

Editing Contracts in MS Word

Note: This process will be the same for Originators using the Projects tab and Collaborators using the Collaborations tab on the Dashboard.

Once in your project and the negotiation has been selected:

- Click on “Download” to download the contract to your local hard drive for editing. You will have a pull down option to download as Word for editing, or PDF for viewing only.
 - Originators can Enable accept/reject changes (*before downloading the document*) using the green “More” button to the right of the contract negotiation listing. The document will be relocked upon upload. The Originator must Enable accept/reject changes at every version level prior to download in order to have that capability.
 - The uploaded documents will be saved onto the Project Dashboard in whatever format they were saved on the local computer drive – i.e. redlines will show when sharing if that is the way the document was saved prior to upload.
 - Enabling accept/reject changes allows the Originator to accept and reject changes in the redlined document.
 - These accepted/rejected changes will be permanent for the newly uploaded version of the contract. A prior version would have to be used if any of the edits during accept/reject changes were not wanted.



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Instructions:

EDITING CONTRACTS: To begin working with your contract, click the "Download" button. Enable accept/reject changes to the document – using the green "More" button to the right of the appropriate contract version before downloading. The PDF versions are not fillable PDF forms – they are for viewing only. To make edits download the Word document, make changes on your computer, and then upload your revised Word document to the table by selecting the Upload button. Uploaded documents must have a .docx extension or be in PDF format. [See User's Guide](#) for system/software requirements and additional instruction on working with contracts in Word.

SHARING CONTRACTS: Click the Share link under the "Share" heading to identify collaborators to invite to read or edit the contract. NOTE: In order to share versions under the "Compare Documents" heading, you must first have shared the version of that document (in the same row) under the "Share" heading.

To share Supporting Documents with a Collaborator, you must first have shared any version of the contract located under the "Share" heading within the project dashboard (not the Compare Documents heading).

Big Bridge Construction Project > Tri-Party Agreement for Integrated Project Delivery

[Upload](#) [Compare Selected](#) [Finalize](#)

| Documents | Share | Uploaded | Comment | Compare Documents | Actions |
|--|-----------------------|----------------------|-------------------------|-------------------|--|
| <input type="checkbox"/> Download 1.0 | Share | Erin S. 4:13 PM | Comment | | More |
| <input type="checkbox"/> Download Standard | | Erin S. 3/13/2012 | | | Move to Top Make Favorite Delete Enable Accept/Reject |

Supporting Documents

[Add document](#)

| Supporting Documents | Creation Date | Share Documents |
|----------------------|---------------|-----------------|
| | 3/13/2012 | |

- Open the downloaded contract from your local computer and edit in MS Word, the save to your local computer.
 - The Draft watermark and footer are locked throughout editing and sharing – until the finalization process.
- Click “Upload” to bring the modified contract back onto the website for sharing, comparison reports, and storing.
- Click “Add File”, and select the contract from your local hard drive files for uploading.
- Click “Start Upload”.
- A redline Comparison Document of the new contract version and the Standard contract (with it's the most recently uploaded version if later in the negotiation) will be automatically generated by the system and posted under the “Comparison Documents” column.

Advanced Instructions for Working with Contracts in Microsoft Word

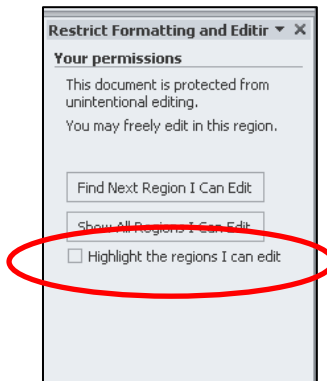
Once the document is downloaded to your local computer, please note the following special instructions:

a. GENERAL INSTRUCTIONS

As a standard form, ConsensusDocs contracts have been designed to establish the relationship of the parties in the standard situation. Recognizing that every project is unique, modifications will be required. Text may be edited, excluded or added (except for the locked footer).

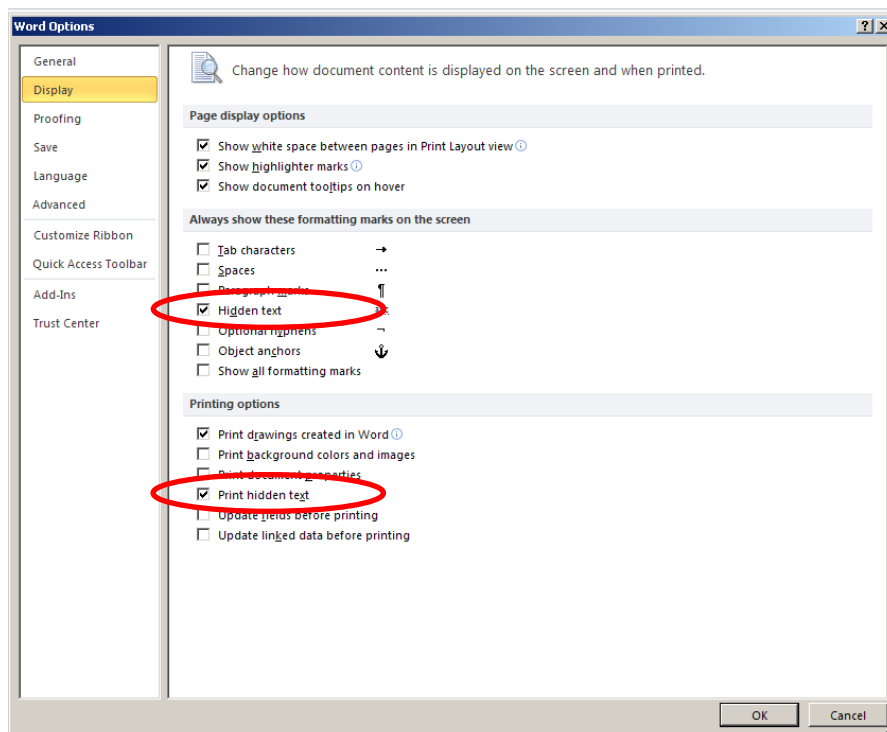
When opened for editing in Microsoft Word, the standard document will show the editable text shaded in yellow. There will be a yellow banner at the top of the document with an “Enable Editing” button that must be selected before changes can be made to the documents. Gray boxes are inserted throughout the document where information is necessary to prepare a complete document. Simply click on these gray boxes and type in your project information. Changes will be inserted with Track Changes activated. *Note: only the “Originator” of the document negotiation can accept/reject changes to the document and finalize it.*

The yellow shading of editable text is provided only as a guide for the editor and is not a necessary part of the document editing process. To turn off the shading, go to the “Review” menu and select “Restrict Editing” from the Protect Section of the tool bar and uncheck the “Highlight the regions I can edit” option.



b. EMBEDDED INSTRUCTIONS are provided to help you complete the document.

- Follow these steps to display or hide instructions:
 1. **Word 2010:** File, Options, Display, check the Hidden Text check box – or you can select “Show all Formatting Marks” which will include hidden text. A shortcut option is to select the “¶” button under the “Home” tab to show all formatting marks.
 2. **Word 2007:** Office button, Word Options button, Display Hidden Text check box.
 3. **Word 2003:** Tools, Options, View, Formatting Marks, Hidden Text check box.
- Follow these steps to print with instructions:
 1. **Word 2010:** File, Options, Display, Printing Options, “print with hidden text” check box.
 2. **Word 2007:** Office button, Word Options button, Printing Options section, Print Hidden Text check box.
 3. **Word 2003:** Tools, Options, Print tab, Include with Document, Hidden Text check box.



There will be three types of embedded instructions within the documents:

Red Boxes: Instructions within red boxes refer to fields that are typically required to be filled in for a complete contract document.

Blue Boxes: Instructions within blue boxes refer to fields that may or may not be required to be filled in for a complete contract document.

Green Boxes: Instructions within green boxes refer to provisions that have General Instructions or ConsensusDocs Coalition Guidebook Comments. The complimentary Guidebook is available at www.ConsensusDocs.org.

c. CROSS REFERENCES

Cross-referencing is included in the contracts for your convenience. Please know that cross-reference links are easily broken, such as in Comparison Documents generated by the platform. As with any legal document, you should always double-check all cross-references and not rely solely upon MS Word functionality.

ConsensusDocs are set up to automatically renumber when sections of text are added, deleted, or moved. There are two important steps to ensuring that cross-reference links within the Standard Contract text are updated to accurately reflect the changes made during editing.

1. Be careful where you insert text to make sure your cross-references update. Cross-references break if you add a new paragraph to your document by pressing “Enter” at the beginning of a referenced (usually numbered) heading. To prevent this, you must add new paragraphs by pressing “Enter” at the end of the previous paragraph (noting the indentation necessary to accurately reflect the appropriate hierarchical level for the section of text). For example, if you have a section numbered 5.2.6 and it's already referenced earlier in your document, DO NOT press “Enter” where the “**x**” is located in the following example: --- 5.2.6**x**Heading Title --- Instead, press “Enter” at the end of the line before this section. If the section before the one being moved is a lower or higher level in section hierarchy – you will need to take care to decrease the indentation to keep the inserted new section at the desired level. (example: when adding Section 5.3 when it will fall just after Subsection 5.2.5 – the inserted “return” will create a new Subsection 5.2.6 in pattern with the auto-numbering rather than a new Section 5.3). Editors can correct the list level by selecting the decrease indent arrow in the Paragraph section on the tool bar or by selecting the new section and hitting “Shift+Tab” to bring the new section to a higher list level.



- 2. ConsensusDocs contracts are locked to allow editing only in certain sections, and to limit the editing capacity of Collaborators. Section changes and deletions will affect cross reference links in the contracts. Changes will be shown in redline format by pressing Ctrl + A (to select all) then F9 or by printing the document, but will not automatically updated. Cross references to moved sections will adjust to the new section number. Cross references for deleted sections will produce an error message prompting the editor to correct the missing cross reference. Only the Originator can accept/reject changes – which is required to update the cross reference links or identifying missing links. To update cross-references, the Originator will first have to accept or reject changes, then press Ctrl + A (to select all) then F9. It is important to note that the cross-references will not be updated until this step is completed.**

System Compatibility

To Upload and Finalize edited documents they must be saved with a .docx extension – this is automatic with Windows MS Word 2007 and 2010, and Macintosh MS Word 2008 and 2001. For older versions, Microsoft offers a free compatibility pack that will allow users of older versions of Word to save files with the .docx extension.

Windows Word [compatibility pack](#)

Macintosh Word [compatibility pack](#)