

CONTRACTS+

JAGGAER CONTRACT AUTHORIZING FOR WORD APP GUIDE

PRODUCT VERSION 19.3



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JAGGAER Contract Authoring for Word App

The JAGGAER Contract Authoring for Word app is a contract authoring tool that allows clause, main document templates and contract text to be managed in Microsoft Word. Documents can be opened directly from Contracts+.

Security is applied from Contracts+. Once the app is installed, you can sign in and out of the app with your Contracts+ login credentials. If your system does not require a password, the Word app will open automatically if you are logged into Contracts+. Access to a record is based on your permissions in Contracts+.

The app is only available for use with Microsoft Word 2013 and above.

The Word app works in a similar way for clauses, main document templates and contracts, but there are a few differences. Here is a general overview of how it is used with each feature:

USING THE WORD APP WITH CLAUSES

- **Create a clause and attach the clause document** - A clause record is created in Contracts+, and the Word document that will be used for clause text is attached to the record and placed in Draft status. You can upload an existing Word file or let the system create a new document by selecting **Create a Blank Word Document for Me**.
- **Modify the clause text** - Once the clause document is saved to the record in Contracts+, it can be opened and edited in Microsoft Word using the Word app. When developing clause text, you can check the clause in and out, insert placeholders, and make any number of changes while the clause is in Draft status. Once the Word app is in use on a clause, all updates to text must be made through the app.
- **Finalize the clause** - Once the clause is ready to use, the draft must be finalized before it can be used with main document templates and contracts. The **Finalize Draft** action can be performed from the Word app or from Contracts+. The Finalize Draft action can also be scheduled so that it occurs on a future date.
- **Add finalized clauses to templates or contracts** - Once the clauses are finalized, they are active and can be inserted into main document templates and contracts. If changes are needed, a new draft can be created at any time.

USING THE WORD APP WITH MAIN DOCUMENT TEMPLATES

- **Create a main document template and attach the template document** - A template record is created in Contracts+, and the Word document that will be used for template text is attached to the record and placed in Draft status. You can upload an existing Word file or let the system create a new document by selecting **Create a Blank Word Document for Me**.
- **Modify the main document template text** - Once a main document template document is saved to the record in Contracts+, it can be opened and edited in Microsoft Word using the Word app. When developing template text, you can check the template in and out, insert placeholders, insert clauses (including alternative language clauses) and make any number of changes while the template is in Draft status. Once the Word app is in use on a template, all updates to text must be made through the app.

- **Finalize the main document template** - Once the main document template is ready to use, the draft must be finalized before it can be used with contracts. The **Finalize Draft** action can be performed from the Word app or from Contracts+. The Finalize Draft action can also be scheduled so that it occurs on a future date.
- **Use the finalized main document template to create contracts** - Once main document templates are active, they are available for use when creating contracts. If changes are needed, a new draft can be created at any time. The use of main document templates is optional when creating contracts. You can choose to use a main document template (using the text provided by a template), or a separate Word file can be uploaded to use for contract text.

USING THE WORD APP WITH CONTRACTS

- **Create a contract and attach the contract document** - A contract record is created in Contracts+, and the Word document that will be designated as the contract's **Main Document** (the one that contains the contract text) is attached to the record and placed in Draft status. When creating a contract, you can choose to use a main document template (using the text provided by a template), or you can upload a separate file by selecting **Upload My Own Contract**.
- **Modify the contract text** - Once the contract's main document is saved to the contract record in Contracts+, contract text can be edited in Microsoft Word using the Word app. You can search for contracts, check contracts in and out for editing, insert placeholders, insert clauses, and modify contract text in Microsoft Word. Once the Word app is in use on a contract, all updates to contract text must be made through the app. Changes to contract text are saved in Contracts+.
- **Release the contract for approval** - Once the contract is ready, it is submitted for approval. Once approved, it moves to Executed: In Effect status.

SEARCHING

Search fields on the Contracts, Template Library and Clause Library tabs in the Word app provide a way to open main document templates and contracts for editing without opening the document from Contracts+.

CHECK IN AND CHECK OUT

Checking out a clause, main document template or contract gives you exclusive use of the document and prevents other users from modifying text while you are working on it. You must check out a document before you can make changes to it. Once you have made all your changes, checking in saves your changes to the document in Contracts+ and makes it available to other users for editing.

At any time, you can click Discard Check Out to undo all changes and return to the last saved version of the document. All changes made since the last save will be erased.

PLACEHOLDERS

Placeholders are used to insert data from the contract header into document text. They provide a way to automatically display information that is different for each contract, such as the contract number or second party, without having to manually update the text on every contract. Placeholders capture the variable field wherever necessary and inserts the proper defined value in its place.

The contract fields that can be inserted as placeholders are listed on the Placeholders tab, under the same group headings they appear under on the contract header.

The following types of custom contract fields are supported as placeholders in the Word app:

- Yes/No
- Dropdown List (Pick One)
- Multiple Choice (Pick One)

In Placeholders tab, custom contract fields are displayed at the end of the placeholder list, under the same headings they are grouped under on the contract header.

CLAUSES

Finalized, active clauses can be inserted into main document templates or contracts.

Clauses added to a **main document template** appear on all contracts created from the template. Alternative language clauses can only be added to main document templates. In this case, an alternative language clause is inserted into template text as a table that contains the default clause, plus all of its alternative text options. When a contract is created from the main document template, only one of clauses is inserted into the text based on field values selected on the contract header. Check the online help for detailed information about working with alternative language clauses.

Clauses on a **contract** are populated from main document templates, but can also be inserted directly into a contract.

VERSIONS

Each time a document is updated and checked in from the Word app, a version is created in Contracts+. Upon completing the check in, the document is not saved locally, but the changes will be pushed to Contracts+ as a new version of that document. This means that saving any document using normal Word procedures, such as saving to your desktop, is not required.

Versioning works slightly differently for clauses and main document templates, and contracts:

- **Clauses and main document templates** - When you need to change a template or clause, you must create a draft copy of the current version to begin making edits in the Word App. The draft version is active – it can be downloaded, changed, and checked in and out any number of times, but it cannot be used in a template or contract until it is finalized.
- **Contracts** - A new version is created in Contracts+ each time a document is updated and checked in from the Word app.

Older versions of a document can be accessed from their Version History in Contracts+, but they can no longer be edited.

Open the Word App for the First Time

The following steps are performed the first time you open the Word app.

Before you begin, you will need an **activation code** from Contracts+. Depending on your system settings you may also need your **username** and **password** from Contracts+.

Note: System administrators can generate a user-specific activation code for each user who requires access to the Word app. See [JAGGAER Authoring for Word App Setup](#).

The app is only available for use with Microsoft Word 2013 and above, and Internet Explorer 10 and above.

Step-by-Step

1. Open a blank document in Microsoft Word.
2. Open the Microsoft Word app as follows:
 - Click the **INSERT** tab.
 - Expand the **My Apps** menu and click **See All...**
 - If this is the first time you are downloading the app, click the **STORE** tab and search for the JAGGAER Contract Authoring for Word app.
 - Click the **JAGGAER Contract Authoring** icon and click **INSERT**. If this is the first time you are downloading the app, click **Trust It**. The JAGGAER Contract Authoring for Word app appears in a panel on the right side of the screen, displaying the Contracts+ sign in page.
3. Click **Sign In**.
4. Enter your **activation code**.
5. Depending on your system settings, either enter your **password** from Contracts+ or click **Continue**. You are logged into the app.

For subsequent log ins, your system may require your Contracts+ password to log into the Word app if it has been longer than 30 minutes since you last logged in. If your system does not require a password, the Word app will open automatically if you are logged into Contracts+.

See *Best Practices* and *Troubleshooting* in the online searchable help for more information.

Search for Clauses, Main Document Templates and Contracts from Word

Search fields allow you to open clauses, main document templates and contracts for editing without logging into Contracts+. You can also search from a document that you have already opened from Contracts+ as long as it is not checked out.

The steps below show you how to search from a blank Word document.

Step-by-Step

1. Open blank Microsoft Word document. The Word app is displayed in a panel to the right.

Note: Make sure there is no text in the document, including text in headers and footers. You can clear all text in the document by using **CTRL-A**, then **Delete**.

2. If required by your system, enter your **password** and click **Sign In**. For systems that require a password, the sign-in page only appears if you have not used the Word app in the last 30 minutes. Otherwise you will not need to enter a password to open the Word app if you are logged into Contracts+.

Note: If you do not see the Word app in the right panel, click **INSERT** in the Microsoft ribbon. Under the My Apps menu, select the JAGGAER Contract Authoring icon, and click **Insert**.

3. Click the **Contracts**, **Template Library** or **Clause Library** tab.

4. Enter search criteria as follows:

- **Contracts** tab - Enter **search criteria** in the open field (maximum of 200 characters) and click the **Search** icon (🔍).
- **Template** and **Clause Library** tabs - Choose one of the following options to search:
 - In the open search field, enter keywords that will identify the clause you want to insert and click the **Search** icon (🔍).
 - Click **More Options** to open search filters. Enter information in the fields and click **Search**.

Search results appear underneath the Search field. You will only see the latest version of documents that you have access to.





5. (optional) Click on a search **result**, then click **Check Out** to open the file. You will not see search options while you have a record checked out.

Open Word Documents from Contracts+

Clause, template and contract text is managed in Microsoft Word using the JAGGAER Contract Authoring for Word app. The record must be created and saved with the main document attached in Contracts+ before you can edit the document in the Word app.

- You need the **Manage Contract Templates and Clauses** permission to open clause and template documents.
- You need the **Contract Manager**, **Contract Administrator** or **Contract Super User** permissions, or be designated as the **Contract Facilitator**, to open contract documents.

Step-by-Step

1. Choose the appropriate navigation path:
 - Clauses - **Contracts**  > **Libraries** > **Clause Library**.
 - Templates - **Contracts**  > **Libraries** > **Contract Template Library**.
 - Contracts - **Contracts**  > **Contracts** > **Contract Search** (or **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the clause, template or contract record.
3. Download the document:
 - *For clauses and templates* - Click the  **file download link** in the **Current Version** or **Draft Version** columns.
 - *For contracts* - Click **Open Main Document** in the left menu, or click the **Main Document** link on the Attachments page.
4. **Open** the downloaded file in Microsoft Word. This will depend on your browser. You may need to click the **document icon** in the lower left corner, or click **OK** to open it from a pop-up window.
5. In the open Word file, you may need to click **Enable Editing**. Once the document opens, the Word app is displayed in a panel to the right.
6. If required by your system, enter your **password** and click **Sign In**. For systems that require a password, the sign-in page only appears if you have not used the Word app in the last 30 minutes. Otherwise you will not need to enter a password to open the Word app if you are already logged into Contracts+.
7. If applicable, click **Open Latest Version** in the Word app panel on the right to make sure you have the most recent version of the record.

Note: This button is displayed if there is a newer version of the document available. If you want to work with the newer version of text, clear all existing text (including headers and footers) by using **CTRL-A**, then **Delete**, then click **Open Latest Version** to populate the document with the newest version of text.

8. Click **Check Out** to prevent other users from modifying the text while you are making changes.

Note: At any time you can click **Discard Check Out**. No changes will be saved to JAGGAER Indirect/Contracts+. To return to the last saved version of the document, clear the contents of the Word document section and select **Open Latest Version**, or download again from Contracts+.

9. (optional) You may want to make sure **Track Changes** is turned **OFF** in Word, on the REVIEW tab.

Note: If Tracked Changes is on, any tracked changes and comments will appear in all documents generated from the Word document, including downloaded PDF documents. When working with templates, Track Changes must be turned **OFF** before you can delete clauses from a template.

Edit a Document in the Word App

Once a Word document is initially saved as a clause, main document template or contract in Contracts+, it can be opened and edited in Microsoft Word using the JAGGAER Contract Authoring for Word app.

Before you start working on a document, you must check it out. Checking out a clause, main document template or contract gives you exclusive use of the document and prevents other users from modifying text while you are working on it. Once you have made all your changes, checking in saves your changes to the document makes it available to other users for editing.

Step-by-Step

1. Open a draft version of a **contract**, **clause** or **main document template** in the Word app.
2. If applicable, click **Open Latest Version** in the Word app panel on the right to make sure you have the most recent version of the record.

Note: This button is displayed if there is a newer version of the document available. If you want to work with the newer version of text, clear all existing text (including headers and footers) by using **CTRL-A**, then **Delete**, then click **Open Latest Version** to populate the document with the newest version of text.

3. Click **Check Out** to prevent other users from modifying the text while you are making changes.

Note: At any time you can click **Discard Check Out**. No changes will be saved to JAGGAER Indirect/Contracts+. To return to the last saved version of the document, clear the contents of the Word document section and select **Open Latest Version**, or download again from JAGGAER Indirect/Contracts+.

4. (optional) You may want to make sure **Track Changes** is turned **OFF** in Word, on the REVIEW tab.

Note: If Tracked Changes is on, any tracked changes and comments will appear in all documents generated from the Word document, including downloaded PDF documents. When working with main document templates, Track Changes must be turned **OFF** before you can delete clauses from a template.

5. Change text as needed.
6. When you are ready to save your changes, click **Check In**.
7. **For clauses and templates ONLY** - Under **Are you ready to finalize this draft clause?** choose one of the following options:
 - Select **No, just save my changes** if you are still working on the text and need to make further changes. This will save the changes you've made so far, but will not finalize the document.
 - Select **Yes, save and finalize now** if the clause or main document template is finished and you want to use it immediately. This will make the clause or main document template ready for use. **Note:** You can save your changes and perform the Finalize Draft action from Contracts+ at a later date using the option above.

- Select **Yes, schedule for a future date** if the clause or main document template is finished, but should not be used until a specific date. If this option is chosen, the Effective Date field appears and you need to **enter the date** that the clause or template will be in effect. **Note:** The clause or main document template is still considered a draft while it is scheduled and can be checked out again if necessary.
8. (optional) Enter information regarding your updates in the **What changes did you make?** field. These appear in the Attachments, Clause Library or Contract Template Library history for the record in Contracts+. It is also added to the Comments column of Version History for the appropriate version of each document.
 9. (optional) Click **Keep this [clause/template/contract] checked out to me** if you want to save your changes and keep the document checked out to you for further editing.
 10. Click **OK**. Your changes are saved and pushed to Contracts+.

Note: When you close the Word file, you will still be asked if you would like to save your changes. If a check in has been done this is not required.

Insert Placeholders into Clauses, Main Document Templates or Contracts

Placeholders can be inserted into clause, main document template or contract text. In clauses and main document templates, the placeholder name appears in the text surrounded by square brackets, e.g., [[Contract Name]]. In contracts, the placeholder value from the contract header appears in the text, e.g., Legal Services Contract, unless the field is blank on the contract header, in which case the placeholder name appears as it does for clauses and main document templates.

- The following types of custom contract fields are supported as placeholders in the Word app:
 - Yes/No
 - Dropdown List (Pick One)
 - Multiple Choice (Pick One)
- If configured for your organization, **Approver** placeholders can be added into clause, main document template or contract text, and approval information will be automatically displayed on the main contract document once the contract is approved. This may be helpful for customers that are not using eSignature, but still want to note workflow step approvers and approval information on the contract document.

Note: Workflow must be configured for your organization in order to use Approver placeholders.

- Within the text, placeholders are highlighted in gray when you pause your mouse over them. If you are using the JAGGAER ribbon, select **Show Placeholders** to display placeholder names in the text.

Step-by-Step

1. Open the **clause**, **main document template** or **contract** in the Word app.
2. If applicable, click **Open Latest Version** in the Word app panel on the right to make sure you have the most recent version of the record.

Note: This button is displayed if there is a newer version of the document available. If you want to work with the newer version of text, clear all existing text (including headers and footers) by using **CTRL-A**, then **Delete**, then click **Open Latest Version** to populate the document with the newest version of text.

3. Click **Check Out** to prevent other users from modifying the text while you are making changes.

Note: At any time you can click **Discard Check Out**. No changes will be saved to Contracts+. To return to the last saved version of the document, clear the contents of the Word document section and select **Open Latest Version**, or download again from Contracts+.

4. (optional) You may want to make sure **Track Changes** is turned **OFF** in Word, on the REVIEW tab.

Note: If Tracked Changes is on, any tracked changes and comments will appear in all documents generated from the Word document, including downloaded PDF documents. When working with templates, Track Changes must be turned **OFF** before you can delete clauses from a template.

5. In the text on the left, **place your cursor** where you want to insert a placeholder.
6. In the right panel, click the **Placeholders** tab. Placeholders are listed under the same group headings they appear under on the contract header. Custom contract fields are displayed at the end of the placeholder list, under the same headings they are grouped under on the contract header.
7. Expand a **placeholder group**, highlight the appropriate **placeholder**, then select **Insert** on the right. The placeholder is inserted into the text.

Note: If you are inserting a contract party, you can choose **Address Block** to insert the contract party and their address information with one click. Each piece of data is inserted as a separate placeholder so that you can delete the placeholders you don't need. This can also be done for contacts by selecting **Contact Block**.

8. When you are ready to save your changes, click **Check In**.
9. (optional) Enter information regarding your updates in the **What changes did you make?** field. These appear in the Attachments, Clause Library or Contract Template Library history for the record in Contracts+. It is also added to the Comments column of Version History for the appropriate version of each document.
10. (optional) Click **Keep this [clause, template, contract] checked out to me** if you want to save your changes, but keep the document checked out to you for further editing.

11. Click **OK**. Your changes are saved and pushed to Contracts+.

Note: When you close the Word file, you will still be asked if you would like to save your changes. If a check in has been done this is not required.

Insert Clauses into Templates or Contracts

Finalized, active clauses can be inserted into main document templates or contracts.

Clauses added to a **main document template** appear on all contracts created from the template. Alternative language clauses can only be added to main document templates. In this case, an alternative language clause is inserted into template text as a table that contains the default clause, plus all of its alternative text options. When a contract is created from the main document template, only one of clauses is inserted into the text based on field values selected on the contract header. Check the online help for detailed information about working with alternative language clauses.

Clauses on a **contract** can be populated from main document templates, but they also can be inserted directly into contract text, except for alternative language clauses. Clauses that are used as part of a "Standard Clause with Options" alternative language clause can be inserted into contract text as a stand-alone item. Clauses that are part of "Jurisdiction" or "Contract Custom Field" alternative language clauses cannot be added to contracts.

Clauses acquire the formatting of the **main document template** or **contract** they are pulled into (i.e., the font, size, and color), based on the *Normal* default style settings of the template or contract in Word. This means that clause formatting does not have an effect on how the clause appears on a contract *except* for the numbering indent levels that are applied. Numbering a clause WILL affect how it can be numbered in a main document template or contract. See [Best Practices](#) for more information.

Note: Column formatting on clauses will not be retained when the clause is inserted into a main document template or contract.

Step-by-Step

1. Open the **main document template** or **contract** in the Word app from Contracts+.
2. If applicable, click **Open Latest Version** in the Word app panel on the right to make sure you have the most recent version of the record.

Note: This button is displayed if there is a newer version of the document available. If you want to work with the newer version of text, clear all existing text (including headers and footers) by using **CTRL-A**, then **Delete**, then click **Open Latest Version** to populate the document with the newest version of text.

3. Click **Check Out** to prevent other users from modifying the text while you are making changes.

Note: At any time you can click **Discard Check Out**. No changes will be saved to Contracts+. To return to the last saved version of the document, clear the contents of the Word document section and select **Open Latest Version**, or download again from Contracts+.

- (optional) You may want to make sure **Track Changes** is turned **OFF** in Word, on the REVIEW tab.

Note: If Tracked Changes is on, any tracked changes and comments will appear in all documents generated from the Word document, including downloaded PDF documents. When working with main document templates, Track Changes must be turned **OFF** before you can delete clauses from a template.

- In the right panel, click the **Approved Clauses** tab.
- Choose one of the following options to search:
 - In the open search field, enter keywords that will identify the clause you want to insert and click the **Search** icon (🔍).
 - Click **More Options** to open search filters. Select or enter information in the fields and click **Search**.
- In the Word document text on the left, **place your cursor** where you want to insert a clause.
- In the right panel, click **Insert** next to the clause.

Note: If you are inserting an alternative language clause, you must select a clause that has the alternative language icon (🌐) or fallback icon (🔄) next to the name. This indicates that it is the entire alternative language clause group and not an individual clause. On templates, the alternative language clause is inserted into the text as a table that shows the default clause plus all of its alternative text options. You can hover over the table heading to see properties of the alternative language clause, or, if you are using the JAGGAER ribbon, click **Show Placeholders** to see which text is part of the clause group. When a contract is created from the template, only the appropriate clause appears in the document, depending on the value chosen for the corresponding field in the contract header.

- Optionally, you can make clauses read-only from the app. They must be negotiable, non-alternative language clauses used in the main document. **Note:** This feature works with the desktop version of Word 2016 and above only.
 - In the right panel, click the **Inserted Clauses** tab. This shows all the clauses in the document that are eligible to be locked.
 - Click the **Lock** button beside a clause to lock it, meaning the text of that clause cannot be changed.

The **Unlock** button appears beside locked clauses. You can click this button to unlock a clause and make it editable again.
- When you are ready to save your changes to JAGGAER Indirect, click **Check In**.
- For main document templates only** - Under **Are you ready to finalize this draft template?** choose one of the following options:
 - Select **No, just save my changes** if you are still working on the text and need to make further changes. This will save the changes you've made so far, but will not finalize the document.
 - Select **Yes, save and finalize now** if the main document template is finished and you want to use it immediately. This will make the template final and ready for use. **Note:** You can save your changes and perform the Finalize Draft action from Contracts+ at a later date using the option above.

- Select **Yes, schedule for a future date** if the main document template is finished, but should not be used until a specific date. If this option is chosen, the Effective Date field appears and you need to **enter the date** that the template will be in effect. **Note:** The main document template is still considered a draft while it is scheduled and can be checked out again if necessary.
12. (optional) Enter information regarding your updates in the **What changes did you make?** field. These appear in the Attachments or Contract Template Library history for the record in Contracts+. It is also added to the Comments column of Version History for the appropriate version of each document.
 13. (optional) Click **Keep this [template/contract] checked out to me** if you want to save your changes, but keep the document checked out to you for further editing.
 14. Click **OK**. Your changes are saved and pushed to Contracts+.

Note: When you close the Word file, you will still be asked if you would like to save your changes. If a check in has been done this is not required.
