description of this list item
treeltems	List<NovatusListComboltem>	For tree values, the immediate children of this list item.

ListAdmin Service

The ListAdmin service does not have the usual create, update, or query methods. Instead, it has List<NovatusListComboItem> getList(String name) and setList(String name, List<NovatusListComboItem> list) methods. The name field is the name that appears on the application under Admin 17#17 Lists.

```

1 List<NovatusListComboItem> exampleComboValues =
2     service.getList( "Example Combo Value" );
3 NovatusListComboItem newItem = new NovatusListComboItem();
4 newItem.setName( "Combo Item Added With API" );
5 newItem.setDescription( "A description for the value" );
6 exampleComboValues.add(newItem);
7 service.setList( "Example Combo Values" , exampleComboValues);
    
```

- [Retrieving a List](#)
- [Setting a List](#)

Retrieving a List

Field Name	Description
getList	Gets a List

Setting a List

Field Name	Description
setList	Sets a list

Creation Template API

- Creation templates can be run using the API
- The creation template must be set up and Active in the system already
- You cannot use the API to run the creation template if there are questions on it. These questions are set up in the Admin section of the application

- Use the below code AFTER creating a valid session to run the template on the contract profile
- After the template is created it will be attached to the contract profile

```
1  NovatusCreationTemplateService ctPort =  
   portCreators.creationTemplate(sessionId);  
2  String documentId =  
   ctPort.runSimpleTemplate( "{documentId}" , "{creationtemplateId}" )  
   ;
```

Conga Contracts Features by Release

Review the latest Conga Contracts Features by Release document.

- [Features by Release](#)

Features by Release

This document contains an overview of features introduced in each major release of Conga Contracts. For more information, see [Conga Contracts Features by Release](#).

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