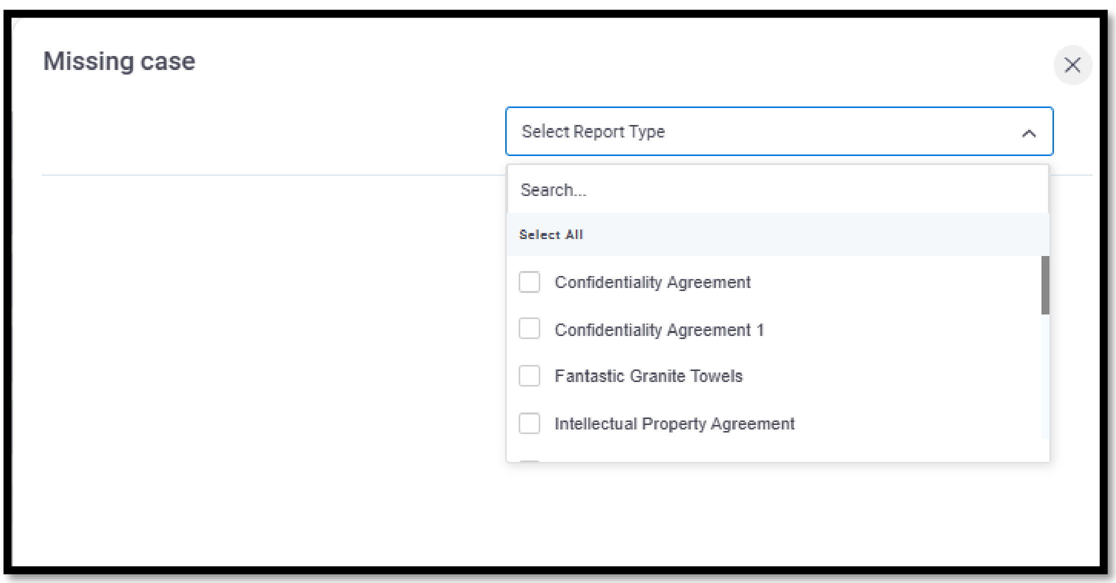
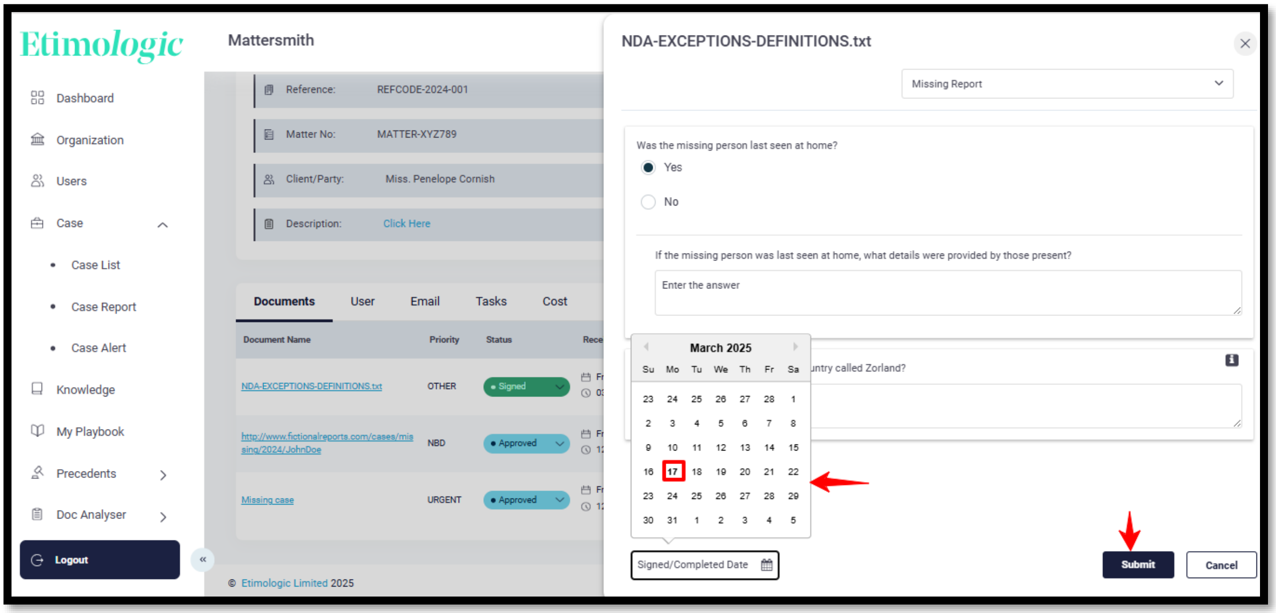
Case Report Function

1. Access Case List from the Mattersmith Dashboard and select the required Case. To create a report the status must be Completed or Signed, this will turn the Report button blue. Click on the Report button.

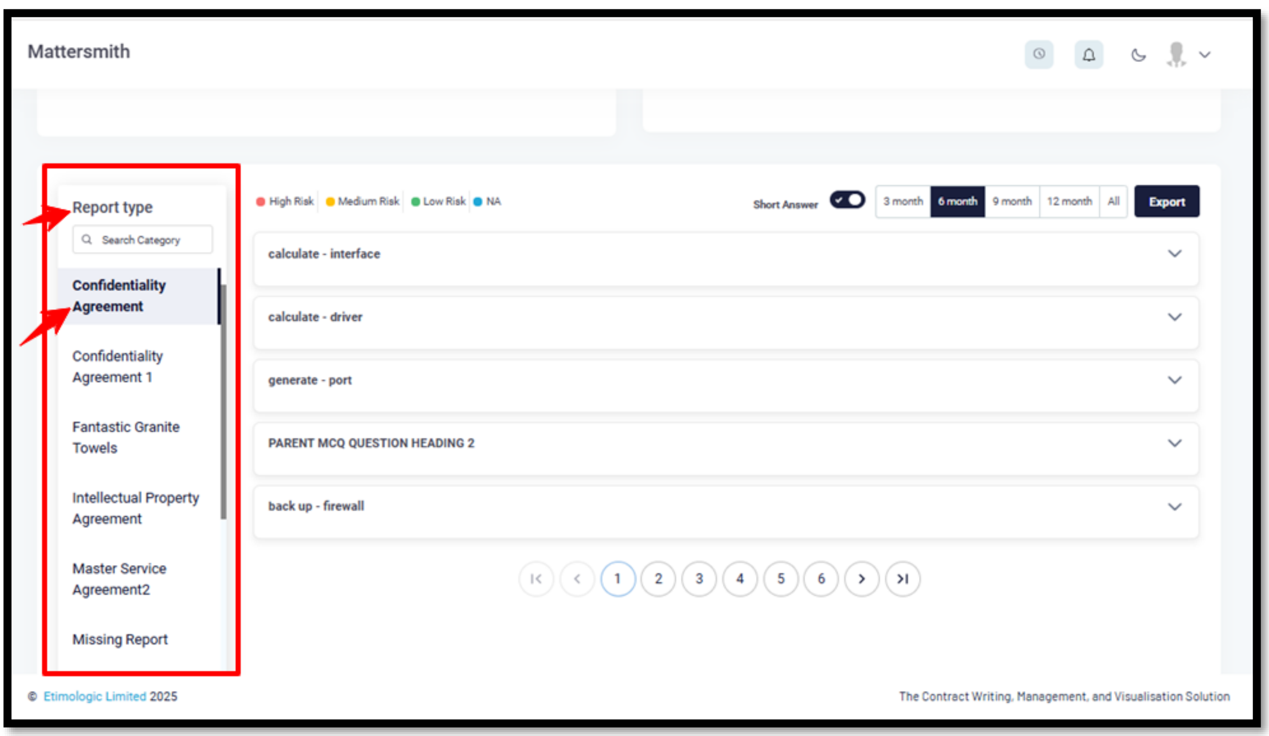
2. The Report function will open in a pop-up box. Select the required report from the drop-down menu.



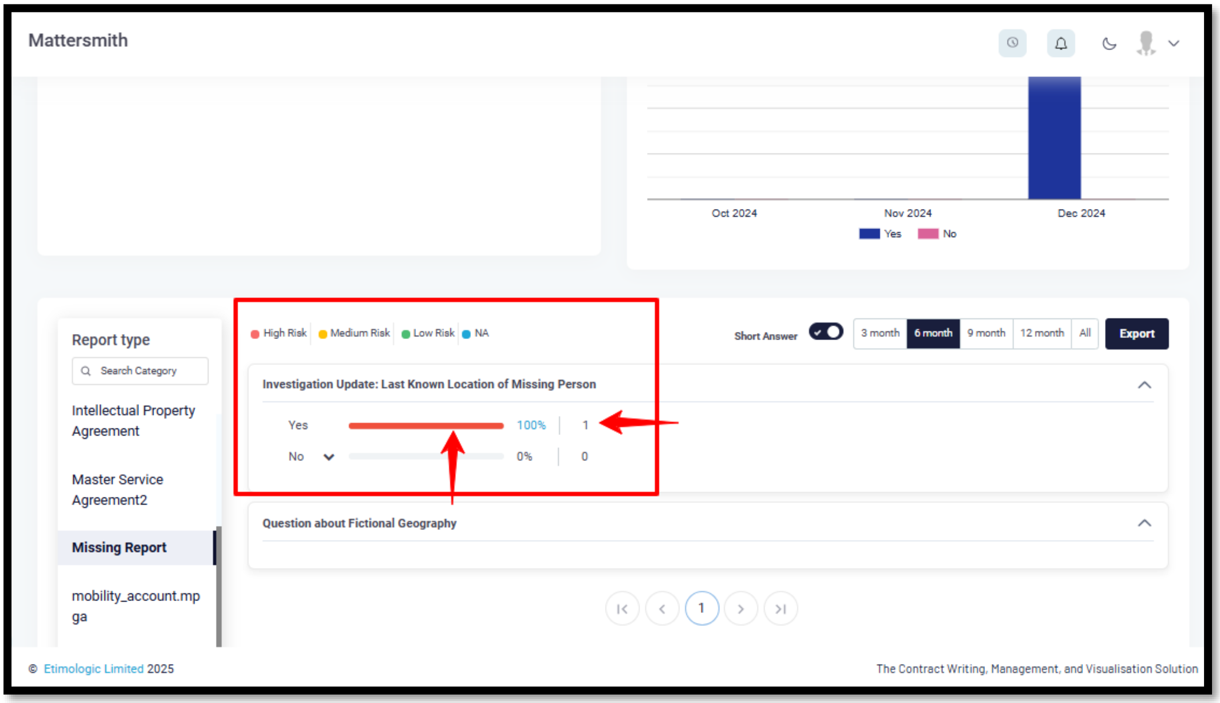
3. Complete the selected report questions, identify the completed or signed date as appropriate, and click the submit button.



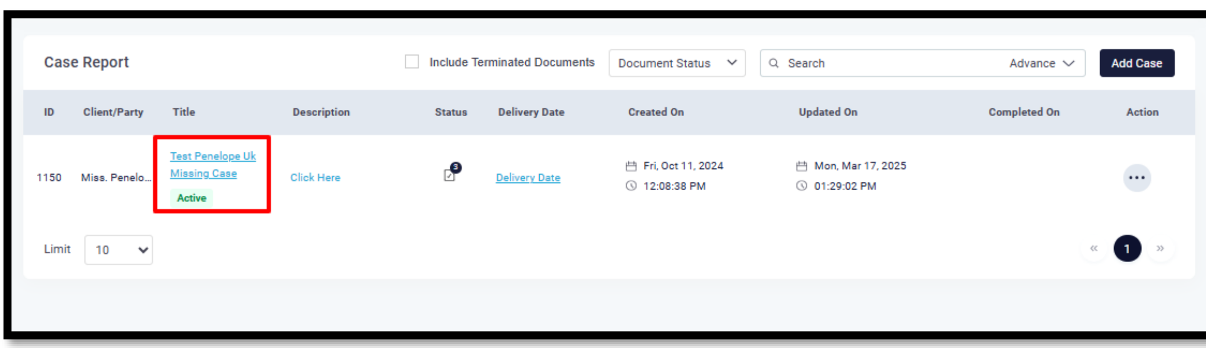
4. Navigate to Dashboard. The dashboard will update automatically. From the Management Dashboard select the document type from the list available.



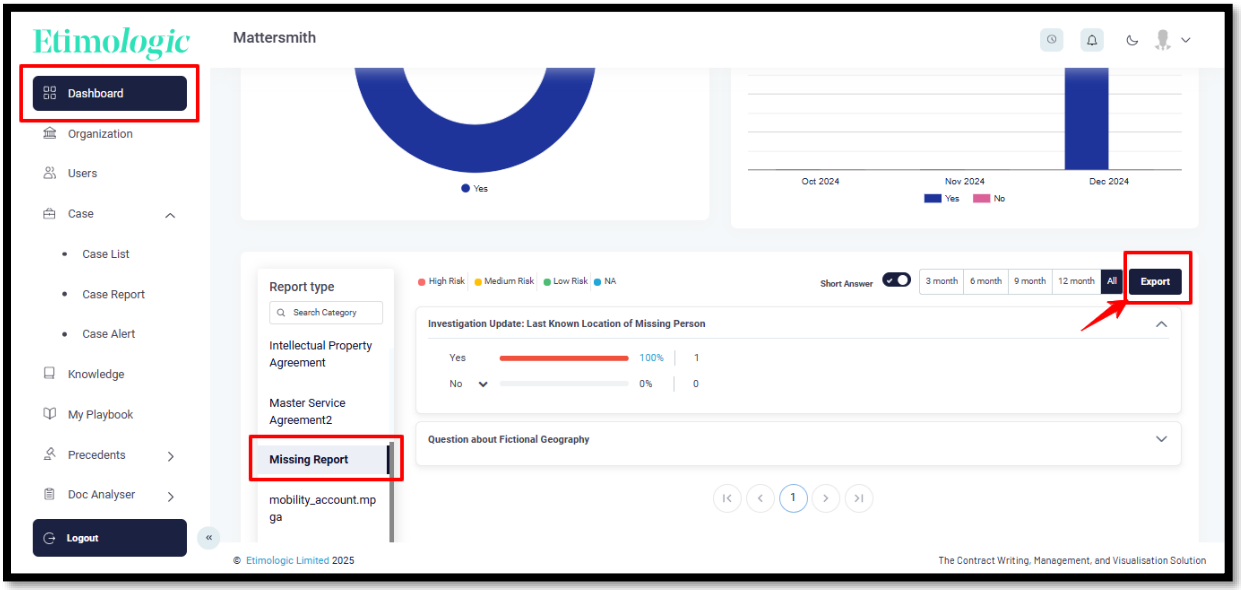
5. Once a question is selected, the results will populate the graph. You can select different periods using the drop-down menus. The percentages of the clause or provision within the sample is shown in blue and the number of documents covered by the report in black. Risk indicators are identified by colour code. By clicking on the percentage slider, you can access the Cases relating to these results for which you have been given permission.



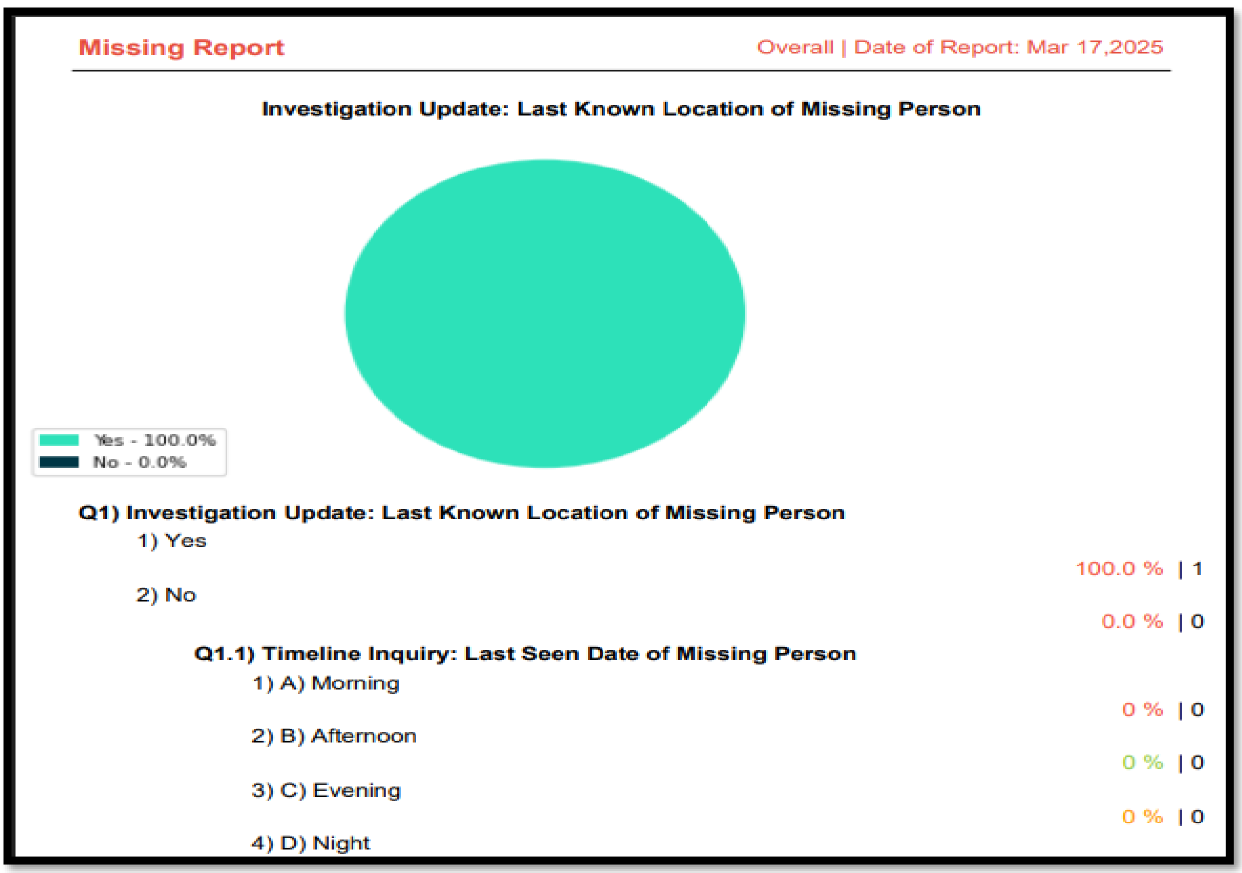
6. You can access the documents within the permissioned Cases by clicking on the title in blue. To preserve the list of cases you wish to review, right click the case title and 'Open link in new tab'.



7. Report results can be exported by clicking the turquoise button and downloading.



8. The report will show the results in graph and data form.



9. If report results need to be amended or removed from the data due to a new version of the document becoming available the ‘Status’ of the case must be changed back to ‘In Progress’, this will revert the green ‘Reported’ button back to black ‘Report’, then the case can be marked as ‘Completed’ again and the ‘Report’ button will revert to blue, allowing new data to be entered if required.