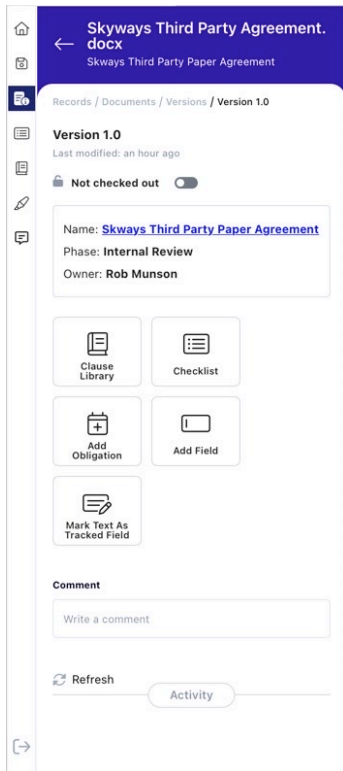


Contract Document Details: the Basics

Now that a new contract document has been created in OnitX CLM and is open in the Word Add-In, users have many options for editing the contract and important status information available.

When OnitX CLM contracts are opened in the Word Add-In, users are automatically shown the Document Details screen. This screen contains all the tools you need to begin redlining this document version.



The first part of the Document Details screen gives the user details about the open contract document. Users can traverse the breadcrumbs from the contract record to all documents which comprise the record, version history and finally, the open version displayed in the Add-In.

This Add-In shows users the current version of the open document as well as a timestamp of this version's last update.

If a document is available for check out, the lock icon will be open next to the grey "Not checked out" status toggle. For more information on checking out documents, please read (need link to new article).

Finally, users have a convenient way to navigate directly to the contract record inside OnitX CLM via web browser, an they can see the Phase and Owner of the document.

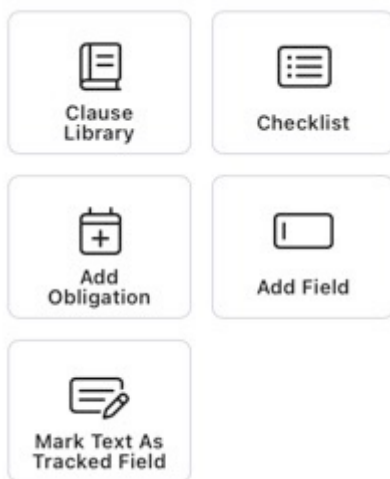
All of this information is meant to let users know if they can edit this document, how to get to this document inside OnitX CLM and who may be consulted about this document in the event of any questions or inquiries.



The next segment of the Document Details screen features tiles to unlock redlining functionality in the Add-In. There are tiles for accessing the Clause Library to insert clauses to the contract, access AI Checklists in Catalyst for Contracts to review your contract against for any risky language or terms, adding an obligation to the OnitX CLM contract record, adding CLM fields to track and marking existing text in the contract to track.

For more in-depth information on the Clause Library, Checklists in Catalyst for Contracts, Obligation Management and Fields, please read these articles:

- [Clause Library](#)
- [Working with Catalyst for Contracts: Playbooks and Checklists](#)
- [Obligations](#)
- [Field Management](#)



The final portion of this Document Details screen allows commenting on the record. Users simply type in text, hit Enter and observe the comment is posted in the Activity Feed on this screen. At any time, the feed can be refreshed to observe new comments made by other users.

Comment

Marsha, please begin your review.

 Refresh

Activity

Comment

Write a comment

 Refresh

Activity

Rob Munson
a few seconds ago

Marsha, please begin your review.