

# Manage Contracts on SharePoint

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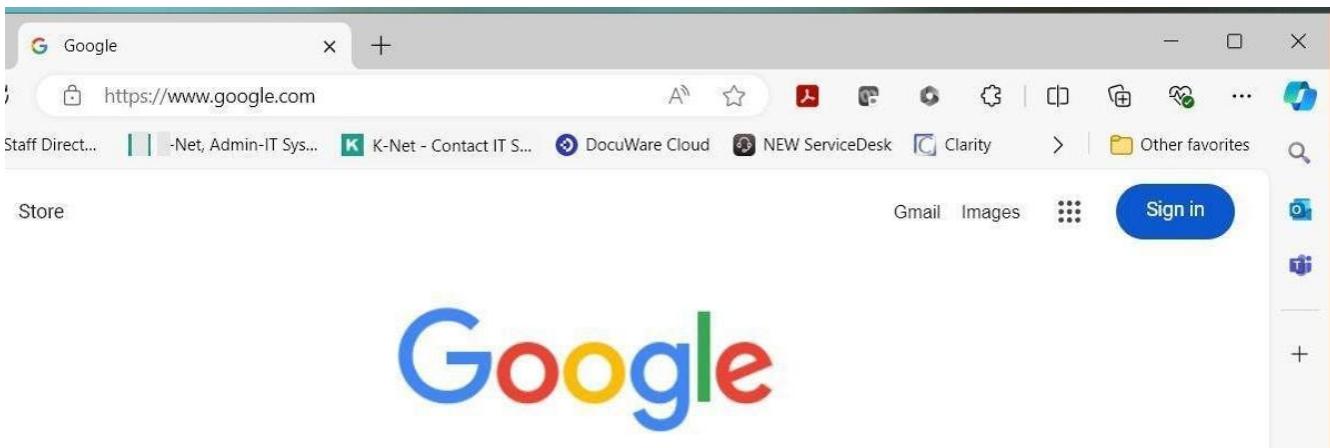
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## 1. Introduction

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.

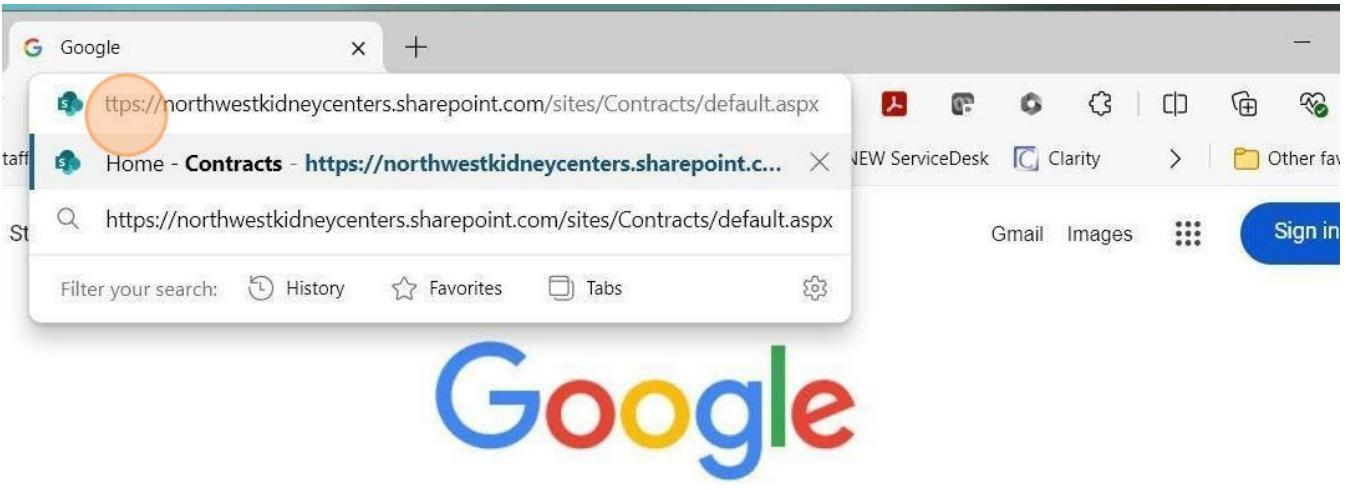
## 2. Accessing SharePoint

- Open a web browser



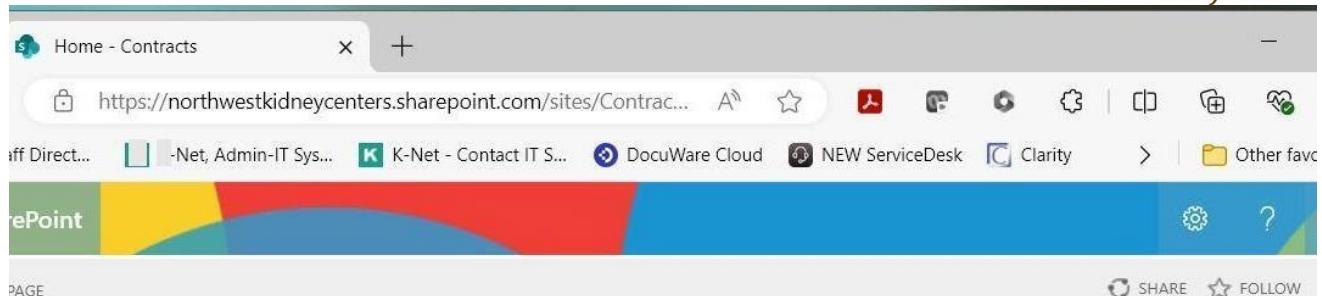
- Enter this URL:

<https://northwestkidneycenters.sharepoint.com/sites/Contracts/default.aspx>



## 3. Searching Documents

- Click "Search this site"



Home - Contracts https://northwestkidneycenters.sharepoint.com/sites/Contracts/

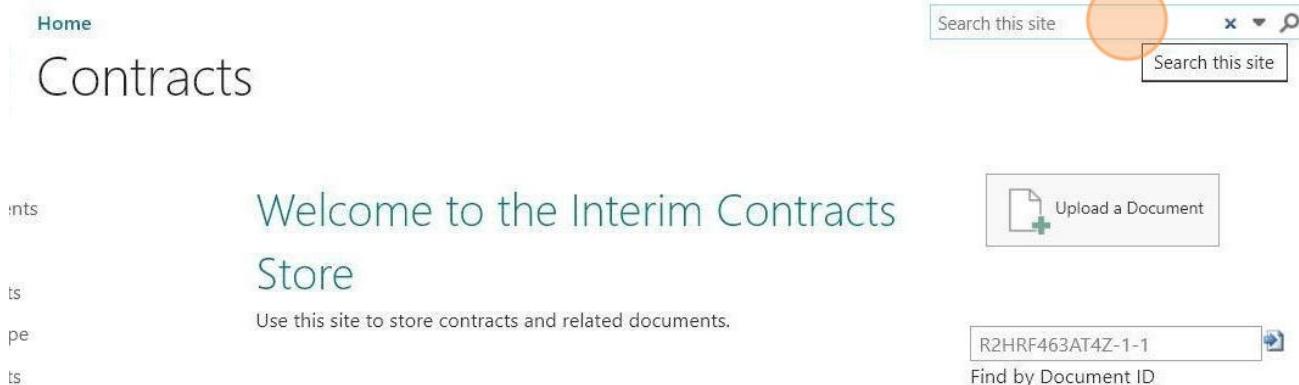
Staff Direct... -Net, Admin-IT Sys... K-Net - Contact IT S... DocuWare Cloud NEW ServiceDesk Clarity > Other favs

SharePoint PAGE

SHARE FOLLOW

Search this site

Search this site



Contracts

Welcome to the Interim Contracts Store

Use this site to store contracts and related documents.

Upload a Document

R2HRF463AT4Z-1-1

Find by Document ID

b. Enter a few words to search. Example: **Clarity**  
Click the magnify class to search



Contracts https://northwestkidneycenters.sharepoint.com/sites/Contracts/

-Net, Admin-IT Sys... K-Net - Contact IT S... DocuWare Cloud NEW ServiceDesk Clarity > Other favs

SHARE FOLLOW

clarity

tracts

## Welcome to the Interim Contracts Store

Use this site to store contracts and related documents.

Upload a Document

R2HRF463AT4Z-1-1

Find by Document ID

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

 Search

t type

clarity



Results found in Contracts ▾

Preference for results in English ▾

 **Clarity** Development Statement of Work\_history

northwestkidneycenters.sharepoint.com/.../Clarity Development State...

or

 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**

1 Risk Group

MORE

c. Click a document to view


 Search

result type

clarity



Results found in Contracts ▾

Preference for results in English ▾

 **Clarity** Development Statement of Work\_history

northwestkidneycenters.sharepoint.com/.../Clarity Development State...

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 **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**

SharePoint

OWSE PAGE

SHARE

Home

Search this site

Contracts

cent

Documents

Tasks

Documents

partments

Contract Type

contents

Welcome to the Interim Contracts Store

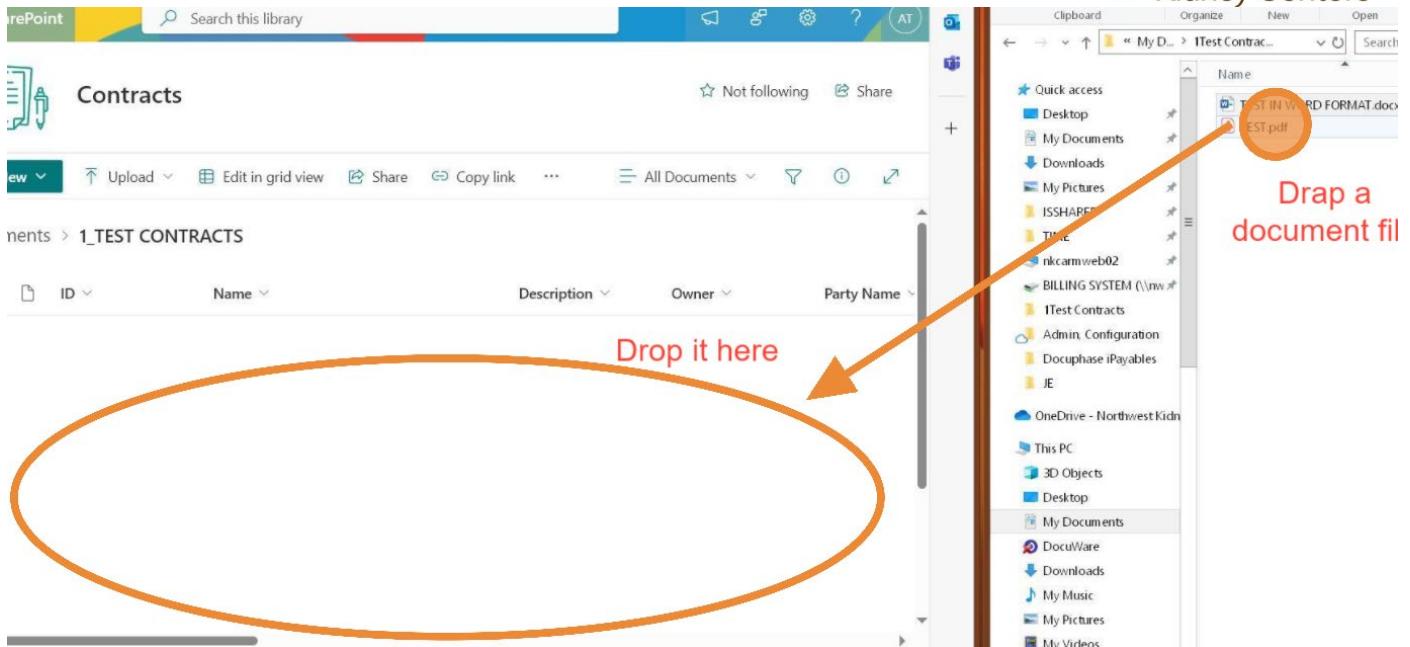
Use this site to store contracts and related documents.

R2HRF463AT4Z-1-1

Find by Document ID

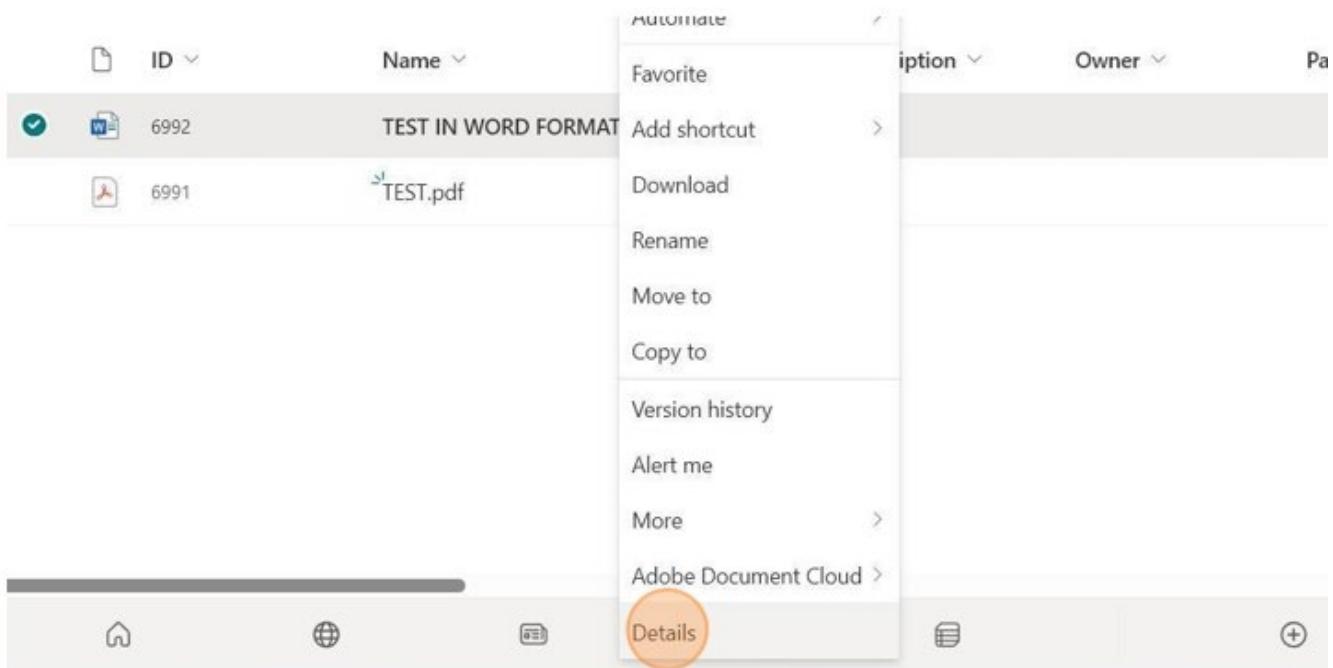
b. Select a folder. Example: select '1\_TEST CONTRACTS' folder

c. Drag a document and drop it on the "1\_TEST CONTRACTS" folder



## 5. Update Metadata

a. Right click a document -> select 'Details'



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

Edit in grid view Open Share ... X 1 selected All Documents ⓘ ↗

**TEST CONTRACTS**

Name	Description
TEST IN WORD FORMAT.docx	<input type="text"/> Name * <b>TEST IN WORD FORMAT.docx</b> <input type="text"/> Title <input type="text"/> Enter value here <input type="text"/> Document ID <b>R2HRF463AT4Z-312115358-6992</b> <input type="text"/> Owner <input type="text"/> Enter a name or email address <input type="text"/> Party Name <input type="button" value="="/> More details.
TEST.pdf	

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

https://northwestkidneycenters.sharepoint.com/sites/Contracts... A ⭐ ↗

-Net, Admin-IT Sys... -Net - Contact IT S... DocuWare Cloud NEW ServiceDesk Clarity > Other favorites

Search this library

**Contracts** Not following Share

Upload Edit in grid view Share Copy link ... All Documents ⤵ ⓘ ↗

1\_TEST CONTRACTS

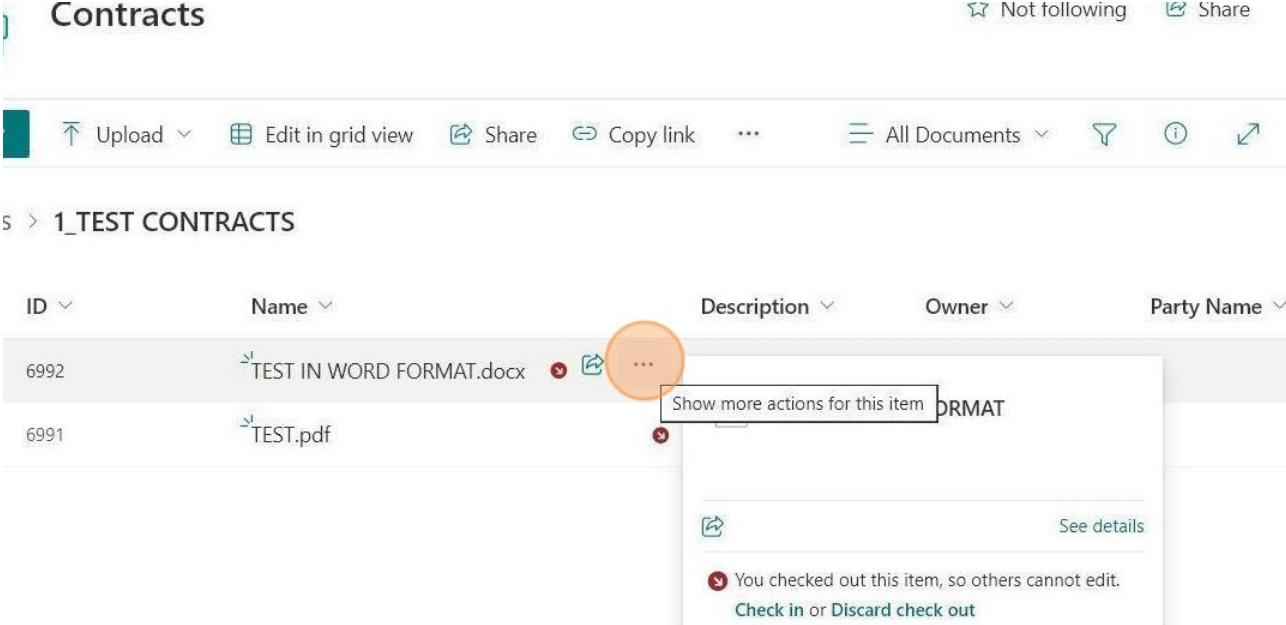
ID	Name	Description
6992	TEST IN WORD FORMAT.docx	
6991	TEST.pdf	

Has access Manage access

Properties Edit all

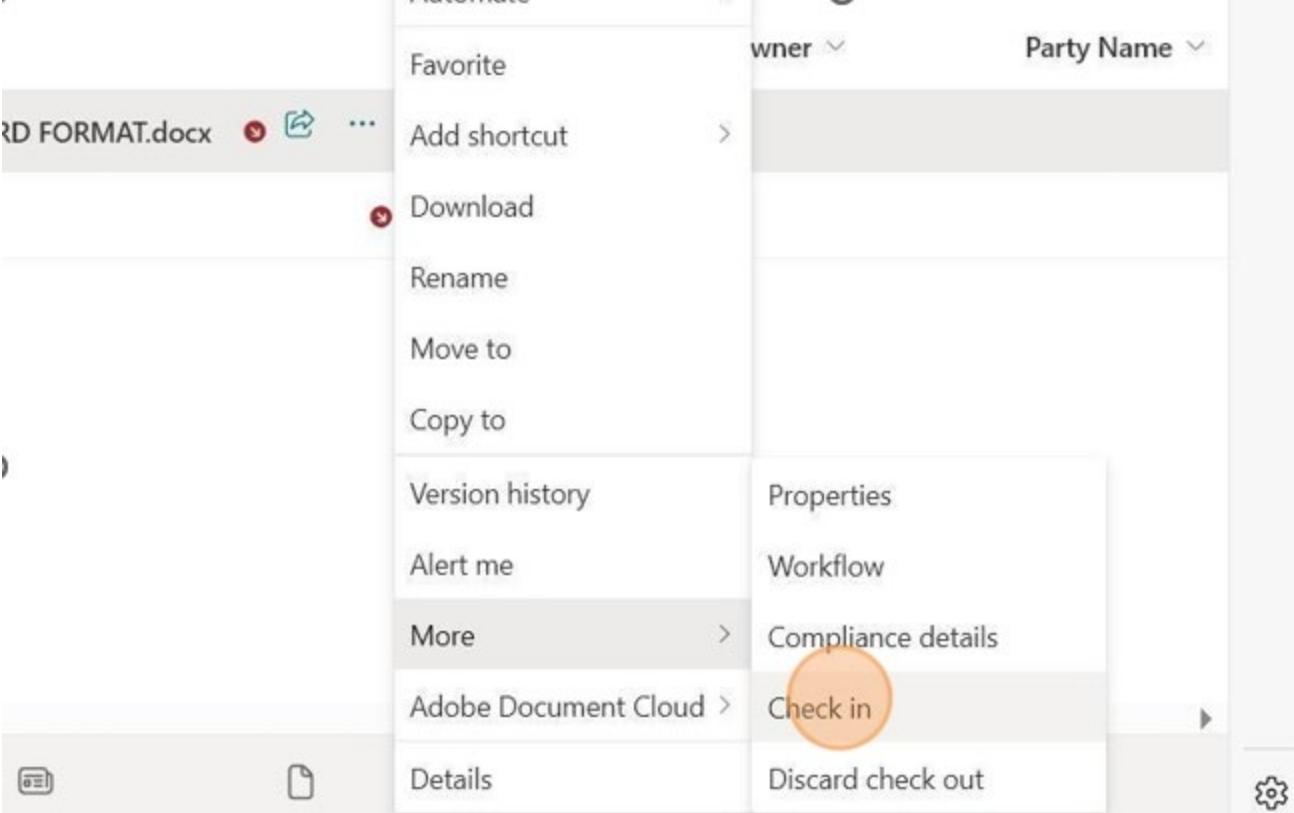
## 6. Check In a Document

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



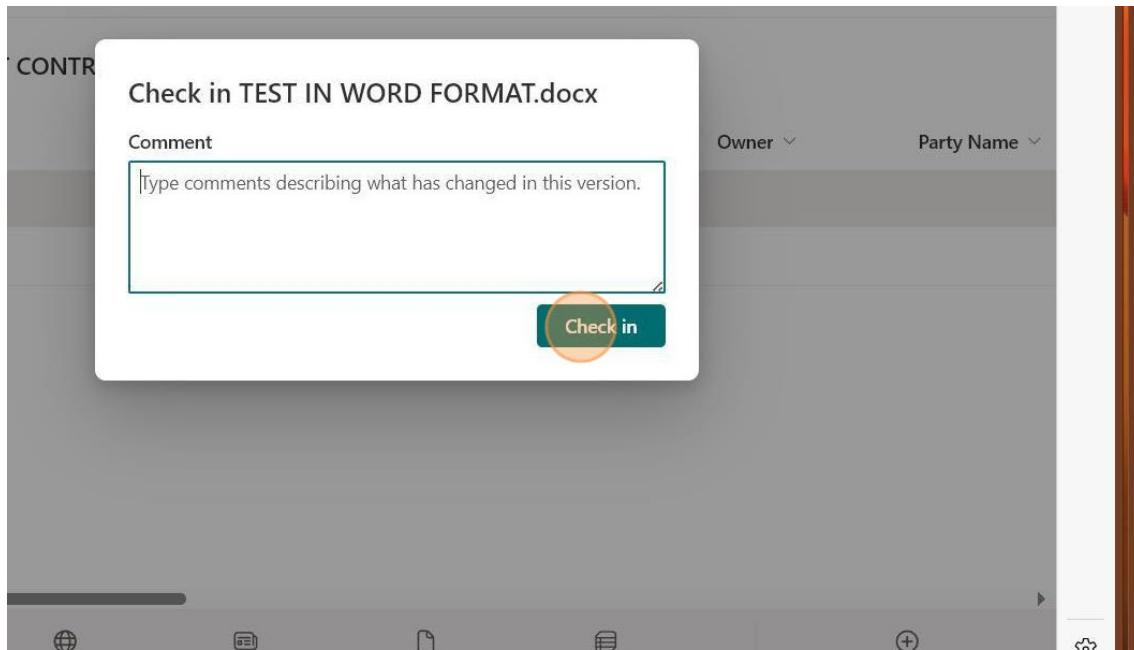
The screenshot shows a SharePoint 'Contracts' library. A document named 'TEST IN WORD FORMAT.docx' (ID 6992) is selected and has a context menu open. The menu is titled 'Show more actions for this item' and contains the following items: 'Check in' (highlighted with an orange circle) and 'Discard check out'. Other menu items include 'See details', 'Check out', and 'Check in or Discard check out'.

b. Select More -> Check In



The screenshot shows a SharePoint 'Contracts' library. A document named 'TEST IN WORD FORMAT.docx' (ID 6992) is selected and has a context menu open. The menu is titled 'More' and contains the following items: 'Add shortcut', 'Download', 'Rename', 'Move to', 'Copy to', 'Version history', 'Alert me', 'More' (highlighted with an orange circle), 'Adobe Document Cloud', 'Details', 'Properties', 'Workflow', 'Compliance details', 'Check in' (highlighted with an orange circle), and 'Discard check out'.

c. Click "Check in"



## 7. Check Out a Document

a. Click the three dots (...)

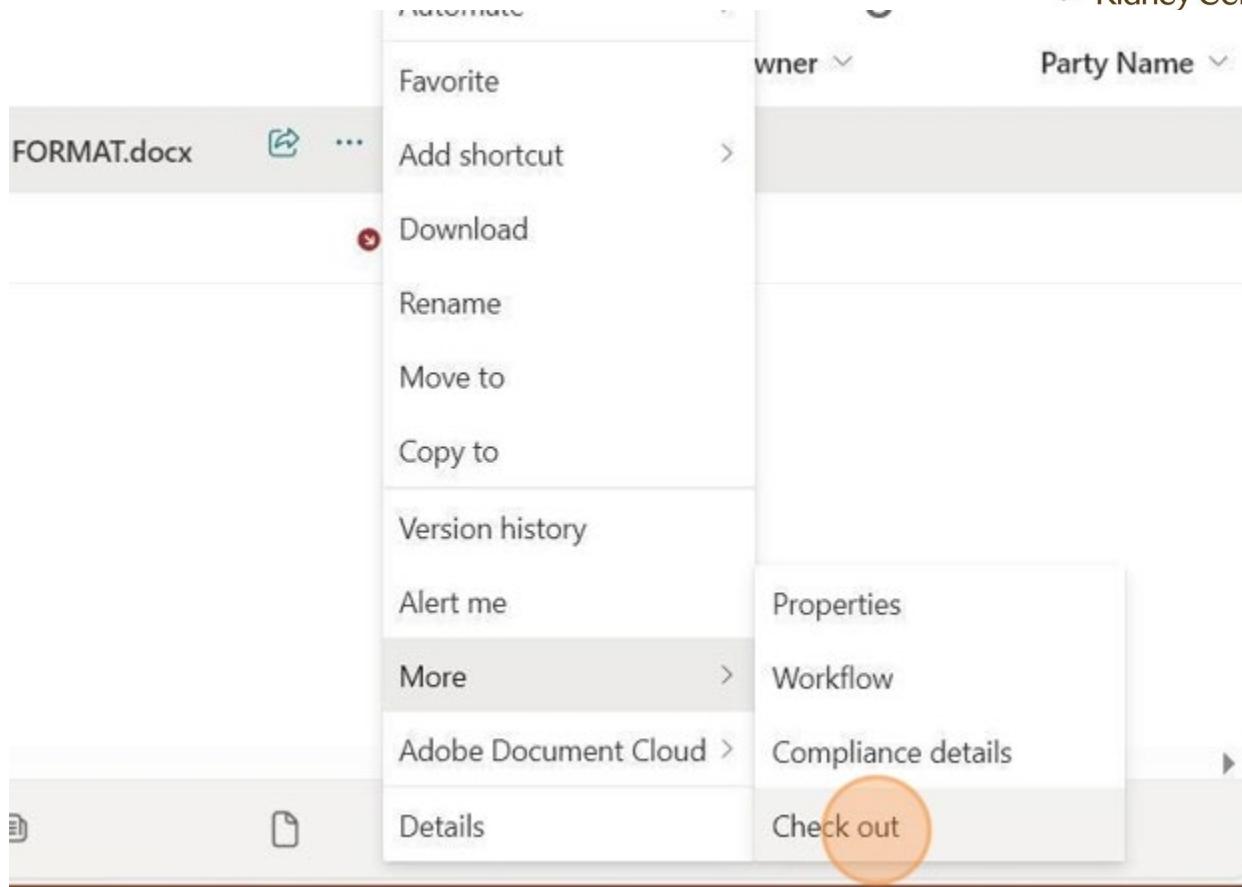
Contracts ☆ Not following Share

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

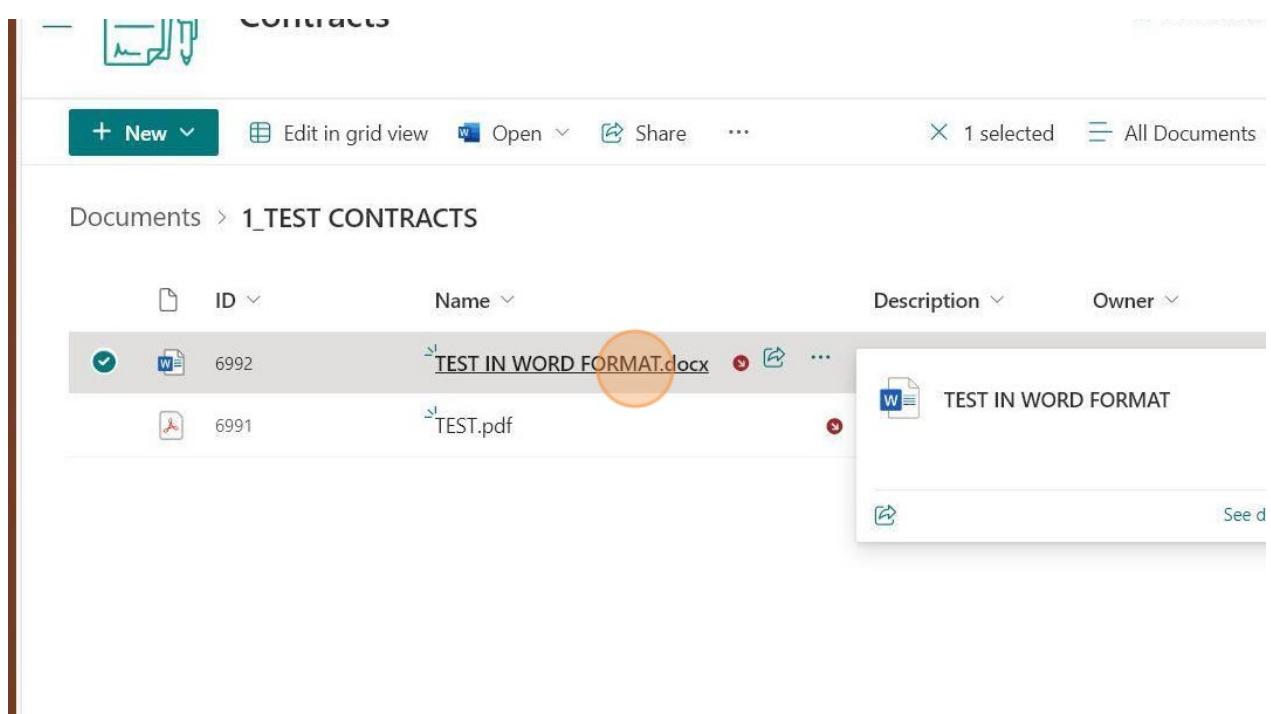
1 > 1\_TEST CONTRACTS

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

b. Select More -> Check Out



c. Click the checked out document to edit

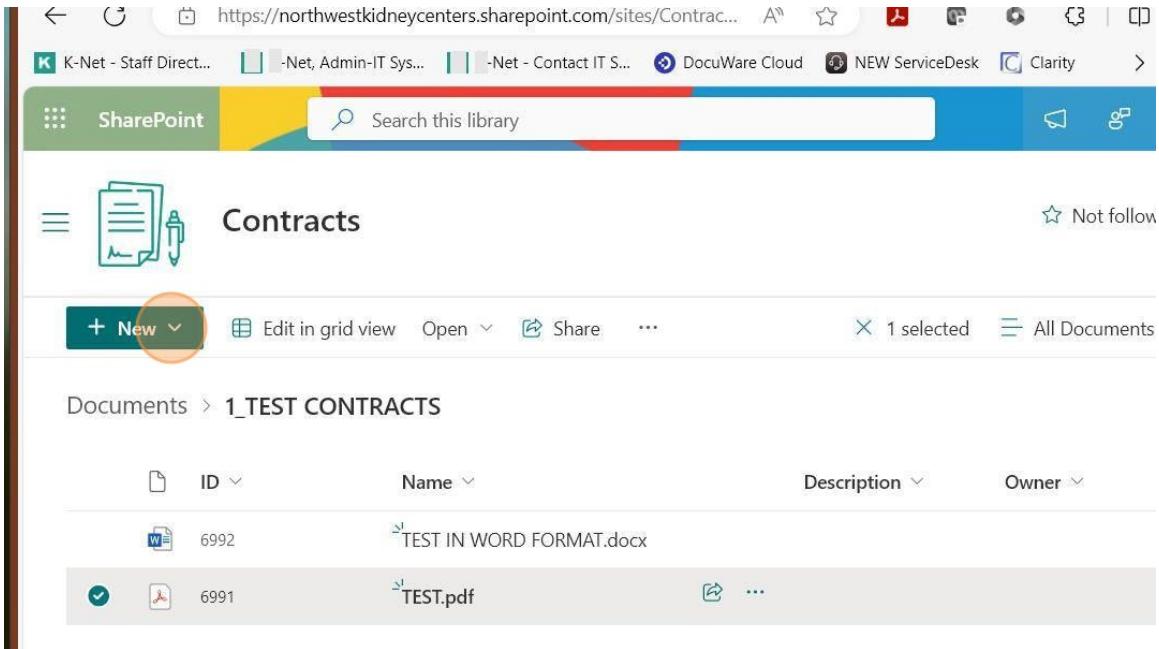


Documents > 1\_TEST CONTRACTS

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

## 8. Create a New Folder

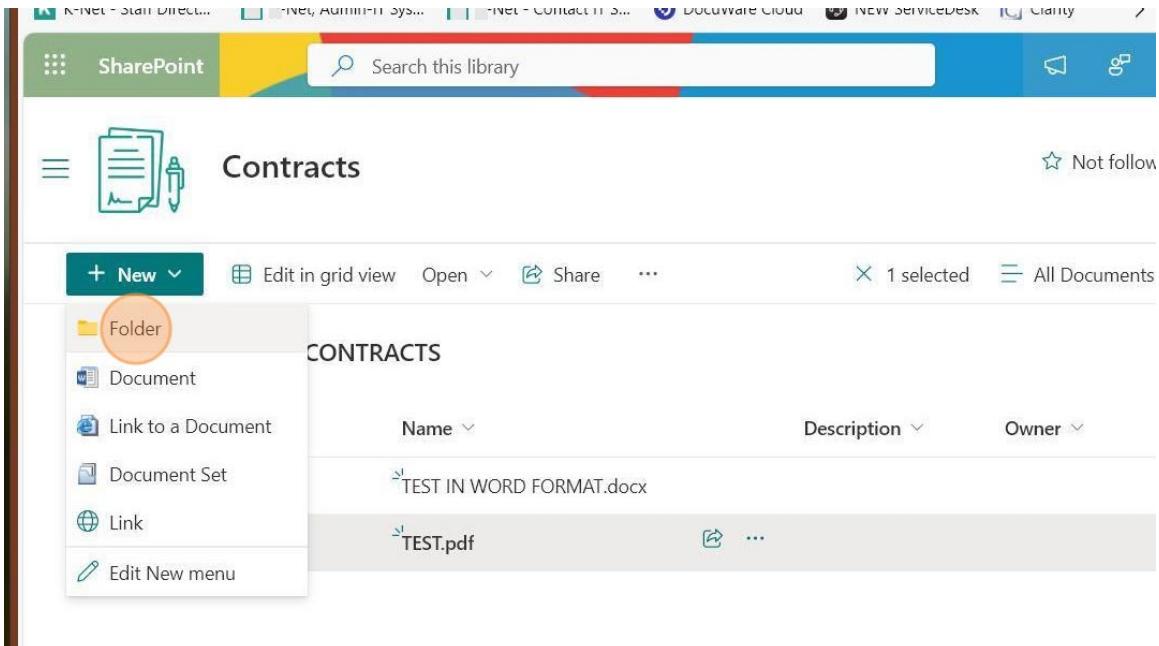
a. Click "New"



Documents > 1\_TEST CONTRACTS

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

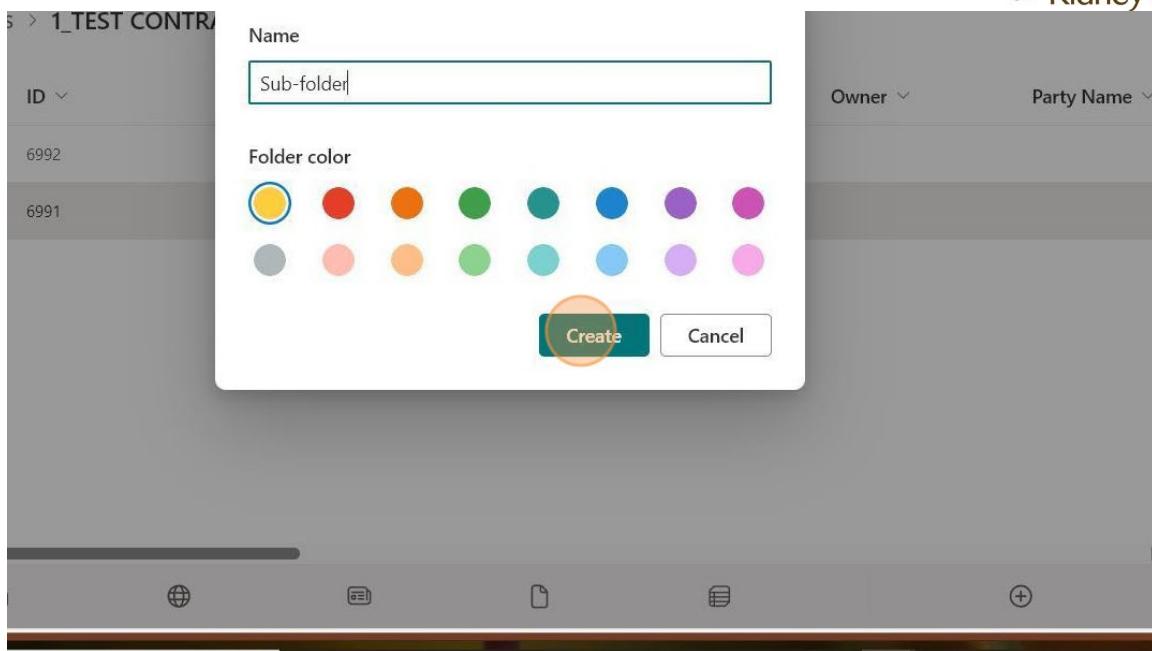
b. Click Folder



CONTRACTS

Name	Description	Owner
TEST IN WORD FORMAT.docx		
TEST.pdf		

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.