Step-by-Step Instructions for Creating a Contract Template

1. Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Contracts** and then select **Browse Templates** from the drop-down menu.

2. Click **Create Template**.

3. Complete the template details. Please refer to the next page for details regarding the required fields.
Step-by-Step Instructions for Creating a Contract Template

3. **Code**: This is a manually entered code. No spaces or special characters are allowed. Only alphanumeric characters and underscores can be used.

4. **Name**: This is the label for the template and should be descriptive.

5. **Contract Type**: This field includes the contract type that can leverage this template. If this template should be used for multiple contract types, additional contract templates will need to be created for each contract type.

6. **Contract Sub-Types**: This field includes all of the contract sub-types that can leverage this template. If all contract sub-types can leverage the template, then it is important to select all of the values.

7. **Comments**: This includes any helpful comments for users who are responsible for managing the contract.

8. **Contracting Entity**: This includes all contracting entities that can leverage the contract.

After completing the contract details, click **Save**.

Navigate to the **Clause Authoring** tab to edit the template.

To leverage an existing template, start typing the template name in the **Select Template** field.

After selecting the existing template, the clauses will appear. They will be available for additional editing.
Step-by-Step Instructions for Creating a Contract Template

7. To add a master clause, click **Add a Master clause**.
   
   Using the **Keywords** field, search for the name of the clause you need to insert. Click the **insert (      )** icon next to the clause.

8. Language can also be typed directly into the contract template. Click **New Clause** under the existing clause that should come before the clause you are inserting.
   
   Click **Ok** to confirm.

9. Click inside the area for the new clause. Language can be typed directly into the template or copy/pasted using the text editor.

10. If a clause needs to be moved, they can be dragged and dropped in the necessary order. Under the Summary section.
Clauses can be deleted by clicking the X icon next to the clause under the Summary section. Click Ok.

To save this version of the template. Click the plus sign (+) under the Version Management section.

A version code will automatically populate. Enter a label.

Click the Create Version button after all fields are complete. The version will be locked for editing.

Click Submit for review. The contract template will be routed to all Deputy Chief Procurement Officers (DCPOs) for review.
Step-by-Step Instructions for Approving a Contract Template

1. Log in to Ohio|Buys. Click the object hyperlink next to the template that needs to be approved. The template will have an Activity of “Final Approval.”

2. To review the contents of the template, navigate to the Clause Authoring tab.

For each clause, there are various actions that can be taken.

a) **Description:** This contains comments or attachments related to the clause.

b) **Mark as read:** This will mark the individual clause as read/reviewed.

c) **Lock/Unlock:** This locks or unlocks the clause. Note: only clauses on the current version can be locked or unlocked. This will affect whether other users viewing the draft template can edit upon opening. Users do have the option to unlock while drafting.

d) **Comment:** Approvers can type in comments for each clause or attach documents to support their comments.

   ▲ Approvers are encouraged to leave comments or provide examples via the attachments on their comments if they want changes made to a template before publishing. After making comments, click **Refuse** to send it back to the Template Manager.

3. **History:** Users can view the entire history of the clause, compare versions, and even revert the clause to a previous version.
Step-by-Step Instructions for Approving a Contract Template

To approve and publish the template, click **Approve**. The template will immediately become available to contract creators for use.

To reject the template, click **Refuse**.
Step-by-Step Instructions for Updating an Existing Template

1. Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Contracts** and then select **Browse Templates** from the drop-down menu.

2. Using the **Keywords** field search for the contract that needs to be updated and click the **Pencil (✏️)** icon next to the template.

3. Update the contract template details as needed.
Step-by-Step Instructions for Updating an Existing Template

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Navigate to the **Clause Authoring** tab to edit the template.

5

To add a master clause, click **Add a Master** clause.

Using the **Keywords** field, search for the name of the clause you need to insert. Click the **insert (      )** icon next to the clause.

6

Language can also be typed directly into the contract template. Click **New Clause** under the existing clause that should come before the clause you are inserting.

Click **OK** to confirm.
Click inside the area for the new clause. Language can be typed directly into the template or copy/pasted using the text editor.

If a clause needs to be moved, they can be dragged and dropped in the necessary order. Under the Summary section.

Clauses can be deleted by clicking the X icon next to the clause under the Summary section. Click **Ok**.
Step-by-Step Instructions for Updating an Existing Templates

To save this version of the template. Click the **plus sign (+)** under the **Version Management** section.

A version code will automatically populate. Enter a label.

Click the **Create Version** button after all fields are complete. The version will be locked for editing.

▲ When editing an active contract template, it is very important to create new versions for tracking purposes. Edited templates are not routed for additional approval prior to being made available to contract creators.

Click **Save**.