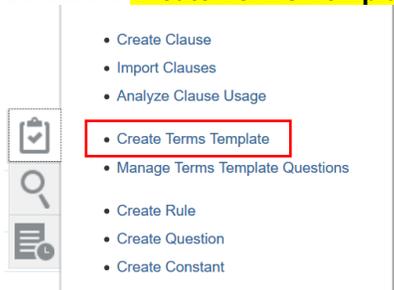# Using the Terms Library
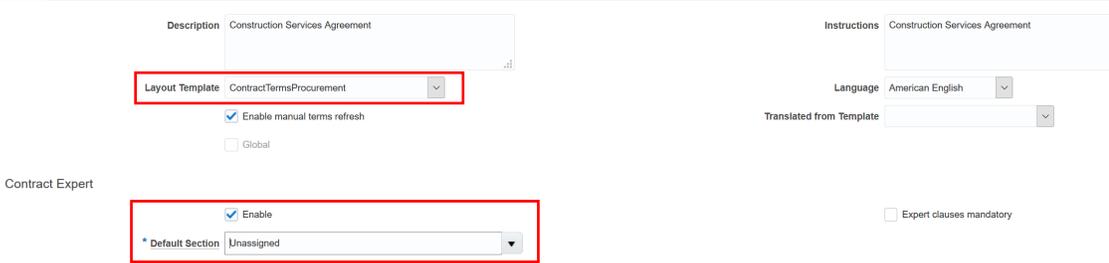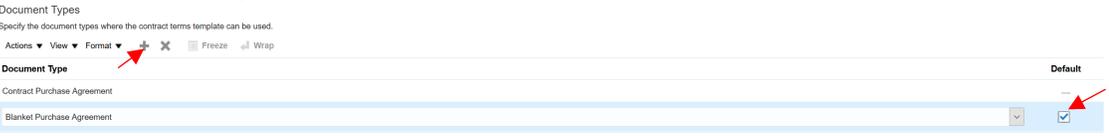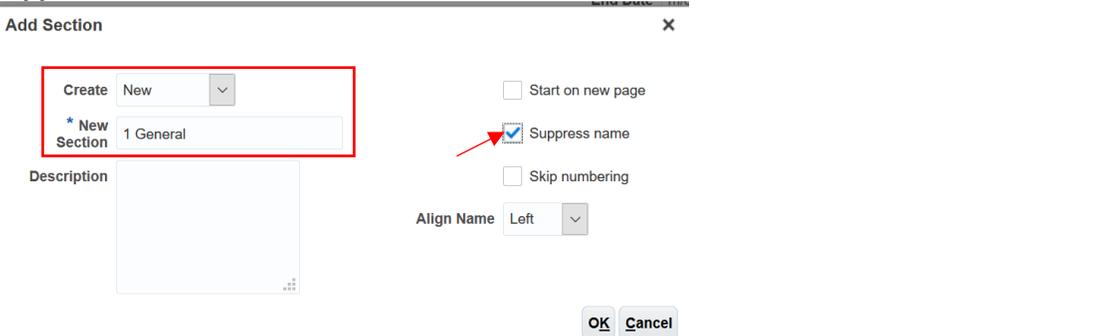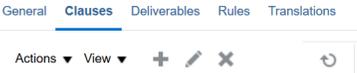
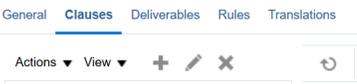**Audience:** Procurement Managers, Procurement Contract Administrators, Buyers

Purpose: The Contract Terms Library contains terms templates that you can use to insert boilerplate terms and conditions into contracts during contract authoring.

This library contains individual sections, clauses and variables. Each clause, which is usually a single paragraph, contains text that specifies a set of legal terms. Clauses make up contract sections, which are then assembled to create a terms template or a contract's terms and conditions. Variables are used within a clause to insert information into the contract terms from a sourcing document. Finally, contract expert rules are made up of questions and responses that drive clause selection, terms template selection, and business policies and standards.

This job aid will assist you in creating a terms template with and without Contract Expert enabled.

Step	Action
1	Navigate to **Contract Management** > **Terms Library** > Task **Menu**.
2	Select the **Create Terms Template.**
3	**BU** = Select BU **Name** = XXXXXXX Test Contract Terms Template (In this example 'Construction Services Agreement') **Intent** = Buy **Type** = Structured **Start Date** = Enter a date greater than today's date.
4	Select the **Layout Template** = ContractTermsProcurement.

5	**Contract Expert** = Enabled **Default Section** = Unassigned.
	General Clauses Deliverables Rules Translations Description: Construction Services Agreement Instructions: Construction Services Agreement Layout Template: ContractTermsProcurement Language: American English ☑ Enable manual terms refresh Translated from Template: ☐ Global Contract Expert ☑ Enable ☐ Expert clauses mandatory * Default Section: Unassigned
6	Click the **+** icon to add **Document Types**: Blanket Purchase Agreement (Select as Default) Contract Purchase Agreement. Document Types Specify the document types where the contract terms template can be used. Actions ▾ View ▾ Format ▾ + ✖ ▦ Freeze ◁ Wrap Default **Document Type** Contract Purchase Agreement Blanket Purchase Agreement ☑
7	From the **Clause** tab click **Actions > Add Section**. General **Clauses** Deliverables Rules Translations Actions ▾ View ▾ + ✏ ✖ ↺ Add Section
8	**Create**= New **New Section** = XXXXXXX Test Section (In this example 1 General was used) **Suppress Name** – Checked. Add Section ✖ Create: New ☐ Start on new page * New Section: 1 General ☑ Suppress name Description: ☐ Skip numbering Align Name: Left OK Cancel
9	Select **OK**.
10	Click **+** icon to add a clause. General Clauses Deliverables Rules Translations Actions ▾ View ▾ + ✏ ✖ ↺
11	**Search** and select a clause (In this example ARTICLE I is selected)

LUCAS COUNTY
OHIO

Add Clauses ✕

◢ Search

Search | Title | ▾ | | 🔍 | Advanced

View ▾ Format ▾ ▦ Freeze ⬏ Wrap

Title	Display Title	Description	Type	Version	Details
ARTICLE ONE			Agreement	3	🗇
ARTICLE SE...			Agreement	3	🗇
ARTICLE NINE			Agreement	3	🗇
Legal Frame...			General terms	1	🗇
Bid Alteratio...			General terms	2	🗇
Taxes			General terms	1	🗇
Compliance ...			General terms	1	🗇
Non-Accepta...			General terms	1	🗇
Performance...			General terms	2	🗇
Co-Op Oppo...			General terms	2	🗇

Rows Selected 1

Apply OK Cancel

12	Click **Apply**.
13	Click **+** icon to add a clause.
	General **Clauses** Deliverables Rules Translations
	Actions ▾ View ▾ + ✎ ✖ ↺
14	**Search** and Select a clause (In this example Compliance with the Law is selected.)

| 15 | Click **Apply** and **OK**. |
| 16 | Click **Save**. |