dbs | case manager contract: User

Table of Contents

1. dbs | case manager contract

1.1. Introduction

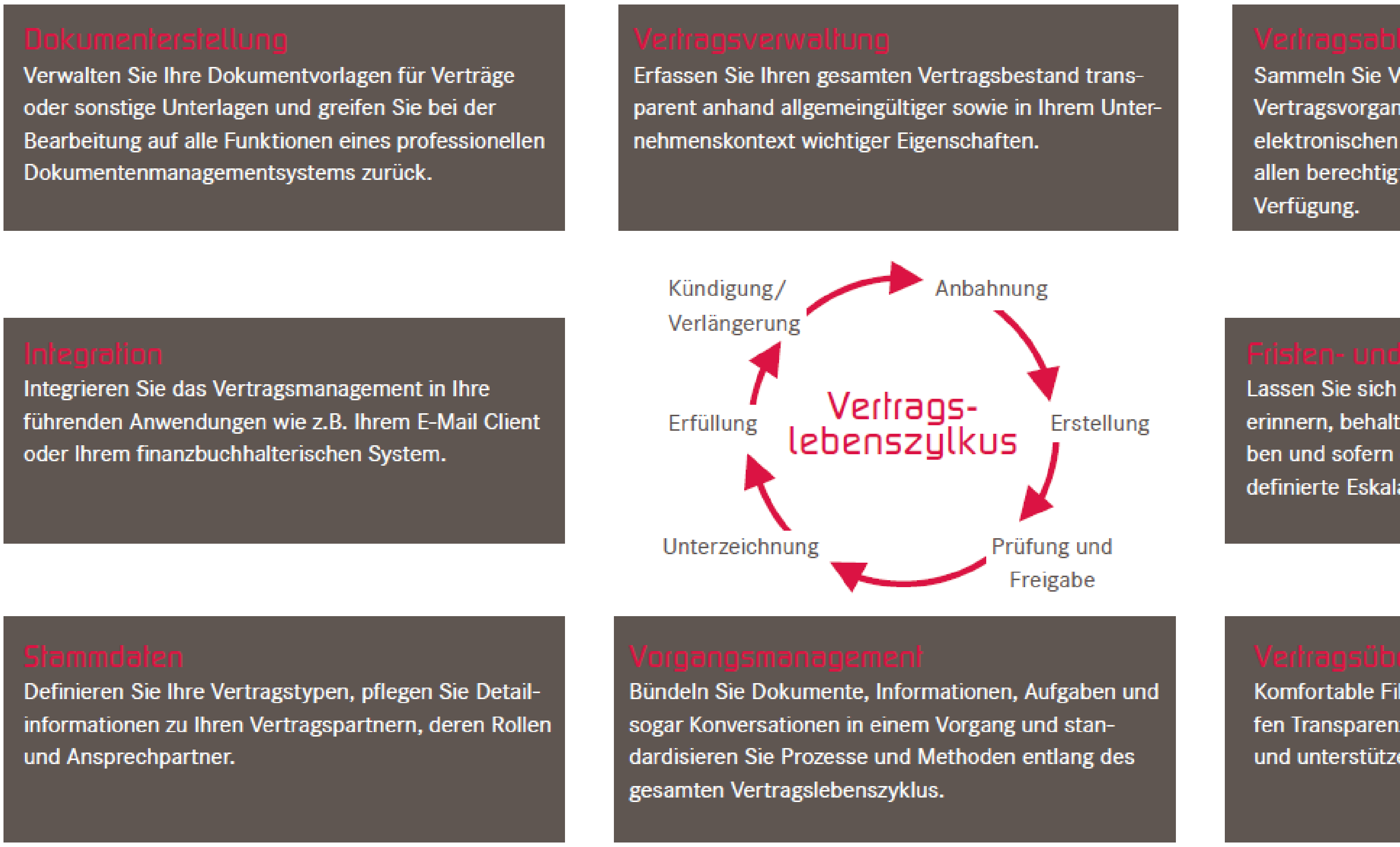
This topic lists general product information and conventions applied in this product documentation.

1.1.1. About dbs | case manager contract

The management of contracts is a company-critical process and comes with a lot of challenges.

Various departments with different tasks are to be organized along to the total contract life cycle.

All departments have one thing in common - transparency is the essential factor of success.



With dbs | case manager contract the d.velop AG provides a holistic contract management. The contract process in the d.3ecm system remedies a logical bracket for the organization and control of all contract-related activities in a totally new quality and thus combines all requirements to the management of contracts in one system.

1.1.2. Prerequisites

This documentation describes the settings for and work with the dbs | case manager contract; it is thus targeted at users.

Basic knowledge of and experience in d.3 and Microsoft Windows are assumed.

1.2. Installation

Due to the complexity, the installation and configuration should only be done by an administrator.

The respective documentation dbs | case manager contract administration manual for the installation and configuration of the dbs | case manager contract can be found in the d.velop service portal.

1.3. Contract management for the end users

In this chapter you find information about the contract management for end users.

The following topics are covered:

- Overview dbs | case manager contract
- Creating and editing contracts
- Contract overview
- Partner administration

1.3.1. Overview dbs | case manager contract for end users

dbs | case manager contract is displayed in the browser language you have set. If further language packages have been licensed, you can also select other d.3 national languages.

> **Note**
>
> Note: In Rising 1, German and English are initially supported. In a later Rising, the d.3 national languages will be reimplemented.

On the start screen of d.3one you will find the tiles for creating a new contract, the contract overview and the partner management. More setting options are summarized under Configuration.

The functions behind the tiles are described in the following chapters including creating and editing contracts, tasks and contract overview.

> **Note**
>
> If the system has not been fully configured or there is a problem communicating with an external application, an information banner can be displayed on each page to indicate any problems. If this banner becomes visible, depending on the error message displayed, your administrator must be informed about it in order to solve the problem permanently. The banner can be hidden by clicking on "Ignore". All accessible web pages try to provide full functionality at all times. This is also the case when a banner is a problem. Depending on the problem, it may then be possible, for example, that individual sections of a page are usable and functional, but other areas have only limited functionality. Example: The configuration for the external applications is invalid. It may then not be possible to create a task in the Task app, but the master data of the contract will still be functional.

1.3.2. Creating and editing contracts

This is how it works

Click on the tile **New contract**.

At this point you can start creating a new contract. The creation is divided into the following areas:

- Master data
- Period and terms
- Tasks
- Coversheet generation
- Activities
- Conversations
- Additional explanations

- Dossier structure
- Configure sections
- View

Master data

In this section you define the master data for your contract.

This is how it works

1. Select whether you want to create a blanket agreement or an individual contract.
2. Under **Description of the contract** enter the name of the contract.
3. Select contract type and contract status.
4. Specify under **Responsible** the responsible persons. You can also define multiple responsible persons via the selection boxes. If set in the general configurations, the author of the contract is already entered automatically.
5. Enter the organizational unit. You can also define multiple organizational units via the selection boxes.

> **Note**
> The following information is optional:
>
> - External contract number. An internal contract number is created automatically.
> - Contract value
> - Storage location
> - Blanket agreement number
> - Organizational unit

6. In the section **Advanced Master Data** advanced properties are displayed which were added additionally and administratively to the contract dossier. Here, you can maintain single input fields or multi-value fields in a table.
7. Click on **Create** to save the contract.

Period and terms

In this section you define the periods and terms for your contract.

This is how it works

1. Select whether the contract is open-ended or fixed-term. Fixed-term contracts end either on a certain date or after a certain duration.
2. Indicate the start date of the contract and the date of signing. For fixed-term contracts, you still specify the end date or the duration of the time limit. Your entries are clearly visualized on a timeline.

After creating the contract, you still have the possibility to terminate a fixed-term contract, set up an extension and create other terms.

Cancelling a contract

It may happen that you want to cancel a contract. Of course, this is also possible.

This is how it works

1. Click on the **+** character.
2. Choose the tab **Cancellation**.
3. Enter a name for the cancellation under **Description**.
4. Enter one or multiple users or groups under **Person responsible**. Depending on the permission configuration, it is possible that only these users can edit the term afterwards.

5. Select whether the cancellation can be executed at any time or you want to define a cancellation term.

> **Note**
> When you select cancellation term, you have the option to enter detailed information. You can set up a reminder. To do this, set the check mark at **Reminder**. You can then specify the date to be reminded. The users who are specified under **Responsible** will get the reminder.

6. If you want to cancel the contract immediately, click **Perform cancellation** and enter the respective information.
7. Click on **Save** to apply the changes.
8. Then, save the contract.

Configuring a renewal

Suppose you want to extend a contract, this is not a problem. Note that a renewal is only available for fixed-term contracts.

This is how it works

1. Click on the **+** character.
2. Choose the tab **Renewal**.
3. Enter a name for the renewal under **Description**.
4. Enter one or multiple users or groups under **Person responsible**. Depending on the permission configuration, it is possible that only these users can edit the term afterwards.
5. Select whether the renewal should apply once or on a rolling basis.
6. Specify until when the renewal should apply.
7. Enter the period.
8. Set the check mark at **Silent renewal** if the contract is always renewed without cancellation.

> **Note**
> You can set up a reminder. To do this, set the check mark at **Reminder**. You can then specify the date to be reminded. The users who are specified under **Responsible** will get the reminder.

9. If you want to renew the contract immediately, click **Perform renewal**.
10. Click on **Save** to apply the changes.
11. Then, save the contract.

If you want to revoke the renewal, click on the trash icon in the row of the renewal.

Creating another term

You can create other terms that you can name individually.

This is how it works

1. Click on the **+** character.
2. Choose the tab **Other term**.
3. Enter a name for the term under **Description**.
4. Enter one or multiple users or groups under **Person responsible**. Depending on the permission configuration, it is possible that only these users can edit the term afterwards.
5. Specify until when the term should apply.

> **Note**
> You can set up a reminder. To do this, set the check mark at **Reminder**. You can then specify the date to be reminded. The users who are specified under **Responsible** will get the reminder.

6. Click on **Save** to apply the changes.

If you want to remove the term, click on the trash icon in the row of the term.

Tasks

In the **Tasks** area, you get an overview of the tasks that have been completed and those that are still pending. In addition, you can create tasks from task templates at this point.

> **Note**
> The buttons to create a task are enabled as soon as you have saved your existing contract data.

Your tasks are listed in a table. In the listing you will see the following information, which you can use to sort the listing:

- Type (reminder, user task)
- Status (Processing, Completed)
- Reminder
- Deadline
- Subject
- Person in charge

> **Note**
> You can also find all tasks relevant for you in the corresponding area of d.ecs task. If you have further questions about this, please have a look at the documentation of d.ecs task.
>
> If the reminder date of a task is in the past, it will be set to the next possible date in the future plus five minutes for the creation in d.ecs task, so that the reminder for this task takes place as soon as possible.

Show all tasks

By default, you will see only tasks that are not yet completed. Enable **Completed tasks** so that tasks that have already been completed are also displayed. At the end of the listing you can also set how many tasks are displayed at once.

Completing an existing task

If you want to complete tasks that are in the **Processing** status, click the checkmark icon in the task row.

Types of tasks

dbs | case manager contract differentiates various types of tasks which are explained below.

Differentiation based on the template type

- **Ad-hoc-tasks:** Ad-hoc-tasks are manually created by the user within an actual case.
- **Task templates:** These are defined by the content administrator for specific contract types and states and can be selected by the user within a specific contract or are generated automatically on meeting certain conditions.

Differentiation based on the execution:

- **Once:** These tasks may only be created once in the entire contract.
- **More than once:** These tasks can also be created several times simultaneously in one contract.
- **Regularly:** These tasks can be repeated at regular intervals. They can also be created several times simultaneously in one contract.
- **Automatic:** These tasks are automatically generated from a task template if a certain condition is met.
- **Manually:** These tasks can be created manually from a predefined task template, they are available for the user in the context of the current contract status.

Differentiation based on the terms:

- **Absolute terms:** Specify a concrete date as a term.
- **Term from creation date:** These terms are calculated relative to the creation of the task.
- **Dynamic terms:** Dynamic terms are calculated based on a dynamic term end (e.g. end of the month).

Differentiation based on the template type

Tasks within the dbs | case manager contract are either created ad-hoc or from a task template. Ad-hoc-tasks cover all those tasks that come up spontaneously. These do not have the character of recurring tasks that frequently come up at specific status of a contract or even always. Ad-hoc tasks are typically created by the process supervisor or an involved employee in the context of the actual contract. Information on how to create ad-hoc-tasks can be found in the chapter Create an Ad-hoc-task.

Task templates are used to pre-organize recurring tasks and thus to structure and standardize processes. They are suitable for recurring jobs and are typically created by a content administrator or process supervisor when designing the process depending on the contract type and the contract status. The process design is described in chapter contract management for the content administrator while creating a specific task from a template is described in chapter Creating tasks from templates.

Differentiation based on the execution type

Depending on whether a user creates an ad-hoc-task or if they are generated by a task template, different execution modes are available:

In the context of the created **ad-hoc user tasks**, the following execution types are available:

- **once:** These tasks may only be created once in the entire case.
- **more than once:** These tasks can also be created several times simultaneously in one case.
- **regularly:** These tasks can be repeated at regular intervals. They can also be created several times simultaneously in one case.

Specific information on editing and completing a task can be found in chapter Working on tasks.

In the context of the **task templates**, the following execution types are available:

- **automatic:** These tasks are automatically generated from a task template if a certain condition is met.
- **manually:** These tasks can be created manually from a predefined task template, they are available for the user in the context of the current case status.

The content administrator defines, if a task is automatically generated under certain conditions (e.g. once a predecessor has been completed) or is available for manual selection.

Differentiation by term types

When creating an actual task or a task template, you can decide between different term types. When creating an actual task, the user can choose between an absolute and a dynamic term, when he is creating a term template he can choose between a term from creation date and a dynamic term.

- **Absolute term**: Absolute terms can only be used in an actual task. In an absolute term, you can specify a fixed date as the term. In the same way, you can configure a reminder as static.
- **Term from creation date**: Terms from creation date can only be used in a task template. When creating a term from creation date, the term or reminder can be automatically calculated relative to

the creation date of the task. In the example, 2 was entered for the term and 1 day(s) were entered for the reminder. Additional options are working days, weeks, months and years. If an actual task was generated on 04/06/2016 based on this task template, then the term would be set to the 04/08/2016 and the reminder to 04/07/2016.

- **Dynamic term**: Dynamic terms can be used in task templates as well as for actual tasks. Here, the user can have the term calculated dynamically. He or she can define the number of days, working days, months or years the term should be before a configurable end date (end of month, end of quarter, end of year, end of contract expiry) or after a defined start date. If a term was configured, a reminder for the term can be configured. If the term is remained empty, the reminder can also be set before the previously mentioned times. In this example, 4 days from the contract expiry (09/30/2016) were configured. If an actual task was generated on 08/01/2016 based on this task template, then the term would be set to the 09/26/2016. With an actual task, the reminder is automatically preset based on the defined case or contract type configuration. The contract type configuration or the processes allow you to configure the number of working days that the reminder is sent prior to the term for each contract- or case-type. These settings are used to calculate the reminder date. The presets can be customized. In this example the reminder is to be set 30 working days before the term. Accordingly, the reminder date is 08/15/2016. If the user adjusts the settings for the term, the reminder date is automatically updated.

Calculating the working days

The calculation of the working days requires a configuration. You can access the configuration via **Configuration > Administration > Terms**.

Here, you can specify the country and region for which the public holidays are to be determined. These and the weekend days Saturday and Sunday are excluded from the calculation of the working days.

Create an Ad-hoc-task

Ad-hoc-tasks are always generated as new tasks within an actual contract.

This is how it works

1. Click on the button **+** below **Tasks**.
2. Enter a subject: This text describes the task and is later also displayed in the d.3 mailbox (and in the optionally related mail).
3. Select the person or the group in charge for this task using the auto-complete list **Responsible**. You can also define multiple responsible persons via the selection boxes.
   Optional:
4. If you want to specify further details for this task, enable the option **Advanced view**.
5. Specify further information (if required) under **Additional explanations**.
6. Optionally enter a term. These can be specified as the key date or as a dynamic term in an ad-hoc-task:
   Term (key date): Specify the date by which the task has to be completed under Term. Specify the date on which you want to be actively reminded of the task in the d.3 mailbox.
   Dynamic term: Enter the term as a period for the contract expiry end date, end of month, end of quarter, end of year, due date, since due date or to the middle of the month. The forerun time can be specified as day(s), working day(s), month(s) or year(s). The term date is then automatically calculated from the forerun time. The reminder is calculated from the specified forerun and the first term date.
7. Select a grade of completion, if you have already started on the task.
8. Select the button **Create** to save the task.

Having created the task, this is displayed in the section **Tasks**.

Creating tasks from templates

Task templates are available for the employee depending on the current contract type and contract status in the section **Task templates**. These templates can accelerate the creation of a task.

This is how it works

1. The task templates listed here can be included in the case as actual tasks via the button .
2. Click on **Create**. The new task is now displayed in the section of the pending tasks.

Tasks templates are typically maintained by a content administrator or an eligible user via the tile **Processes**.

Working on tasks

You can view and edit tasks for a contract as follows:

1. Under **Tasks** of the concrete contract you can see the scheduled tasks.
2. If you click on a task entry, you can edit the task.
   - Use the **Save** button to apply your changes.
   - With the button **Complete** you confirm that this task is completed.
   - The button **Delete** allows you to delete the task.
   - The button **Cancel** allows you to discard the current changes to the task.

With the checkmark symbol in the overview of scheduled tasks, a task can be completed directly. For security reasons, a confirmation is required: Confirm it with **Complete**, if the task is completed.

If a task has been completed, it disappears from the default overview. With the help of the slider **Completed tasks** you can, however, show entries of tasks already completed.

> **Note**
> Consider that after deleting a contract orphaned tasks are being automatically stopped by the reminder service.

Coversheet generation

You can use **Cover sheet generation** to generate a cover sheet based on a contract, which summarizes the most important information of a contract and makes it available for download as a PDF.

To generate the cover page, click on the printer icon in the top right corner of the contract form header. In the dialog that opens, you can choose which areas to print in the cover sheet. Click on "Create" to start the generation.

Activities

The **Activities** show you the last changes to the contract. Click on the button Refresh to show changes that have been applied in the meantime.

Conversations

The **Conversations**-tab provides you with an overview of conversations started for this contract.

To start a new conversation, do the following:

1. Click on the button **+**.
2. Enter a title and a participant.
3. Write your text.
4. Click on the arrow button.

To send an e-mail to external subscribers, proceed as follows:

1. Click on the button **^**.
2. Select "E-mail" for the **type of message**.

3. Enter an **e-mail subject**.
4. Enter an e-mail address for **External participants**. If you want to send an e-mail to multiple recipients, separate the e-mail addresses with a ";".
5. Add your message and click on the arrow button.

Conversation attachments

It is possible to attach tasks, documents or dossiers to a conversation.

This is how it works

1. Enter a new message.
2. Select an attachment using the paper clip button. You will be offered all tasks, documents and dossiers that are in the case. If there are more results than you are offered to choose from, you will have to restrict your search further.
3. Apply the selected item. A placeholder is inserted at the end of the message. If you remove or edit it, the attachment will not be added to the conversation. You may only change the position of the placeholder.
4. Click on the arrow button to send the message.
5. You can now open the attachment using the link in the added message. Alternatively, you can find all added attachments using the paper clip button next to the conversation title.

Additional explanations

The **Additional explanations** offer the possibility of maintaining an advanced description for a contract. This will not be versioned.

Dossier structure

In the **Dossier structure** you can view the contract dossier and all subordinate dossiers and documents. If you drag and drop documents onto the contract dossier, the import dialog opens and you can add new documents to the dossier.

Configure sections

The button **Configure sections** opens a dialog window which is used to show or hide individual sections of the page.

Furthermore, the order of the sections can be changed. To do this, you can move the sections directly in the left section of the page or within the Configure Sections dialog by drag and drop.

The configuration of the sections is saved user-specifically and applied when the page is called up again.

View

The **View** button on the left side of the page opens a dialog box which provides the configuration of grid spacing.

Sliders can be used to change both the inner and outer distance of the grid in which the individual input fields are arranged. In this way, the input fields can be moved closer together or further apart, depending on your preferences, so that you can see different amounts of information at a glance.

The grid spacing configuration is also saved in the user context and applied to all form pages.

1.3.3. Contract overview

Click on the start page on **Contract overview**.

In the contract overview you get an overview with facets of your contracts. You see the result list of d.3one. This also gives you access to all context actions registered there, such as the Excel export.

In addition, all terms for the contracts shown are displayed in a further table. These can also be facetted or filtered, grouped and sorted using the table's own functions. For more information on how to use the table, please refer to the user manual of d.3one.

Additionally, the corresponding tasks can be displayed for the filtered contracts for which the user is responsible.

Searching contracts

You can use the search function to browse the current contracts.

Moreover, the following wildcards are supported:

- ?
  A question mark replaces any character. Example: The entry "dvel?p" also returns all entries with the word "dvelop".
- *
  An asterisk replaces any number of other characters. Example: The entry "*elop" also returns all entries with the word "dvelop". The search *v* returns all matches containing the letter "v".

Searching contracts using facets

The faceting allows you to do a filtering of the current contracts with so-called facets. So, for example, you can display only contracts with an automatic renewal.

Which facets are available to you as a user can be configured by an administrator.

This is how it works

1. Click on **Further facets**.
2. Select the facets you want to use for the search from the list. To do this, enable the checkbox.
3. Enter the search term in a facet field. Use the checkboxes for selecting the values.
4. Under **Contracts** you see the cases matching the search. If you do not enter a search term, you will see all contracts.

Exporting contracts

Contracts displayed under **Contracts** can be exported as Excel- (XLSX) or CSV-file.

This is how it works

1. Click on the button .
2. Select the cases you want to export.
3. Again, click on the button
4. Save the file on your device.

> **Note**
> You can export the terms on the same way.

Displaying the tasks

In the contract overview, tasks can be displayed according to the task list for which the user is responsible.

Simply click on the button . Each time you click on this button, the task list adapts to the case list without having to open it again.

> **Note**
> For this purpose, responsibility rules must first be created.

1.3.4. Partner Administration

Use the partner administration accessible via the tile **Partners** to maintain the master data of your business partners.

Here are your maintained business partner listed in a table. The unique partner ID, partner name and, if available, the primary contact person are listed in the overview.

Filter options allow you to reduce the list and to directly search for partners. The search uses d.3 search, so you must have d.3 search configured to use it. Here you can perform a full-text search with a specific search term.

Moreover, you can sort the list of partners ascending or descending by partner ID or partner name using the respective buttons.

You can edit the properties of a partner after you have opened a partner by clicking on the corresponding line. On the page that opens, it is possible to delete the partner using the Delete button.

Furthermore, you can now select the desired context (case or contract management) in which the partner should be available. Moreover, you can specify the partner name, the postal address, the contact persons with the respective e-mail addresses and phone numbers. If multiple contacts are entered, it is essential to select exactly one primary contact which is then displayed in the overview table. The unique partner ID is not editable for already specified contacts. Save your changes using the Save button. Optionally discard your changes via the **Cancel** button.

You maintain the master data of a new partner by navigating to the corresponding page via the context action "+". When adding a new partner to the system, it is necessary to enter a unique identifier into the mandatory field for the partner ID.

1.3.5. Delegates (personal)

Under **Delegates (personal)** in the configuration you find your maintained delegates listed in a table. The contracts type, the user and the delegate are listed in the overview.

If you are not in the company for a certain period of time, e.g. during vacation, you can appoint a personal delegate.

This is how it works

1. Navigate to **Configuration > Custom settings > Delegates (personal)**.
2. Click on the button **+** to create a new delegate rule.
3. Select the contract type for which you want a user to act as your delegate.
4. Select one or more users in the **Delegates** field.
5. **Save**.

> **Note**
> In the deputy administration for end users, the user name is configured as the currently logged in user which cannot be changed.
>
> The administrator has access to a separate **Delegates (administrative)** tile where the user name is also selectable.

Note
When sending notifications to groups, the delegates are not taken into account.

Note
The configuration of delegates is also possible if d.ecs userprofile is not installed. However, the delegate rules are only applied when a user has reported absent via d.ecs userprofile.

1.4. Contract management for the content administrator

In this chapter you find information about the contract management for the content administrator.

The following topics are covered:

- Overview dbs | case manager contract
- Permission
- Content administration

1.4.1. Overview dbs | case manager contract for content administrators

On the start page next to the relevant tiles for the end users (**New contract**, **Contract overview** and **Partner**) you also find the tile **Configuration** with the sub menus **Permission** and **Content administration**.

Permission

- **Case type accesses**: You manage the access permissions to contract types.

Content administration

- **Processes:** This tile allows you to create new contract types and model processes. This includes the management of the status model as well as the creation of task templates.
- **Organizational units**: You manage the organizational units.
- **Facets**: Define which facets should be visible in the contract overview and define the preferred facet order.
- **Detail tab configuration**: You manage the available detail tabs.

Note
Please note that you see only those tiles for which you have been granted access rights.

If the system has not been fully configured or there is a problem communicating with an external application, an information banner can be displayed on each page to indicate any problems. If this banner becomes visible, depending on the error message displayed, your administrator must be informed about it in order to solve the problem permanently. The banner can be hidden by clicking on "Ignore". All accessible web pages try to provide full functionality at all times. This is also the case when a banner is a problem. Depending on the problem, it may then be possible, for example, that individual sections of a page are usable and functional, but other areas have only limited functionality. Example: The configuration for the external applications is invalid. It may then not be possible to create a task in the Task app, but the master data of the contract will still be functional.

1.4.2. Permission

Below **Permission** you find the following:

- **Case type accesses**

Case type accesses

Here you can authorize users or groups to specific contract types.

Only after the authorization has been set can the selected users or groups see these contract types or create contracts of this type.

Besides you get an overview over your case management licenses. For a contract management only installation these numbers are irrelevant.

This is how it works

1. Please choose a user or group.
2. Below **Visibility**, you use the switch to control whether the user or user group is to be given access to the corresponding contract type.
3. **Save**.

The selected contract types are then marked as "visible" for the selected user and you can use these types in the context of a contract.

Example

In the following, the further functionalities are explained by means of an example. As an example, a user should first be granted additional rights to the "Purchase contract" contract type and the rights to the "Service contract" and "Leasing contract" should also be revoked. To grant the new authorization for the "Purchase contract", it is first possible to filter by the contract type using the corresponding search field. The filtering takes into account both the name of the case type and the case ID. Then the case type is marked as visible and the configuration is saved.

Now that the right for the "Purchase contract" contract has been successfully granted, the rights for the "Service contract" as well as for the "Leasing contract" are now withdrawn from the corresponding user. If the list is longer, it may be helpful to filter it first using "only visible case types" or with a search term. The respective types can then be unselected and the configuration can be saved.

In this example, two separate save processes were used to first grant a new right and then withdraw two rights. The process can also be accelerated by directly selecting all desired contract types as "visible" and deselecting all unwanted access and then saving.

> **Warning**
>
> Before you select another user, you must save the configuration or your changes are lost.
>
> If you do not want to save the changed configuration, selecting a new or no user is equivalent to pressing "Cancel". When reselecting the previous user, the saved configuration is loaded again.

You can directly select or deselect all contract types by selecting the toggle in front of the "Visible" column title. This also (de-)selects contract types that are hidden due to selected filter options.

Restricting the contract functionality

Due to the assignments of users to contract types, the contract functionality is restricted for the current user. The restrictions are explained in the following contexts:

- Processes
- Creating / editing a contract
- Opening a contract without rights
- Contract overview

Processes

Navigate to **Configuration > Content administration > Processes** to define new contract types or to edit existing contract types. Note that all contract types to which you are not authorized are initially hidden.

Creating / editing a contract

When newly creating or editing a contract, the current user only sees those contract types with the respective states that have been assigned to him.

Opening a contract without rights

If the current user opens a contract for which the user does not have rights, an error message is displayed.

Contract overview

In the **Contract overview**, the user only sees those cases and tasks of the contract types that have been assigned to the user. Moreover, the facets are restricted to the contract types assigned to the user.

Responsibility rules

In order for the created tasks to be displayed in the **contract overview** according to the filtered contract list, the tasks must first be assigned to the corresponding persons or groups using **responsibility rules**. Responsibility rules are used to authorize individuals or groups to perform tasks based on selected metadata. The exact description and definition of the responsibility rules is already covered by d.ecs task.

To create a new responsibility rule, the user must first navigate via the **Configuration** in the **Tasks and processes** section and open the **Responsibility rules** menu option. Among other things, metadata is required for the definition of a rule. Contract and case management offers five metadata for this purpose:

1. Internal contract number (metadata: **internalContractNumber**)
2. Internal case number (metadata: **internalCaseNumber**)
3. Contract type (metadata: **contractType**)
4. Case type (metadata: **caseType**)
5. Created on (metaadata: **createdAt**)

In addition to the listed metadata, the **Context** property exists. The property can be selected directly and has fixed values that are also available for selection. By means of the property, a differentiation of the tasks for contract and case management takes place. For a new rule, the **Context** property can be selected or a metadatum can be entered, such as **internalContractNumber**. Compared to the **context**, the value must be entered for a metadatum.

1.4.3. Content administration

Below **Permission** you find the following:

- **Processes**
- **Organizational units**
- **Facets**
- **Detail tab configuration**

Processes

You can digitize and standardize a wide variety of processes in the company.

You define a process as follows:

1. First, define the contract type.
2. Then, define the contract status.
3. Finally, define task templates for the recurring tasks.

Additional information on these steps can be found in the following chapters.

Contract types

To get to the contract management, navigate to **Configuration > Content administration > Processes**.

Below **Contract management** you find an overview of the already created contract types and you can edit these. You can also create a new contract type. Note that all contract types to which you are not authorized are initially hidden. You can display them by clicking on the icon with the eye.

One click on **Contract management** takes you to the configuration and the cross-contract status maintenance.

You can define the default configuration via **Contract management > Configuration**. Each contract type will use this configuration as default unless you customize it.

In the default configuration you can set how many working days before the end of the term a reminder or an escalation should be sent. In addition, the persons responsible for escalation can be configured.

> **Note**
> If the value **None** is configured for **Send escalation**, no escalation notifications will be sent.
>
> Escalation managers can only be configured if an escalation forerun has been entered.

Creating contract types

To create a new contract, do the following:

1. Click on the button **+ (New contract type)**.
2. Enter the name of the contract type.
   Optionally, you can specify how many working days before the end of the term a reminder and an escalation is sent and you can determine the person responsible for the escalation. You can also grant yourself a direct right to the new contract type.
3. Click on **Create**.

Edit contract types

To edit an existing contract type, do the following:

1. Under **Contract management** select the contract type.
2. Make your changes.
3. Click on **Save**.
   Or:
   Select **Delete** to remove the contract type.

> **Warning**
> Contract types should always be generated from within dbs | case manager contract. Do not maintain the contract types manually in d.3 admin.

Contract type dependant configuration of the advanced properties

For each contract type, you have the option of setting which advanced properties are to be displayed in the **Advanced master data** area of the contract form. When you create a new contract type or edit an existing one, you will now see the list of all advanced master data that you can show or hide. By default, all properties are displayed.

The list contains all properties from the two document types that you use for individual and blanket agreements. Note that a property may not be displayed here. This is the case if this property has been added to the document types and hidden in d.3 (setting **Visible in - Storage dialog**) or if a property has been added to both document types and also hidden for both document types.

If you now want to create a contract with a specific contract type, all advanced master data will be displayed, unless the following is the case:

- The advanced property was hidden in d.3 (setting **Visible in - Storage dialog**).
  Or:
- The advanced property is visible in d.3 but has been hidden in the selected contract type.

You can also configure in which order the properties should be displayed. To do this, click a little longer on a property until the line is detached and then move it up or down. It is only set that all multi-value properties are displayed after the other properties.

Maintain contract status

The status selectable for a case are defined under **Contract management > Status**.

Add a new status

To add a new status, enter a status description and click **Enter**.

Rename a status

You can rename a status by clicking on the pencil icon and changing the status name.

Delete a status

To delete a status, click on the button with the trash can.

Change the status order

You can move a status by clicking a little longer on the icon in front of the status name and moving the line up or down. Wait a moment until saving is automatically executed.

Task templates

The number of task templates for the status is displayed next to the status name. If you click on the number or the status name, you can view details about the tasks and create a new task via the button **+**.

Task templates

You can create and edit task templates and link these with your defined Conditions and actions.

Create task templates

You can specify task templates for the various status of the contract types. However, in contrast to the creation of a task in a concrete contract, every created task at this point is always a template.

This is how it works

1. Navigate to **Configuration > Processes** > **Contract management > Status** and select a status. Then you see the **Task templates**.
2. Use the button **+ (new task)** to create a new task.
3. At least enter a subject. If you do not select a person responsible, the person responsible for the task is automatically entered in the contract when this task template is created. If you create a successor task template, the person responsible for the predecessor task template is automatically entered.
4. Click **Create** to add the template to the status.

Optionally, you can activate the **Advanced view** slider, giving you the option of making further settings. This includes how often the execution should take place (see also differentiation by execution type), which term you want to choose and whether there are any conditions and actions for this task template.

You can specify a term for the task templates. For this, you have two options:

- Term from creation date: The date is created depending on the date of creation of a concrete task from this template.
- Dynamic term: The date is created dynamically at a given time.

The editor receives a message on the day of the reminder and the person responsible for escalation receives a message via d.ecs notification on the day of escalation if the task is not yet completed.

With the property **Mandatory** it is defined, if a task in the status must be completed in any case.

Edit task templates

You can edit an existing task template:

1. Click on the pen icon next to the template.
2. Now change the details of the task template.
3. Apply your changes with a click on **Save**.

You can discard your changes via **Cancel**.

If yiou want to remove the template from the status, use **Delete**.

Conditions and actions

You have the option to define conditions and actions for a task template:

> **Warning**
> No translatable dataset hooks are supported. I.e. if you want to maintain a condition or action for an advanced property, then the hook must not return translated values. If an advanced property has a dataset assigned, this dataset may be translated.

Conditions

Conditions must be met to create a task automatically or to create tasks manually by a user. In the last case the tasks only appear under the available tasks in the case as soon as the condition is fulfilled. All conditions are handled in the standard and-linked manner. Once you have added more than one condition, you can also link the conditions using logical operation, e.g. or-link. For this purpose, all conditions are assigned a unique ID. Use all IDs at least once in the logical expression. Use only spaces, "AND" and "OR" next to the IDs. "AND" binds more strongly here than "OR".

Whether a task is created automatically or made available for manual scheduling depends on the startup type selected:

- **Automatic**
- **Manually**

The following options are available as condition:

- **Advanced property has the following value**
  A d.3 property will be checked for a certain value. Note that usually a task with a property condition is not automatically scheduled when a new case is created. To achieve this, you must add the condition **A case was created** described below.
  Depending on the type of the d.3 property the following comparisons are provided:
  - Equal

  - Not equal
  - Earlier than
  - Later than

  The comparison value can be entered freely.

- **A case has been created**
  You can define the creation of a case as a condition here. So it is possible to create automatically certain initial tasks for the creation of a case immediately or to provide for the manual selection.
- **A predecessor (task) has been finished**
  This task will be created only after the predecessor task has been completed. Unless the predecessor task is optional. Then this condition is automatically true.

Linking of conditions

If two or more conditions are defined for the start of a task template, an additional input field is provided for configuring the link. This field allows the And- and Or-linking of conditions. It should be noted that the use of brackets and logical negation is not possible so far. Furthermore, the following rules apply:

- The input field can be shown and hidden by clicking on the sum character.
- The sum character also provides a tooltip that explains the rules to be followed again.
- All declared conditions must be present in the logical operation.
- All conditions must be linked by exactly one AND or exactly one OR.
- If you do not make their own configuration, all conditions are interpreted by default and-linked.

> **Warning**
> When logically linking conditions, note that an ampersand implicitly binds more strongly than an or. E.g. 1 AND 2 OR 3 is interpreted as (1 AND 2) OR 3 and not as 1 AND (2 OR 3).

Actions

Actions will be executed as soon as the task has been completed in the case.

The following options are available as action:

- **A notification will be send**
  If you want to send a message via d.ecs notification after finishing a task, please select this option.
- **A successor (task) will be started**
  After completion of a task, a task can be created as successor.
- **The advanced property will be changed to the following value**
  After completing a task, an operation property can be changed in d.3.

When creating conditions and actions, please note that several conditions and actions can be stored for each task template. Having used the button **Add**, the respective entry is inserted into the respective table under conditions or actions and can then be saved in the task template.

> **Warning**
> If you specify the change of a property below the actions, consider that the affected users have the right to change properties in release. Otherwise, under circumstances problems can occur during the processing of the action and error messages involved can appear.

> **Note**
> When creating successor tasks for a predecessor not configured as mandatory, the following task is generated simultaneously to the predecessor.

Organizational units

You manage the organizational units.

Enter the name of the organizational unit in the "Add" input field and press **Enter** to create it.

You can rename or delete existing organizational units.

> **Note**
> When you create a new contract, you can store an organizational unit in the master data area. This allows you to assign your contracts to a specific organizational unit. You can define exactly what your organizational units are. For example, it could be different departments in your company.

Facets

As administrator you can define the facets available for the user and the first three are displayed by default in the contract overview.

To do so, do the following:

1. Navigate to **Configuration > Content administration > Facets**.
2. Select **Contract facets**.
3. Set the visibility of each facet by using the corresponding slider.
4. You set the order of the facets by dragging and dropping them onto the icon with the two small lines.
5. **Save** to apply the changes.

Delegates (administrative)

The deputy administration for the administrator differs from the Deputy administration for the end user only in that way that the administrator can freely define the user name and can make company-wide delegate arrangements.

Detail tab configuration

You have the option of displaying your own detail tab pages in the contract form in order to display further information to the user or to maintain additional data.

Assuming that you want to manage mobile phone contracts, they certainly require more data than the master data available in dbs | case manager contract. You could simply add them as additional advanced properties to the master agreement, then these properties would appear in the advanced master data section of the contract form. Or you can create a detail tab that stores data in a separate database or in the advanced properties of the contract dossier.

For a detail tab to appear in the contract form, you must enter the detail tab accordingly in the configuration. The logic for when a detail tab should be displayed, for example, only in the contract context or only when selecting a certain contract type, etc., is not configured here. You must program the logic yourself in the detail tab.

If no detail tabs are listed in the detail tab configuration, you can do this directly.

This is how it works

1. Click on the button **+**.
2. Enter the data for:
   a. Name: This name is displayed in the contract form as a section header.
   b. URL: Enter the URL with which the detail tab can be accessed. Note that the details tab must be accessible via d.ecs http gateway. Hence the URL has to start with an '/'.
   c. Height: Specify how much space at height the detail tab should take up. Use only values that are valid for the CSS property 'height' to set the height of a HTML item.
   d. Icon: Specify an icon by entering the name of an icon from Material Design. Possible values can be found at https://material.io/tools/icons/.
   e. Initially visible: If you select this, the detail tab is initially visible. The visibility can be changed by the detail tab itself using an API function. If the details tab does not use this function, the details tab is always displayed when initially visible is enabled, else the detail tab is never displayed.
3. Click on **Create**.

You also have the option of creating additional tabs by enabling the option **Create another detail tab** before clicking **Create**.

1.4.4. Transporting case types

You have the possibility to transport contract types, including the associated configuration and translations, between different dbs | case manager instances.

For example, the case types configured in the test environment can easily be transferred to the productive environment.

This is how it works:

The system from which you want to export the contract types is called **source system** in the following. The system that is to import the contract types is called the **destination system**.

In the source system:

1. Select from the list of contract types which you want to export.
2. Click on Export.
3. You will get a JSON file containing the export.

> **Note**
> For each contract type, the **Configuration** and **Translations** are exported. Task templates are not included. If the default contract type **Contract Management** is exported, the **status model** for contracts is exported as well.

> **Note**
> Contract types can reference configurations of the default type **Contract Management**. This has two possible effects when transporting contract types.
>
> - If you export the default type and the configuration of the default type changes as a result, this changed configuration will be adopted for existing contract types in the destination system during an import.
> - If you do not export the default type, when you import, for all the contract types from the import that reference configurations of the default type, the configuration of the default type is taken from the destination system.

In the destination system:

1. On the Transport case types page, select **Import**.
2. The displayed field allows you to upload the export by drag&drop or clicking.
3. A list will then be displayed containing the contract types to be imported. This list is for control purposes only and does not allow further restriction.
4. Click on Import.
5. f the default type Contract Management is also exported, conflicts between the existing status model for contracts and the one to be imported are checked.
    a. If there are no conflicts, the successful import of the contract types is confirmed and the transport of contract types is completed.
    b. If the existing status model contains a contract status that is not included in the status model of the import, it must be decided whether this contract status should be kept.
    A corresponding dialog is displayed.

> **Note**
> If you decide not to keep a contract status, it will be deleted. Contracts that are in the corresponding status must be adjusted manually.

1.5. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.