Agreements Navigation and Basic Tasks

Navigate the General Dashboard Video (opens in a new tab)

Navigate the Agreements Page Video (opens in a new tab)

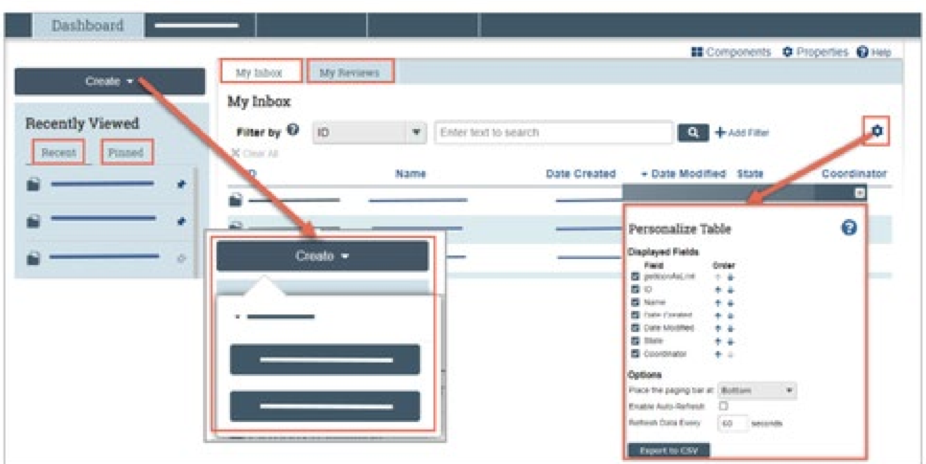
Navigate the Agreement Workspace Video (opens in a new tab)

This section explains where to go to perform basic actions on an agreement.

To find key items

From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox.
- **Create menu and buttons:** Actions you can perform. The menu will not show if you do not have access to any buttons.
- **Recently Viewed:**
  - **Recent**:The last several items you viewed. Scroll through this list to find an item you worked on recently.
  - **Pinned:** You can pin the items in Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



To take or assign ownership

1. In the Top Navigator, click **Agreements**.
2. Click the **Unassigned** tab.
3. Open the agreement you want to assign owner for.
4. On the left, click **Assign Owner**.
5. Select the owner from the available list.
6. Add any notes or attachments, if required.
7. Click the **OK** button.

The agreement will appear in the owner's inbox (My Inbox) whenever reviewer action is required.

To open an agreement

1. From My Inbox, click the agreement name.

   Alternatively, if the agreement is not in your inbox, click **Agreements** in the Top Navigator and locate the agreement on one of the tabs (All Agreements, Unassigned, etc.)

To view the current status

1. From the agreement workspace, see the status on the top left.

To take action on the agreement

1. From the agreement workspace, click the appropriate activity link on the left.

To view agreement history

1. From the agreement workspace, click the **History** tab.