

Quick Start User's Guide Online Technology Platform

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This Quick Start Guide is intended to present typical actions that will be performed for collaborative project negotiations using the new ConsensusDocs technology platform. More detailed instructions can be found in the [User's Guide](#) on the website.

KEY: **O** = Originator action **C** = Collaborator action

Website users can be both Originators and Collaborators. Location of contracts and allowable editing privileges are determined by the role assumed by a user upon entry to the website. The instructions below indicate where those differences are found.

The **Originator** is often the contract purchaser and is the initiator and manager of projects.

The **Collaborator** is invited by the Originator to view/comment on a project negotiation through a controlled Collaborations section of the website. Collaborators do not have access to the Project Dashboard set up by another Originator.

1. Register and Sign In (O and C)

(Any page)

- 1st visit – do not sign in – instead click on “Register” below the sign-in area and complete the form.
- Click on “Sign in” at the top of the page.

1.1. Make a Purchase (O)

(Catalog, and Quick Purchase pages)

- On the Home page, Select “Contract Catalog” or “Quick Purchase” at the top of the page.
- From the Quick Purchase page, select the subscription package you want OR
- From the Contract Catalog page, find the contract you want via the Contract Series or Contract Categories links.
 - Select “Purchase Options” button to see subscription package options that include that contract.
- Click on Select Package, enter quantity of user licenses, and discount code, if applicable.

- Click “Submit” – to verify billing information only - charges not made until the next step.
- Review your order and click “Purchase” – a receipt will be e-mailed to you.
- At the purchase confirmation screen that follows, you will be linked to your Dashboard where you can begin working with your contract - under the My Contracts tab – by adding the contract to a new or existing project (see section 1.3). *If you made a multiple license purchase – there will be additional steps that are described in section 1.2. below.*

1.2. Assign Multiple Licenses (O)

(My Information Tab)

If you purchased multiple subscription licenses you must assign a license to yourself and authorized users, following the instructions below, before proceeding to use the contracts:

- You will assign all licenses (**including your own**) through your Dashboard,
 - My Information Tab - select “Assign Subscriptions” in the My Information box.

- For multiple licenses - click on the subscription to be assigned, enter the e-mail address of the user, a personal message (optional), and click “Submit”.
- Once you have assigned a contract to yourself – return to the Dashboard and under the My Contracts Tab, select the contract and set up a new project or assign to an existing project where you will use the contract (see next section).

1.3. Setting up a Project and Add a Contract (O)

There are two ways of doing this – 1.3.1 or 1.3.2

1.3.1 (from the [My Contracts Tab](#))

- If setting up a new project – go to the My Contracts Tab – choose the Contract Series that contains the contract you wish to work with.
- Click on the “Select Contract” button next to the document you want to use.
- If you don’t already have projects set up on your Dashboard, you will be taken to an Add Project screen. Enter a project name and click “Create”.
- On the next “Create Contract” screen, rename your contract, if you wish, assign it to an existing project or “create a new project”, and click “Create”.
- You will be taken to your Project Dashboard where you can begin your collaborations by clicking on the link under the Negotiation Name column.

1.3.2 (from the [Projects Tab](#))

- Sign into your account.
- Click on the orange Dashboard button at the top of the page.
- Click on the “Projects” tab
- Click on the green “Add Project” button and name your project, then click “Create”
- Click on the Project Name link that you just created.
- Click on the green “Add Contracts” button
- Select the contract series that contains the contract you wish to work with.

- Click on the “Select Contract” button next to the document you want to use.
- On the next screen, rename your contract, if you wish, assign it to an existing project or “create a new project”, and click “Create”.
- You will be taken to your Project Dashboard where you can begin your collaborations by clicking on the link under the Negotiation Name column.

1.4. Edit Contracts (O and C)

([Projects Tab](#) or [Collaborations Tab](#))

To modify the Standard contract, or any version of the document:

- **(O and C)** From your Dashboard, under the Projects Tab **(O)** or the Collaborations Tab **(C)**, select the Project then select the Negotiation, then Click on the green “Download” button to download the contract to your computer for editing.
 - An Originator can Enable accept/reject changes using the green “More” pull down menu **before** downloading the contract to activate this feature.
- **(O and C)** Open the downloaded contract from your computer, edit, save to your hard drive, and close.
 - Editable sections are shaded beginning on the first page of the contract which follows the instructions page.
- **(O)** From your Dashboard under the Projects Tab, select the Project and the Negotiation, then click “Upload”.
- **(C)** On the Collaborations Tab, select the Negotiation, then click “Upload”.
- **(O and C)** Select “Add Files” and click “Start Upload”.
- **(O)** The revised contract will show on your Dashboard and an automatic comparison with the standard or the previous version will be generated and shown under the “Compare Documents” heading.

- **(C)** An automatic e-mail will be sent to the Originator notifying that an edited contract was added to the Dashboard.

1.5. Share Contracts and Collaborate (O and C)

[\(Projects Tab\)](#) or [\(Collaborations Tab\)](#)

An edited contract can be shared in the format it was saved and uploaded – clean or redline.

- **(O)** To create a clean copy of the contract, while in Word, go to the Review Tab, Tracking section, click on “Final” in the top pull down menu, Save, Upload to the Dashboard.
 - This process is similar to accepting all changes – only it is not permanent. To return to the redline version select “Final: show markup” from the location above.
- **(O)** From document download Dashboard, click “Share” next to the contract version you want to share with your Collaborator(s).
- **(O)** Enter Collaborator email address(es) - an e-mail will automatically be sent to invited collaborators with a link to the document for editing.
- “Sharing with...” is displayed for the Originator’s reference, on the document dashboard under that shared version (each version must be shared individually).
- The Compare Document version can be shared after the edited document version has been shared.
- **(C)** From the Collaborations Tab, select the Negotiation Name, download the contract by clicking on the pdf or Word icon under “Documents”, edit, and save to your hard drive.
- **(C)** On the Collaborations Tab, select “Upload”.
- An e-mail will be automatically sent to the Originator that an edited contract has been uploaded.
- **(C)** Comments can be made and read on the Collaborations Tab. All comments will be viewable by all Collaborators within that negotiation step/version.

1.6. Make a Favorite (O)

[\(Projects Tab\)](#) then [\(My Contracts Tab\)](#)

- From the Dashboard, select the Project then the Negotiation, then use the “More” pull down menu to the right of the appropriate contract version, and select “Make Favorite”.
- Favorites are saved under the My Contracts tab in the Document Series box under “Favorites”.
- Use Favorites on any future project – just select a favorite rather than a new Standard Document during the “Add Contract” process for a project.

1.7. Finalize a Contract (O)

[\(Projects Tab\)](#)

You cannot re-finalize or un-finalize a Finalized document. Finalizing will accept all redline changes, remove the “DRAFT” watermark and insert a unique Content Security ID code into the footer.

- From the Projects Tab, click the check box next to the Contract that you want to Finalize.
- Select the “Finalize” button.
- All documents in the finalized negotiation are automatically moved from the In Progress tab to the Finalized tab.
- After Finalizing, you can still edit the Word version of the document that was used for Finalization and “re-finalize” that.
- Download the Word version, edit, save, close, upload back to the project dashboard
- Use the More button to Make a Favorite
- Select that Favorite from the My Contracts tab
- Add that Favorite to the same project where the finalized contract is – it will now come into the In Progress tab but still in the same Project dashboard.
- Click on the check box to the left of the version 1.0 (the final you just added to the project)
- Click on the green Finalize button

1.8. System Requirements

- Microsoft Windows XP or greater or Apple Macintosh version 10.2.8 or greater
- Explorer 7 – 9, Firefox 6 +, Chrome 10+, or Safari 4+
- Windows: Microsoft Word 2003 (free [Compatibility Pack](#) required), 2007, 2010, 2013, 2016
- Macintosh: Microsoft Word 2004 (free [Compatibility Pack](#) required), 2008, 2011