Manage Contracts on SharePoint

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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.
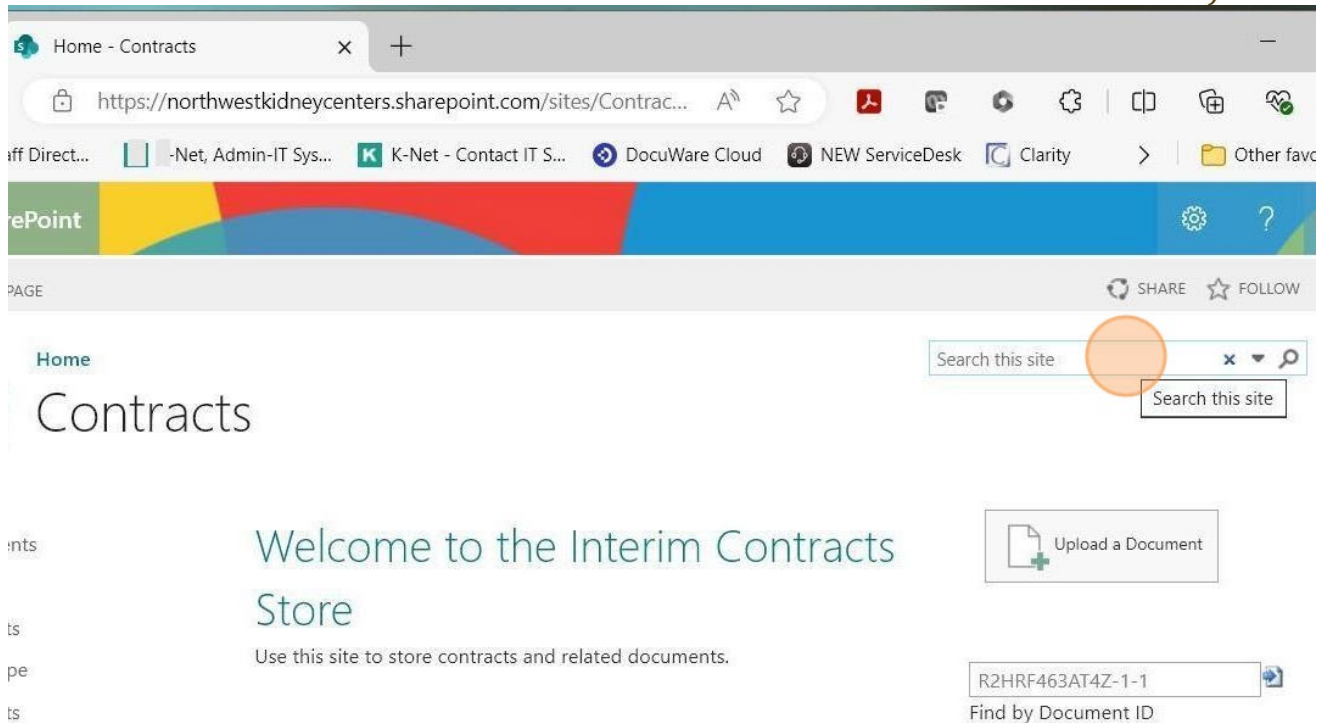
2. Accessing SharePoint
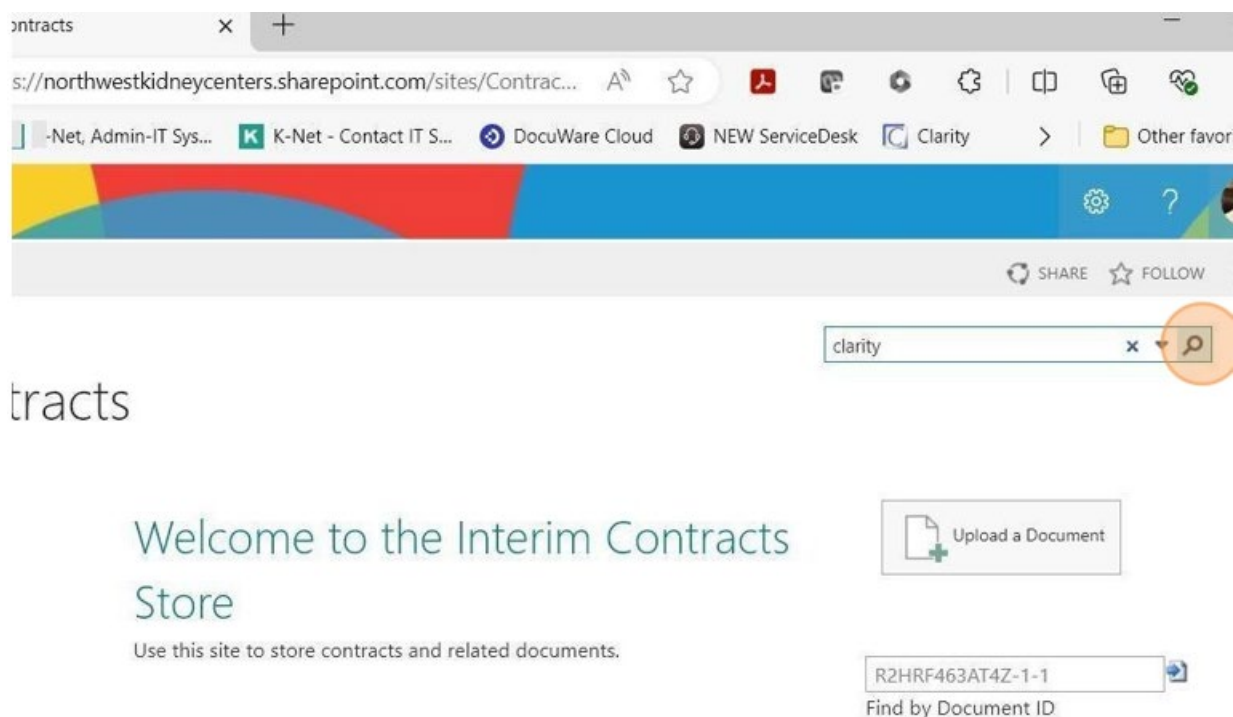
a. Open a web browser

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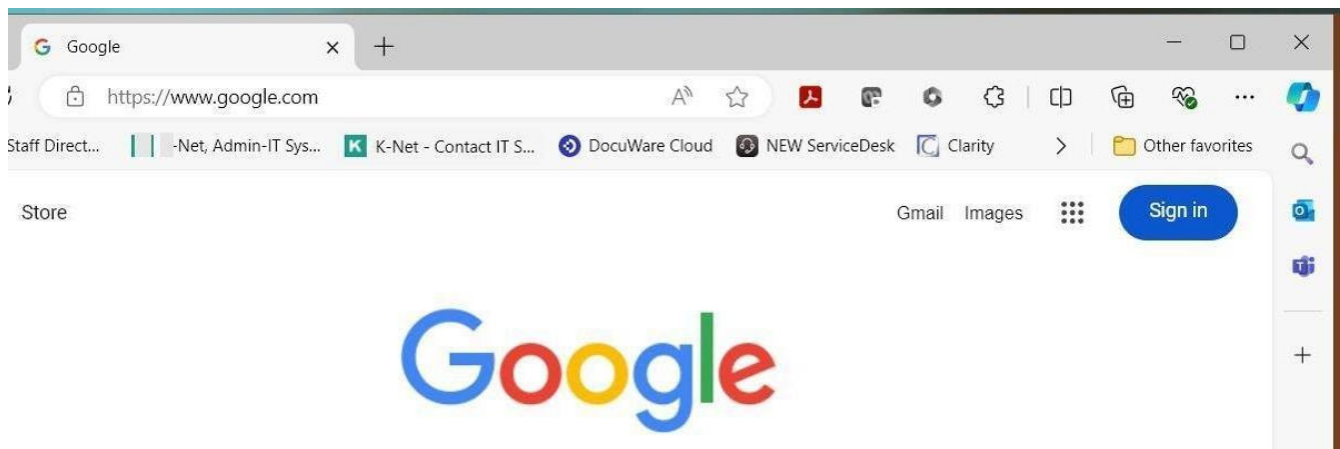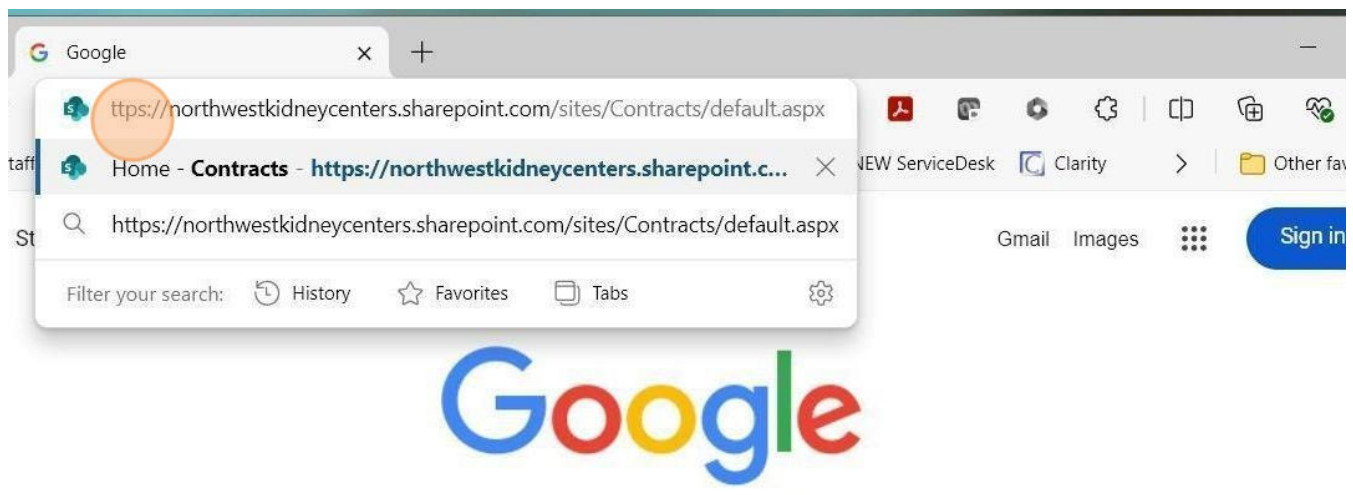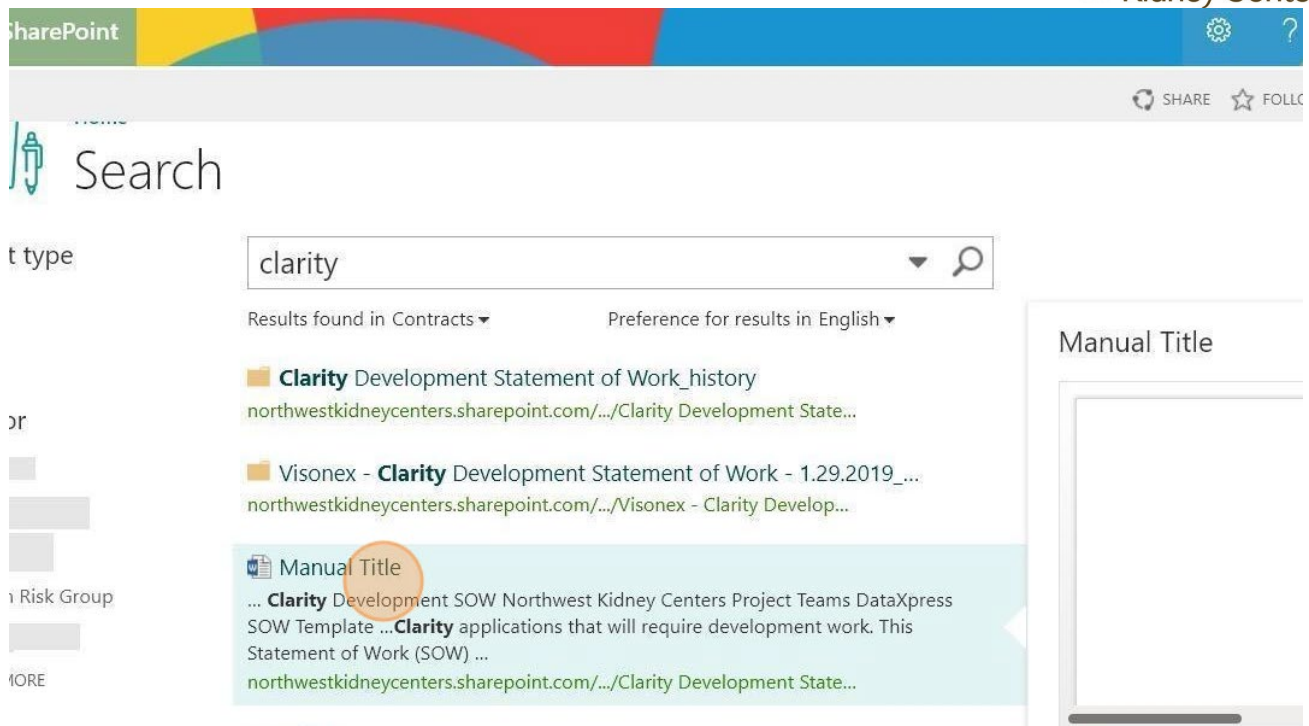

3. Searching Documents

a. Click "Search this site"

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

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

c. Click a document to view

4. **Upload a Document**
a. Click **Documents**

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

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

Drop it here

Drap a document fil
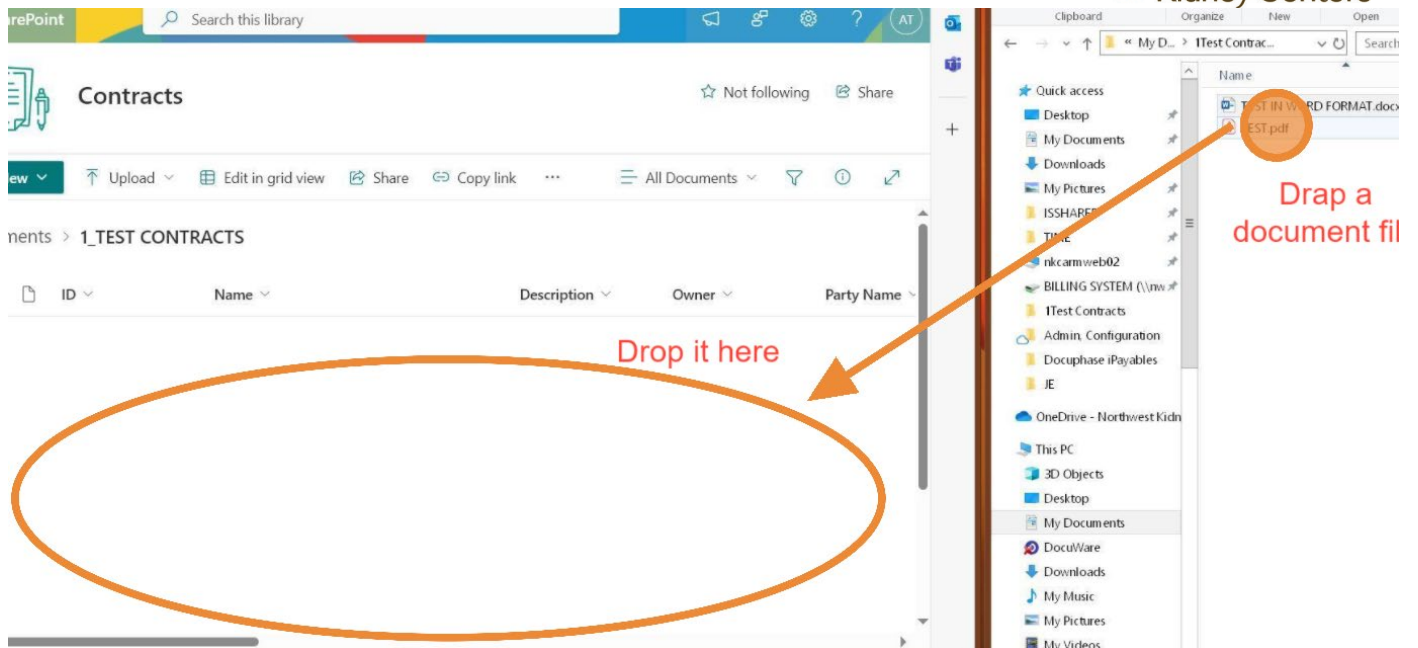
5. Update Metadata

a. Right click a document -> select 'Details'
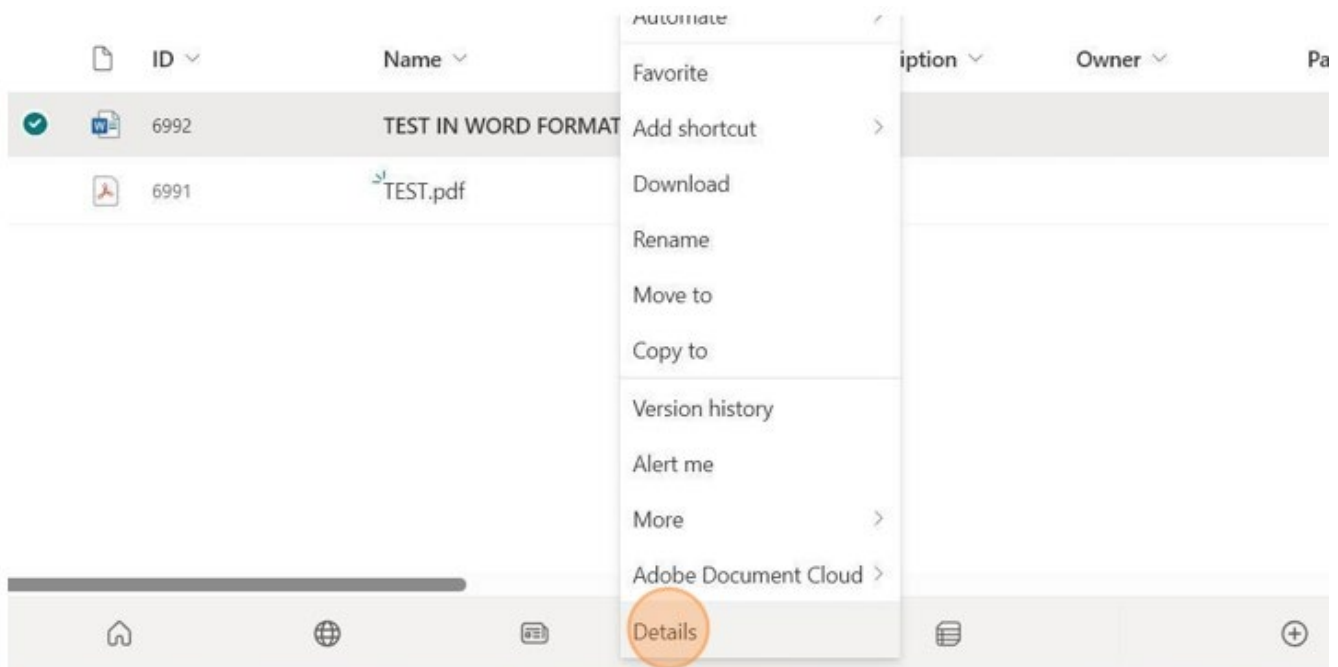
b. Enter data for the fields: Name, Title, Owner, Start Date, End Date, etc.

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

6. Check In a Document

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

b. Select More -> Check In

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
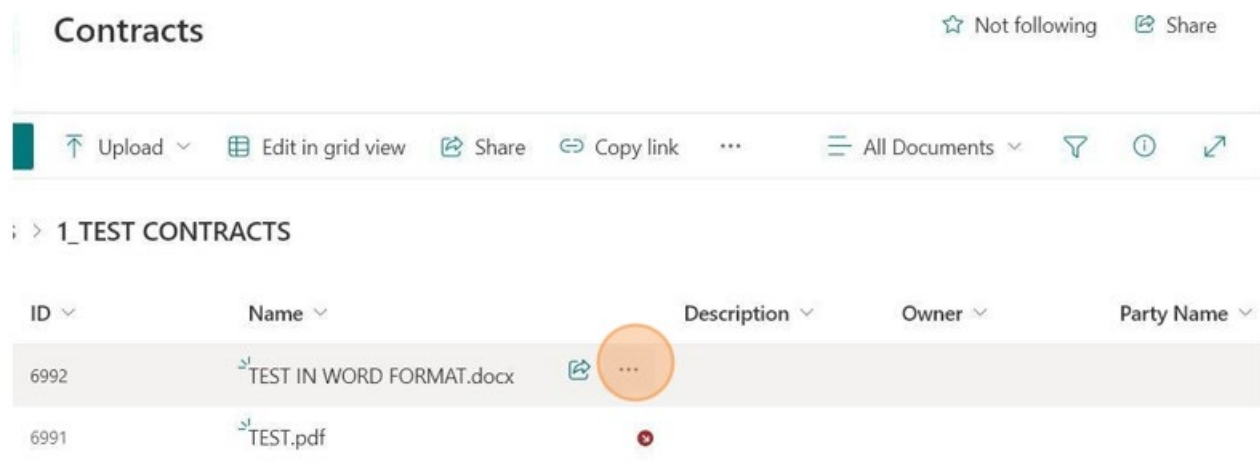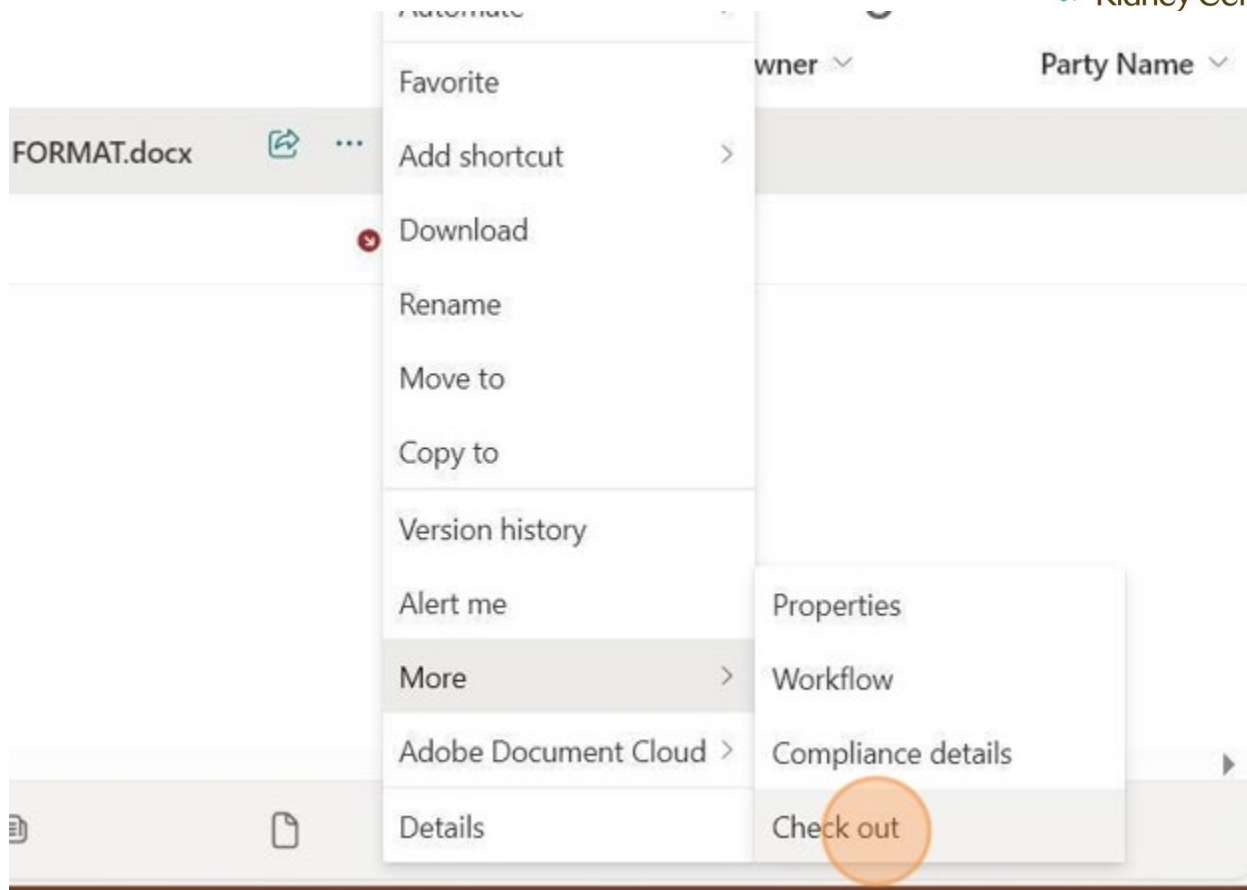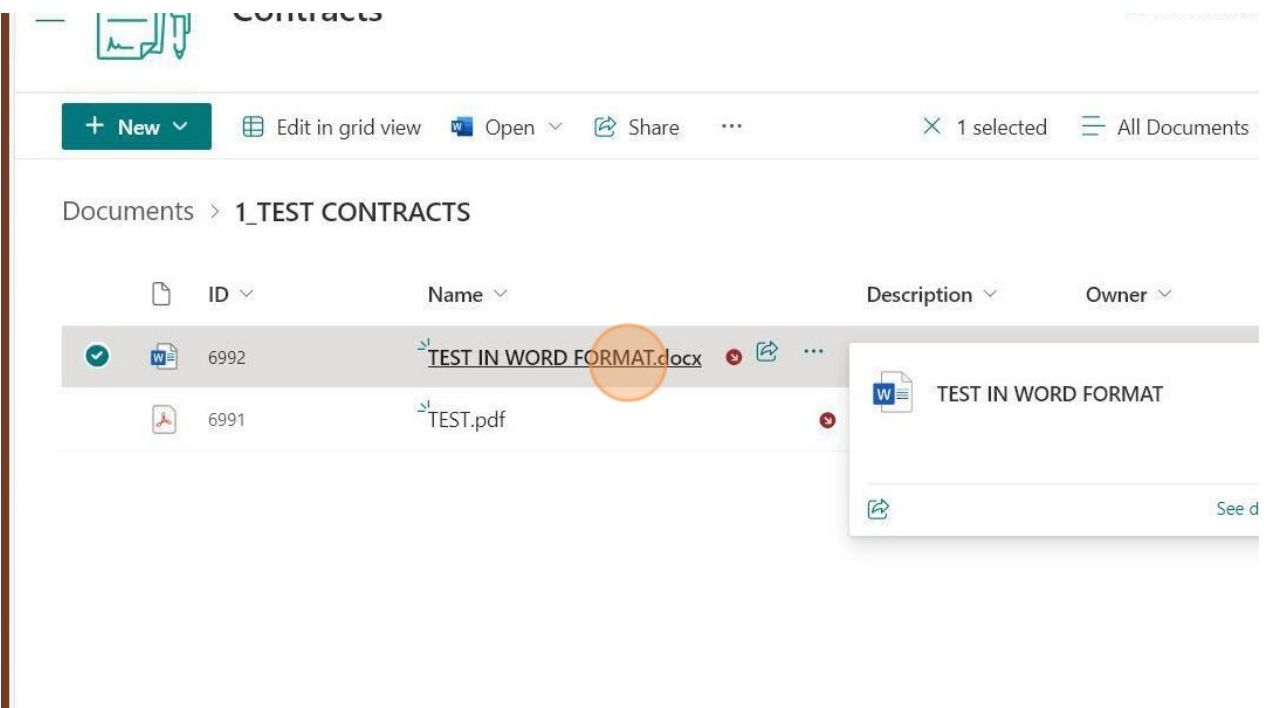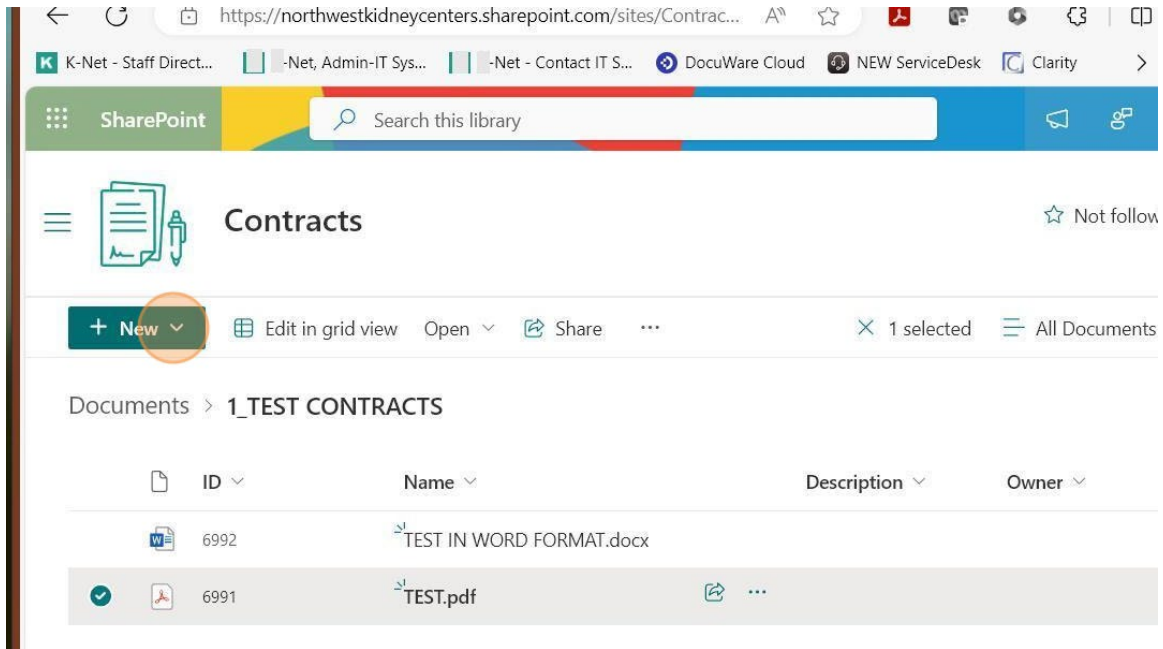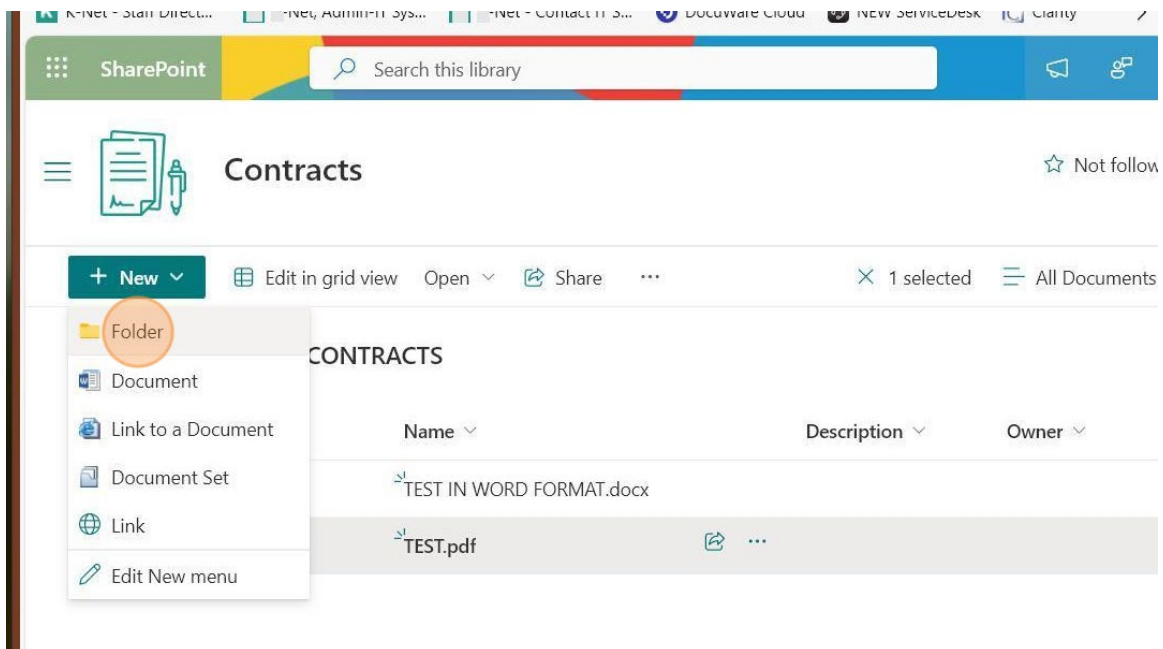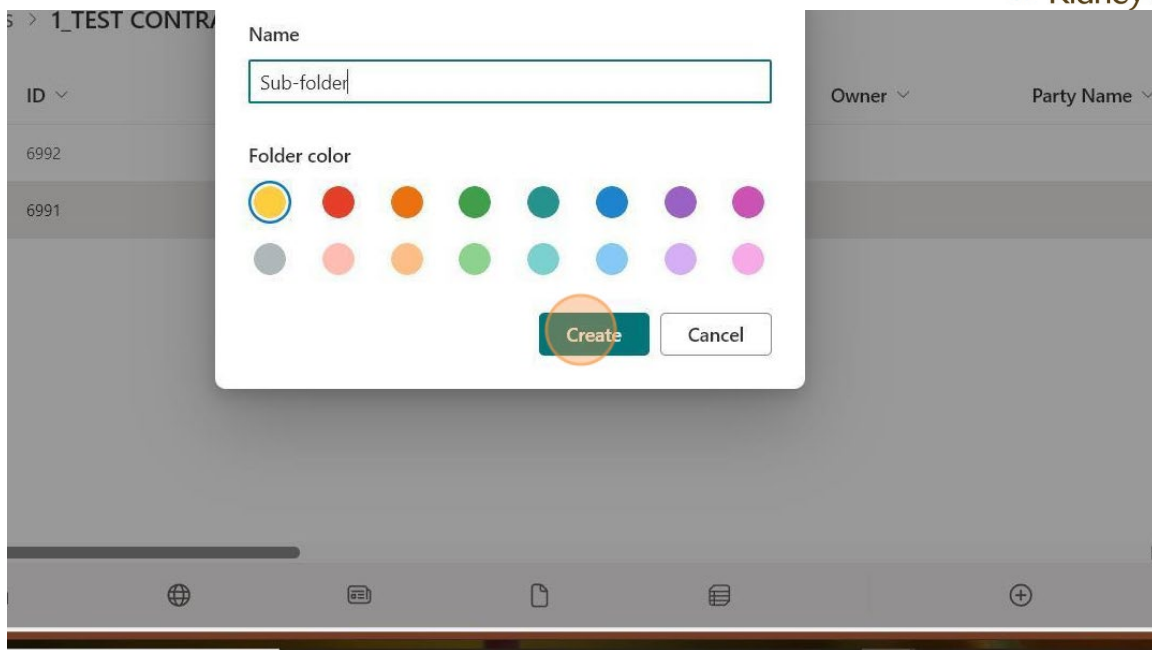
- **Use Metadata:** Instead of relying solely on folders, add metadata tags (e.g. Name, Description, Party Name, Contract Type, Dept, Start date, End date, etc.) to improve searchability.

- **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.