

Manage Contracts on SharePoint

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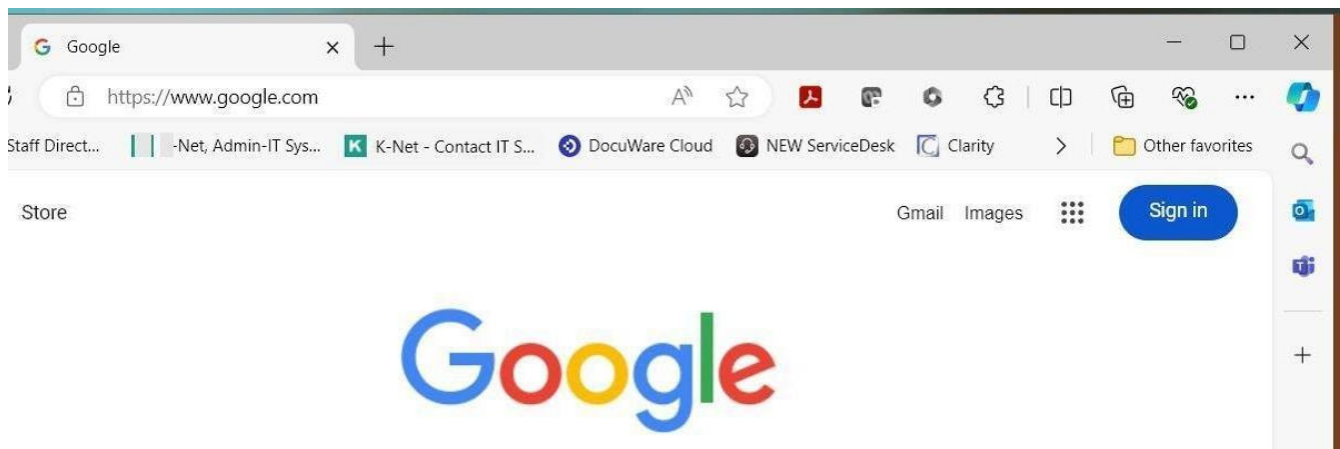
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1. Introduction

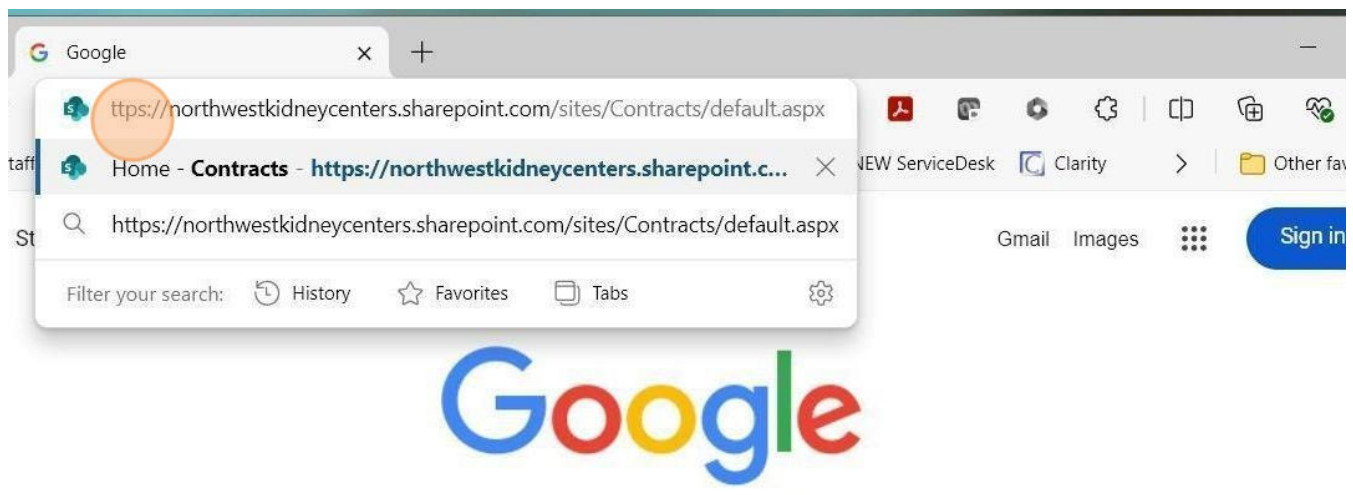
This document provides a step-by-step guide on how to use SharePoint for managing contract documents, including searching, uploading, adding metadata, checking in/out, organizing files into folders, and other key functionalities.

2. Accessing SharePoint

- a. Open a web browser

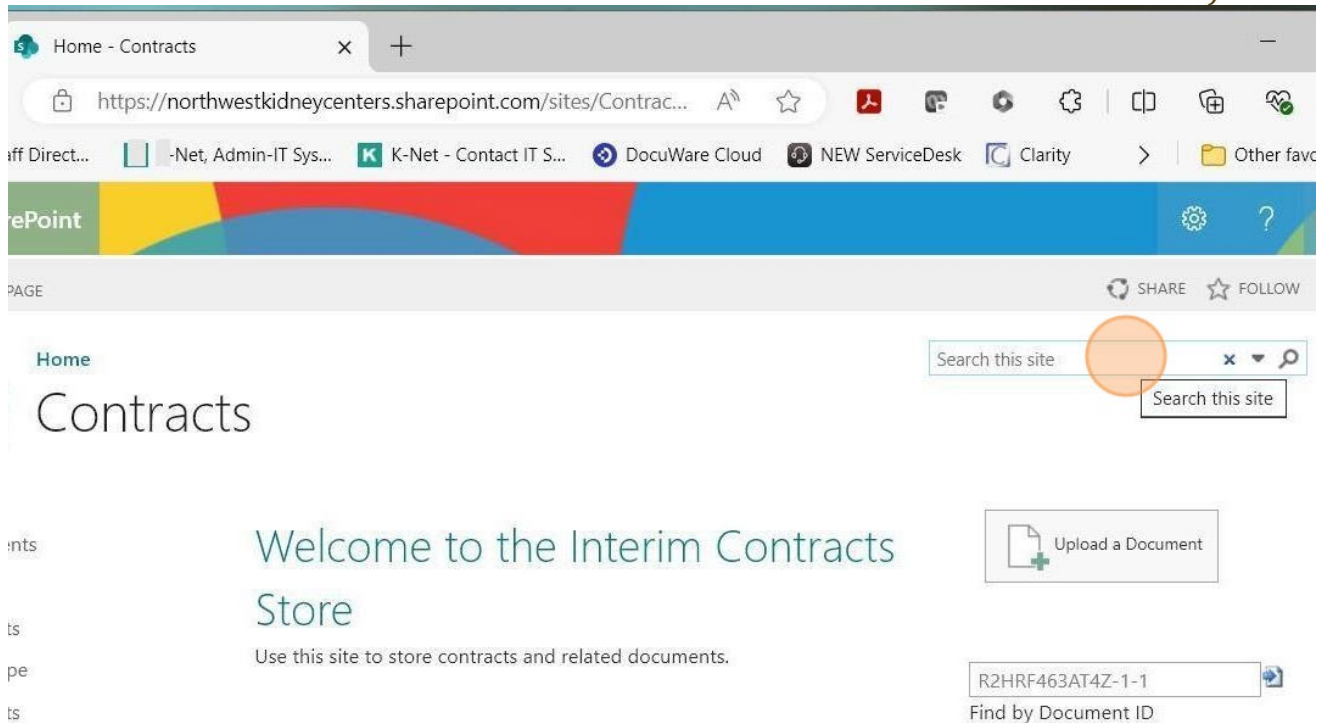


- b. Enter this URL:
<https://northwestkidneycenters.sharepoint.com/sites/Contracts/default.aspx>

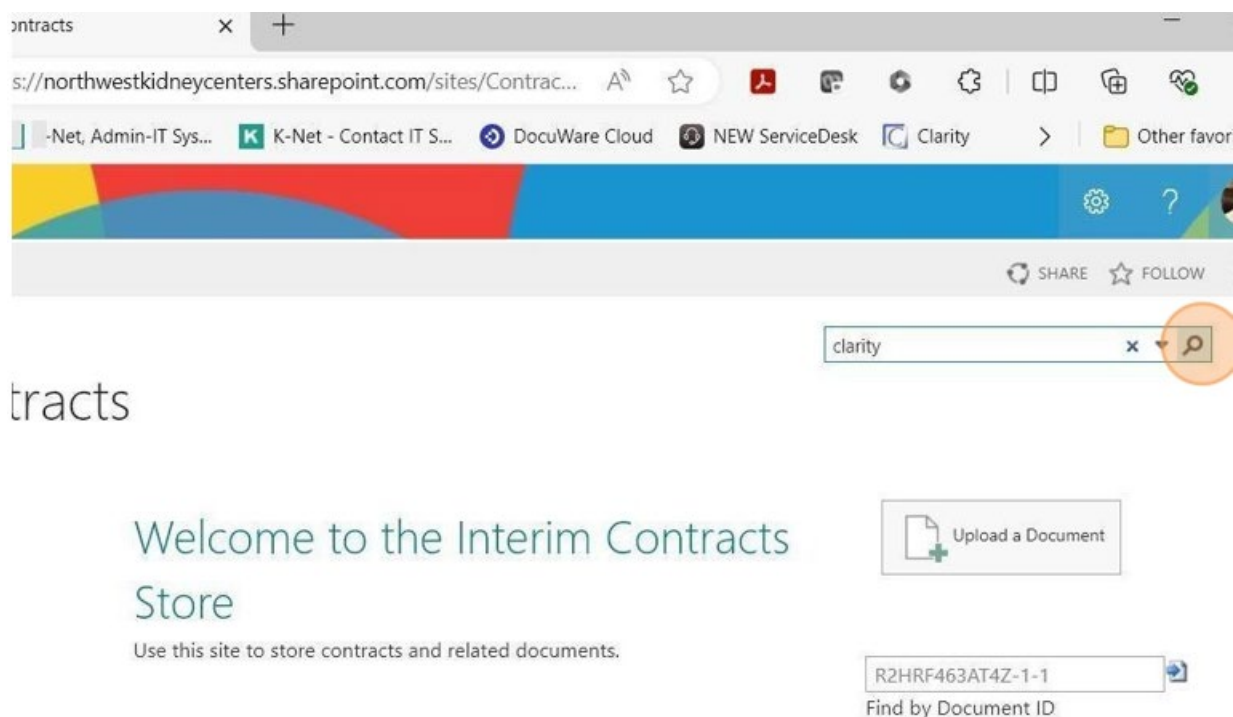


3. Searching Documents

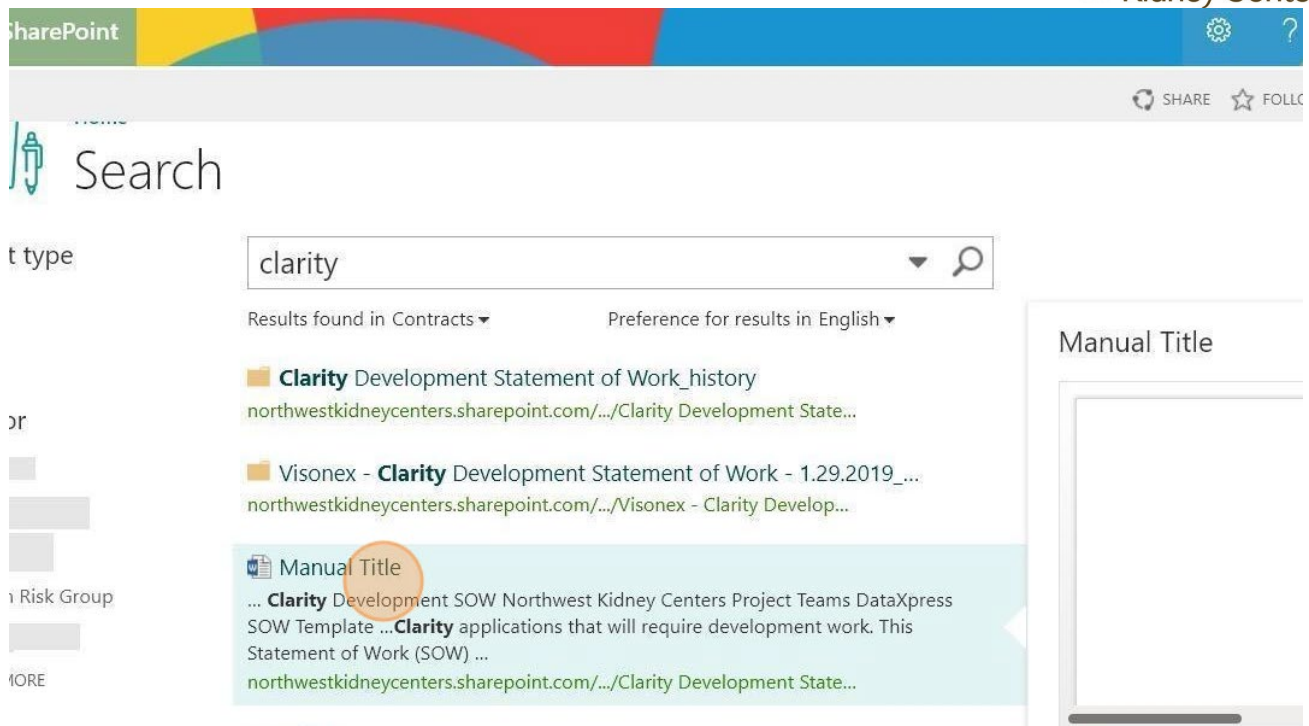
- a. Click "Search this site"



- b. Enter a few words to search. Example: **Clarity**
Click the magnifying glass to search



A list of documents that have the word 'clarity' is displayed.



SharePoint

Search

clarity

Results found in Contracts Preference for results in English

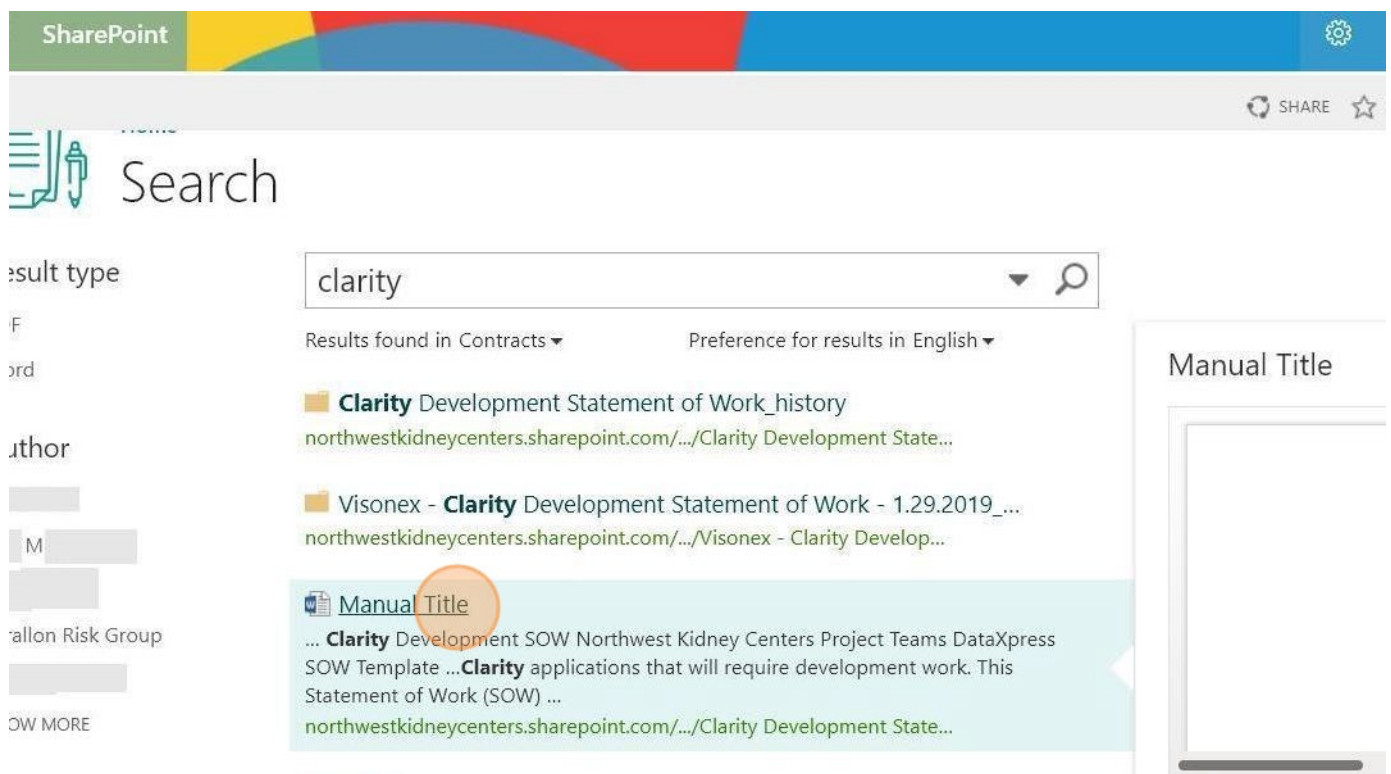
Clarity Development Statement of Work_history
northwestkidneycenters.sharepoint.com/.../Clarity Development State...

Visonex - **Clarity** Development Statement of Work - 1.29.2019_...
northwestkidneycenters.sharepoint.com/.../Visonex - Clarity Develop...

Manual Title
... **Clarity** Development SOW Northwest Kidney Centers Project Teams DataXpress SOW Template ...**Clarity** applications that will require development work. This Statement of Work (SOW) ...
northwestkidneycenters.sharepoint.com/.../Clarity Development State...

Manual Title

c. Click a document to view



SharePoint

Search

clarity

Results found in Contracts Preference for results in English

Clarity Development Statement of Work_history
northwestkidneycenters.sharepoint.com/.../Clarity Development State...

Visonex - **Clarity** Development Statement of Work - 1.29.2019_...
northwestkidneycenters.sharepoint.com/.../Visonex - Clarity Develop...

Manual Title
... **Clarity** Development SOW Northwest Kidney Centers Project Teams DataXpress SOW Template ...**Clarity** applications that will require development work. This Statement of Work (SOW) ...
northwestkidneycenters.sharepoint.com/.../Clarity Development State...

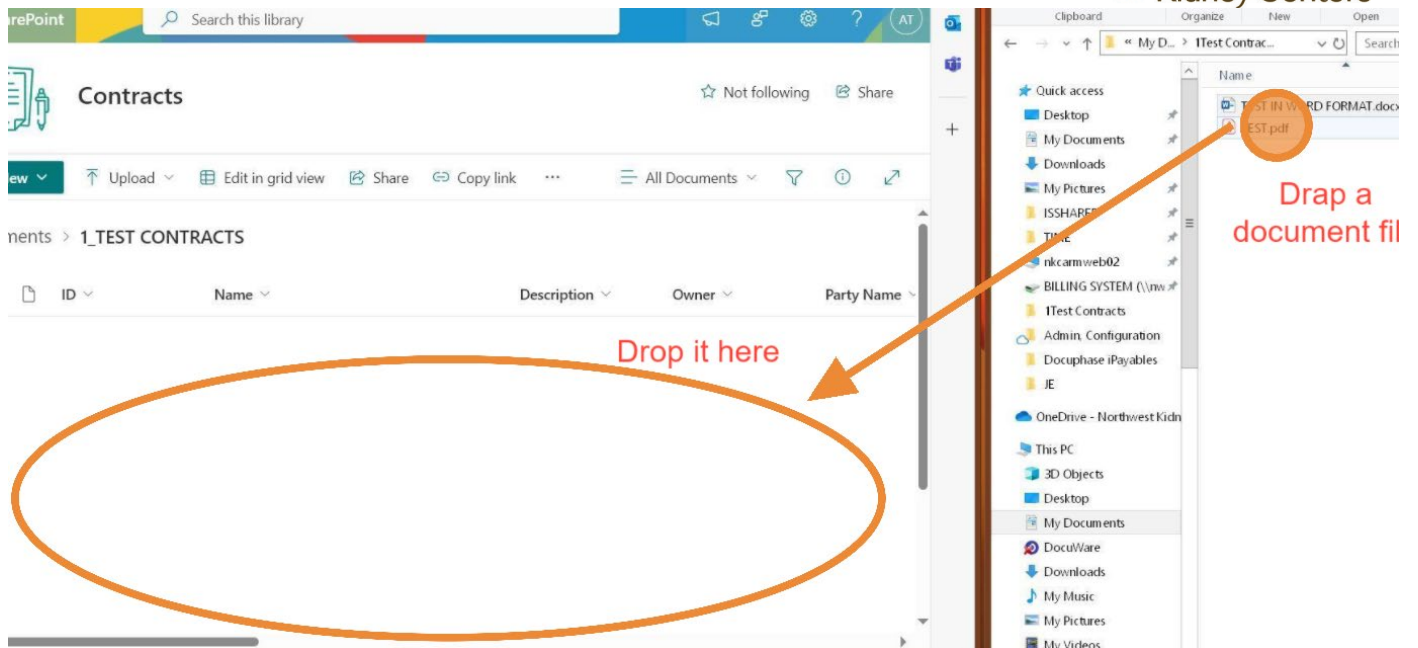
Manual Title

4. Upload a Document

a. Click **Documents**

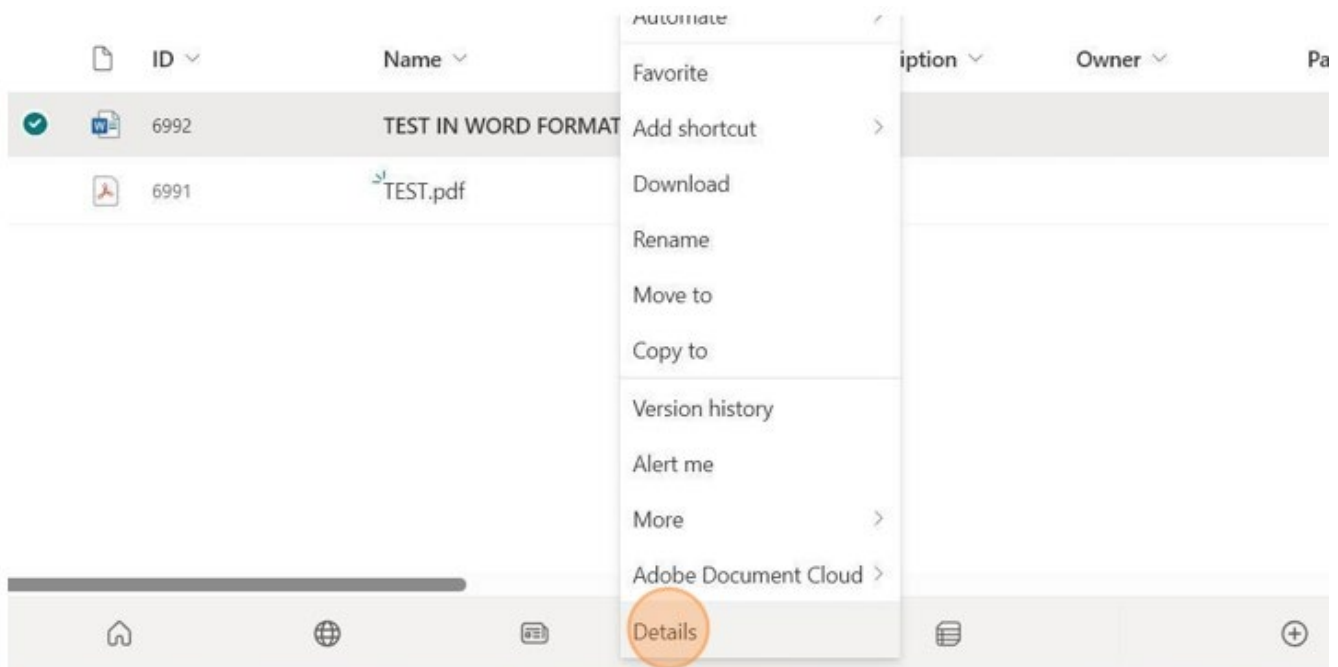
The screenshot shows a SharePoint 'Contracts' library. The page header includes the URL 'https://northwestkidneycenters.sharepoint.com/sites/Contrac...', a search bar, and navigation icons. The library title 'Contracts' is displayed, along with 'Not following' and 'Share' options. The document bar shows 'New', 'Upload', 'Edit in grid view', 'Sync', and 'All Documents'. The document list has columns for ID, Name, Description, Owner, and Party Name. The first document is '1_TEST CONTRACTS' with ID 5190. A red circle highlights the document name, and a tooltip shows the same name.

5



5. Update Metadata

- Right click a document -> select 'Details'



- Enter data for the fields: Name, Title, Owner, Start Date, End Date, etc.

Edit in grid view Open Share ... 1 selected All Documents

TEST CONTRACTS

| Name | Description |
|--------------------------|-------------|
| TEST IN WORD FORMAT.docx | |
| TEST.pdf | |

TEST IN WORD FORMAT.docx

Document

Name *

TEST IN WORD FORMAT.docx

Title

Enter value here

Document ID

R2HRF463AT4Z-312115358-6992

Owner

Enter a name or email address

Party Name

More details

c. When done, click X to close the details pane

https://northwestkidneycenters.sharepoint.com/sites/Contrac... A ☆

Search this library

Contracts ☆ Not following Share

Upload Edit in grid view Share Copy link ... All Documents

1_TEST CONTRACTS

| ID | Name | Description |
|------|--------------------------|-------------|
| 6992 | TEST IN WORD FORMAT.docx | |
| 6991 | TEST.pdf | |

1_TEST CONTRACTS

Has access

Manage access

Properties Edit all

6. Check In a Document

a. After a document is uploaded, it needs to be checked in. Click the three dots (...)

Contracts Not following Share

Upload Edit in grid view Share Copy link All Documents

1_TEST CONTRACTS

| ID | Name | Description | Owner | Party Name |
|------|--------------------------|-------------|-------|------------|
| 6992 | TEST IN WORD FORMAT.docx | | | |
| 6991 | TEST.pdf | | | |

Show more actions for this item

See details

You checked out this item, so others cannot edit.
[Check in](#) or [Discard check out](#)

b. Select More -> Check In

TEST IN WORD FORMAT.docx

Favorite

Add shortcut

Download

Rename

Move to

Copy to

Version history

Alert me

More

Adobe Document Cloud

Details

Properties

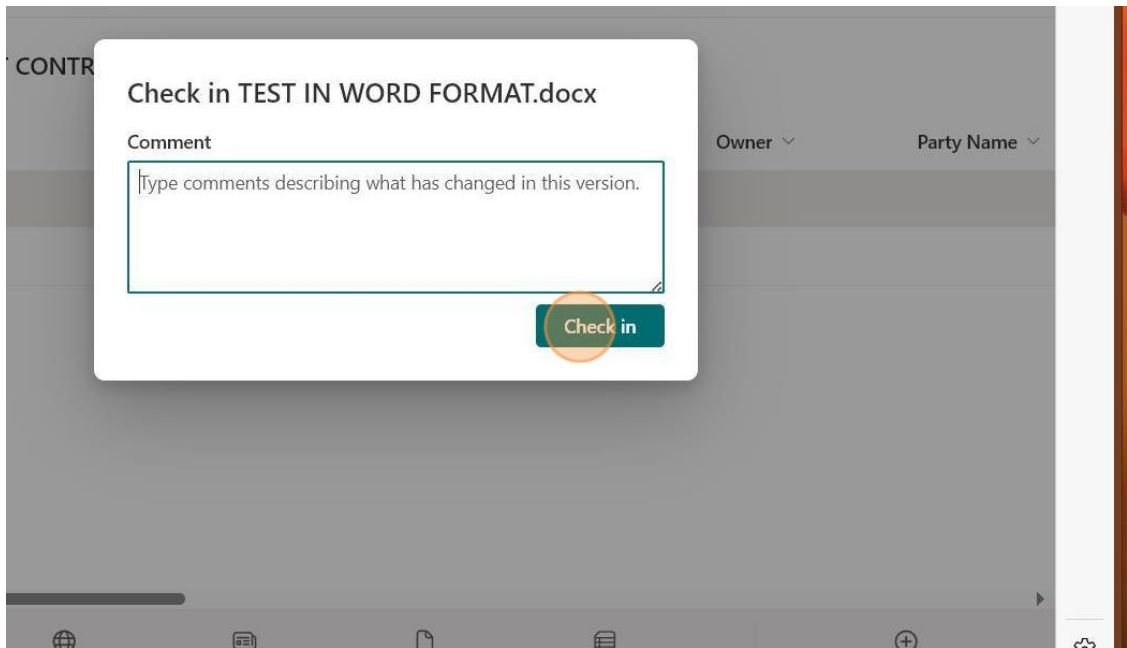
Workflow

Compliance details

Check in

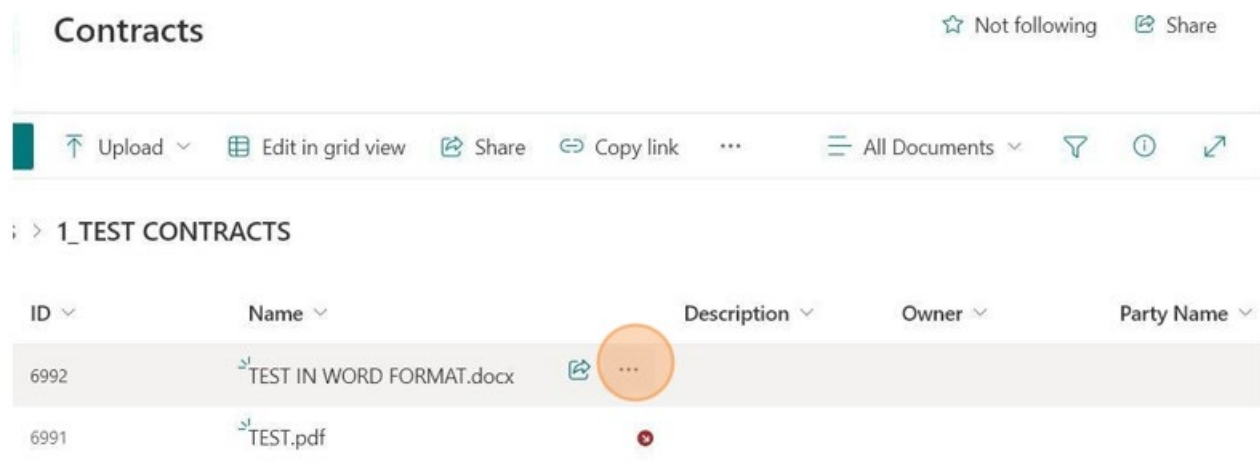
Discard check out

c. Click "Check in"

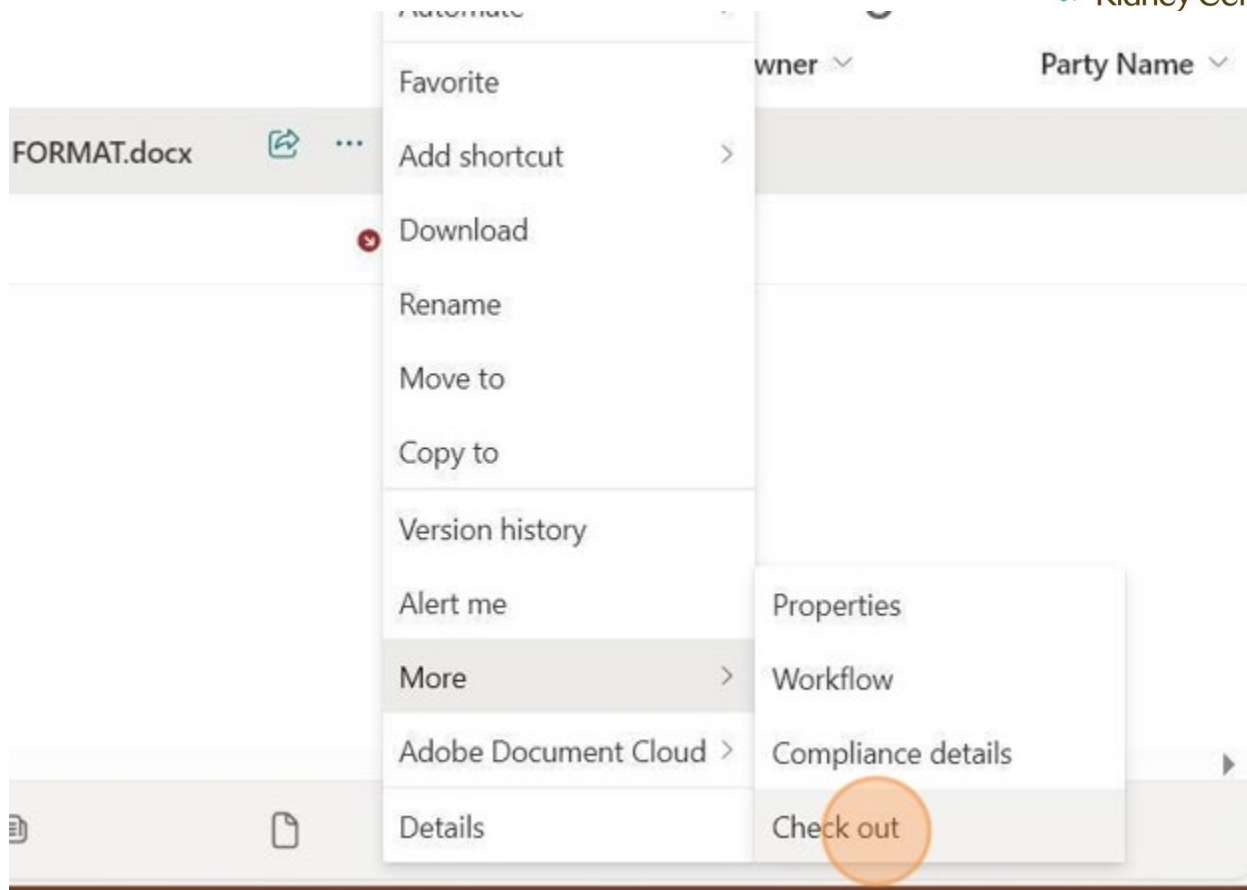


7. Check Out a Document

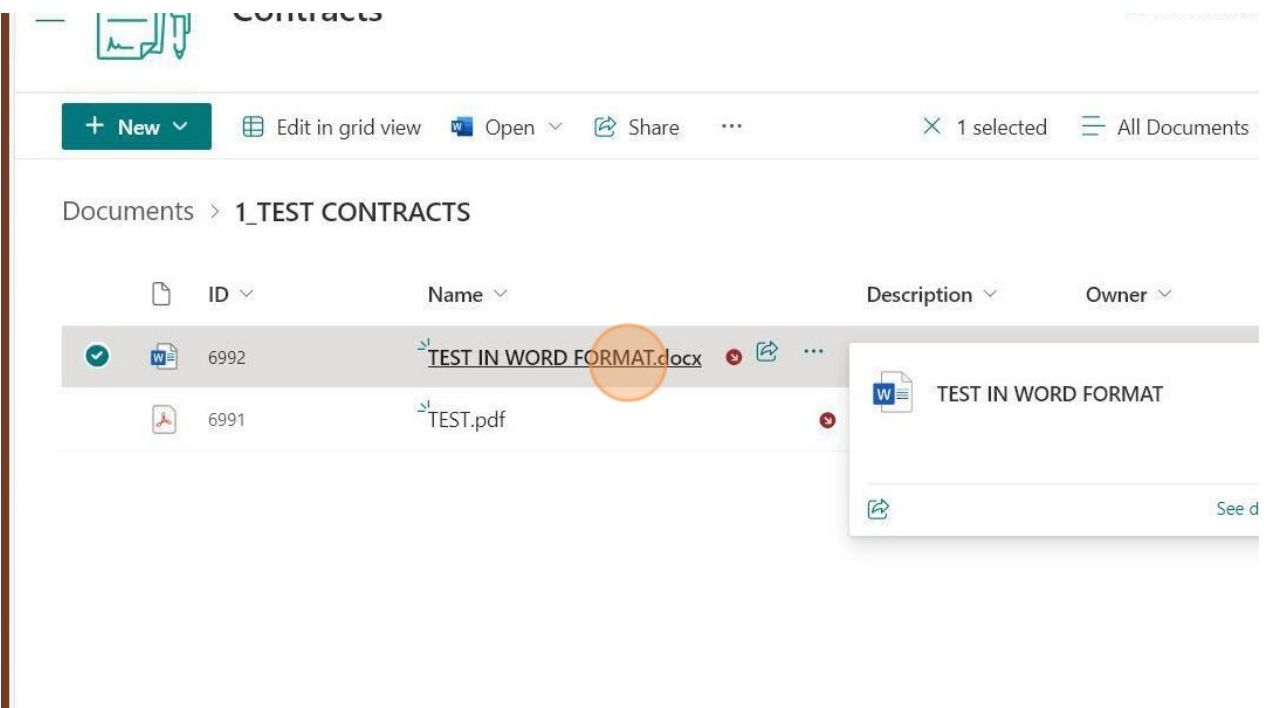
a. Click the three dots (...)



b. Select More -> Check Out

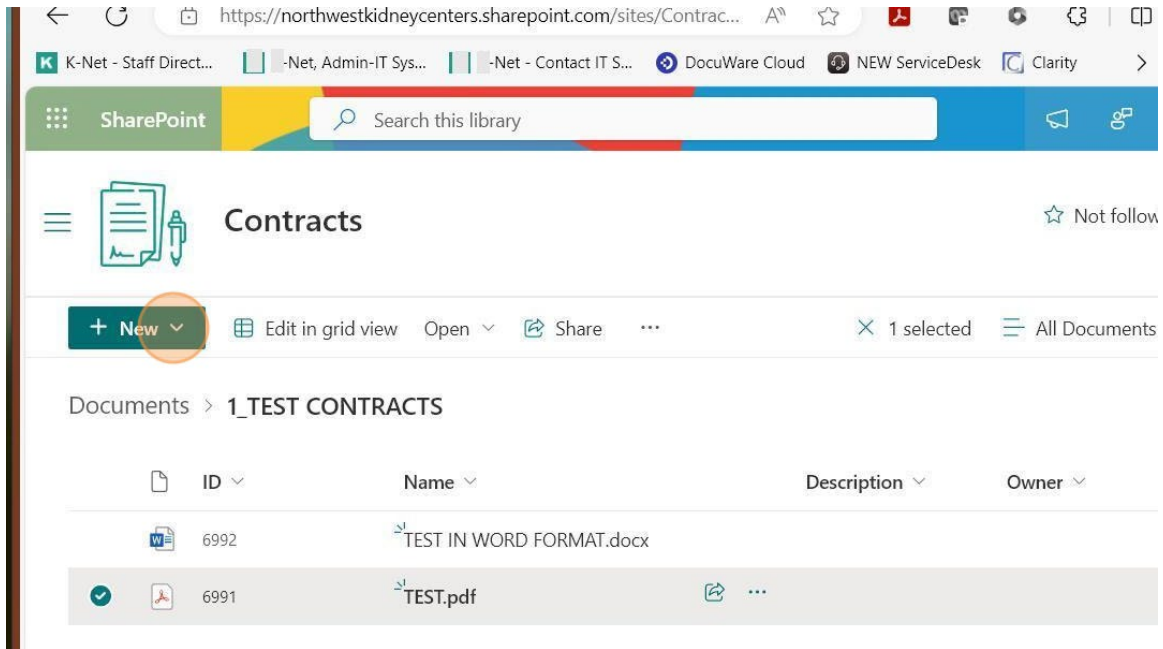


c. Click the checked out document to edit

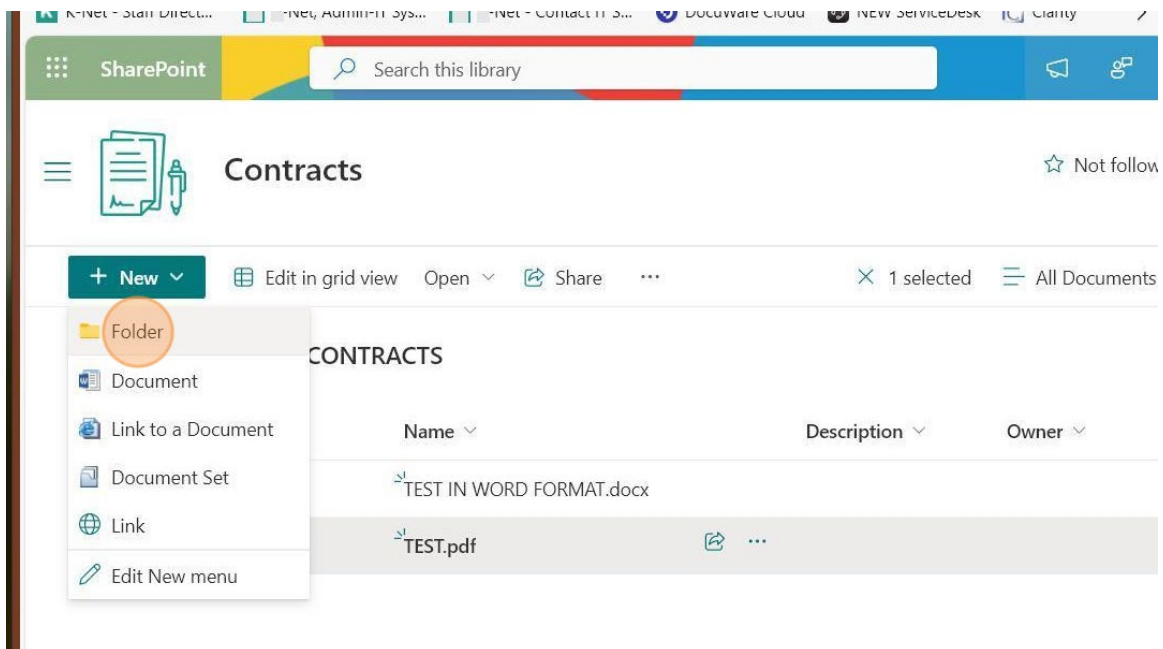


8. Create a New Folder

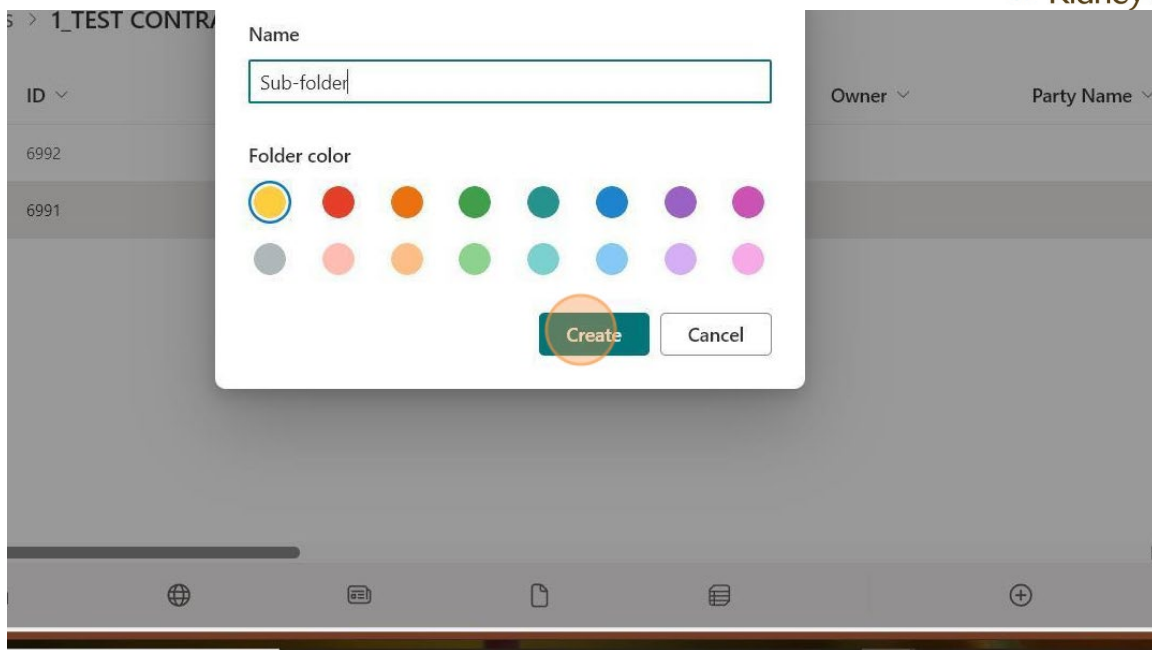
a. Click "New"



b. Click Folder



c. Enter a folder name, then click Create



9. Best Practices and Tips

- **Use Metadata:** Instead of relying solely on folders, add metadata tags (e.g. Name, Description, Party Name, Contract Type, Dept, Start date, End date, etc.) to improve searchability.
- **Version Control:** Always check the version history to track document changes.
- **Avoid Duplication:** Search before uploading to prevent duplicate contracts.
- **Set Permissions:** If working with sensitive documents, ensure proper permissions are set to restrict access.