Step-by-Step Instructions for Adding a New Clause

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

2. Click **Create Master Clause**.

3. Complete the fields related to the clause.
   - **Clause Name**: This is a label for the clause that will help users identify the contents.
   - **Comments**: These are any comments that will help users manage the clause or provide additional context for approving.
   - **Instructions**: These instructions help contract creators understand how to leverage the clause when authoring contracts.
   - **Locked by Default**: Engaging this field will lock the clause when it is inserted into an authored contract. Note: the contract can be unlocked by the contract creator.
   - **Contracting Entity**: This field restricts usage of this clause to specific contracting entities.
How to Manage the Contract Clause Library

Step-by-Step Instructions for Adding a New Clause

4

Click Save.

Additional tabs will appear on the left-hand side.

5

Click in the Clause Content section.

Using the text editor, type directly in the section or copy/paste existing text. The text editor can be used to enrich the text (i.e. bold, italicized).

6

Drafts can be saved and finished later by clicking Save. When you are ready to make the clause available to the public for use, click Publish.
The clause will be locked for editing. If a new version needs to be created to incorporate updates, refer to the next page for steps on editing an existing clause.
Step-by-Step Instructions for Updating an Existing Clause

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

2. Using the **Keywords** field search for clause and click the **Pencil (✏️)** icon.

3. To update information related to the clause or the language in the clause itself, click **Create Version**.

4. Make the necessary updates and once complete, click **Publish**.

   The edits will be visible in the clause for any new contract templates or authored contracts are created in Ohio|Buys

5. There may be existing contract templates that leverage the clause that will require a manual update. Navigate to the Templates tab to view all templates that leverage a version of the clause.
Step-by-Step Instructions for Managing the Contract Clause Library

6. To update all of the templates with the most recent version of the clause, click **Update All**. Only contracts in Draft status will be visible. There is no option to update active contracts.

7. To update only select templates, click the checkbox next to the template then click **Update Selected**.

8. There may be existing contracts that leverage the clause that will require a manual update. These contracts may be in various statuses such as Draft, Signature in Progress, or Signed.

   Navigate to the Contracts tab to view all contracts that leverage a version of the clause.

9. To view the details of each contract, click the **Show details** hyperlink.

10. ▲ It is a best practice to notify the contract owners of the changes instead of manually pushing out updates to the contract. Pushing out updates will override any manual changes that have been made to that particular contract which will undo the work done during negotiations.

    To notify contract owners of changes to the contract clause, click **Notify All**. On the subsequent pop up message, click **OK**.
Step-by-Step Instructions for Archiving a Contract Clause

If contract owners are not notified or the contract is not mass updated, contract owners will see the option to update a master clause when they log in to the contract to review the Documents tab.

Clicking the **Update** hyperlink will allow the user to see the current version of the clause in their contract compared to the new version.
Step-by-Step Instructions for Archiving an Existing Clause

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

2. Using the **Keywords** field search for clause and click the **Pencil** (✏️) icon.

3. Click the **Archive** button.

The master clause will not be available for future use if a new contract is created. However, if the clause has already been added to a contract it will remain inside of the authored document.

If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).