

Purpose & Profiles

This job aid covers the steps for creating, updating, and approving templates.

Profiles: Agency Template Managers, Template Managers

Used When

Reference this when creating and managing contract templates.

Click Contracts

 Log in to OhioBuys. From the Main Menu Navigation bar, click Contracts and select Browse Templates from the drop-down menu.

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Click Create Template

2. Click the Create Template button.

Create Template

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Enter Template Code

3. Enter the desired Code.

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Note: This is a manually entered code. No spaces or special	
characters are allowed. Only alphanumeric characters and	
underscores can be used.	

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Enter Template Name

4.	Enter t	he des	ired Na	ame.

Name*		

Note: This is the label for the template and should be descriptive.

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Enter Template Contract Type

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template. If this template should be used for multiple contract types,					
additional contract templates will need to be created for each					
additional contract templates will need to be created for each					
contract type.					

Enter Contract Sub-Types

6. Select the desired Contract Sub-Types .	The OtioBuys	Suppliers Sourcing Contracts Shop Config Integration Settings	Procurement Approvals	Invoicing Release & Permit Analytic	Public Request Admin	A 🕒 Patrick G. 🔹 🚺
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Add Comments

7. Type any desired **Comments** to add context on the template.

Comments





Enter Template Contract Entity

8. Select the desired Contracting Entity.

Contracting Entity	

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Note: This includes all contracting entities that can leverage the contract template.

Click Save

Save

9. Click the Save button.



Navigate to the Clause Authoring tab

10. Navigate to the Clause Authoring tab.



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Select Template

 To begin with an existing template (e.g., to create a new template that is similar to an existing one), click the Select Template field.

Template & Clause I	ibrary
Select Template	
	•
Add Master Clause	



After selecting the existing template, the clauses will appear. They will be available for additional editing.

Click Add Master Clause

12. Click the **Add Master Clause** button if a master clause needs to be applied.

Add Master Clause



🔺 Note

If a master clause does not need to be applied, skip this step.

Search by Keyword

13. Search for the name of the clause you need to insert, click the **Keywords** field.

(evwords	



Click the Insert (📲) icon next to the clause.

Click the Insert icon



New Clause

Note: Language can also be typed directly into the contract template.



Type New Clause



If you have questions or need additional assistance, please contact the OBM Contact Center via email (<u>OBM.ContactCenter@obm.ohio.gov</u>) or phone (877-644-6771).

Click Checkmark

17. After completing edits to a new clause, click the **Checkmark** icon to approve it.

Checkmark Icon: 🗹



X Icon: 🛛 🗙

Click the X icon to reject the new clause.

Review the contents of the template.



- a. **Description**: This contains comments or attachments related to the clause.
- b. Mark as read: This will mark the individual clause as read/reviewed.
- c. Lock/Unlock: This locks or unlocks the clause. Note: only clauses on the current version can be locked or unlocked. This will affect whether other users viewing the draft template can edit upon opening. Users do have the option to unlock while drafting.
 d. Comment: Approvers can type in comments for each clause or attach documents to support their comments.
- e. **History**: Users can view the entire history of the clause, compare versions, and even revert the clause to a previous version.

🔺 Note

Users can optionally drag and drop clauses in the Summary section to reorder them once they have been inserted.



Click Plus Sign



Label	
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Click Create Version



Click Submit for Review

21. Click the **Submit for review** button.

Submit for review



🔺 Note

Updating an existing contract template is similar to the process outlined above. Within an existing template, users should follow steps 9-19 to modify an existing template and create a new version.