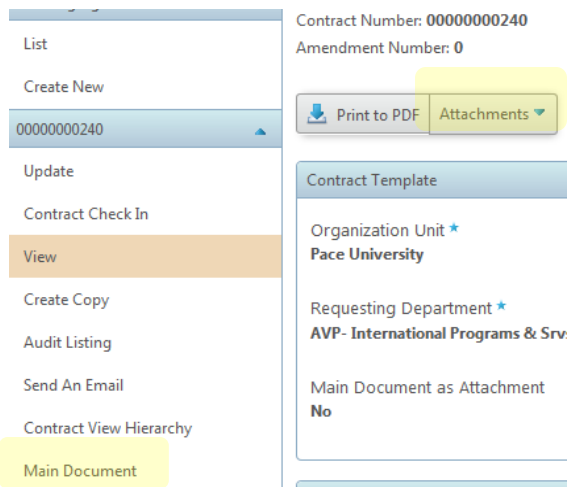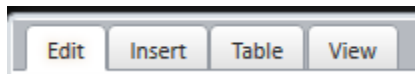## ACCESS THE MAIN DOCUMENT

- From the Contract, click the **Main Document** link from the left navigation menu to view/edit the Standard Contract Template or Rider.

  *Note - **Attachments** contains the Vendor's Paper/Contract or additional information required to process the contract.
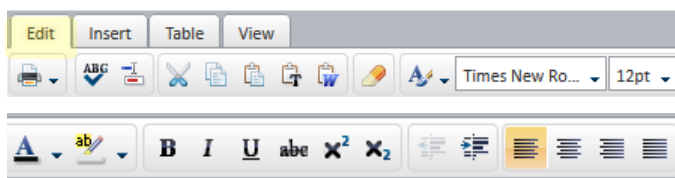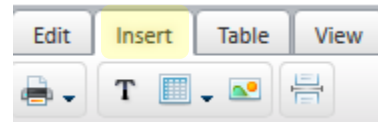
MAIN DOCUMENT

- Click **Edit**, for format adjustments
- Click **Insert**, to insert text, tables, images
- Click **Table**, to adjust table properties
- Click **View**, to open the panel, compare documents, view inline redlining, show placeholder values, switch from web to fixed view

EDIT TAB

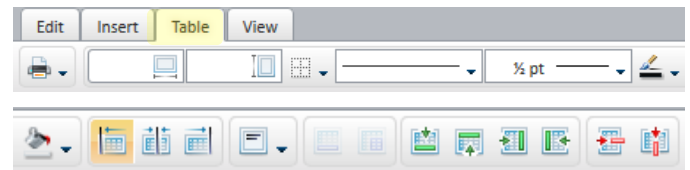- Print, spellcheck, cut, copy, paste, format font type, size and color, adjust alignment

INSERT TAB

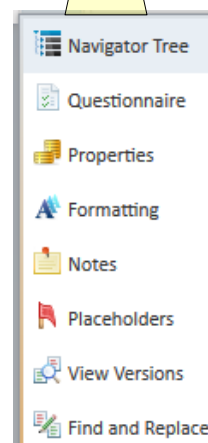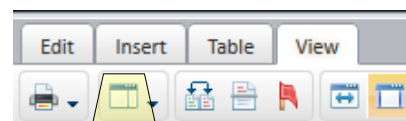- Insert text, tables, images and page breaks

TABLE TAB

Note – A table must be created from the Insert tab for the Table tab to be usable.

Set column width, row height, borders (style and width), border and background color, adjust alignment, insert/remove rows/ columns.

VIEW TAB

Open Panel, compare documents, view inline redlining, show placeholder values, and adjust view.

- **Navigator Tree** - Displays all items in a document, and their relative position within the document. Items are listed in order of insertion.

- **Questionnaire** - Adjust clause settings for: alternate or additional clause, numbering, mandatory type, help text, classifications, compliance items, keywords and security.

- **Properties** - Contains settings for selected items in the document editor. Adjust item settings for: numbering, mandatory type, help text, classifications, compliance items, keywords and security.

- **Formatting** - Used to change style information such as pagination, indentation, spacing and tabs, on individual items within the document editor, and overwrites the template stylesheet formatting.

- **Notes** - Allows you to add additional text information to individual items within the document editor.

- **Placeholders** - Used to capture and display data that has been entered in other areas of the application, such as contract manager, contract number, contract date and second party information.

- **View Versions** - used to compare two different versions of a single item in the document editor. A version of an item is created every time changes are made and the item is saved. Only two versions can be compared at once.

- **Find and Replace** - search the document editor (including tables) to find a specific word. It can also be used to replace selected words with different text or with placeholders.
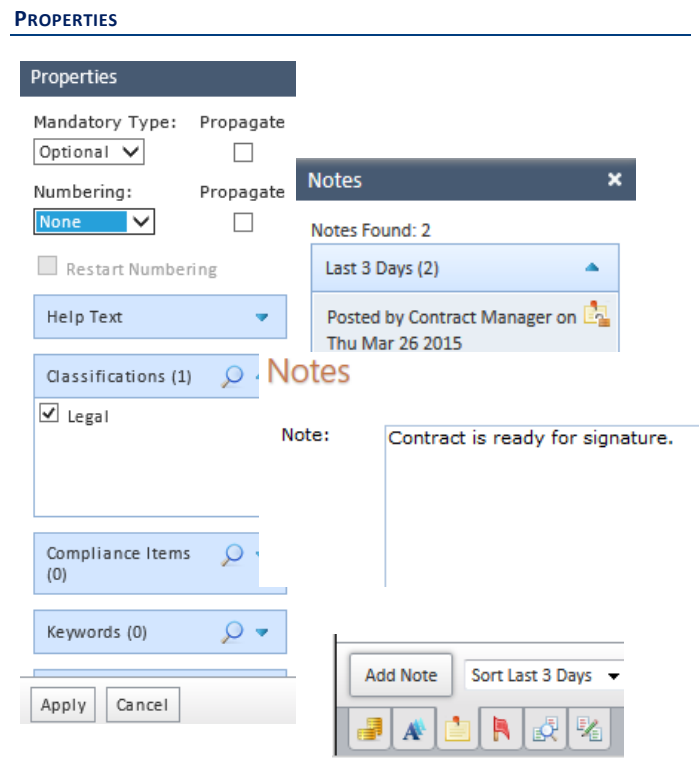
MAIN DOCUMENT EDITING TECHNIQUES

- Shift Enter – Creates a soft break/new paragraph instead of a new contract clause.
- Ctrl X - Cuts selected/highlighted clause text
- Ctrl C - Copies selected clause text
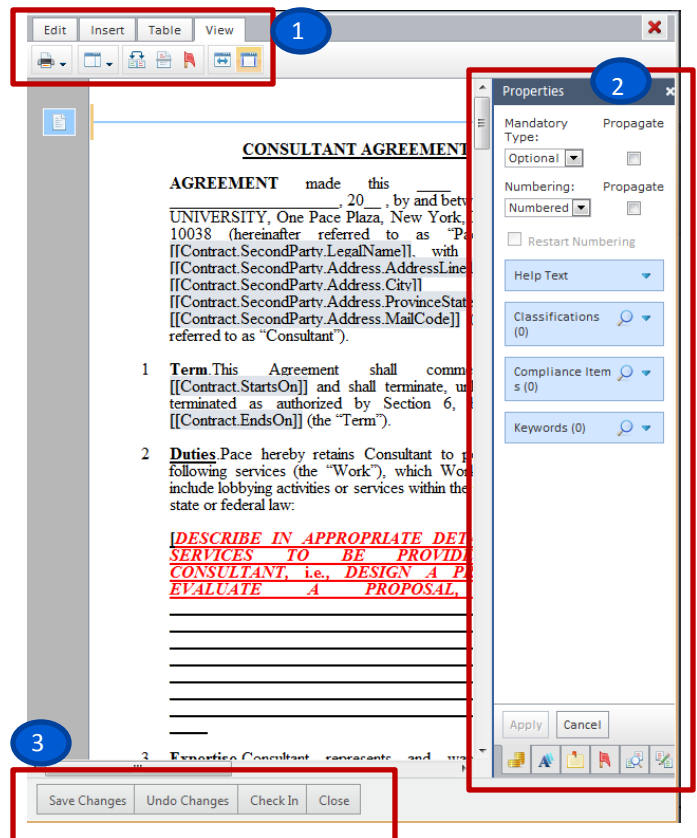- Ctrl V - Paste copied clause text

BUTTONS

These buttons appear on the bottom of the editor window:

- **Save Changes** – Saves the changes made to the document
- **Undo Changes** – Undoes any changes made and reverts document to last saved version
- **Check Out** – Checks out the document for editing. A document can only be checked out to one user at a time. This button is only available if the document is available to be checked out by you.
- **Check In** – Checks in a document. In order for another user to be able to check out the document, the current user must check the document back in. This button is only available if the document is currently checked out to you.
- **Close** – Closes the document editor

PROPERTIES

MAIN DOCUMENT VIEW

1. **Tabs**
2. **View tab – Properties**
3. **Buttons**