

Configuring the Onit Word Add-in

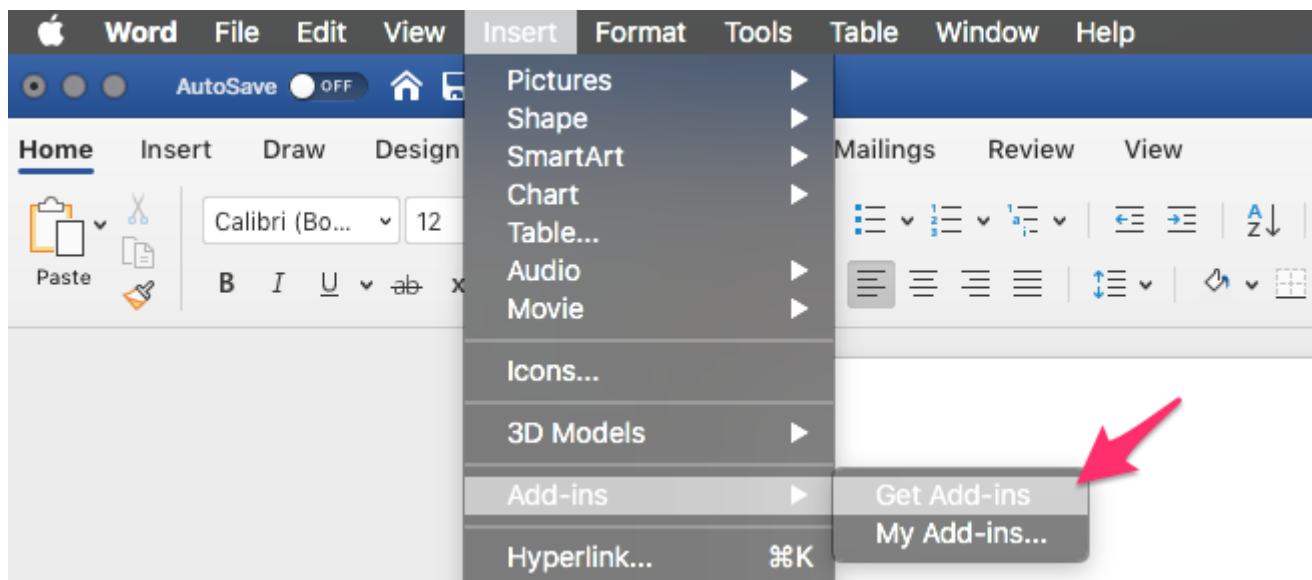
- [How to Install Onit Connect](#)
- [Using search in Onit Connect](#)
- [Editing and Saving Documents](#)
 - [Send for Internal / External Review](#)
 - [Send for Approval](#)
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- [How to Create a New Record from the Add-in](#)
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Add-in Requirements

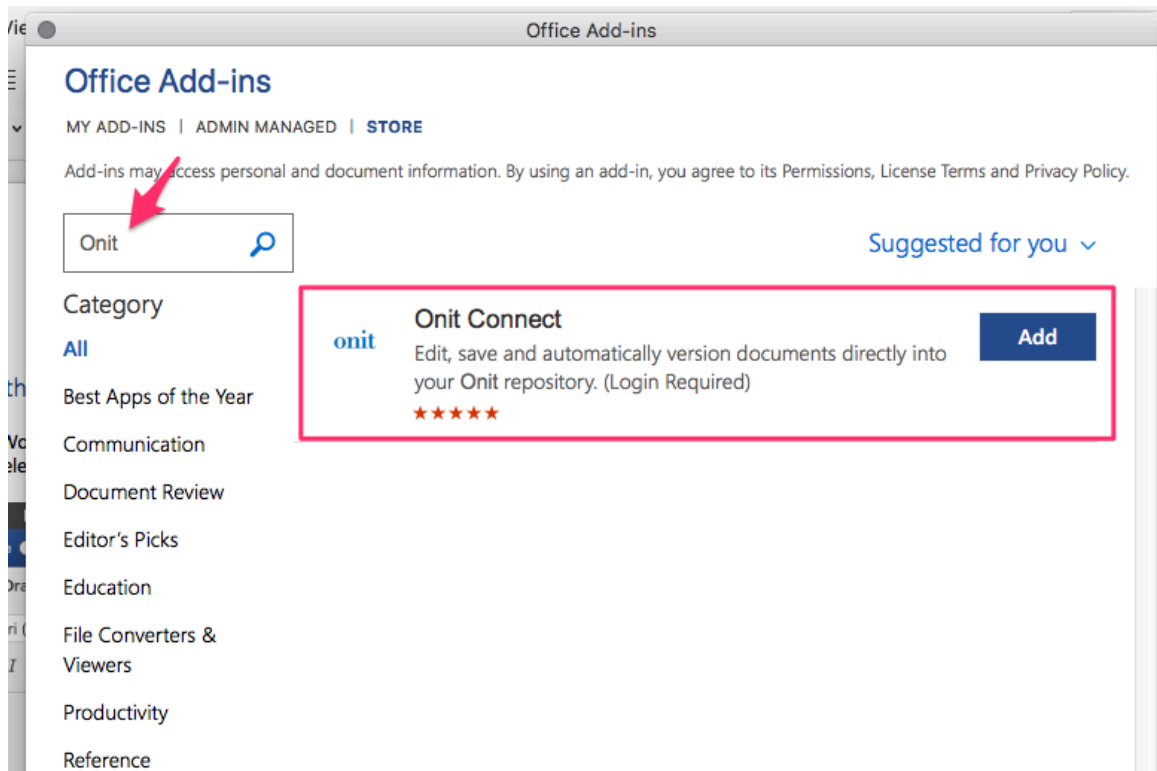
- Word 2016 for Mac
- Word 2016 or later

How to Install Onit Connect

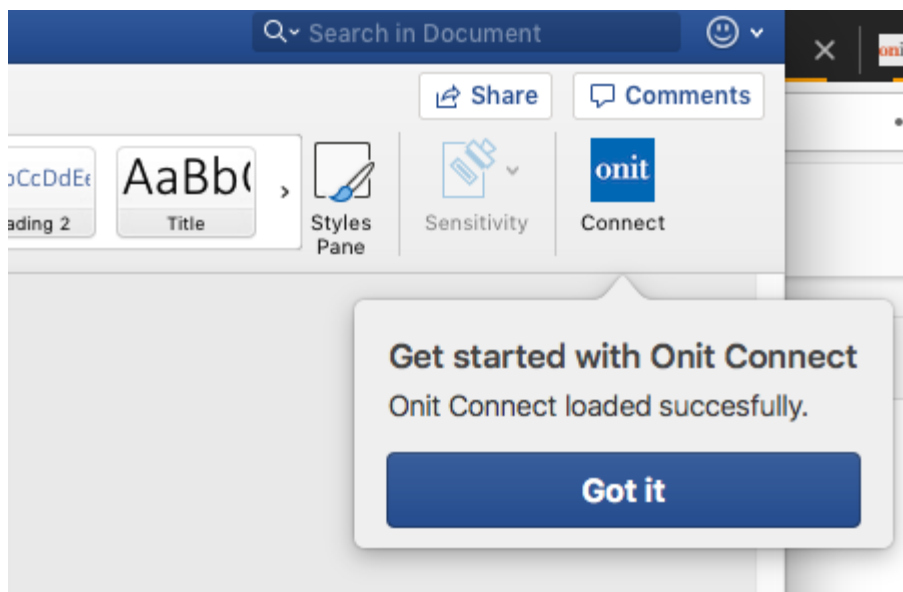
To install the **Onit Connect** Add-in begin by opening Microsoft Word. In the **Insert** menu hover over **Add-ins** and select **Get Add-ins**.



In the search box search “Onit” and click the **Add** button on the **Onit Connect** Add-in.

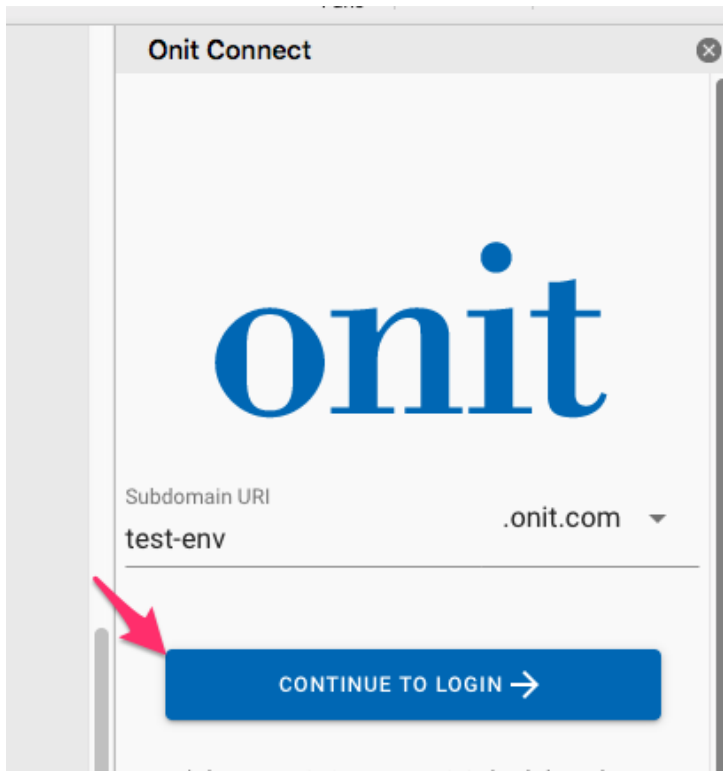


When the Add-in is successfully installed you will see this popup in the Word ribbon.



Click the **Onit Connect** Add-in and enter your environment's subdomain. The subdomain is your environment's URL after the `https://` and before `.onit.com`. For example, the subdomain for `https://test-env.onit.com` would be **test-env**.

Once you have entered your environment's subdomain click **Continue to Login**.

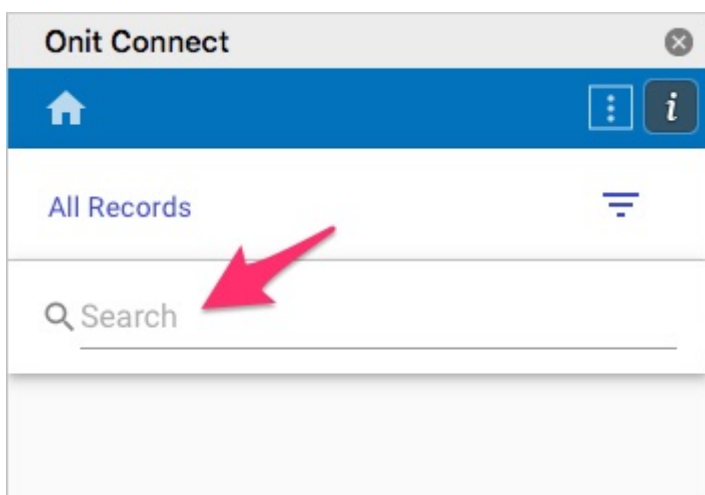


Enter your username and password in the popup window to login. When you have successfully logged in you as **Logged In Successfully** balloon.

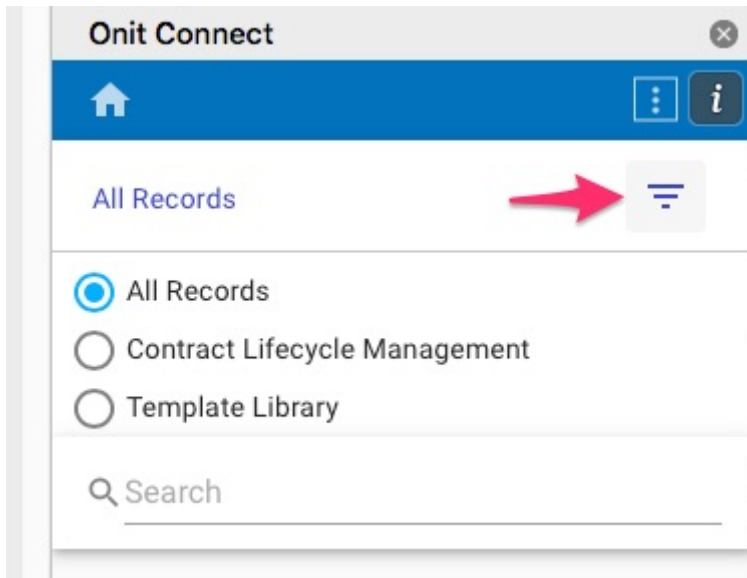
The setup is now complete.

Using Search in Onit Connect

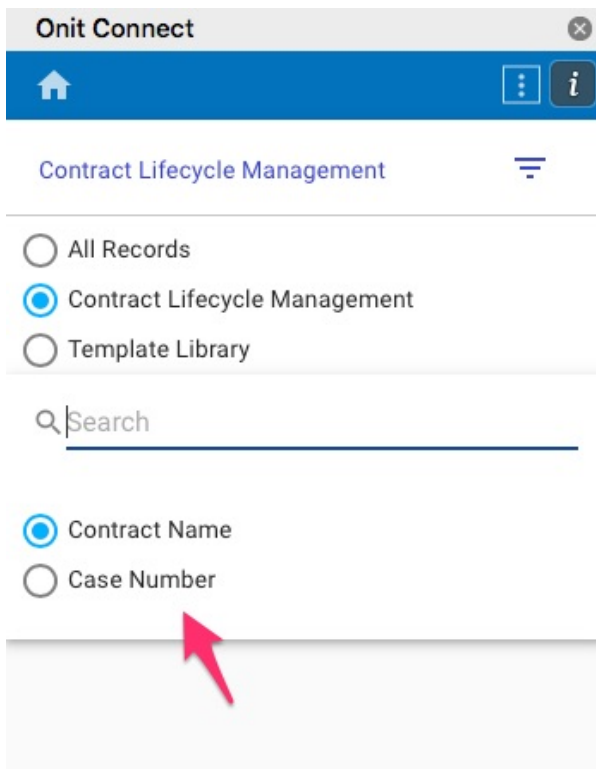
To search for documents from the **Onit Connect** Add-in in enter a keyword or name of the document in the search bar.



You can further narrow your search by selecting a specific App or by searching in the Template Library. Click on the dropdown menu to display more options.

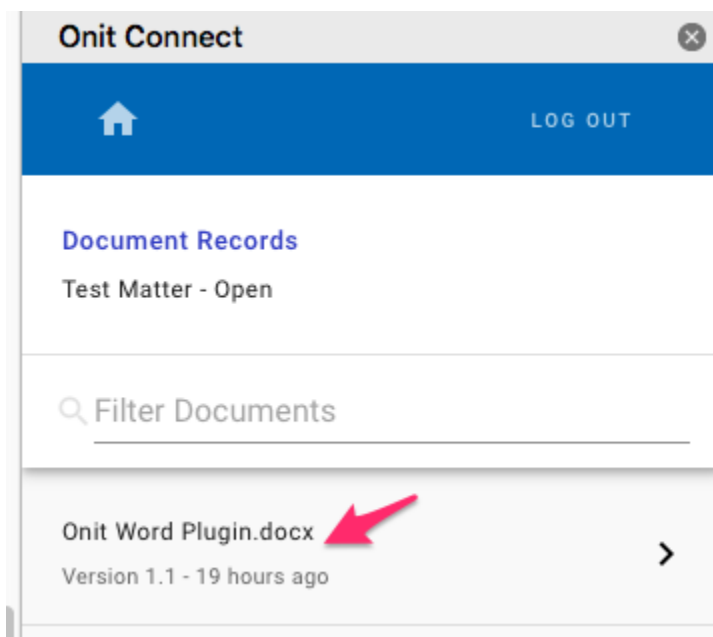


Additionally, by selecting a specific App you can search on the **Contract Name** or **Case Number**.

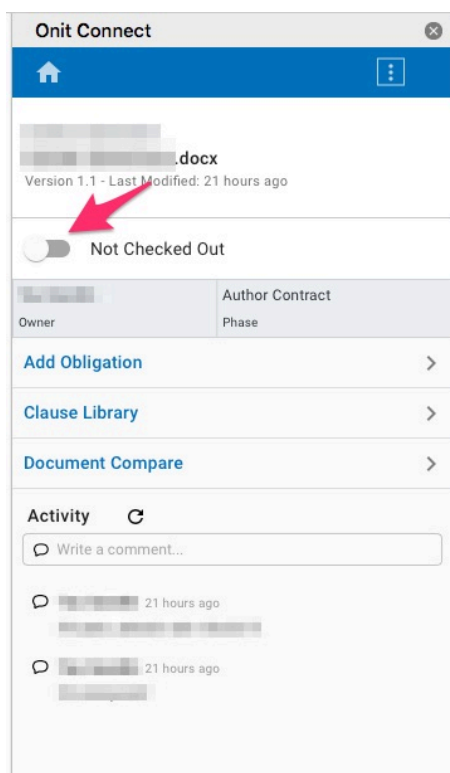


Editing and Saving Documents

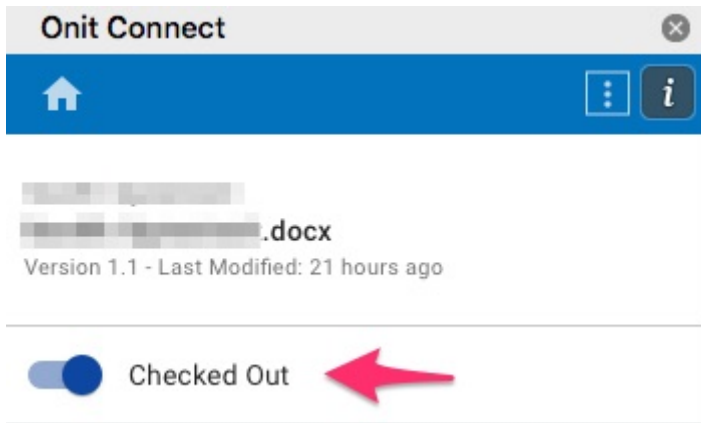
To start editing a document click on a document from the **Onit Connect** panel.



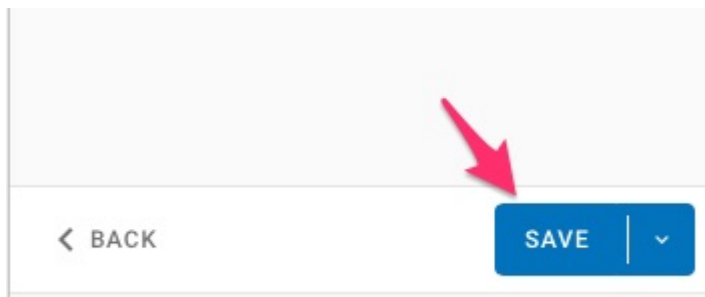
A new browser window will open and prompt you to save the document to your computer. Once you have saved the document open the document in Word and begin editing as normal. If you would like to prevent other users from checking in (i.e., saving) a new version of the same document while you are editing, click the **Not Checked Out** toggle to Check Out the document.



When the document is marked “Checked Out” other users will not be able to upload a new version of the document to Onit.



Once you are done editing a document you can check the document back into Onit. Click the **Save** button in the **Onit Connect** panel.



Choose whether you would like to save the document as a major or minor change. A major change will increment the whole version number (e.g., 1.0 to 2.0) while a minor change will increment the decimal number (e.g., 1.0 to 1.1). Each major change will reset the decimal number to zero.

Onit Connect

Save [] .docx

☐ Major Change ☒ Minor Change

Brief description of the change you made.
(Optional)

Workflow

☒ Check In

☐ Check In and Send for Internal Review

☐ Check In and Send for External Review


☐ Check In and Send for Approval

Reconciliation

☐ Reconcile Tracked Changes?

< CANCEL SAVE AND FINISH

Enter an optional description of your changes and click **Save and Finish**.

 Note: If you have chosen to Reconcile Tracked Changes the **Save and Finish** button will change to **Next** and navigate you to the reconciliation screen.

Check In and Send for Internal / External Review

Clicking either **Check In and Send for Internal Review** or **Check in and Send for External Review** will check in the document *and* send the document to Onit Users or external emails respectively.

Workflow

☐ Check In

☒ Check In and Send for Internal Review

☐ Check In and Send for External Review

☐ Check In and Send for Approval

Users ▼

Workflow

☐ Check In

☐ Check In and Send for Internal Review

☒ Check In and Send for External Review

☐ Check In and Send for Approval

Contacts ▼

Check In and Send for Approval

The **Check In and Send for Approval** button will check the document in and advance it to the approval stage in your Onit workflow.


Workflow

☐ Check In

☐ Check In and Send for Internal Review




☐ Check In and Send for External Review

☒ Check In and Send for Approval

Users 

Reconciliation

When saving a document you have the option to reconcile tracked changes. To reconcile tracked changes click **Save** then on the next screen make sure **Reconcile Tracked Changes?** is selected.

☐ Major Change ☒ Minor Change


Brief description of the change you made.
(Optional)


Workflow


☒ Check In

Reconciliation

☒ Reconcile Tracked Changes?





 CANCEL **NEXT**

All fields identified for reconciliation will show on the next screen.

2 Fields Available for Reconciliation

	Previous	Current	CLM
Annual Uplift	<input type="radio"/> .05	<input checked="" type="radio"/> .085	<input type="radio"/> .05
Contract Amount	<input type="radio"/> \$120,000.00	<input checked="" type="radio"/> \$1,20,000.00	<input type="radio"/> \$0.00

< CANCEL

SAVE AND NEXT

1 Clauses Available for Reconciliation

Uplifts - Changed

Original

Uplifts. Upon renewal of the products after the end of their original term an uplift of .05% will be applied unless otherwise negotiated prior to renewal.

Edited

Uplifts. Upon renewal of the products after the end of their original term an uplift of ~~.05%~~ **.085%** will be applied unless otherwise negotiated prior to renewal.

< CANCEL

SAVE AND FINISH

Add Obligation

The **Add Obligation** button creates a new Record in the **Obligation** App within Onit. To create a new obligation select **Add Obligation**.

Version 2.0 - Last Modified: 2 months ago

☐ Not Checked Out

Owner	Language Approved	Phase
Add Obligation		>
Clause Library		>
Document Compare		>

Activity

Fill in the Onit intake form with the appropriate details, then click **Submit**.

Obligations

English

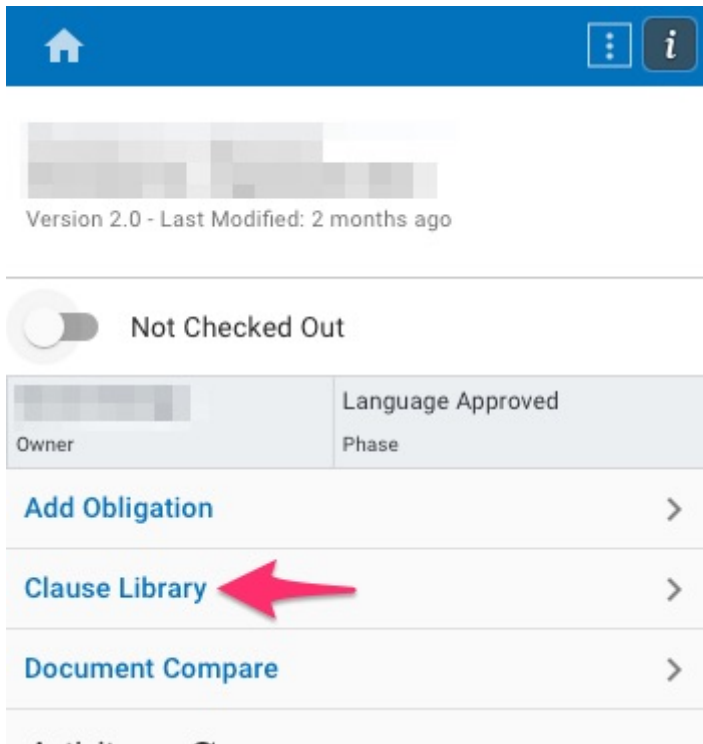
Create Obligation

Obligation Type *	
Short Description	
Recurrence *	
Owner	
Due Date	M/D/YYYY
Status	Not Started
Clause	

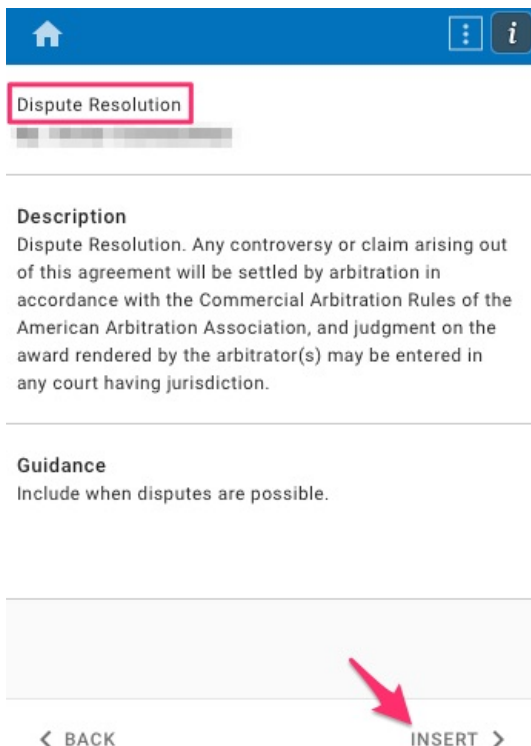
Submit

Using the Clause Library

To add a clause to your document place your cursor where you would like the clause to be inserted and click **Clause Library**.



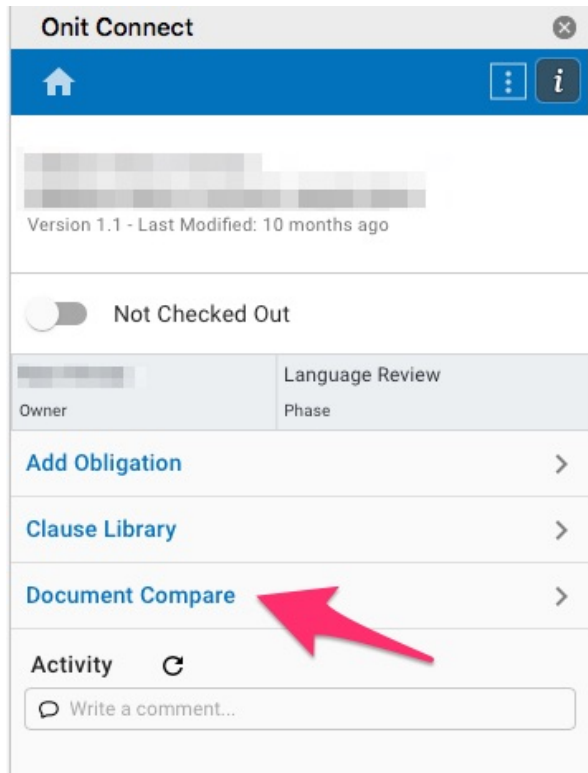
The clause library shows all available clauses. Filtering tools are available by clicking the the filtering icon under the search bar. Click on the appropriate clause, then click **Insert**.



The clause will be inserted where your cursor is located.

Document Compare

To compare two existing documents, first open one document in the Word Add-in. From the add-in panel choose **Document Compare**.



An Onit window will open where the original and revised version of the document can be selected. The **Select Original Document** field will automatically be populated with the document currently open in the Word Add-in. From the drop downs select the versions of the original and revised documents to compare.

The **Label Changes With** field will tell Word who to attribute changes to, e.g., John Smith.



The **Save as version of** field determines if the comparison document will be saved as a version of the original or revised document. Additionally, the **As a** field determines if the comparison document is saved as a major or minor version.

Once the **Document Compare** fields are filled in, select **Submit** to generate the comparison document.

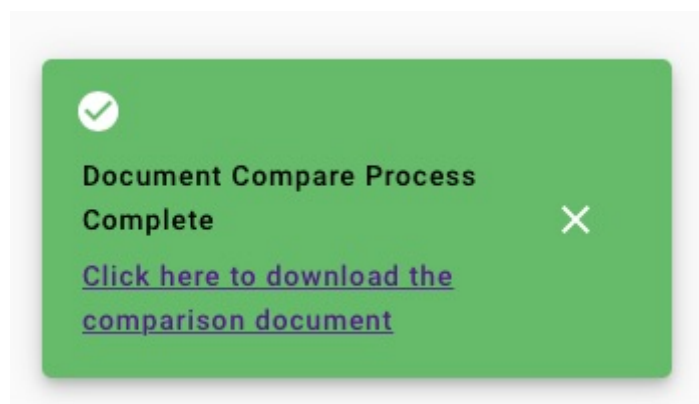
Document Compare

English

Create Request

Select Original Document	Demo Contract_signed.pdf
Select Original Version *	Demo Contract.docx v1.0  Version 1.0
Select Revised Document	Demo Contract_signed.pdf
Select Revised Version *	Demo Contract.docx v1.2  Version 1.2
Label Changes With *	Demo Change
Comparison Settings	<input checked="" type="checkbox"/> Insertions and Deletions <input checked="" type="checkbox"/> Case Changes <input checked="" type="checkbox"/> Comments <input checked="" type="checkbox"/> Headers and Footers <input checked="" type="checkbox"/> Fields <input checked="" type="checkbox"/> Tables <input checked="" type="checkbox"/> Footnotes and Endnotes <input checked="" type="checkbox"/> Textboxes <input checked="" type="checkbox"/> Formatting
Show Changes at:	<input checked="" type="radio"/> Word level <input type="radio"/> Character level
Save as version of:	<input checked="" type="radio"/> Original document <input type="radio"/> Revised document
As a:	<input checked="" type="radio"/> Minor version <input type="radio"/> Major version




Depending on the length of the documents, generating the comparison might take a moment. Once the generation is done a pop-up will appear in the bottom of the add-in panel.



Click the link to download the comparison document to your computer.

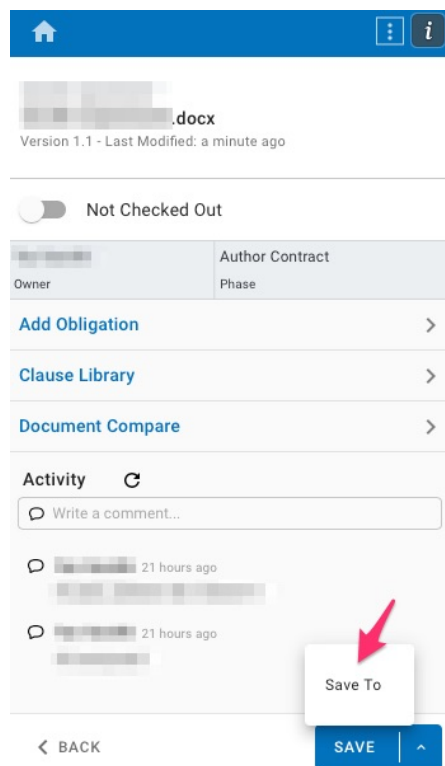
In Onit, the document will show as "Checked in from document compare", along with a download link.

Document Details Document Versions (7)

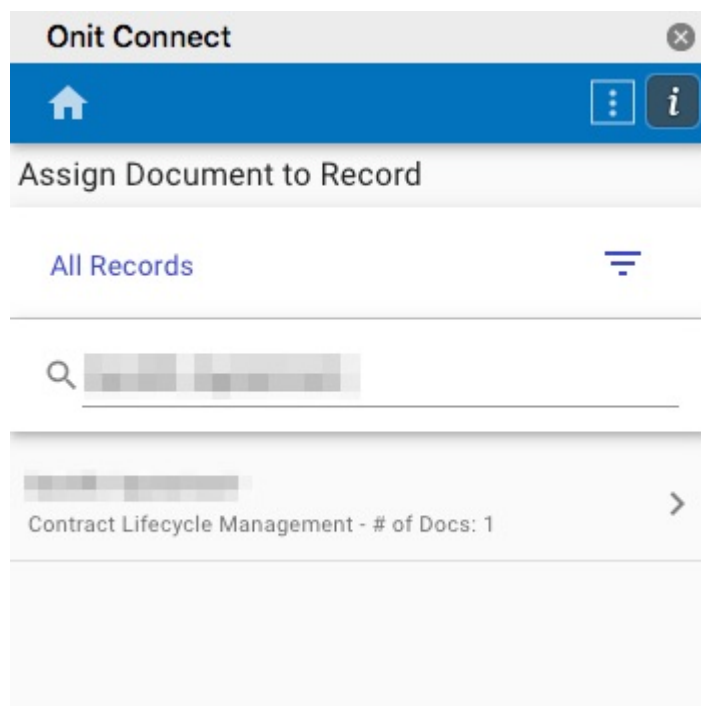
Actions						Mode: Simple Advanced	  		
<input type="checkbox"/>	Document Version Name	Start	Download Link	Comment	Name				
<input type="checkbox"/>	Demo Contract_signed.pdf v2.3		Demo Contract_signed.pdf	Checked In from document compare	System				

How to Associate an Existing Document with a New Record

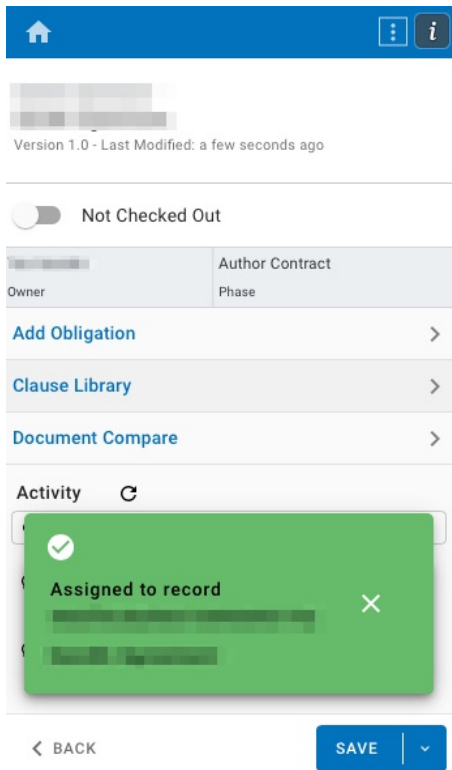
It is easy to save an existing document to a new Record in Onit. Simply open the existing document in Word and choose the **Save To** button by clicking the up arrow next to **Save** in the **Onit Connect** panel.



Then choose the Record you would like to associate the document to.



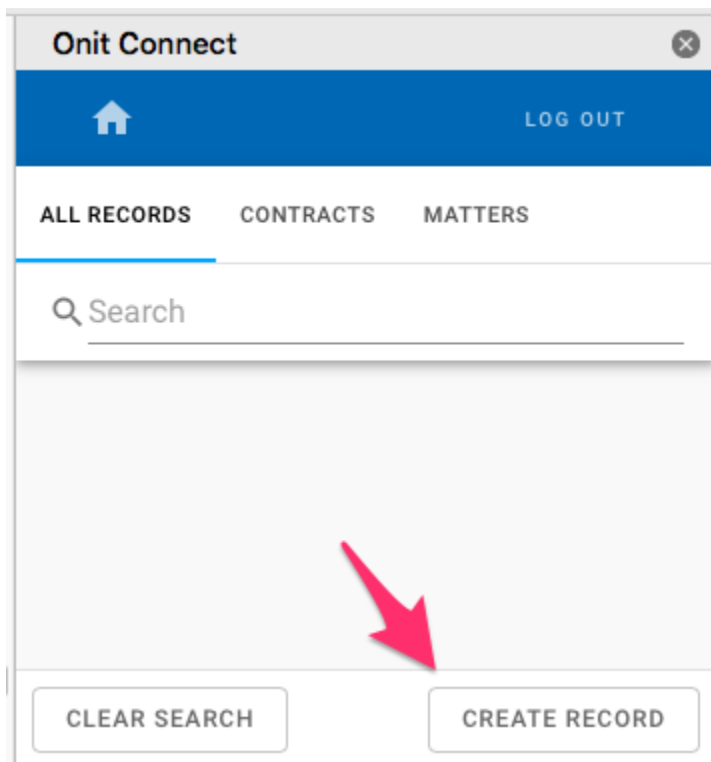
You will see a confirmation notice when the document is successfully associated.



You can now continue editing the document as normal.

How to Create a New Record from the Add-in

To create a new Record from the **Onit Connect** Add-in choose **Create Record** from the bottom of the screen.

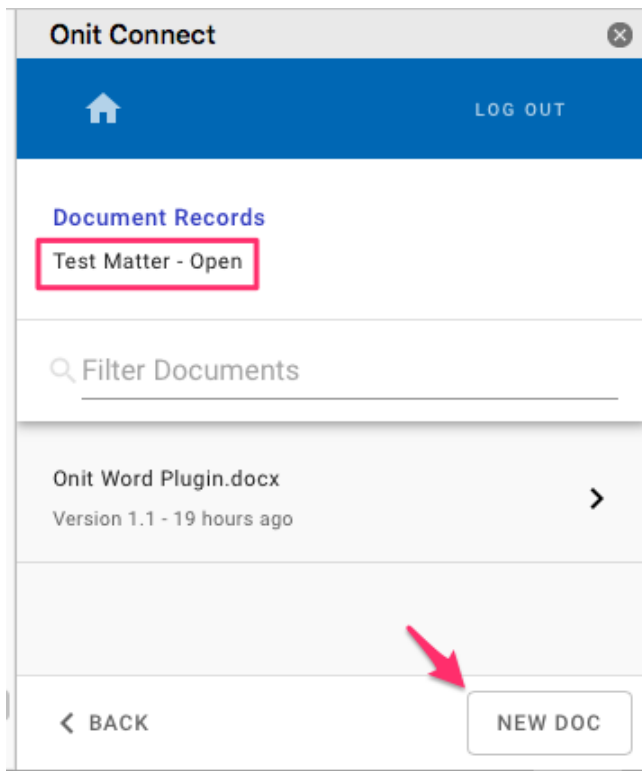


A new Record launch form will popup in a separate window. Click **Save** to save the new Record.

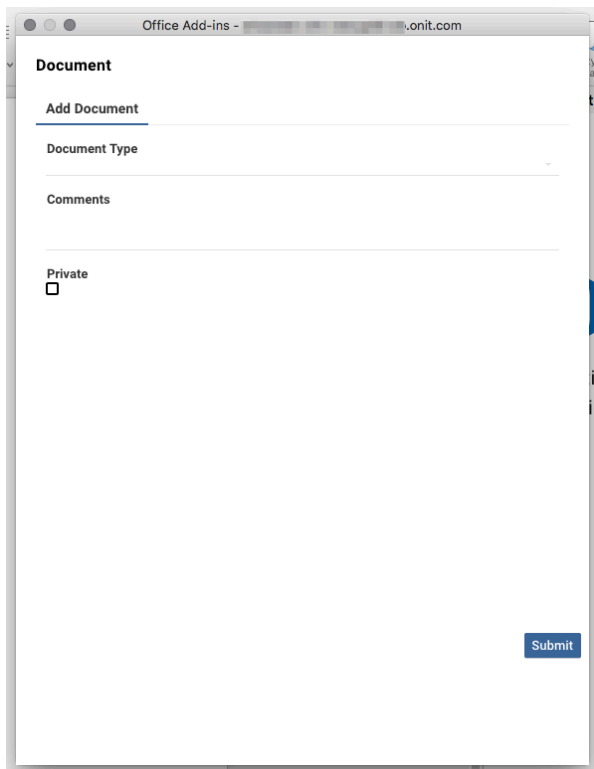
The screenshot shows a 'Contract Lifecycle Management' form in a separate window. The form has a title bar that says 'Office Add-ins - Onit Connect'. The form is divided into several sections. The first section is 'Create Contract', which includes fields for 'Contract Name' (with a red asterisk), 'Executed Contract' (a checkbox), 'Contract Type' (with a red asterisk and a dropdown menu), 'Third Party Paper' (a checkbox), 'State Of Incorporation' (a dropdown menu), 'Contract Amount' (a text field with a currency symbol and a dropdown menu), 'Contract Notes' (a text area), 'Effective Date' (with a red asterisk and a date picker), 'Region' (with a red asterisk and a dropdown menu), and 'Early Termination Penalty' (a text field). There is a 'Next' button at the bottom right of the form.

How to Create a New Document from the Add-in

To create a new document from the **Onit Connect** Add-in navigate to a Record within the Add-in. Once you are on a Record's page click the **New Doc** button in the lower right of the panel.




A new window will open to name the document. Once you are done click **Save**.



Once the document has been successfully created the Add-in will navigate to the new document. You can continue editing the document as normal.

Onit Connect



LOG OUT

Test Matter

Document -

Version: 1.0 Last Modified: a few seconds ago

Not Checked Out

Party	<div></div>	Open
	Owner	Phase