PAPER
SOFTWARE

Contract Tools

User Guide

Paper Software LLC
papersoftware.com

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Contents

Welcome to Contract Tools

Contract Tools is a powerful Word add-in for drafting and analyzing contracts.

To learn how to get started with Contract Tools, see Chapter 1, "Getting Started" on the next page.

Note: This user guide is not intended to be a guide to drafting contracts, provide legal advice, or create an attorney-client relationship. This user guide, and Contract Tools itself, cannot substitute for the advice of an attorney. You should consult an attorney before you enter into any contract.

Chapter 1

Getting Started

Install Contract Tools. Get a free trial. Activate Contract Tools using an activation key. Connect to your organization's license server. Enable Contract Tools in Word. Get a tutorial. Update Contract Tools. Learn about Contract Tools' prerequisites.

To learn about	Go to
Step-by-step instructions for installing Contract Tools	Section 1.1, "Installing Contract Tools" on the next page
Starting a free trial of Contract Tools	Section 1.2, "Trying Contract Tools" on the next page
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1.1 Installing Contract Tools

To install Contract Tools, you need PaperSoftwareContractToolsSetup.exe (available at https://papersoftware.com/support).

You may need an administrator account to install Contract Tools.

To install Contract Tools:

1. Find PaperSoftwareContractToolsSetup.exe on your computer, and then double-click it to open Contract Tools Setup.

2. When Contract Tools Setup is finished, click Finish.

   Note: On computers with Word 2007, you must install Contract Tools only for you, not for everyone who uses your computer. To do this, choose "Only me (*[Your User Name]*)", not "Everyone who uses this computer", in the Installation Type dialog of Contract Tools Setup.

   When you install Contract Tools, you also install Contract Tools' prerequisites; see Section 1.10, "Prerequisites for Installing Contract Tools" on page 12 to learn more.

   After you install Contract Tools, you can try it for free for 7 days; see Section 1.2, "Trying Contract Tools" on this page to learn more.

   If you have a Contract Tools subscription, you can activate Contract Tools using your activation key; see Section 1.3, "Activating Contract Tools" on the next page to learn more.

   When you open Word after installing Contract Tools, this alert message may appear: "The solution cannot be installed because it is signed by a publisher whom you have not yet chosen to trust. If you trust the publisher, add the certificate to the Trusted Publisher List." To learn how to add Paper Software to your list of trusted publishers, see Section 1.6, "Adding Paper Software as a Trusted Publisher" on page 10.

   You may need to enable Contract Tools in Word; see Section 1.7, "Enabling Contract Tools" on page 11 to learn how.

   To learn how to uninstall Contract Tools, see Section 15.4, "Uninstalling Contract Tools" on page 59.

   To troubleshoot problems with installing Contract Tools, see Section 16.1, "Contract Tools Setup Won't Download Prerequisites" on page 61 and Section 16.2, "Program Compatibility Assistant Appears after Installing Contract Tools" on page 62.

1.2 Trying Contract Tools

After installing Contract Tools (see Section 1.1, "Installing Contract Tools" on this page to learn more), you can try it for free for 7 days.

To begin a trial of Contract Tools:

1. Open a document or create a new document in Word. The Contract Tools pane appears next to your document.

2. Click Begin Trial in the Contract Tools pane.

   Note: Once you begin a trial, it cannot be suspended.

After your trial, you can keep using Contract Tools by entering the activation key you receive when you buy a subscription. To buy a Contract Tools subscription, visit https://papersoftware.com. To learn about activating Contract Tools with an activation key, see Section 1.3, "Activating Contract Tools" on this page.

Trying Contract Tools requires real hardware, not a virtual machine; see Section 1.4, "Using Contract Tools on a Virtual Machine" on the next page to learn more.

To troubleshoot problems with beginning a trial, see Section 16.7, "Contract Tools Cannot Connect to the Internet" on page 65, Section 16.8, "Contract Tools Won't Activate Due to Disabled Network Adapters" on page 66, and Section 16.9, "Contract Tools Won't Activate Due to a Problem with Windows Management Instrumentation" on page 66.

1.3   Activating Contract Tools

To use Contract Tools after your trial (see Section 1.2, "Trying Contract Tools" on the previous page to learn more), you need the activation key you receive when you buy a subscription. To buy a Contract Tools subscription, visit https://papersoftware.com. To recover an activation key, visit https://papersoftware.com/activation.

To learn about	Go to
Activating Contract Tools by sending your activation key over the internet	Section 1.3.1, "Activating Online" on this page
An alternative to sending your activation key over the internet	Section 1.3.2, "Activating Offline" on the next page

Activating Contract Tools requires real hardware, not a virtual machine; see Section 1.4, "Using Contract Tools on a Virtual Machine" on the next page to learn more.

If your organization uses Contract Tools License Server to administer Contract Tools, you can connect Contract Tools to Contract Tools License Server instead of activating it. See Section 1.5, "Connecting to Contract Tools License Server" on page 10 to learn more.

You can use your activation key to activate Contract Tools on one computer at a time. If you want to activate Contract Tools on a different computer, you should first deactivate Contract Tools on your current computer. Also, if Contract Tools is already activated using one activation key, and you want to activate Contract Tools using a different activation key, you must first deactivate Contract Tools. To learn how to deactivate Contract Tools, see Section 15.1, "Deactivating Contract Tools" on page 57.

To troubleshoot problems with activating Contract Tools, see Section 16.7, "Contract Tools Cannot Connect to the Internet" on page 65, Section 16.8, "Contract Tools Won't Activate Due to Disabled Network Adapters" on page 66, and Section 16.9, "Contract Tools Won't Activate Due to a Problem with Windows Management Instrumentation" on page 66.

1.3.1   Activating Online

Generally, you activate Contract Tools by sending your activation key over the internet.

To activate Contract Tools online:

1. Open a document or create a new document in Word. The Contract Tools pane appears next to your document.

2. Enter your activation key in the Contract Tools pane, and then click Activate.

1.3.2   Activating Offline

If you cannot activate Contract Tools online, you can activate Contract Tools offline. When you activate Contract Tools offline, you save a request file, upload this request file at https://papersoftware.com/offline-activation to get a response file, and then activate Contract Tools by opening the response file.

To activate Contract Tools offline:

1. Open a document or create a new document in Word. The Contract Tools pane appears next to your document.

2. Choose Activate Offline from the pop-up menu at the top of the Contract Tools pane.

3. Enter your activation key, and then click Save Request File. Choose where you want to save the request file, and then click Save.

4. Visit https://papersoftware.com/offline-activation and upload the request file to get a response file.

5. Click Open Response File. Find the response file on your computer, select it, and then click Open.

   You can use a response file only once. If you need to activate Contract Tools offline again, follow the steps listed above to get another response file. It's OK to delete the request file and response file after you've activated Contract Tools.

   Note: You cannot deactivate Contract Tools offline; see Section 15.1, "Deactivating Contract Tools" on page 57 to learn how to deactivate Contract Tools.

1.4   Using Contract Tools on a Virtual Machine

To activate or begin a trial of Contract Tools, Windows, Word, and Contract Tools must be installed on real hardware, not on a virtual machine. Examples of virtual machine software include Citrix Virtual Apps and Desktops, Microsoft 365 Defender, Parallels Desktop, Remote Desktop Services, VMware Fusion, Windows 365, Windows Sandbox, and Windows Virtual Desktop.

If you believe you're using real hardware, but an alert message about virtual machines appears when you try to activate or begin a trial of Contract Tools, make sure that Windows virtualization features are disabled. Examples of Windows virtualization features include Hyper-V Platform, Memory Integrity, Virtual Machine Platform, Windows Defender Application Guard, and Windows Hypervisor Platform. If disabling Windows virtualization features doesn't resolve the issue, make sure that virtualization is disabled on your computer's processor; your computer's documentation should have instructions on how to disable virtualization on your computer's processor.

If you need to use Contract Tools on a virtual machine, email info@papersoftware.com to learn about deployment options.

To learn about trying Contract Tools, see Section 1.2, "Trying Contract Tools" on page 7. To learn about activating Contract Tools, see Section 1.3, "Activating Contract Tools" on the previous page. To learn about other Contract Tools prerequisites, see Section 1.10, "Prerequisites for Installing Contract Tools" on page 12.

1.5 Connecting to Contract Tools License Server

If your organization uses Contract Tools License Server to administer Contract Tools, you can start using Contract Tools by connecting to your organization's license server.

To connect Contract Tools to Contract Tools License Server:

1. Open a document or create a new document in Word. The Contract Tools pane appears next to your document.

2. Choose "Connect to License Server" from the pop-up menu at the top of the Contract Tools pane.

3. Enter the address and port of your organization's license server. Your system administrator can provide the address and port that you should use.

4. Click Connect.

   If a message that says "Contract Tools cannot connect to your organization's license server" appears at the top of the Contract Tools pane, see Section 16.10, "Contract Tools Cannot Connect to a License Server" on page 67.

   To learn how to disconnect from Contract Tools License Server, see Section 15.2, "Disconnecting from Contract Tools License Server" on page 58.

1.6 Adding Paper Software as a Trusted Publisher

Word may require add-ins like Contract Tools to be signed by a trusted publisher. To check this, choose File > Options > Trust Center, click Trust Center Settings to show the Trust Center dialog, click Add-ins on the left of the Trust Center dialog, and then check whether the "Require Application Add-ins to be signed by Trusted Publisher" checkbox is selected.

To use Contract Tools when Word requires add-ins to be signed by a trusted publisher, you must add Paper Software to your list of trusted publishers.

To add Paper Software to your list of trusted publishers:

1. Right-click PaperSoftwareContractToolsSetup.exe (visit https://papersoftware.com/support to download this file), and then choose Properties.

2. Click Digital Signatures at the top of the Properties window.

3. Select Paper Software LLC in the signature list, and then click Details.

4. Click View Certificate in the Digital Signature Details window.

5. Click Install Certificate in the Certificate window.

6. In Windows 8.1 and later, choose Current User. Click Next.

7. Choose "Place all certificates in the following store", and then click Browse.

8. Select Trusted Publishers in the Select Certificate Store window, and then click OK.

9. Click Next, and then click Finish.

   After you add Paper Software to your list of trusted publishers, you may need to enable Contract Tools in Word; see Section 1.7, "Enabling Contract Tools" on the next page to learn how.

1.7 Enabling Contract Tools

You may need to enable Contract Tools in Word before you can use it. To enable add-ins in Word, you use the Add-ins pane of Word Options. To show the Add-ins pane, choose File > Options > Add-ins. Contract Tools appears as Paper Software Contract Tools in the Add-ins pane.

To enable Contract Tools when it appears below Inactive Application Add-ins:

1. Choose COM Add-ins from the Manage pop-up menu at the bottom of the Add-ins pane, and then click Go. The COM Add-ins dialog appears.

2. Select the Paper Software Contract Tools checkbox, and then click OK.

To enable Contract Tools when it appears below Disabled Application Add-ins:

1. Choose Disabled Items from the Manage pop-up menu at the bottom of the Add-ins pane, and then click Go. The Disabled Items dialog appears.

2. Select Paper Software Contract Tools, and then click Enable.

Note: If you cannot enable Contract Tools in Word 2007, make sure that Contract Tools is installed only for you, not for everyone who uses your computer. A simple way to do this is to uninstall and reinstall Contract Tools; see Section 15.4, "Uninstalling Contract Tools" on page 59 and Section 1.1, "Installing Contract Tools" on page 7 to learn how.

1.8 The Contract Tools Tutorial

You can use the Contract Tools Tutorial (Contract Tools Tutorial.rtf) to learn how to use Contract Tools. To download the Contract Tools Tutorial, visit https://papersoftware.com/support.

Note: When you open the Contract Tools Tutorial in Word, it may open in Protected View. You cannot use Contract Tools in Protected View. To exit Protected View, click Enable Editing at the top of the Word window. If Contract Tools is turned off, click Contract Tools at the top of the Word window to show the Contract Tools ribbon tab, and then click the On / Off button to turn on Contract Tools. To learn about Protected View, search for "protected view" in Word Help.

1.9 Updating Contract Tools

By default, Contract Tools automatically checks for updates. To turn this off, show the Contract Tools pane, click the Subscription button, and then deselect the "Automatically check for updates" checkbox.

Whether Contract Tools can automatically check for updates depends on how your computer and network are configured. If Contract Tools isn't updating automatically, you can update Contract Tools manually.

Here are ways to update Contract Tools manually:

- Show the Contract Tools pane, click the Subscription button, and then click "Check for Updates". If more than one update is available, you can install only the latest update and skip the others. To skip an update, deselect the checkbox next to the update in the "Found Updates for Contract Tools" dialog.

- Use PaperSoftwareContractToolsSetup.exe (available at https://papersoftware.com/support) to install the latest version of Contract Tools; see Section 1.1, "Installing Contract Tools" on page 7 to learn how.

To troubleshoot problems with updating Contract Tools, see Section 16.20, "Contract Tools Won't Install Updates" on page 72.

1.10   Prerequisites for Installing Contract Tools

On all computers, Contract Tools requires Windows 7 or later, Word 2007 or later, and Visual Studio 2010 Tools for Office Runtime.

On computers with Windows 7 and 8.1, Contract Tools requires .NET Framework with a version between 4.5.2 and 4.8. On computers with Word 2007, Contract Tools also requires .NET Framework 3.5.

To download an installer for this	Visit
Visual Studio 2010 Tools for Office Runtime	https://www.microsoft.com/en-us/download/details.aspx?id=105890
.NET Framework 4.5.2	https://www.microsoft.com/en-us/download/details.aspx?id=42643
.NET Framework 3.5	https://www.microsoft.com/en-us/download/details.aspx?id=21

By default, when you install Contract Tools (see Section 1.1, "Installing Contract Tools" on page 7), you also install Contract Tools' prerequisites, so you shouldn't need to download the installers listed above. To troubleshoot problems with installing Contract Tools' prerequisites, see Section 16.1, "Contract Tools Setup Won't Download Prerequisites" on page 61.

Activating and beginning a trial of Contract Tools require real hardware, not a virtual machine; see Section 1.4, "Using Contract Tools on a Virtual Machine" on page 9 to learn more.

Chapter 2

Tools and Techniques

Turn Contract Tools on or off. Navigate your document. Go back in navigation history. Highlight text. Complete defined terms and snippets. Copy and paste content. Use the Context button to do common tasks. Use the Issues pop-up menu to find problems.

To learn about	Go to
Turning Contract Tools on and off; showing and hiding the Contract Tools pane	Section 2.1, "The Contract Tools Ribbon Tab" on this page
Navigating your document	Section 2.2, "Navigating Documents" on the next page
Highlighting defined terms, cross-references, drafting errors, list markers, and more	Section 2.3, "Highlighting Content" on page 15
Completing defined terms and snippets as you type	Section 2.4, "The Completion Menu" on page 16
The Context button; the Previous and Next buttons; views within the Contract Tools pane; the Issues pop-up menu	Section 2.5, "The Contract Tools Pane" on page 16

2.1   The Contract Tools Ribbon Tab

You can use the buttons in the Contract Tools ribbon tab to turn Contract Tools on or off, show or hide the Contract Tools pane, and more. To show the Contract Tools ribbon tab, click Contract Tools at the top of the Word window.

Analyze your document.

Go back or forward in navigation history; clear history.

Show the Contract Tools pane.

Open Contract Tools Help.

Turn Contract Tools on or off.

On / Off   Analyze   Back   Forward   Clear   Contract Tools Pane   Provisions   Related Items   Ancillaries   Analysis Settings   Help

Defined Terms   Drafting Errors   Search   Preferences

Cross-References   To-Dos   Snippets   Subscription

On / Off   Analyze   History   Contract Tools Pane   Help

On / Off: Click the On / Off button to turn Contract Tools on or off. You can choose whether Contract Tools is on or off when you open documents; see Chapter 14, "Setting Preferences" on page 56 to learn how.

Analyze: Click the Analyze button to update Contract Tools' analysis; see Section 3.2, "Updating Analysis" on page 22 to learn more. To learn general information about analysis, see Chapter 3, "Analyzing Documents" on page 21.

History: Click the Back and Forward buttons to go back or forward in navigation history, and click the Clear button to remove all items from navigation history. You can also use the Back and Forward buttons in the Contract Tools pane; see Section 2.2, "Navigating Documents" on this page to learn more.

Contract Tools Pane: Click the Contract Tools Pane button to show or hide the Contract Tools pane, and click one of the other buttons to show a Contract Tools pane view; see Section 2.5, "The Contract Tools Pane" on page 16 to learn more.

Help: Click the Help button to open Contract Tools Help. For more resources, visit https://papersoftware.com/support.

2.2   Navigating Documents

You can use a variety of tools and techniques to navigate your document.

Go back or forward in navigation history.

Navigate defined terms and cross-references; see where you are.

Go to items that are simlar to one you select.

Double-click a use of a defined term to go to where it's defined.

Double-click a cross-reference to go to what it references.

See where you've scrolled when you drag the vertical scroller.

Scrolling: When you drag the vertical scroller, the name of the part of the document to which you've scrolled appears at the bottom of the Word window. To stop this information from appearing, show the Contract Tools pane, click the Preferences button, and then deselect the "Show location when dragging vertical scroller" checkbox.

Double-clicking: When you double-click a use of a defined term (see Chapter 5, "Working with Defined Terms" on page 28 to learn more), you go to where it's defined. When you double-click a cross-reference (see Chapter 6, "Working with Cross-References" on page 32 to learn more), you go to what it references. When you set the insertion point (cursor) within text you can navigate by double-clicking, it's highlighted in blue; see Section 2.3, "Highlighting Content" on this page to learn more. To turn off navigation by double-clicking, show the Contract Tools pane, click the Preferences button, and then deselect the "Double-click defined terms and cross-references to navigate" checkbox. Navigation by double-clicking does not change your document in any way.

Back and Forward buttons: Click the Back and Forward buttons at the top left of the Contract Tools pane to return to items to which you've navigated. You can also use the Back and Forward buttons in the Contract Tools ribbon tab; see Section 2.1, "The Contract Tools Ribbon Tab" on page 13 to learn more.

Context button, Previous and Next buttons: You can use the Context button at the top of the Contract Tools pane to navigate selected defined terms and cross-references, see the name of the part of the document you're working with, and more. You can use the Previous and Next buttons at the top right of the Contract Tools pane to go to items that are similar to one you select. See Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn more.

To learn more about the Contract Tools pane, see Section 2.5, "The Contract Tools Pane" on the next page.

2.3   Highlighting Content

Contract Tools highlights many items in your document. Some items are highlighted depending on what you select. You can select an item by clicking or by setting the insertion point (cursor) using the arrow keys.

When you select this	This is highlighted	To learn more, go to
Defined term	Instances of the defined term	Chapter 5, "Working with Defined Terms" on page 28
Cross-reference	Cross-references to the same item	Chapter 6, "Working with Cross-References" on page 32
Placeholder	Other placeholders	Chapter 9, "Finding To-Dos" on page 43
Ancillary	Other ancillaries	Chapter 10, "Working with Ancillaries" on page 45
Inline list, proviso list	List markers	Chapter 11, "Working with Inline Lists and Proviso Lists" on page 47
Amount of money, duration, date, time of day	Similar items	Section 12.2, "Finding Numbers, Amounts of Money, and Dates and Times" on page 49

When you select this	This is highlighted	To learn more, go to
Parenthesis		—
	Matching parentheses	

Other items are always highlighted, even if they're not selected:

- Drafting errors (see Chapter 8, "Proofreading Documents" on page 36)

- Search results (see Chapter 12, "Finding Text" on page 48)

To hide highlighting, or to use underlining instead of highlighting, show the Contract Tools pane, click the Preferences button, and then use the Highlighting & Underlining controls.

Note: Highlighting and underlining do not change your document in any way.

In addition to highlighting items you select, you can use the Context button and the Previous and Next buttons to work with items you select; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on the next page to learn how.

To troubleshoot problems with highlighting appearing in the wrong place, see Section 16.6, "The Contract Tools Pane Appears with Black Shapes; Highlighting Is Misplaced" on page 64.

2.4   The Completion Menu

You can use the Completion menu to insert uses of defined terms (see Chapter 5, "Working with Defined Terms" on page 28) and snippets (see Chapter 13, "Working with Snippets" on page 53) into your document. When you start typing a use of a defined term or the name of a snippet, the Completion menu appears with a list of suggestions. You can continue typing to refine or ignore the suggestions. To choose a suggestion, use the Up Arrow and Down Arrow keys to select it, and then press the Right Arrow key. You can also choose a suggestion by clicking it.

To set Completion menu preferences, show the Contract Tools pane, click the Preferences button, and then use the Completion Menu controls.

2.5   The Contract Tools Pane

You can use the Contract Tools pane to do a variety of tasks. To show the Contract Tools pane, click the Contract Tools Pane button in the Contract Tools ribbon tab; see Section 2.1, "The Contract Tools Ribbon Tab" on page 13 to learn more.

To learn about	Go to
Performing actions and navigating based on an item you select	Section 2.5.1, "The Context Button; the Previous and Next Buttons" on the next page
Views within the Contract Tools pane	Section 2.5.2, "Contract Tools Pane Views" on page 18
Using the contents of views to share or create content	Section 2.5.3, "Copying and Pasting the Contents of Views" on page 18
Viewing a list of potential problems	Section 2.5.4, "The Issues Pop-Up Menu" on page 19

To learn about	Go to
Updating information in the Contract Tools pane	Section 2.5.5, "The Analyze Button" on page 20

To troubleshoot problems with the Contract Tools pane, see Section 16.5, "The Contract Tools Pane Won't Appear" on page 64 and Section 16.6, "The Contract Tools Pane Appears with Black Shapes; Highlighting Is Misplaced" on page 64.

2.5.1   The Context Button; the Previous and Next Buttons

The Context button and the Previous and Next buttons appear at the top of the Contract Tools pane. What these buttons do depends on what you select in your document. You can select an item in your document by clicking or by setting the insertion point (cursor) using the arrow keys.

When you select this	You can use the Context button to do this	And the Previous and Next buttons to go to this	To learn more, go to
Defined term	Go to where it's defined, show where it's defined in a new window, show it in the Defined Terms view	Instances of the defined term	Chapter 5, "Working with Defined Terms" on page 28
Cross-reference	Convert it to a field, go to what it refers to, show what it refers to in a new window, show it in the Cross-References view	Cross-references to the same item	Chapter 6, "Working with Cross-References" on page 32
Drafting error	Ignore it, show it in the Drafting Errors view, undo ignoring	Instances of the same kind of drafting error	Chapter 8, "Proofreading Documents" on page 36
Placeholder	Show it in the To-Dos view	Other placeholders	Chapter 9, "Finding To-Dos" on page 43
Ancillary	Show it in the Ancillaries view	Other ancillaries	Chapter 10, "Working with Ancillaries" on page 45
Amount of money, duration, date, time of day	Find similar items in the Search view	Similar items	Section 12.2, "Finding Numbers, Amounts of Money, and Dates and Times" on page 49
Other text	See the name of the part of the document you've selected	—	—

When you can do more than one action with a selection, an arrow appears to the right of the Context button, and you can click the arrow to choose an action.

In addition to using the Context button and the Previous and Next buttons to work with items you select, you can highlight items based on what you select; see Section 2.3, "Highlighting Content" on page 15 to learn more.

2.5.2 Contract Tools Pane Views

You can use views in the Contract Tools pane to navigate provisions, find defined terms, manage drafting errors, search for words and phrases, and more.

Here are ways to show views in the Contract Tools pane:

- Click one of the buttons at the top of the Contract Tools pane. From left to right, these buttons show these views: Provisions, Defined Terms, Cross-References, Related Items, Drafting Errors, To-Dos, Ancillaries, Search, Snippets, Analysis Settings, Preferences, and Subscription.
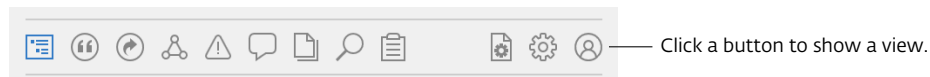
Click a button to show a view.

- Use the buttons in the Contract Tools ribbon tab; see Section 2.1, "The Contract Tools Ribbon Tab" on page 13 to learn more.

- To show a second view, click the arrow at the bottom right of the Contract Tools pane.

As you work with views in the Contract Tools pane, you may want to switch back to your document using your keyboard instead of your mouse or trackpad. To do this, press the Esc (Escape) key.

To learn about this view	Go to
Provisions	Section 4.2, "Managing Provisions" on page 26
Defined Terms	Section 5.3, "Managing Defined Terms" on page 30
Cross-References	Section 6.2, "Managing Cross-References" on page 32
Related Items	Chapter 7, "Finding Related Items" on page 35
Drafting Errors	Section 8.3, "Managing Drafting Errors" on page 41
To-Dos	Chapter 9, "Finding To-Dos" on page 43
Ancillaries	Chapter 10, "Working with Ancillaries" on page 45
Search	Chapter 12, "Finding Text" on page 48
Snippets	Chapter 13, "Working with Snippets" on page 53
Analysis Settings	Section 3.4, "Saving Analysis Settings" on page 23 Section 3.6, "Analyzing Tables" on page 25 Section 5.1, "Finding Defined Terms" on page 28 Section 8.1, "Checking for Drafting Errors" on page 36
Preferences	Chapter 14, "Setting Preferences" on page 56
Subscription	Section 1.9, "Updating Contract Tools" on page 11 Chapter 15, "Deactivation, Subscription Management, and Uninstalling" on page 57

2.5.3 Copying and Pasting the Contents of Views

You can copy the contents of many Contract Tools pane views to the Windows clipboard, and then paste this content elsewhere. This is useful for sharing content with others and for creating new content. Here are examples:

Copy and paste the contents of this view	To create this	To learn more, go to
Provisions	Table of contents	Chapter 4, "Working with Provisions" on page 26
Defined Terms	Index of defined terms	Chapter 5, "Working with Defined Terms" on page 28
Drafting Errors	List of potential problems	Chapter 8, "Proofreading Documents" on page 36
To-Dos	Issues list, to-do list	Chapter 9, "Finding To-Dos" on page 43
Ancillaries	List of ancillaries	Chapter 10, "Working with Ancillaries" on page 45
Search	Lists of words and phrases, amounts of money, dates, and so on	Chapter 12, "Finding Text" on page 48

To copy all of a view's contents, choose the Copy command from the Action pop-up menu in the view. To copy part of a view's contents, use the Filter field at the bottom of the view before copying. To include page numbers when you copy, choose "Copy with Page Numbers" from the Action pop-up menu.

Note: Copying with page numbers may take several seconds.

To paste in many Windows applications, press Control-V. What you paste depends on the application you're using:

- In rich text editors (like an email in Outlook or a document in Word), you paste rich text.

- In spreadsheet applications (like Excel) and plain text editors (like Notepad), you paste tab-separated values.

When you paste the contents of the Defined Terms view and the Ancillaries view as rich text, use counts are not included. When you paste the contents of these views as tab-separated values, use counts are included.

To learn about Contract Tools pane views, see Section 2.5.2, "Contract Tools Pane Views" on the previous page.

2.5.4   The Issues Pop-Up Menu

You can use the Issues pop-up menu at the bottom of the Contract Tools pane to see a list of potential problems.

The Issues pop-up menu shows this	To learn more, go to
Unused defined terms, defined terms used once	Chapter 5, "Working with Defined Terms" on page 28
Cross-references to unknown items	Chapter 6, "Working with Cross-References" on page 32
Drafting errors	Chapter 8, "Proofreading Documents" on page 36
To-dos	Chapter 9, "Finding To-Dos" on page 43

Choose an item in the Issues pop-up menu to learn more about it. To choose which items appear in the Issues pop-up menu, click the Preferences button at the top of the Contract Tools pane, and then use the Issues Pop-Up Menu controls.

2.5.5   The Analyze Button

Click the Analyze button at the bottom of the Contract Tools pane to update Contract Tools' analysis, and click the arrow next to the Analyze button to choose whether Contract Tools analyzes all or part of your document; see Section 3.2, "Updating Analysis" on page 22 and Section 3.3, "Analyzing Part of a Document" on page 23 to learn more. To learn general information about analysis, see Chapter 3, "Analyzing Documents" on the next page.

Chapter 3

Analyzing Documents

Learn about the kinds of information Contract Tools finds. Update Contract Tools' analysis. Analyze all or part of a document. Import and export analysis settings. Learn about analyzing when using Track Changes. Include tables in Contract Tools' analysis.

To learn about	Go to
What Contract Tools finds when it analyzes your document	Section 3.1, "Analyzing Generally" on this page
Ways to reanalyze as you make changes	Section 3.2, "Updating Analysis" on the next page
Limiting Contract Tools' analysis	Section 3.3, "Analyzing Part of a Document" on page 23
Saving customized analysis settings, ignored defined terms, and more	Section 3.4, "Saving Analysis Settings" on page 23
Excluding deletions from Contract Tools' analysis when using Track Changes	Section 3.5, "Analyzing When Using Track Changes" on page 24
Including tables in Contract Tools' analysis	Section 3.6, "Analyzing Tables" on page 25

3.1   Analyzing Generally

Contract Tools finds a variety of items when it analyzes your document.

Contract Tools finds this	To learn more, go to
Provisions, provision numbers, provision titles	Chapter 4, "Working with Provisions" on page 26
Defined terms	Chapter 5, "Working with Defined Terms" on page 28
Cross-references	Chapter 6, "Working with Cross-References" on page 32

Contract Tools finds this	To learn more, go to
Drafting errors	Chapter 8, "Proofreading Documents" on page 36
To-dos	Chapter 9, "Finding To-Dos" on page 43
Ancillaries	Chapter 10, "Working with Ancillaries" on page 45
Inline lists, proviso lists	Chapter 11, "Working with Inline Lists and Proviso Lists" on page 47
Amounts of money, durations, dates, times of day	Section 12.2, "Finding Numbers, Amounts of Money, and Dates and Times" on page 49

You can use many tools and techniques to work with these items; see Chapter 2, "Tools and Techniques" on page 13 to learn more.

Contract Tools' analysis updates automatically as you type and delete text, and you can also update Contract Tools' analysis manually after you make other kinds of changes; see Section 3.2, "Updating Analysis" on this page to learn more.

You can limit Contract Tools' analysis to part of a document, which is useful for excluding items like tables of contents and signatures from Contract Tools' analysis; see Section 3.3, "Analyzing Part of a Document" on the next page to learn more.

To customize how Contract Tools analyzes your document, you can adjust analysis settings. To learn about analysis settings for defined terms, see Section 5.1, "Finding Defined Terms" on page 28; to learn about analysis settings for drafting errors, see Section 8.1, "Checking for Drafting Errors" on page 36. Analysis settings are saved with your document; see Section 3.4, "Saving Analysis Settings" on the next page to learn more.

You can adjust Track Changes settings to make Contract Tools' analysis include or exclude tracked deletions; see Section 3.5, "Analyzing When Using Track Changes" on page 24 to learn more.

By default, Contract Tools does not analyze content within tables. To learn how to make Contract Tools analyze content within tables, see Section 3.6, "Analyzing Tables" on page 25.

To troubleshoot problems with analysis, see Section 16.11, "Analyzing a Document Converted from a PDF Takes a Long Time" on page 67 and Section 16.12, "Contract Tools Won't Find Content" on page 68.

3.2   Updating Analysis

Generally, Contract Tools updates its analysis automatically as you type and delete text. To turn off automatic updating, show the Contract Tools pane, click the Preferences button, click More below Analysis, and then deselect the "Update analysis after typing and deleting text" checkbox.

After you make some kinds changes to your document (for example, editing a defined term or pasting text), it's a good idea to make Contract Tools reanalyze your document.

Here are ways to make Contract Tools reanalyze your document:

- Click the Analyze button at the bottom of the Contract Tools pane (see Section 2.5, "The Contract Tools Pane" on page 16 to learn more). When there are unanalyzed changes, the Analyze button becomes blue.

- Save your document. To quickly save your document, press Control-S. To stop Contract Tools from analyzing your document when you save, show the Contract Tools pane, click the Preferences button, and then deselect the "Analyze when saving" checkbox.

- Click the Analyze button in the Contract Tools ribbon tab (see Section 2.1, "The Contract Tools Ribbon Tab" on page 13 to learn more).

3.3   Analyzing Part of a Document

You can make Contract Tools analyze part of your document. This is useful if you want to exclude content from Contract Tools' analysis, for example:

- A cover page, a table of contents, and other content that appears at the beginning of a document

- Signature blocks, exhibits, schedules, and other content that appears at the end of a document

This is also useful if you want to analyze a contract that's part of a larger document.

To make Contract Tools analyze part of your document:

1. Select the part of your document that you want Contract Tools to analyze. To select text, drag the mouse pointer over text. Or, set the insertion point (cursor) at the beginning of the text you want to select, and then Shift-click the end of the text you want to select.

2. Click the arrow next to the Analyze button at the bottom of the Contract Tools pane; see Section 2.5, "The Contract Tools Pane" on page 16 to learn more.

3. Choose Analyze Selection.

   To see the part of your document that Contract Tools analyzes, click the arrow next to the Analyze button at the bottom of the Contract Tools pane, and then choose Show Analyzed Selection. To make Contract Tools analyze your entire document, choose Analyze Document.

   Note: The part of your document that Contract Tools analyzes is included in your document as a hidden bookmark named _PaperSoftwareContractToolsAnalysisRange. When you choose Analyze Document, you delete this hidden bookmark. To learn about bookmarks, search for "bookmarks" in Word Help.

   By default, when a document opens, Contract Tools automatically selects the part of the document that's best suited to analysis, if possible. To turn this off, show the Contract Tools pane, click the Preferences button, click More below Analysis, and then deselect the "Set analysis range when documents open" checkbox.

   Also, by default, Contract Tools does not analyze content within tables, even if you make Contract Tools analyze a part of your document that includes tables. To learn how to make Contract Tools analyze content within tables, see Section 3.6, "Analyzing Tables" on page 25.

3.4   Saving Analysis Settings

In Word 2010 and later, Contract Tools saves the following items with your documents as custom XML data by default:

- Analysis settings (see Section 5.1, "Finding Defined Terms" on page 28 to learn about analysis settings for defined terms, and see Section 8.1, "Checking for Drafting Errors" on page 36 to learn about analysis settings for drafting errors)

- Ignored defined terms, drafting errors, and ancillaries (see Section 5.3, "Managing Defined Terms" on page 30, Section 8.3, "Managing Drafting Errors" on page 41, and Chapter 10, "Working with Ancillaries" on page 45 to learn more)

To disable saving these items with your documents, show the Contract Tools pane, click the Preferences button, click More below Analysis, and then deselect the "Save analysis settings as custom XML data" checkbox.

If you disable saving these items with your documents, or if you use software that removes custom XML data from your documents, you can export these items and import them when you use Contract Tools. To do this, show the Contract Tools pane, click the Analysis Settings button, and then click Export or Import at the bottom of the Analysis Settings view.

To learn about custom XML data, search for "custom XML data" in Word Help.

3.5   Analyzing When Using Track Changes

As you work on your document, you may use Track Changes to make your edits easy to see. To learn about Track Changes, search for "track changes" in Word Help.

Contract Tools analyzes text that appears in your document, including tracked deletions. To exclude tracked deletions from Contract Tools' analysis, configure Track Changes to hide tracked deletions or show them next to your document. To configure Track Changes, use the controls in the Tracking group within the Review ribbon tab.

Here are ways to exclude tracked deletions from Contract Tools' analysis:

- Hide tracked deletions. To do this:

    - In Word 2013 and later (including Word for Microsoft 365), choose Simple Markup or No Markup from the "Display for Review" pop-up menu at the top of the Tracking group.

    - In Word 2010 and 2007, choose Final from the "Display for Review" pop-up menu at the top of the Tracking group.

- Show tracked deletions next to your document. To do this:

    - In Word 2013 and later (including Word for Microsoft 365), choose All Markup from the "Display for Review" pop-up menu at the top of the Tracking group, and then choose Show Markup > Balloons > Show Revisions in Balloons.

    - In Word 2010, choose Final: Show Markup from the "Display for Review" pop-up menu at the top of the Tracking group, and then choose Show Markup > Balloons > Show Revisions in Balloons.

    - In Word 2007, choose Final Showing Markup from the "Display for Review" pop-up menu at the top of the Tracking group, and then choose Balloons > Show Revisions in Balloons.

After configuring Track Changes, you should update Contract Tools' analysis; see Section 3.2, "Updating Analysis" on page 22 to learn how.

3.6   Analyzing Tables

By default, Contract Tools does not analyze content within tables (search for "tables" in Word Help to learn more). If your document includes content that you want Contract Tools to analyze within tables, or if your document is laid out using tables, you can make Contract Tools analyze content within tables.

To make Contract Tools analyze content within tables:

- Show the Contract Tools pane, click the Analysis Settings button, and then deselect the "Don't analyze tables" checkbox.

Chapter 4

Working with Provisions

Learn how Contract Tools finds provisions. Navigate provisions. Create cross-references using copy and paste. Filter provisions by number or title.

To learn about	Go to
How Contract Tools finds provisions	Section 4.1, "Finding Provisions" on this page
Navigating and filtering provisions	Section 4.2, "Managing Provisions" on this page

4.1   Finding Provisions

When analyzing a document, Contract Tools finds provisions, provision numbers, and provision titles.

To learn more about how Contract Tools analyzes documents, see Chapter 3, "Analyzing Documents" on page 21. To learn about troubleshooting problems with finding provisions in documents laid out using tables, see Section 16.12, "Contract Tools Won't Find Content" on page 68.

4.2   Managing Provisions

You can use the Provisions view to manage provisions. To show the Provisions view, click the Provisions button at the top of the Contract Tools pane.

The Provisions button. ———

Go to a provision. ———

Choose an action for ———
provisions.

Filter provisions. ———
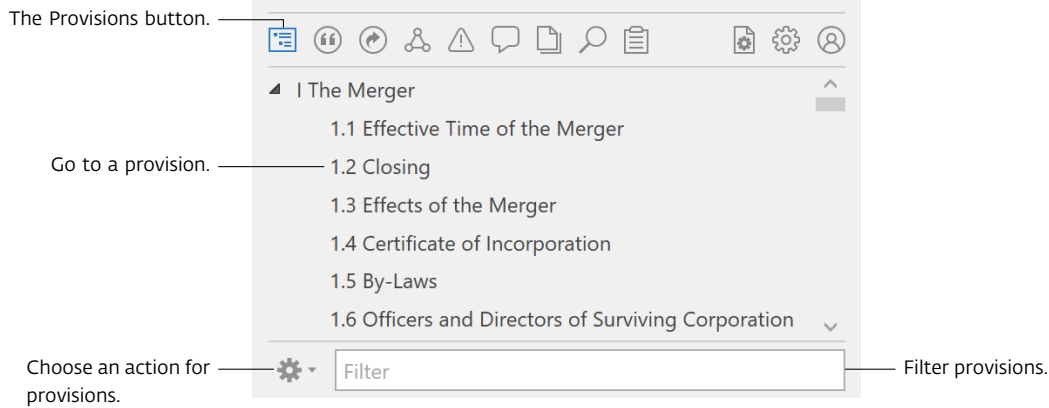
Here are ways to use the Provisions view:

- To go to a provision, click a provision in the view. To learn about other ways to navigate provisions, see Section 2.2, "Navigating Documents" on page 14.

- To copy a list of provisions to the clipboard, choose Copy Provisions from the Action pop-up menu at the bottom of the view; see Section 2.5.3, "Copying and Pasting the Contents of Views" on page 18 to learn more.

- To copy a cross-reference to a selected provision to the clipboard, click a provision in the view to select it, and then choose "Copy Cross-Reference" from the Action pop-up menu at the bottom of the view. To paste this cross-reference into your document, press Control-V. To learn more about cross-references, see Chapter 6, "Working with Cross-References" on page 32.

- To find a provision in the view, type the number or title of the provision you want to find in the Filter field at the bottom of the view.

Chapter 5

Working with Defined Terms

Manage the words and phrases that Contract Tools interprets as
defined terms. Include defined terms from another document.
Ignore and restore defined terms.

To learn about	Go to
How Contract Tools finds defined terms	Section 5.1, "Finding Defined Terms" on this page
Including defined terms found in another document	Section 5.2, "Including Defined Terms from Another Document" on page 30
Navigating, ignoring, and restoring defined terms	Section 5.3, "Managing Defined Terms" on page 30
Inserting uses of defined terms into your document	Section 5.4, "Using Defined Terms" on page 31

5.1   Finding Defined Terms

By default, Contract Tools finds defined terms using double quotation marks (" ", " ") or
guillemets (« », ‹ ›). Alternatively, you can make Contract Tools find defined terms using text
formatting (available in Word 2010 and later) or single quotation marks (' ', ' '). To choose how
Contract Tools finds defined terms, show the Contract Tools pane, click the Analysis Settings
button, and then use the Defined Terms controls.

Note: It's a good idea to make Contract Tools find defined terms using text formatting only if
defined terms aren't enclosed in double quotation marks or guillemets. It's a good idea to make
Contract Tools find defined terms using single quotation marks only if defined terms aren't
formatted.

When Contract Tools finds defined terms, it ignores some words and phrases that would
otherwise be interpreted as defined terms if they're not used:

- Words and phrases that are preceded by *definition of*, *heading*, *trademark*, and so on

- Words and phrases that are followed by *as set forth*, *format*, *shall exclude*, and so on

In addition, Contract Tools ignores numbers and amounts of money when it finds defined terms; see Appendix A, "Finding Amounts of Money" on page 75 to learn about the currencies Contract Tools detects.

You may want Contract Tools to ignore some kinds of words and phrases when it finds defined terms.

To make Contract Tools ignore words and phrases when it finds defined terms:

- Show the Contract Tools pane, click the Analysis Settings button, click Exclude below Defined Terms, and then select the kinds of words and phrases you want Contract Tools to ignore.

Select this	To make Contract Tools ignore these kinds of words and phrases
Cross-reference prefixes, ancillaries, and proviso markers	Article clause Exhibit provided that provided, however Schedule Section
Words and phrases that appear in US laws	closely held employee benefit plan hazardous substance well-known seasoned issuer
Lowercase words and phrases defined in the Uniform Commercial Code	account debtor electronic chattel paper net proceeds uncertificated security
Common jargon	and blue sky earn-out flex

In general, the words and phrases that you can make Contract Tools ignore when it finds defined terms are lowercase.

Note: Contract Tools always interprets ignorable words and phrases as defined terms when they appear in a list of defined terms and definitions.

To troubleshoot problems with finding defined terms in documents laid out using tables, see Section 16.12, "Contract Tools Won't Find Content" on page 68.

To learn how to include defined terms Contract Tools finds in another document in your main document, see Section 5.2, "Including Defined Terms from Another Document" on the next page. To learn how to manage defined terms, including how to ignore defined terms, see Section 5.3, "Managing Defined Terms" on the next page. To learn how to complete uses of defined terms as you type, see Section 5.4, "Using Defined Terms" on page 31.

5.2 Including Defined Terms from Another Document

You can make Contract Tools include defined terms from another document in your main document. This is useful when you're working with related documents, like a document that uses defined terms in a separate definitions list.

The document with the defined terms that you want to include in your main document must be open in Word, and it must not be a new, unsaved document. Also, both documents must be open in the same instance of Word.

To include defined terms from another document:

- Show the Contract Tools pane, click the Analysis Settings button, click the "Include from" pop-up menu, and then choose the document with the defined terms you want to include.

  To troubleshoot problems with including defined terms from another document, see Section 16.13, "Including Defined Terms from Another Document Is Impossible" on page 68.

  To learn how Contract Tools finds defined terms, see Section 5.1, "Finding Defined Terms" on page 28.

5.3 Managing Defined Terms

You can use the Defined Terms view to manage defined terms. To show the Defined Terms view, click the Defined Terms button at the top of the Contract Tools pane.

The Defined Terms button.

Sort defined terms alphabetically or by number of uses.

Sort by: Defined Term   Uses

▷ Acquisition Proposal   37
▷ Acquisitions   5
▷ Agreement   226
▷ Applicable Antitrust Laws   7
▷ Benefit Plans   8
  Canadian Competition Act   0

Ignore a defined term.

Choose an action for defined terms.

Filter

Filter defined terms.
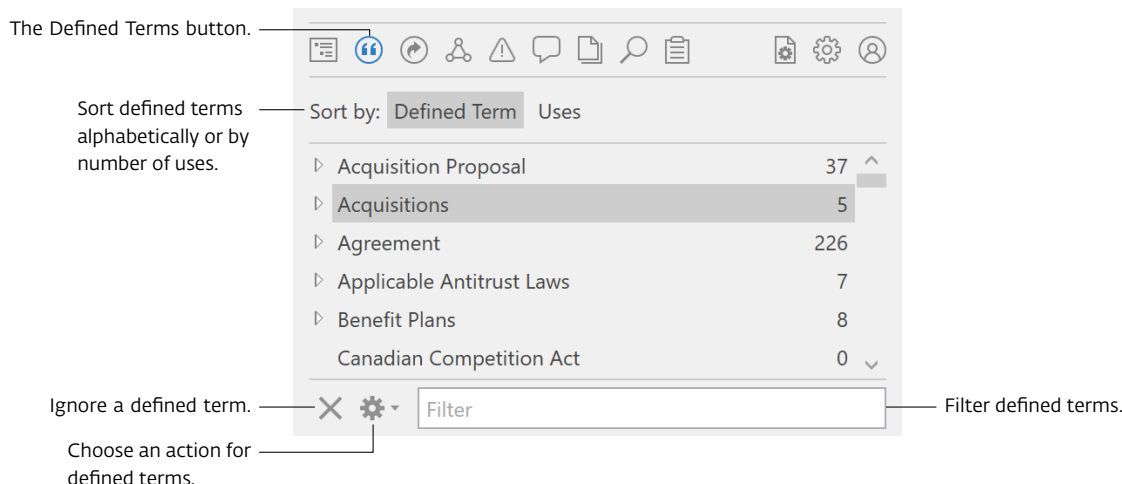
Here are ways to use the Defined Terms view:

- To sort defined terms alphabetically or by number of uses, click one of the buttons at the top left of the view.

- To go to where a defined term is defined, click a defined term in the view. To learn about other ways to go to where a defined term is defined, see Section 2.2, "Navigating Documents" on page 14.

- To show where a defined term is used, click the disclosure triangle next to a defined term. You can also use the Previous and Next buttons to find uses of defined terms; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn more.

- To ignore a defined term, click a defined term in the view to select it, and then click the Ignore button (×) at the bottom of the view or press the Backspace key. Defined terms you ignore are saved with your document by default; see Section 3.4, "Saving Analysis Settings" on page 23 to learn more.

- To restore a defined term you've ignored, choose Show Ignored Defined Terms from the Action pop-up menu at the bottom of the view, select the ignored defined term you want to restore, and then click the Restore button at the bottom of the view or press the Backspace key.

- To quickly restore all ignored defined terms, choose Restore Ignored Defined Terms from the Action pop-up menu at the bottom of the view.

- To copy a list of defined terms to the clipboard, choose Copy Defined Terms from the Action pop-up menu at the bottom of the view; see Section 2.5.3, "Copying and Pasting the Contents of Views" on page 18 to learn more.

- To find a defined term in the view, type all or part of the defined term you want to find in the Filter field at the bottom of the view.

Defined terms are highlighted when you select them; see Section 2.3, "Highlighting Content" on page 15 to learn more.

To learn how Contract Tools finds defined terms, see Section 5.1, "Finding Defined Terms" on page 28.

5.4   Using Defined Terms

You can insert uses of defined terms into your document by typing, and you can use the Completion menu to complete uses of defined terms as you type; see Section 2.4, "The Completion Menu" on page 16 to learn more.

To learn how Contract Tools finds defined terms, see Section 5.1, "Finding Defined Terms" on page 28.

Chapter 6

Working with Cross-References

Navigate cross-references. Make cross-references update as you edit your document.

To learn about	Go to
How Contract Tools finds cross-references	Section 6.1, "Finding Cross-References" on this page
Navigating cross-references	Section 6.2, "Managing Cross-References" on this page
Making cross-references update as you make changes	Section 6.3, "Converting Text in Cross-References to Fields" on the next page

6.1   Finding Cross-References

When analyzing a document, Contract Tools finds text that looks like cross-references, and then finds the items to which these cross-references refer based on the text of the cross-references, provision numbers (see Chapter 4, "Working with Provisions" on page 26 to learn more), and inline list markers like *(a) (b) (c)* and *(i) (ii) (iii)* (see Chapter 11, "Working with Inline Lists and Proviso Lists" on page 47 to learn more). Contract Tools ignores cross-references to other documents, like statutes and ancillaries (see Chapter 10, "Working with Ancillaries" on page 45 to learn more).

To learn about ways to work with cross-references, see Section 6.2, "Managing Cross-References" on this page. To learn how to convert text in cross-references to fields, see Section 6.3, "Converting Text in Cross-References to Fields" on the next page. To learn more about how Contract Tools analyzes documents, see Chapter 3, "Analyzing Documents" on page 21.

6.2   Managing Cross-References

You can use the Cross-References view to manage cross-references. To show the Cross-References view, click the Cross-References button at the top of the Contract Tools pane.

The Cross-References button.

Sort cross-references.

Filter cross-references.

Sort by: **Item** Count Location

Show: All ▾

Convert to Fields

Make cross-references update as you
edit your document.

▷ I The Merger 1
◢ II Effects of the Merger 35
     2.2(a)
     2.2(e)
     2.4 Lost, Stolen or Destroyed Certificates
  ▷ 2.1 Effect on Capital Stock 3
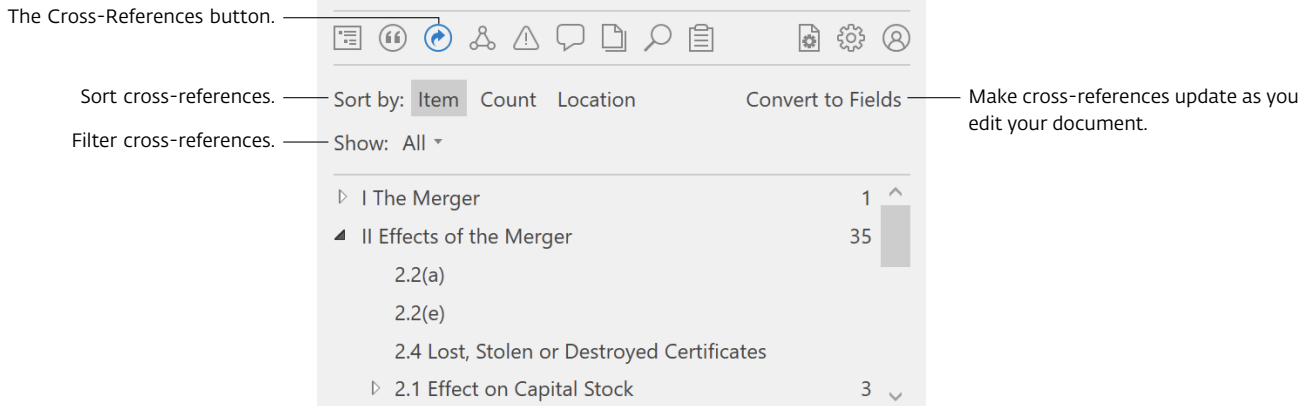
Here are ways to use the Cross-References view:

- To sort cross-references by referenced item, count, or location, click one of the buttons at the top left of the view.

- To show all cross-references or a kind of cross-reference, use the Show pop-up menu at the top left of the view.

- To convert text in cross-references to fields, click "Convert to Fields" at the top right of the view; see Section 6.3, "Converting Text in Cross-References to Fields" on this page to learn more.

- To go to a cross-reference, click a cross-reference in the view. You can also use the Previous and Next buttons to go to cross-references; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn more.

- To find cross-references to unknown items, sort the Cross-References view by item or count, and then click the disclosure triangle next to Unknown. You can also use the Issues pop-up menu; see Section 2.5.4, "The Issues Pop-Up Menu" on page 19 to learn more.

- To go to the item to which a cross-reference refers, sort the Cross-References view by location, and then click the arrow to the right of the cross-reference. To learn about other ways to go to the item to which a cross-reference refers, see Section 2.2, "Navigating Documents" on page 14.

When you select a cross-reference, cross-references to the same item are highlighted; see Section 2.3, "Highlighting Content" on page 15 to learn more.

You can copy a cross-reference to a provision you select in the Provisions View to the clipboard; see Section 4.2, "Managing Provisions" on page 26 to learn more.

To learn how Contract Tools finds cross-references, see Section 6.1, "Finding Cross-References" on the previous page.

6.3 Converting Text in Cross-References to Fields

You can convert text in cross-references to fields that update as you make changes. To learn about fields and how to update them, search for "field" and "update fields" in Word Help.

Here are ways to convert text in cross-references to fields:

- To convert text in a selected cross-reference to a field, click the Context button; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn more.

- To convert text in all cross-references to fields, click "Convert to Fields" at the top of the Cross-References view; see Section 6.2, "Managing Cross-References" on page 32 to learn more.

Text in some cross-references may not be convertible to fields. To find text that isn't convertible to fields, choose Not Convertible from the Show pop-up menu at the top of the Cross-References view.

For text in a cross-reference to be convertible to a field:

- The cross-reference must include only text, not a field. To find cross-references that include only text, choose Text from the Show pop-up menu at the top of the Cross-References view.

- The cross-reference must include full context (alphanumerics for the cross-referenced item and all parent items) or no context (an alphanumeric for only the cross-referenced item): for example, *Section 3.1(d)(i)* or *clause (i)*, not *clause (d)(i)*.

- The item to which the cross-reference refers must be known; see Section 6.2, "Managing Cross-References" on page 32 to learn how to find cross-references to unknown items.

- The item to which the cross-reference refers must use multilevel list numbering; search for "multilevel list" in Word Help to learn more.

If text that you want to convert to fields isn't convertible, try editing your document to make text convertible. For example, make sure the items to which cross-references refer use multilevel list numbering, or edit cross-references to include full context. As an alternative, use Word's built-in controls to create cross-references; search for "cross-reference" in Word Help to learn how.

If you convert a cross-reference to a field, and then delete the item to which the cross-reference refers, the field is flagged as a drafting error; see Chapter 8, "Proofreading Documents" on page 36 to learn more.

To learn about other ways to work with cross-references, see Section 6.2, "Managing Cross-References" on page 32. To learn how Contract Tools finds cross-references, see Section 6.1, "Finding Cross-References" on page 32.

Chapter 7

Finding Related Items

Find provisions and other items that are related to an item you choose.

You can use the Related Items view to find items that are related to an item you choose. For example, you can use the Related Items view to find provisions that contain cross-references to the provision you're working with. To show the Related Items view, click the Related Items button at the top of the Contract Tools pane.

The Related Items button.

Sort related items.

Click the Scope button to go back to the item to which the Related Items view applies.

Sort by: **Item** Count	⊕ 3.1(i) Benefit Plans
⊿ **Cross-Referenced By**	1
▷ 3.1(c)(ii)(B)	1
Cross-References	0
⊿ **Defined Terms**	4
▷ Benefit Plans	1
▷ ERISA	1
▷ MX Benefit Plan	1
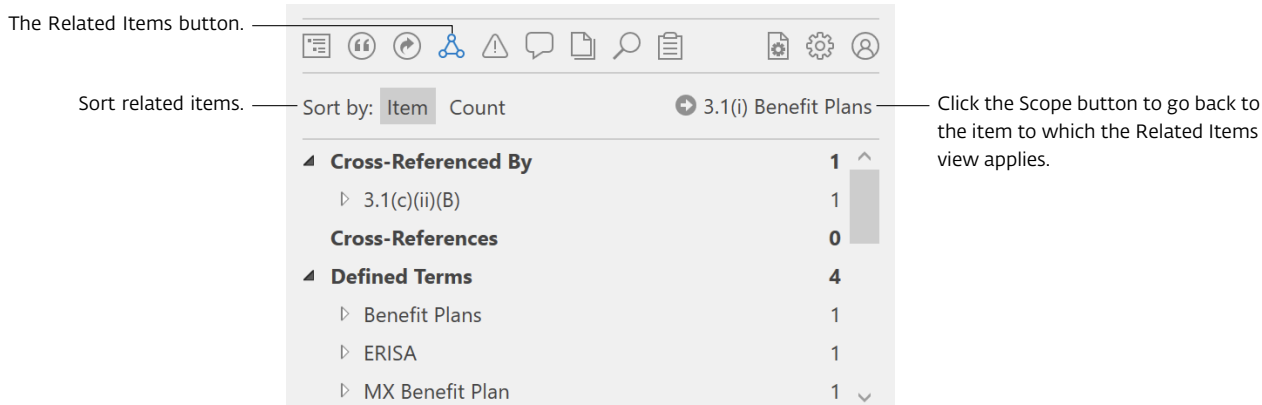
Here are ways to use the Related Items view:

- To choose the item to which the Related Items view applies, select an item in your document. You can select an item by clicking or by setting the insertion point (cursor) using the arrow keys.

- To sort related items alphabetically or in the order in which they appear in your document, click Item at the top left of the view. To sort related items by number of items, click Count at the top left of the view.

- To see more information about a related item, click the disclosure triangle next to the item.

- To go to a related item, click an item in the view.

- To go back to the item to which the Related Items view applies, click the Scope button at the top right of the view.

Chapter 8

Proofreading Documents

Check your document for common contract drafting errors.
Ignore and restore drafting errors.

Contract Tools checks your document for common kinds of contract drafting errors.

To learn about	Go to
Kinds of drafting errors Contract Tools finds; excluding words and phrases while proofreading	Section 8.1, "Checking for Drafting Errors" on this page
Ways to review drafting errors	Section 8.2, "Reviewing Drafting Errors" on page 40
Navigating, ignoring, and restoring drafting errors	Section 8.3, "Managing Drafting Errors" on page 41

8.1   Checking for Drafting Errors

Contract Tools checks for the following kinds of drafting errors:

Not defined: Capitalized words and phrases that are not uses of a defined term.

Duplicate defined terms: Defined terms that are defined more than once.

Miscapitalized defined terms: Uses of defined terms with inconsistent letter case.

Formatting inconsistencies: Inconsistently formatted provision titles, defined terms, cross-references, and ancillaries (available in Word 2010 and later).

List order: Problems with the order of provision numbers, inline list markers (such as *(a) (b) (c)* and *(i) (ii) (iii)*), and defined terms in definitions lists.

Unmatched punctuation: Unmatched parentheses, brackets ([ ]), braces ({ }), curly double quotation marks (" "), and guillemets (« », ‹ ›).

Broken Ref fields: Ref fields whose Bookmark property is unknown. For example, if you convert a cross-reference to a field, and then delete the item to which the cross-reference refers, the field is flagged as a drafting error. To learn about Ref fields, search for "ref field" in Word Help.

To learn about	Go to
Provisions	Chapter 4, "Working with Provisions" on page 26
Defined terms	Chapter 5, "Working with Defined Terms" on page 28
Cross-references	Chapter 6, "Working with Cross-References" on page 32
Ancillaries	Chapter 10, "Working with Ancillaries" on page 45
Inline lists	Chapter 11, "Working with Inline Lists and Proviso Lists" on page 47

Contract Tools ignores some errors by default. To choose the kinds of errors that Contract Tools ignores, show the Contract Tools pane, click the Analysis Settings button, and then use the Drafting Errors controls.

Here are errors that Contract Tools ignores by default:

Adjacent uses of defined terms: When Contract Tools checks for capitalized words and phrases that are not uses of a defined term, it ignores adjacent uses of defined terms.

Duplicate defined terms: When Contract Tools checks for duplicate defined terms, it ignores different forms of the same defined term (for example, *"Company"*, *"Companies"*, and *"the Company"*) that appear in the same paragraph.

Miscapitalized defined terms: When Contract Tools checks for miscapitalized defined terms, it ignores all-uppercase and all-lowercase text. For example, if *Material Contract* is a defined term, Contract Tools finds *material Contract*, but not *material contract*.

Capitalized words and phrases: Contract Tools ignores many kinds of capitalized words and phrases when it checks for those that are not uses of a defined term. To select the kinds of capitalized words and phrases that Contract Tools ignores, click Exclude below Drafting Errors in the Analysis Settings view, and then select the kinds of capitalized words and phrases you want Contract Tools to ignore.

Select this	To make the Proofreader ignore these kinds of capitalized words and phrases
Accounting and finance terms	Goldman, Sachs & Co. PricewaterhouseCoopers Baa3 New York Stock Exchange *The Wall Street Journal*
Arbitration forums	American Arbitration Association Judicial Arbitration and Mediation Services JAMS
Business entities	Paper Software LLC Paper Software, Inc. OOO Paper Software Paper Software, SA/NV Paper Software s.à r.l.

Select this	To make the Proofreader ignore these kinds of capitalized words and phrases
Business entity terms	Board of Directors Audit Committee Chief Executive Officer Assistant Secretaries Articles of Formation Class A Series B
Canadian government bodies	Bank of Canada Canada Mortgage and Housing Corporation Department of Foreign Affairs and International Trade
Canadian statutes	Bankruptcy and Insolvency Act Food and Drugs Act Winding-up and Restructuring Act
Contact information	Attention Facsimile Email
Dates and times	Midnight Friday December Eastern Standard Time
Government bodies	Consumer Financial Protection Bureau Department of Justice Ministry of Defence
Incentive plans	Approved Share Option Scheme Long Term Incentive Plan Restricted Stock Plan
Intergovernmental organizations	European Union United Nations World Trade Organization
Jargon	Amended and Restated Plan of Merger Article Federal Form of Notice Stock Purchase Agreement Risk Factors
Law firms	Adams and Reese Krieg DeVault Wyatt, Tarrant & Combs
Medical and scientific terms	COVID Good Clinical Practices New Drug Application

Select this	To make the Proofreader ignore these kinds of capitalized words and phrases
Names and honorifics	James Smith, Esq. Dr. Mary Johnson
Places	Central America United States of America British Columbia New York City Bailiwick of Guernsey
Regulations and forms	International Traffic in Arms Regulations Form W-8BEN Regulation S-X Rule 144A Schedule 14D-9
Self-regulatory organizations	Accounting Principles Board Financial Industry Regulatory Authority Public Company Accounting Oversight Board
Statute titles	Bankruptcy Code Companies Act Treaty of Amsterdam
Technology terms	PDF Internet MIT License
UK government bodies	Bank of England Financial Services Trade and Investment Board Her Majesty's Treasury
UK public general acts	Contracts (Rights of Third Parties) Act Financial Services (Banking Reform) Act Income and Corporation Taxes Act
Uniform laws	National Conference of Commissioners on Uniform State Laws UCC Uniform Gifts to Minors Act
US federal courts	Supreme Court of the United States United States Court of Appeals for the Second Circuit United States Court of Federal Claims Southern District of New York
US federal government bodies	Federal Reserve System Patent and Trademark Office Electronic Data Gathering, Analysis, and Retrieval System Flood Insurance Rate Map
US federal statutes	COBRA Food, Drug, and Cosmetic Act Worker Adjustment and Retraining Notification Act

Select this	To make the Proofreader ignore these kinds of capitalized words and phrases
US state business entity regulators	Delaware Secretary of State Secretary of State of New York Virginia State Corporation Commission
US state business entity statutes	General Corporation Law of the State of Delaware New York Partnership Law Beverly-Killea Limited Liability Company Act
US state courts	Delaware Court of Chancery New York Supreme Court California Court of Appeal for the First District

Contract Tools always ignores the following kinds of capitalized words and phrases when it checks for those that are not uses of a defined term:

All caps: Contract Tools ignores paragraphs set in all uppercase letters (all caps).

Alphanumeric codes: Contract Tools ignores alphanumeric codes (such as *B26354*).

Capitalized words at the beginning of sentences: Contract Tools ignores capitalized words that appear only at the beginning of sentences. In addition, Contract Tools ignores words commonly used to begin sentences (such as *The*, *Each*, and *Notwithstanding*) when they appear at the beginning of sentences, even if they also appear elsewhere.

Currencies: Contract Tools ignores currencies (such as *US Dollars*, *USD*, *Euros*, and *EUR*). To learn about the currencies Contract Tools detects, see Appendix A, "Finding Amounts of Money" on page 75.

Numbers: Contract Tools ignores numbers (such as *One*, *One Hundred Million*, and *First*).

Provision titles: Contract Tools ignores provision titles when they appear at the start of a provision and when they appear within parentheses or brackets ([ ]).

Quotation marks: Contract Tools ignores capitalized words and phrases enclosed in double quotation marks (" ", " ") or guillemets (« », ‹ ›).

Singular and plural forms of defined terms: You may use singular defined terms in their plural forms, and plural defined terms in their singular forms (for example, you may define *Subsidiary* but use *Subsidiaries*). Contract Tools ignores singular and plural forms of defined terms. To learn about defined terms, see Chapter 5, "Working with Defined Terms" on page 28.

Note: Contract Tools does not check for drafting errors in comments, footnotes, and endnotes (search for "comments", "footnotes", and "endnotes" in Word Help to learn more).

To learn about ways to review drafting errors, see Section 8.2, "Reviewing Drafting Errors" on this page. To learn how to manage drafting errors, including how to ignore drafting errors, see Section 8.3, "Managing Drafting Errors" on the next page.

8.2   Reviewing Drafting Errors

You can use a variety of tools and techniques to review drafting errors:

Highlighting: Drafting errors are highlighted in red in your document by default; see Section 2.3, "Highlighting Content" on page 15 to learn more.

Previous and Next buttons: When you select a drafting error in your document, you can use the Previous and Next buttons to find similar drafting errors; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn more.

Issues pop-up menu: A brief list of drafting errors appears in the Issues pop-up menu; see Section 2.5.4, "The Issues Pop-Up Menu" on page 19 to learn more.

Drafting Errors view: Detailed information about drafting errors appears the Drafting Errors view; see Section 8.3, "Managing Drafting Errors" on this page to learn more.

To learn about the drafting errors Contract Tools finds, see Section 8.1, "Checking for Drafting Errors" on page 36. To learn how to manage drafting errors, including how to ignore drafting errors, see Section 8.3, "Managing Drafting Errors" on this page.

8.3 Managing Drafting Errors

You can use the Drafting Errors view to manage drafting errors. To show the Drafting Errors view, click the Drafting Errors button at the top of the Contract Tools pane.

The Drafting Errors button.

Sort drafting errors.

Ignore a drafting error.

Choose an action for drafting errors.

Filter drafting errors.
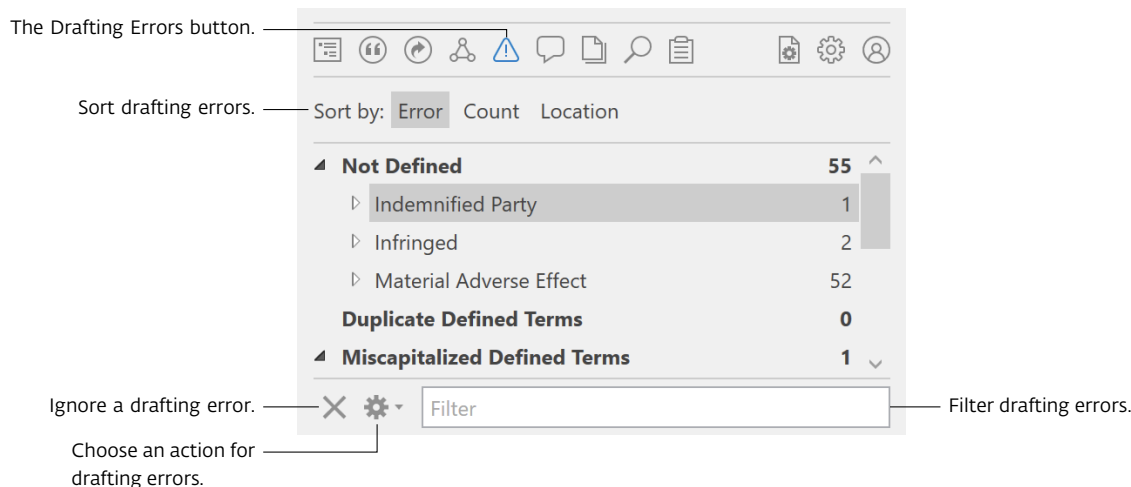
Here are ways to use the Drafting Errors view:

- To sort drafting errors by category, count, or location, click one of the buttons at the top left of the view.

- To go a drafting error, click a drafting error in the view. You can also use the Previous and Next buttons to go to drafting errors; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn more.

- To ignore a drafting error, click a drafting error in the view to select it, and then click the Ignore button (×) at the bottom of the view or press the Backspace key. You can also use the Context button to ignore drafting errors; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn how. Drafting errors you ignore are saved with your document by default; see Section 3.4, "Saving Analysis Settings" on page 23 to learn more.

Note: You ignore categories of drafting errors, not individual drafting errors. You cannot ignore list order errors, unmatched punctuation errors, and broken Ref field errors.

- To restore a drafting error you've ignored, choose Show Ignored Drafting Errors from the Action pop-up menu at the bottom of the view, select the ignored drafting error you want to restore, and then click the Restore button at the bottom of the view or press the Backspace key.

- To quickly restore all ignored drafting errors, choose Restore Ignored Drafting Errors from the Action pop-up menu at the bottom of the view.

- To copy a list of drafting errors to the clipboard, choose Copy Drafting Errors from the Action pop-up menu at the bottom of the view; see Section 2.5.3, "Copying and Pasting the Contents of Views" on page 18 to learn more.

- To quickly fix all formatting inconsistencies, choose Fix Formatting Inconsistencies from the Action pop-up menu at the bottom of the view.

  Note: Before fixing all formatting inconsistencies, it's a good idea to review formatting inconsistencies and ignore the ones you don't want to change.

- To find a drafting error in the view, type all or part of the drafting error you want to find in the Filter field at the bottom of the view.

  To learn about the drafting errors Contract Tools finds, see Section 8.1, "Checking for Drafting Errors" on page 36. To learn about other ways to review drafting errors, see Section 8.2, "Reviewing Drafting Errors" on page 40.

Chapter 9

Finding To-Dos

Find placeholders, bracketed text, highlighted text, comments, and more.

The To-Dos view shows items that may be unfinished:

- Placeholders such as [_], {_}, [•], {*}; also two or more underscores (_) or three or more spaces

- Text enclosed in brackets ([ ]) or braces ({ })

  Note: Contract Tools does not flag text like *[intentionally omitted]*, *[Reserved.]*, and so on as to-dos.

- Highlighted text (search for "highlight" in Word Help to learn more)

- Comments, footnotes, and endnotes (search for "comments", "footnotes", and "endnotes" in Word Help to learn more)

To show the To-Dos view, click the To-Dos button at the top of the Contract Tools pane.

The To-Dos button. ———

Show all to-dos or a kind of to-do. ——— Show: All ▾

_____, ____

Introduction

Local counsel to review.
2.1(c)(iv)

To be reviewed by benefits counsel.
3.1(i) Benefit Plans

Choose an action for ——— ⚙ ▾ Filter ——— Filter to-dos.
to-dos.
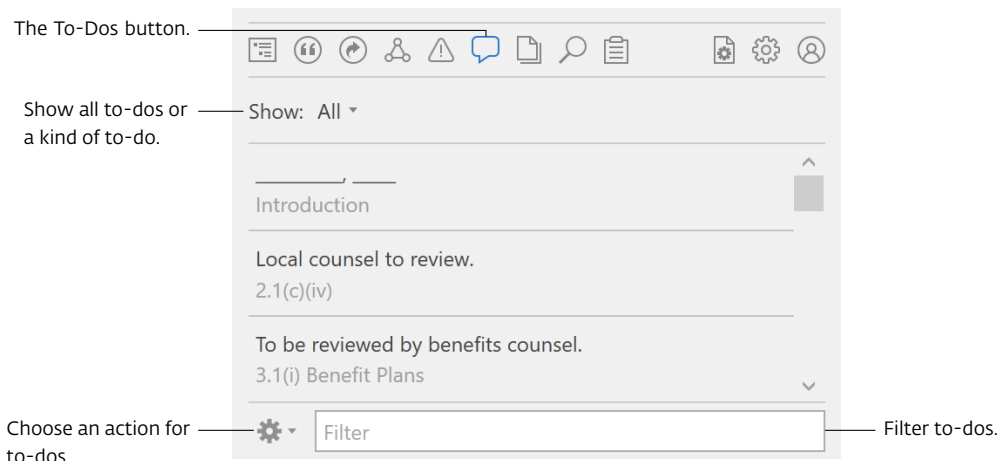
Here are ways to use the To-Dos view:

- To show all to-dos or a kind of to-do, use the Show pop-up menu at the top left of the view.

- To go to a to-do, click a to-do in the view.

- To copy a list of to-dos to the clipboard, choose Copy To-Dos from the Action pop-up menu at the bottom of the view; see Section 2.5.3, "Copying and Pasting the Contents of Views" on page 18 to learn more.

- To find a to-do in the view, type all or part of the to-do you want to find in the Filter field at the bottom of the view.
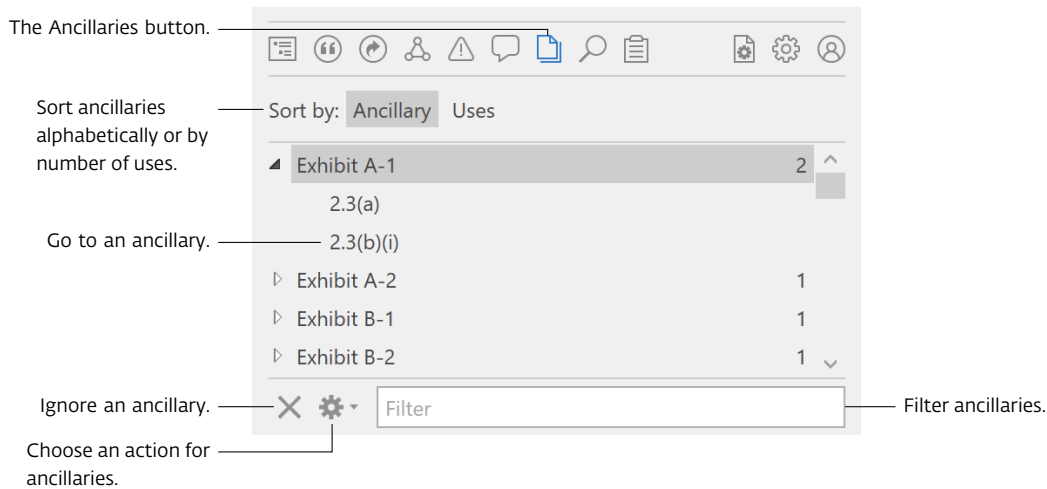
  Placeholders are highlighted when you select them; see Section 2.3, "Highlighting Content" on page 15 to learn more. You can also find placeholders using the Previous and Next buttons; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn how.

Chapter 10

Working with Ancillaries

Find references to other documents.

Some documents refer to exhibits, schedules, and so on. In Contract Tools, these items are called *ancillaries*. You can use the Ancillaries view to find ancillaries. To show the Ancillaries view, click the Ancillaries button at the top of the Contract Tools pane.

The Ancillaries button.

Sort ancillaries alphabetically or by number of uses.

Go to an ancillary.

Ignore an ancillary.

Choose an action for ancillaries.

Filter ancillaries.

Here are ways to use the Ancillaries view:

- To sort ancillaries alphabetically or by number of uses, click one of the buttons at the top left of the view.

- To show the locations of ancillary references, click the disclosure triangle to the left of an ancillary.

- To go to an ancillary, click its location. You can also use the Previous and Next buttons to go to ancillaries; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn more.

- To ignore an ancillary, click an ancillary in the view to select it, and then click the Ignore button (×) at the bottom of the view or press the Backspace key. Ancillaries you ignore are

saved with your document by default; see Section 3.4, "Saving Analysis Settings" on page 23 to learn more.

- To restore an ancillary you've ignored, choose Show Ignored Ancillaries from the Action pop-up menu at the bottom of the view, select the ignored ancillary you want to restore, and then click the Restore button at the bottom of the view or press the Backspace key.

- To quickly restore all ignored ancillaries, choose Restore Ignored Ancillaries from the Action pop-up menu at the bottom of the view.

- To copy a list of ancillaries to the clipboard, choose Copy Ancillaries from the Action pop-up menu at the bottom of the view; see Section 2.5.3, "Copying and Pasting the Contents of Views" on page 18 to learn more.

- To find an ancillary in the view, type all or part of the ancillary you want to find in the Filter field at the bottom of the view.

  Ancillaries are highlighted when you select them; see Section 2.3, "Highlighting Content" on page 15 to learn more.

Chapter 11

Working with Inline Lists and Proviso Lists

Learn general information about inline lists and proviso lists.

When analyzing a document, Contract Tools finds inline lists (that include list markers like *(a) (b) (c)* and *(i) (ii) (iii)*) and proviso lists (that include proviso markers like *provided however* and *provided, further*). To learn more about how Contract Tools analyzes documents, see Chapter 3, "Analyzing Documents" on page 21.

When you set the insertion point (cursor) in an inline list or a proviso list, list markers and proviso markers are highlighted; see Section 2.3, "Highlighting Content" on page 15 to learn more.

Chapter 12

Finding Text

Find words and phrases in your document. Use tokens to find numbers, amounts of money, dates, and more.

To learn about	Go to
Finding words and phrases	Section 12.1, "Finding Text Generally" on this page
Using tokens to find numbers, amounts of money, and so on	Section 12.2, "Finding Numbers, Amounts of Money, and Dates and Times" on the next page

12.1   Finding Text Generally

You can use the Search view to find all instances of words and phrases in your document. To show the Search view, click the Search button at the top of the Contract Tools pane.

The Search button. —

Search for words — and phrases.
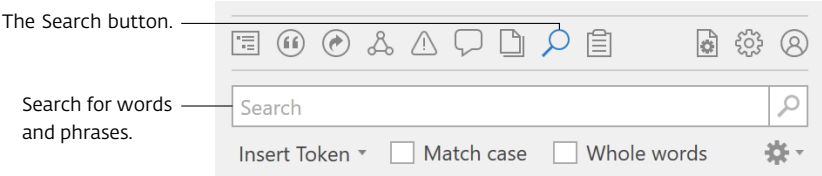
To find text:

1. Enter the text you want to find in the search field.

2. Press Enter or click the search button (looks like a magnifying glass).

   Search results appear below the search field, and the number of search results appears on the right of the search field. To go to where a search result appears in your document, click a search result below the search field. To copy a list of search results to the clipboard, choose Copy Search Results from the Action pop-up menu at the top right of the view; see Section 2.5.3, "Copying and Pasting the Contents of Views" on page 18 to learn more.

   Search results are highlighted in your document; see Section 2.3, "Highlighting Content" on page 15 to learn more.

   To limit search results, select "Match case" or "Whole words".

Match case: When "Match case" is selected, you search for the uppercase and lowercase letters you enter in the search field exactly as you enter them. When "Match case" is deselected, you can use uppercase and lowercase letters interchangeably in the search field. For example, if you search for *partner* when "Match case" is selected, you find *partner* but not *Partner*. If you search for *partner* when "Match case" is deselected, you find both *partner* and *Partner*.

Whole words: When "Whole words" is selected, you find only what you enter in the search field. When "Whole words" is deselected, you find text that contains what you enter in the search field. For example, if you search for *partner* when "Whole words" is selected, you find *partner* by itself, but not in words like *partnership*. If you search for *partner* when "Whole words" is deselected, you find *partner* by itself and in words like *partnership*.

In addition to words and phrases, you can find amounts of money, durations, dates, and more; see Section 12.2, "Finding Numbers, Amounts of Money, and Dates and Times" on this page to learn how.

Note: When you use the search field:

- You search only the part of your document that Contract Tools analyzes (see Section 3.3, "Analyzing Part of a Document" on page 23 to learn more).

- You don't find text within comments, footnotes, and endnotes (search for "comments", "footnotes", and "endnotes" in Word Help to learn more).

- You don't find inline list markers like *(a) (b) (c)* and *(i) (ii) (iii)* and proviso markers like *provided however* and *provided, further* (see Chapter 11, "Working with Inline Lists and Proviso Lists" on page 47 to learn more).

- You don't find provision numbers, cross-references, and ancillaries.

To learn about other ways to find	Go to
Provisions	Chapter 4, "Working with Provisions" on page 26
Cross-references	Chapter 6, "Working with Cross-References" on page 32
Ancillaries	Chapter 10, "Working with Ancillaries" on page 45

12.2   Finding Numbers, Amounts of Money, and Dates and Times

You can use tokens in the search field to find numbers, amounts of money, dates, and more. To insert tokens in the search field, choose a token from the Insert Token pop-up menu below the search field.

Add a token to the search field.
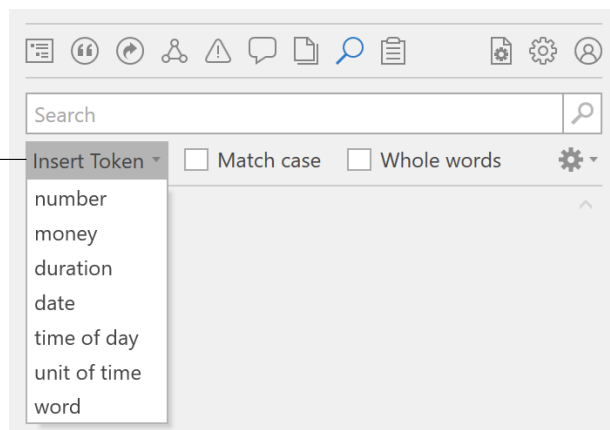
Here are tokens you can use to find numbers, amounts of money, and dates and times:

Use this token	To find this	For example
number	Digits, comma-separated numbers, decimals, percentages, and numbers in word form	1 1.0 one 50% fifty percent fifty per cent fifty per centum 10,000,000 10 million ten million 1st first 58th fifty-eighth
money	Amounts of money denominated in the currencies listed in Appendix A, "Finding Amounts of Money" on page 75	$100 one hundred euros 100 zł 100 ringgits
duration	Durations formatted in common ways	one (1) business day tenth Business Day 15 consecutive Trading Days thirty (30) consecutive calendar days 181st day four consecutive Fiscal Quarters
date	Dates formatted in common ways	August 30, 2010 30 Aug 2010 30th of August 1st day of January

Use this token	To find this	For example
`time of day`	Times of day formatted in common ways	9:30AM 9:30 a.m. 9:30am 9:30 12:00 noon 5:00p.m. 5:00 pm 5:00 5 PM 12:00 midnight
`unit of time`	Commonly used measures of time	seconds minutes hours days weeks months quarters years anniversary
`word`	Any word	—

You can use `number`, `word`, and the other tokens together with text to find a variety of phrases. Here are examples:

When you search for this	You can find phrases like this
`number` shares	1,000 shares 10 million shares ten million shares
`word` stock	A Stock B Stock Common Stock Preferred Stock
`number` to `number`	4.25 to 1.00 3.0 to 1.0 one to one
`number` (`number`)	ten (10) fifty percent (50%) one hundred (100,000)
`money` (`money`)	ten million dollars ($10,000,000) fifty pounds sterling (£50.00) one million euros (¥10,000,000,000)

Amounts of money, durations, dates, and times of day are highlighted when you select them; see Section 2.3, "Highlighting Content" on page 15 to learn more. You can also find these items using the Previous and Next buttons; see Section 2.5.1, "The Context Button; the Previous and Next Buttons" on page 17 to learn how.

To learn about finding text generally, see Section 12.1, "Finding Text Generally" on page 48.

Chapter 13

Working with Snippets

Create snippets from text you select in your document. Insert snippets into your document. Use categories to organize snippets.

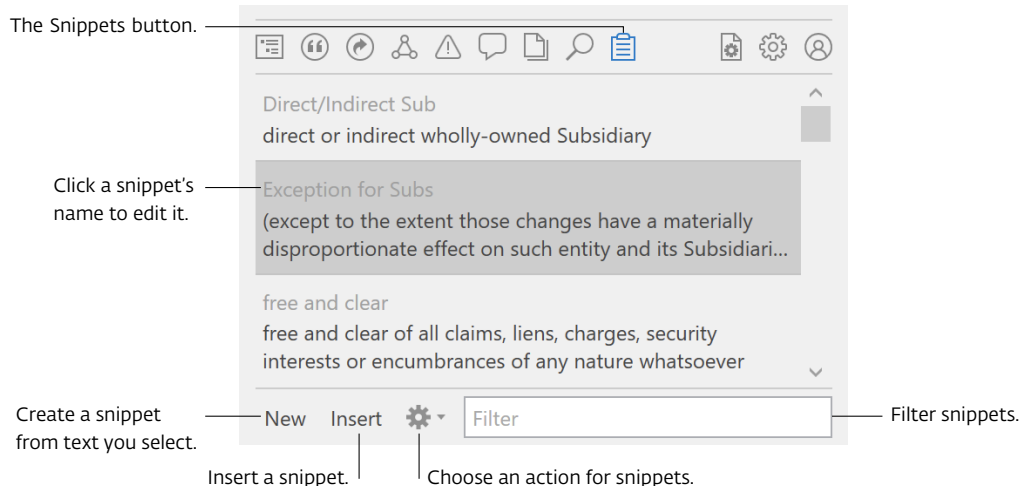| To learn about	Go to
General information about snippets	Section 13.1, "Understanding Snippets" on this page
Creating and deleting snippets	Section 13.2, "Managing Snippets" on this page
Inserting snippets into your document	Section 13.3, "Using Snippets" on the next page
Sorting snippets into categories	Section 13.4, "Assigning Categories to Snippets" on page 55
How snippets relate to other Word features	Section 13.5, "Snippets and Building Blocks" on page 55

13.1   Understanding Snippets

Snippets are useful for quickly inserting text you use often. You create snippets from text you select in a document. Snippets you create in one document can be used in any of your other documents. Snippets can be as long as you'd like, but it's a good idea to limit them to a few sentences.

Snippets are available in Word 2010 and later.

13.2   Managing Snippets

You can use the Snippets view to manage snippets. To show the Snippets view, click the Snippets button at the top of the Contract Tools pane.

Click a snippet's
name to edit it.

Direct/Indirect Sub
direct or indirect wholly-owned Subsidiary

Exception for Subs
(except to the extent those changes have a materially
disproportionate effect on such entity and its Subsidiari...

free and clear
free and clear of all claims, liens, charges, security
interests or encumbrances of any nature whatsoever

Create a snippet
from text you select.

New   Insert   ⚙ ▾   Filter

Filter snippets.

Insert a snippet.   Choose an action for snippets.

Here are ways to use the Snippets view:

- To create a snippet, select text in your document, and then click the New button at the bottom of the view. To select text, drag the mouse pointer over text. Or, set the insertion point (cursor) at the beginning of the text you want to select, and then Shift-click the end of the text you want to select.

  You can create many snippets at once from paragraphs in your document. To do this, choose one of the Convert commands from the Action pop-up menu at the bottom of the view.

  If the New button and the Convert commands are always disabled, see Section 16.14, "Creating Snippets Is Impossible" on page 69.

- To change the name of a snippet, click the snippet's name to set the insertion point (cursor), and then edit the name.

- To delete a snippet, click the snippet to select it, and then press the Backspace key or choose Delete from the Action pop-up menu at the bottom of the view. If you want to delete many snippets, use Shift-click to select the snippets you want to delete.

- To find a snippet in the view, type all or part of the snippet you want to find in the Filter field at the bottom of the view.

  If you use AutoText and Quick Parts, you may want to work with them the way you work with snippets. To make AutoText and Quick Parts appear in the Snippets view, click the Preferences button at the top of the Contract Tools pane, and then select "Include all AutoText and Quick Parts" below Snippets. To learn about AutoText and Quick Parts, search for "AutoText" and "Quick Parts" in Word Help.

  You can sort snippets into categories; see Section 13.4, "Assigning Categories to Snippets" on the next page to learn how.

13.3   Using Snippets

You can use a variety of techniques to add snippets to your document.

Here are ways to insert a snippet:

- Start typing the name of the snippet in your document, and then use the Completion menu to choose the snippet you want to insert; see Section 2.4, "The Completion Menu" on page 16 to

learn more.

- Click a snippet in the Snippets view to select it, and then click Insert at the bottom of the view or press the Enter key.

- Double-click a snippet in the Snippets view.

After you insert a snippet, you may edit its text in your document, and you may want to see how the text you edited differs from the snippet you originally inserted. To compare text you select in your document to a selected snippet, choose "Compare Selection to Snippet" from the Action pop-up menu at the bottom of the Snippets view.

13.4   Assigning Categories to Snippets

You can assign categories to snippets. To show categories in the Snippets view, click the Preferences button at the top of the Contract Tools pane, and then select "Show categories" below Snippets.

New snippets are categorized as General. To change the category of a snippet, use the controls in the Building Blocks Organizer. To learn about the Building Blocks Organizer, search for "building blocks organizer" in Word Help. To show the Building Blocks Organizer, choose Building Blocks Organizer from the Action pop-up menu at the bottom of the Snippets view, or choose Insert > Quick Parts > Building Blocks Organizer.

After you change the category of a snippet, you may need to refresh the Snippets view to see your changes. To do this, choose "Refresh from Building Blocks" from the Action pop-up menu at the bottom of the Snippets view.

To learn how snippets in Contract Tools relate to building blocks in Word, see Section 13.5, "Snippets and Building Blocks" on this page. To learn about building blocks, search for "building block" in Word Help.

13.5   Snippets and Building Blocks

When you create a snippet, you add an AutoText entry to Word. An AutoText entry is a kind of building block; search for "AutoText" and "building block" in Word Help to learn more.

If an alert message about building blocks appears when you quit Word, see Section 16.17, "An Alert about Building Blocks Appears When Word Quits" on page 71.

Chapter 14

Setting Preferences

Set Contract Tools to be turned off when you open documents. Learn about other ways to customize how you work with Contract Tools.

You can set Contract Tools preferences by using the controls in the Preferences view. To show the Preferences view, click the Preferences button at the top of the Contract Tools pane.

Here are preferences you may want to change:

By default, this happens	To make this happen	Do this	To learn more, go to
Contract Tools turns on automatically when documents open	Set Contract Tools to be turned off	Deselect "Turn on when documents open"	Section 2.1, "The Contract Tools Ribbon Tab" on page 13
The Contract Tools pane appears on the right of the Word window	Set the Contract Tools pane to be hidden or appear on the left	Use the Contract Tools Pane controls	Section 2.5, "The Contract Tools Pane" on page 16
Contract Tools analyzes when you save	Analyze manually	Deselect "Analyze when saving" below Analysis	Section 3.2, "Updating Analysis" on page 22
Defined terms, drafting errors, and other content are highlighted	Hide highlighting; use underlining instead of highlighting	Use the Highlighting & Underlining controls	Section 2.3, "Highlighting Content" on page 15
A warning appears to confirm deleting snippets	Delete snippets without showing a warning	Deselect "Show warning before deleting" below Snippets	Chapter 13, "Working with Snippets" on page 53
Unused defined terms, to-dos, and other items appear in the Issues pop-up menu	Exclude items from the Issues pop-up menu	Use the Issues Pop-Up Menu controls	Section 2.5.4, "The Issues Pop-Up Menu" on page 19

Chapter 15

Deactivation, Subscription Management, and Uninstalling

Deactivate Contract Tools on your current computer to activate it on a different computer. Disconnect from your organization's license server. Update your billing information. Cancel your subscription. Uninstall Contract Tools to remove it from your computer.

To learn about	Go to
Using Contract Tools on a different computer	Section 15.1, "Deactivating Contract Tools" on this page
Allowing others to use Contract Tools when your organization uses Contract Tools License Server	Section 15.2, "Disconnecting from Contract Tools License Server" on the next page
Updating your billing information; canceling your Contract Tools subscription	Section 15.3, "Managing Your Contract Tools Subscription" on the next page
Removing Contract Tools from your computer	Section 15.4, "Uninstalling Contract Tools" on page 59

15.1   Deactivating Contract Tools

If you want to activate Contract Tools on a different computer, you should first deactivate Contract Tools on your current computer.

Here are ways to deactivate Contract Tools:

- If you have a Contract Tools subscription, show the Contract Tools pane, click the Subscription button, and then click Deactivate.

- If you don't have a Contract Tools subscription, show the Contract Tools pane, and then click Deactivate.

Note: When you deactivate Contract Tools, you do not cancel your subscription; see Section 15.3, "Managing Your Contract Tools Subscription" on this page to learn how to cancel your subscription. Also, when you deactivate Contract Tools, you do not remove it from your computer; see Section 15.4, "Uninstalling Contract Tools" on the next page to learn how to remove Contract Tools from your computer.

To learn how to activate Contract Tools, see Section 1.3, "Activating Contract Tools" on page 8.

If you forget to deactivate Contract Tools on one computer before you try to activate it on another, you can deactivate Contract Tools on your other computers when you activate Contract Tools on your current computer.

To deactivate Contract Tools on your other computers:

1. On your current computer, enter your activation key, and then click Activate; see Section 1.3, "Activating Contract Tools" on page 8 to learn more. An alert message that says "Do you want to deactivate Contract Tools on all of your computers?" appears.

2. Click Yes to deactivate Contract Tools on your other computers and activate Contract Tools on your current computer. If you change your mind about deactivating Contract Tools on your other computers, click No.

To troubleshoot problems with deactivating Contract Tools, see Section 16.7, "Contract Tools Cannot Connect to the Internet" on page 65.

15.2   Disconnecting from Contract Tools License Server

If your organization uses Contract Tools License Server to administer Contract Tools, you may want to disconnect Contract Tools from the server to allow others within your organization to use Contract Tools.

Here are ways to disconnect Contract Tools from Contract Tools License Server:

- Show the Contract Tools pane, click the Subscription button, and then click Disconnect.

- Quit Word.

To learn how to connect to Contract Tools License Server, see Section 1.5, "Connecting to Contract Tools License Server" on page 10.

15.3   Managing Your Contract Tools Subscription

You can update your billing information or cancel your Contract Tools subscription.

Here are ways to manage your Contract Tools subscription:

- Show the Contract Tools pane, click the Subscription button, and then click Manage Subscription.

- Click the link that appears below the Order ID in your billing confirmation emails.

To transfer your Contract Tools subscription to another computer, you can deactivate Contract Tools on your current computer, and then activate Contract Tools on another computer; see Section 15.1, "Deactivating Contract Tools" on the previous page and Section 1.3, "Activating Contract Tools" on page 8 to learn how.

15.4   Uninstalling Contract Tools

You can uninstall Contract Tools to remove it from your computer.

Before you uninstall Contract Tools, you should deactivate it; see Section 15.1, "Deactivating Contract Tools" on page 57 to learn how.

Here are ways to uninstall Contract Tools:

- In Windows 11, open Settings, choose Apps > Installed apps, find Paper Software Contract Tools in the app list, click the More Actions button (looks like three dots) next to Paper Software Contract Tools, and then choose Uninstall.

- In any version of Windows, open Control Panel, click "Uninstall a program" at the bottom left, find Paper Software Contract Tools in the list of programs, select it, and then click Uninstall at the top of the list.

Note: When you uninstall Contract Tools, you do not cancel your subscription; see Section 15.3, "Managing Your Contract Tools Subscription" on the previous page to learn how to cancel your subscription.

It's possible to remove Contract Tools from Word by using Word's COM Add-ins dialog (to show this, choose File > Options > Add-ins to show the Add-ins pane of Word Options, choose COM Add-ins from the Manage pop-up menu at the bottom of the Add-ins pane, and then click Go). Removing Contract Tools from Word is not a good idea. Doing this may permanently prevent Word from loading Contract Tools, even if you reinstall Contract Tools. To undo removing Contract Tools from Word, you may need to perform an online repair of Office; visit *Repair an Office application* (https://support.microsoft.com/en-us/office/repair-an-office-application-7821d4b6-7c1d-4205-aa0e-a6b40c5bb88b) to learn more. You should uninstall Contract Tools instead of removing it from Word.

Chapter 16

Troubleshooting

Learn how to solve problems with Contract Tools. Find version information for Windows, Word, and Contract Tools.

Here are tips for resolving issues that might arise when you use Contract Tools.

To learn about this issue	Go to
Contract Tools Setup stops when downloading prerequisites	Section 16.1, "Contract Tools Setup Won't Download Prerequisites" on the next page
A Program Compatibility Assistant alert appears during Contract Tools installation	Section 16.2, "Program Compatibility Assistant Appears after Installing Contract Tools" on page 62
Contract Tools doesn't start, but no alert messages appear	Section 16.3, "Contract Tools Won't Start" on page 62
Contract Tools doesn't start, and an alert message appears	Section 16.4, "Contract Tools Won't Start Due to an Error" on page 63
The Contract Tools pane doesn't appear, even though the Contract Tools ribbon tab appears	Section 16.5, "The Contract Tools Pane Won't Appear" on page 64
Parts of the Contract Tools pane are black; highlighting is misaligned	Section 16.6, "The Contract Tools Pane Appears with Black Shapes; Highlighting Is Misplaced" on page 64
Activating, deactivating, or beginning a trial fails because Contract Tools can't connect to the internet	Section 16.7, "Contract Tools Cannot Connect to the Internet" on page 65
Activating or beginning a trial fails because of a problem with network adapters	Section 16.8, "Contract Tools Won't Activate Due to Disabled Network Adapters" on page 66
Activating or beginning a trial fails because of a problem with Windows Management Instrumentation (WMI)	Section 16.9, "Contract Tools Won't Activate Due to a Problem with Windows Management Instrumentation" on page 66

To learn about this issue	Go to
A message about connecting to your organization's license server appears at the top of the Contract Tools pane	Section 16.10, "Contract Tools Cannot Connect to a License Server" on page 67
Word becomes unresponsive when Contract Tools analyzes a document created from a PDF	Section 16.11, "Analyzing a Document Converted from a PDF Takes a Long Time" on page 67
Contract Tools doesn't find provisions, defined terms, and other items that appear in your document	Section 16.12, "Contract Tools Won't Find Content" on page 68
A document doesn't appear in the "Include from" pop-up menu in the Analysis Settings view	Section 16.13, "Including Defined Terms from Another Document Is Impossible" on page 68
The New button in the Snippets view is always disabled	Section 16.14, "Creating Snippets Is Impossible" on page 69
A Word window shared using Microsoft Teams appears mostly black	Section 16.15, "Documents Appear Black When Sharing Word Windows Using Microsoft Teams" on page 70
Word becomes unresponsive when closing a document	Section 16.16, "Closing a Document Takes a Long Time When Using Multiple Add-Ins" on page 70
An alert about modified content in Building Blocks appears when quitting Word	Section 16.17, "An Alert about Building Blocks Appears When Word Quits" on page 71
Word becomes unresponsive when quitting on a touch or stylus device	Section 16.18, "Quitting Word Takes a Long Time on a Computer with a Touchscreen or Stylus" on page 72
Word shuts down unexpectedly when using Contract Tools and other add-ins on a touch or stylus device	Section 16.19, "Word Quits Unexpectedly When Using Multiple Add-Ins on a Computer with a Touchscreen or Stylus" on page 72
Contract Tools can't be updated, and an alert message appears	Section 16.20, "Contract Tools Won't Install Updates" on page 72

To help you resolve an issue with Contract Tools, we may need information about your computer and the software you use; see Section 16.21, "Finding Information about Your Computer" on page 73 to learn more.

See Section 16.22, "Disabling Word Add-Ins" on page 74 to learn how to disable a Word add-in.

16.1 Contract Tools Setup Won't Download Prerequisites

What happens: When you're installing Contract Tools (see Section 1.1, "Installing Contract Tools" on page 7), "Downloading prerequisite software" appears in the Contract Tools Setup window, and a progress indicator (a moving bar) shows the status of the download. The progress indicator doesn't move.

What this means: When you install Contract Tools, you also download and install other Microsoft software that Contract Tools requires (see Section 1.10, "Prerequisites for Installing Contract Tools" on page 12 to learn more). Most likely, firewall software (or similar software) is

preventing Contract Tools Setup from downloading this software.

What you should do: Temporarily disable your firewall software, or configure it to allow Contract Tools Setup to connect to the internet. The documentation for your firewall software should have instructions on how to do this. As an alternative, you can download and install Contract Tools' prerequisites. For information about Contract Tools' prerequisites, including links to installers, see Section 1.10, "Prerequisites for Installing Contract Tools" on page 12.

16.2 Program Compatibility Assistant Appears after Installing Contract Tools

What happens: When Contract Tools Setup is finished, a Program Compatibility Assistant alert appears. The alert says that Visual Studio Tools for Office Solution Installer "might not have installed correctly".

What this means: Program Compatibility Assistant (PCA) is Microsoft software that detects when installers or setup programs fail to install software correctly; see *Application Compatibility: Program Compatibility Assistant (PCA)* (https://docs.microsoft.com/en-us/previous-versions/bb756937(v=msdn.10)) to learn more. PCA has incorrectly categorized Visual Studio Tools for Office Solution Installer as a setup program.

What you should do: Click Cancel to dismiss the alert, or click "This program installed correctly" to prevent the alert from appearing again.

16.3 Contract Tools Won't Start

What happens: When you open a document in Word, both the Contract Tools ribbon tab and the Contract Tools pane fail to appear (see Section 2.1, "The Contract Tools Ribbon Tab" on page 13 and Section 2.5, "The Contract Tools Pane" on page 16). No Contract Tools alert messages appear.

What this means: It's possible that Contract Tools failed to install, or that Contract Tools has been uninstalled (see Section 15.4, "Uninstalling Contract Tools" on page 59). It's also possible that Contract Tools is disabled in Word.

What you should do: Confirm that Contract Tools is installed on your computer and enabled in Word.

To confirm that Contract Tools is installed:

1. Show a list of applications on your computer. Here are ways to do this:

    - In Windows 11, open Settings and choose Apps > Installed apps.

    - In any version of Windows, open Control Panel and click "Uninstall a program" at the bottom left.

2. Make sure that Paper Software Contract Tools appears in the list of applications.

    See Section 1.1, "Installing Contract Tools" on page 7 to learn how to install Contract Tools.

    Note: On computers with Word 2007, make sure that Contract Tools is installed only for you, not for everyone who uses your computer. A simple way to do this is to uninstall and reinstall

Contract Tools; see Section 15.4, "Uninstalling Contract Tools" on page 59 and Section 1.1, "Installing Contract Tools" on page 7 to learn how.

To confirm that Contract Tools is enabled in Word:

1. Choose File > Options > Add-ins to show the Add-ins pane of Word Options.

2. Make sure that Paper Software Contract Tools appears below Active Application Add-ins in the list of add-ins.

   See Section 1.7, "Enabling Contract Tools" on page 11 to learn how to enable Contract Tools.

   Note: If Contract Tools was removed from Word using Word's COM Add-ins dialog, Contract Tools may not appear in Word's list of add-ins, even if Contract Tools is installed on your computer. To enable Contract Tools when it has been removed from Word, you may need to perform an online repair of Office; visit *Repair an Office application* (https://support.microsoft. com/en-us/office/repair-an-office-application-7821d4b6-7c1d-4205-aa0e-a6b40c5bb88b) to learn more. You should uninstall Contract Tools instead of removing it from Word; see Section 15.4, "Uninstalling Contract Tools" on page 59 to learn how.

   If Contract Tools still won't start after confirming that it's installed and enabled, email support@papersoftware.com.

   If an alert message about Contract Tools appears when Word starts, see Section 16.4, "Contract Tools Won't Start Due to an Error" on this page. If the Contract Tools pane doesn't appear even though the Contract Tools ribbon tab appears, see Section 16.5, "The Contract Tools Pane Won't Appear" on the next page.

16.4   Contract Tools Won't Start Due to an Error

What happens: When you open Word, an alert message about Contract Tools appears. The Contract Tools ribbon tab (see Section 2.1, "The Contract Tools Ribbon Tab" on page 13) fails to appear, or appears with most buttons disabled. The Contract Tools pane (see Section 2.5, "The Contract Tools Pane" on page 16) fails to appear.

What this means: It's possible that a Contract Tools prerequisite is missing; see Section 1.10, "Prerequisites for Installing Contract Tools" on page 12 for a list of prerequisites. It's also possible that the file in which Contract Tools preferences are saved is damaged.

What you should do: Make sure that Contract Tools' prerequisites are installed. A simple way to do this is to uninstall and reinstall Contract Tools; see Section 15.4, "Uninstalling Contract Tools" on page 59 and Section 1.1, "Installing Contract Tools" on page 7 to learn how. If this doesn't resolve the issue, you can make Word create a new, undamaged Contract Tools preferences file with default preferences.

To make Word create a new Contract Tools preferences file:

1. Quit Word.

2. Open File Explorer and go to C:\Users\[*Your User Name*]\AppData\Local\Microsoft_Corporation. If you can't see the AppData folder, choose View > Show > Hidden items in File Explorer.

3. In the Microsoft_Corporation folder, there should be a subfolder with a name that begins with PaperSoftwareContractTool_. Move this subfolder to the Recycle Bin. (This subfolder is created and managed by Word. It contains subfolders named with Word version numbers, and each of

these subfolders contains a file named user.config. These files contain the preferences you set in the Preferences view.)

4. Open a document in Word to start Contract Tools.

   If Contract Tools still won't start, email support@papersoftware.com.

   If no alert messages appear when you open Word but Contract Tools still fails to start, see Section 16.3, "Contract Tools Won't Start" on page 62. If the Contract Tools pane doesn't appear even though the Contract Tools ribbon tab appears as expected, see Section 16.5, "The Contract Tools Pane Won't Appear" on this page.

16.5   The Contract Tools Pane Won't Appear

What happens: When you open a document in Word, the Contract Tools pane fails to appear, even though the Contract Tools ribbon tab appears (see Section 2.5, "The Contract Tools Pane" on page 16 and Section 2.1, "The Contract Tools Ribbon Tab" on page 13). When you click the Contract Tools Pane button in the Contract Tools ribbon tab, the Contract Tools pane doesn't appear.

What this means: Most likely, another add-in is changing the default behavior of Word such that the Contract Tools pane cannot appear. (Litéra LexPro has been reported to cause this behavior.)

What you should do: Disable your other Word add-ins and see whether this resolves the issue. To learn how to disable a Word add-in, see Section 16.22, "Disabling Word Add-Ins" on page 74.

If the Contract Tools pane still won't appear, email support@papersoftware.com.

If both the Contract Tools ribbon tab and the Contract Tools pane fail to appear, see Section 16.3, "Contract Tools Won't Start" on page 62 and Section 16.4, "Contract Tools Won't Start Due to an Error" on the previous page. If the Contract Tools pane is concealed by black shapes, see Section 16.6, "The Contract Tools Pane Appears with Black Shapes; Highlighting Is Misplaced" on this page.

16.6   The Contract Tools Pane Appears with Black Shapes; Highlighting Is Misplaced

What happens: The Contract Tools pane (see Section 2.5, "The Contract Tools Pane" on page 16) is partially covered by black rectangles. Highlighting (see Section 2.3, "Highlighting Content" on page 15) is not aligned with text in your document.

What this means: Most likely, the scale of your computer's display has changed since you signed in to Windows. A Display Settings button may appear at the bottom of the Word window when this happens. Your display's scale may change when you connect your computer to an additional display or disconnect it from an additional display. Also, in Windows 11, you can change your display's scale in Settings (choose System > Display).

What you should do: Sign out of Windows (or restart your computer), sign in to Windows, and then open Word.

Here are ways to sign out of Windows 11:

• Show the Start menu, click your user name at the bottom left, and then choose "Sign out".

- Right-click the Start button and choose Shut down or sign out > Sign out.

  As an alternative, in Word 2016 and later (including Word for Microsoft 365), you can adjust Word options: choose File > Options > General, and then select "Optimize for compatibility". Visit *Office support for high definition displays* (https://support.microsoft.com/en-us/office/office-support-for-high-definition-displays-6720ca0e-be59-41f6-b629-1369f549279d) to learn more.

  If black rectangles still appear in the Contract Tools pane or if highlighting still appears in the wrong place, email support@papersoftware.com.

  If the Contract Tools pane fails to appear, see Section 16.5, "The Contract Tools Pane Won't Appear" on the previous page. If both the Contract Tools ribbon tab and the Contract Tools pane fail to appear, see Section 16.3, "Contract Tools Won't Start" on page 62 and Section 16.4, "Contract Tools Won't Start Due to an Error" on page 63.

16.7   Contract Tools Cannot Connect to the Internet

What happens: When you try to activate, deactivate, or begin a trial of Contract Tools, an alert message that says "Contract Tools cannot connect to the internet" appears.

What this means: To begin a trial and to become activated or deactivated, Contract Tools must connect to the internet. Most likely, antivirus or firewall software on your computer or network is preventing Word from connecting to the internet (because Contract Tools is a Word add-in, Contract Tools connects to the internet through Word). It's also possible that your computer isn't connected to the internet or that the website of Contract Tools' license management system (https://wyday.com) is being blocked. If you connect to the internet through a proxy, you may need to change Contract Tools' proxy settings.

What you should do: Make sure that your computer is connected to the internet, that you can visit https://wyday.com using Edge or Internet Explorer, and that antivirus and firewall software is configured to allow Word to connect to the internet. If you connect to the internet through a proxy, make sure Contract Tools' proxy settings are properly configured.

To diagnose and resolve this issue:

1. Make sure your computer is connected to the internet. One way to do this is to use a web browser to go to a website you visit regularly. If you can't visit this website, connect to the internet, and then try to activate, deactivate, or begin a trial of Contract Tools again.

2. If your computer is connected to the internet, try using Edge or Internet Explorer to visit https://wyday.com, the website of Contract Tools' license management system. (It's important to use Edge or Internet Explorer because Contract Tools' license management system uses the same proxies that Edge and Internet Explorer use.) If you can't visit https://wyday.com using Edge or Internet Explorer, ask your network administrator to unblock wyday.com.

3. If you connect to the internet through a proxy, you may need to change Contract Tools' proxy settings. To do this, use the Proxy Settings controls. Your network administrator can provide the proxy settings you should use.

4. If you can visit https://wyday.com, then most likely, antivirus or firewall software is preventing Word from connecting to the internet. To identify antivirus or firewall software that's causing this issue, temporarily disable this software, and then try to activate, deactivate, or begin a trial

of Contract Tools again. The documentation for your antivirus or firewall software should have instructions on how to configure it to allow Word to connect to the internet.

If Contract Tools still cannot connect to the internet, email support@papersoftware.com.

Instead of activating Contract Tools over the internet, you can activate Contract Tools offline; see Section 1.3.2, "Activating Offline" on page 9 to learn how.

If you need to use Contract Tools without connecting to the internet, email info@papersoftware.com to learn about deployment options.

If an alert message about enabling network adapters appears, see Section 16.8, "Contract Tools Won't Activate Due to Disabled Network Adapters" on this page. If an alert message about Windows Management Instrumentation appears, see Section 16.9, "Contract Tools Won't Activate Due to a Problem with Windows Management Instrumentation" on this page.

16.8   Contract Tools Won't Activate Due to Disabled Network Adapters

What happens: When you try to activate or begin a trial of Contract Tools in Windows 7, this alert message appears: "To activate or begin a trial of Contract Tools, you must enable all of your computer's network adapters."

What this means: To prevent unauthorized use, Contract Tools' license management system creates a profile of your computer's hardware. This profile must include your computer's network adapters. In Windows 7, Contract Tools' license management system cannot profile disabled network adapters, so it cannot create a profile of your computer's hardware if network adapters are disabled.

What you should do: Enable any disabled network adapters, and then try to activate or begin a trial of Contract Tools again. As an alternative, update to Windows 8.1 or later.

To enable network adapters:

1. Open Control Panel, and then choose Network and Internet > Network and Sharing Center > Change adapter settings.

2. Right-click any disabled network adapters (highlighted in gray), and then choose Enable.

   If an alert message about connecting to the internet appears, see Section 16.7, "Contract Tools Cannot Connect to the Internet" on the previous page. If an alert message about Windows Management Instrumentation appears, see Section 16.9, "Contract Tools Won't Activate Due to a Problem with Windows Management Instrumentation" on this page.

16.9   Contract Tools Won't Activate Due to a Problem with Windows Management Instrumentation

What happens: When you try to activate or begin a trial of Contract Tools, an alert message about re-enabling Windows Management Instrumentation (WMI) appears.

What this means: Windows Management Instrumentation is Microsoft software that Contract Tools and other Windows applications require. Either Windows Management Instrumentation is disabled, or a Windows configuration problem is preventing Windows Management Instrumentation from working as expected.

What you should do: Make sure that Windows Management Instrumentation is running. You may need an administrator account to do this. If this doesn't resolve the issue, other resources are available to help you troubleshoot problems with Windows Management Instrumentation.

To confirm that Windows Management Instrumentation is running:

1. View local services. One way to do this in Windows 11 is to open Control Panel, choose System and Security > Windows Tools, and then open Services.

2. Double-click Windows Management Instrumentation in the list of services.

3. Make sure that the "Startup type" pop-up menu is set to Automatic. If Running does not appear to the right of "Service status", click Start or Resume.

   To troubleshoot problems with Windows Management Instrumentation, you can use Windows Management Instrumentation Tester. To use this program, enter `wbemtest` in PowerShell or Command Prompt. Additional resources for troubleshooting problems with Windows Management Instrumentation are available at WMI Troubleshooting (https://docs.microsoft.com/en-us/windows/win32/wmisdk/wmi-troubleshooting).

   If an alert message about connecting to the internet appears, see Section 16.7, "Contract Tools Cannot Connect to the Internet" on page 65. If an alert message about enabling network adapters appears, see Section 16.8, "Contract Tools Won't Activate Due to Disabled Network Adapters" on the previous page.

16.10   Contract Tools Cannot Connect to a License Server

What happens: A message that says "Contract Tools cannot connect to your organization's license server" appears at the top of the Contract Tools pane.

What this means: Contract Tools is configured to connect to your organization's license server automatically, but Contract Tools can connect to a license server only if your computer and the license server are connected to the same network. Most likely, your computer is not connected to the same network as your organization's license server. It's also possible that the license server's address and port are misconfigured.

What you should do: Make sure your computer is connected to your organization's network (through a VPN, for example), and then try to connect to the license server again (a simple way to do this is to reopen Word). Your network administrator can help with connecting to your organization's network, and your system administrator can help with configuring your organization's license server.

For general information about connecting to a license server, see Section 1.5, "Connecting to Contract Tools License Server" on page 10.

16.11   Analyzing a Document Converted from a PDF Takes a Long Time

What happens: When Contract Tools analyzes a Word document converted from a PDF, analysis takes a long time, and Word may temporarily become unresponsive (freeze, hang).

What this means: Word documents converted from PDFs using some third-party conversion applications may include numerous, slight formatting adjustments. In some cases, every

character (letter) in a converted Word document may be formatted individually. The way in which these formatting adjustments are implemented in Word documents can make analysis take a long time, especially in Word 2013 and later.

What you should do: Use Word 2013 or later instead of a third-party conversion application to convert PDFs to Word documents; search for "opening PDFs" in Word Help to learn how. As an alternative, copy text in the converted Word document, paste unformatted text into a new Word document, and then analyze this new Word document. To learn how to paste unformatted text, search for "paste text only" in Word Help.

For general information about analysis, see Chapter 3, "Analyzing Documents" on page 21.

16.12   Contract Tools Won't Find Content

What happens: When Contract Tools analyzes your document, it fails to find provisions, defined terms, and other content, even though these items appear in your document.

What this means: It's possible that Contract Tools is analyzing only a part of your document; see Section 3.3, "Analyzing Part of a Document" on page 23 to learn more. It's also possible that your document is laid out using tables. By default, Contract Tools doesn't analyze content within tables.

What you should do: Make Contract Tools analyze your entire document, or choose the part of your document that you want Contract Tools to analyze; see Section 3.3, "Analyzing Part of a Document" on page 23 to learn how. If your document is laid out using tables, make Contract Tools analyze content within tables; see Section 3.6, "Analyzing Tables" on page 25 to learn how.

16.13   Including Defined Terms from Another Document Is Impossible

What happens: A document with defined terms that you want to include in your main document (see Section 5.2, "Including Defined Terms from Another Document" on page 30 to learn more) doesn't appear in the "Include from" pop-up menu in the Analysis Settings view.

What this means: It's possible that the document with the defined terms that you want to include is closed or new. To include defined terms from another document, it must be open in Word and it must not be a new, unsaved document.

If the document with the defined terms that you want to include is open in Word and saved, then most likely, this document and your main document are open in separate instances of Word. To include defined terms from another document in your main document, both documents must be open in the same instance of Word.

In Word 2016 and later (including Word for Microsoft 365), documents may open in separate instances of Word if you quickly open documents while Word is closed (for example, by double-clicking documents in File Explorer).

What you should do: Make sure the document with the defined terms that you want to include in your main document is open in Word and saved. Also, make sure both documents are open in the same instance of Word. If you're working with two documents in two instances of Word, a generally reliable way to do this is to close one of the documents and Word instances

by clicking the Close button (×) at the top right of a Word window, and then reopen the document you closed. If Word's opening display (splash screen) does not appear when you reopen this document, it's opening in the same instance of Word as the other document.

Here are ways to open documents in the same instance of Word:

- Double-click a document in File Explorer to open Word, wait for the document to appear in a Word window, and then double-click another document in File Explorer.

- Double-click a document in File Explorer to open Word, and then open another document using Word's controls; search for "open file" in Word Help to learn how.

- Open Word by clicking its icon in the taskbar or the Start menu, and then open documents using Word's controls.

Here are ways to see how many instances of Word are open:

- Use Task Manager; search the internet for "Windows Task Manager" to learn how.

- Use PowerShell or Command Prompt. For example, enter in PowerShell:

`Get-Process WINWORD`

or in Command Prompt:

`tasklist /fi "IMAGENAME eq WINWORD.EXE"`

If the output contains more than one instance of WINWORD or WINWORD.EXE, more than one instance of Word is open.

16.14   Creating Snippets Is Impossible

What happens: The New button at the bottom of the Snippets view is always disabled, even when text in your document is selected. The Convert commands in the Action pop-up menu at the bottom of the Snippets view are disabled.

What this means: In Contract Tools, the file in which snippets are saved is called a *snippets file*. When Contract Tools starts for the first time, it attempts to create a snippets file in a folder from which Word loads building blocks. Either Contract Tools couldn't create this file, or the file was moved or deleted. It's also possible that the file is saved in a folder from which Word does not load building blocks.

What you should do: Choose or create a snippets file in a folder from which Word loads building blocks.

To choose or create a snippets file:

1. Show the Contract Tools pane, click the Preferences button, and then click Snippets File.

2. Click Choose to choose an existing snippets file or click New to create a new one.

3. Reopen Word.

The snippets file must be saved in a folder from which Word loads building blocks. Generally, this folder is %APPDATA%\Microsoft\Document Building Blocks*[Locale Identifier]**[Word Version]*.

- %APPDATA% is a shorthand for the path of a folder in which Windows applications can save data. This path is usually C:\Users*[Your User Name]*\AppData\Roaming. If you can't see this folder, open File Explorer and choose View > Show > Hidden items.

- *[Locale Identifier]* is a number that identifies a language used by Word. For example, 1033 means US English. For more information about locale identifiers, see these resources:

For these versions of Word	See
Word 2016 and later (including Word for Microsoft 365)	Language identifiers and OptionState Id values in Office 2016 (https://docs.microsoft.com/en-us/deployoffice/office2016/language-identifiers-and-optionstate-id-values-in-office-2016#language-identifiers)
Word 2013	Language identifiers and OptionState Id values in Office 2013 (https://docs.microsoft.com/en-us/previous-versions/office/office-2013-resource-kit/cc179219(v=office.15)#language-identifiers)
Word 2010	Language identifiers and OptionState Id values in Office 2010 (https://docs.microsoft.com/en-us/previous-versions/office/office-2010/cc179219(v=office.14)#language-identifiers)

- *[Word Version]* is 16 for Word 2016 and later (including Word for Microsoft 365), 15 for Word 2013, and 14 for Word 2010.

For general information about snippets, see Chapter 13, "Working with Snippets" on page 53. To learn how snippets in Contract Tools relate to building blocks in Word, see Section 13.5, "Snippets and Building Blocks" on page 55.

16.15   Documents Appear Black When Sharing Word Windows Using Microsoft Teams

What happens: When you share a Word window using Microsoft Teams, the people with whom you're sharing see a black rectangle instead of your document.

What this means: Contract Tools uses an overlay to apply highlighting (see Section 2.3, "Highlighting Content" on page 15) without changing your document. Some versions of Microsoft Teams can cause this overlay to appear as a black rectangle when sharing a Word window.

What you should do: Update Microsoft Teams to the latest version; visit *Update Microsoft Teams* (https://support.microsoft.com/en-us/office/update-microsoft-teams-535a8e4b-45f0-4f6c-8b3d-91bca7a51db1) to learn how. If Microsoft Teams cannot be updated, you can share your desktop instead of a Word window, or turn off Contract Tools while sharing a Word window; see Section 2.1, "The Contract Tools Ribbon Tab" on page 13 to learn how to turn off Contract Tools. For help using Microsoft Teams, visit *Microsoft Teams help & learning* (https://support.microsoft.com/en-us/teams).

16.16   Closing a Document Takes a Long Time When Using Multiple Add-Ins

What happens: While using Contract Tools and other Word add-ins, Word temporarily becomes unresponsive (freezes, hangs) when closing a document.

What this means: Most likely, another add-in is causing Word to perform a time-consuming and unnecessary task with data that Contract Tools uses to sync analysis results with

documents while there are unanalyzed changes. iManage Integration for Office, a Word add-in distributed with some versions of iManage FileSite and DeskSite, can cause this behavior.

What you should do: If you use iManage Integration for Office, you may be able to resolve this issue by creating a Registry value; see Appendix B, "Configuring iManage Software" on page 81 to learn more. As an alternative, you can disable the add-in that's causing the issue; see Section 16.22, "Disabling Word Add-Ins" on page 74 to learn how. If you can't disable the add-in that's causing the issue, you can disable syncing while there are unanalyzed changes.

To disable syncing while there are unanalyzed changes:

- Show the Contract Tools pane, click the Preferences button, and then deselect the "Sync analysis results with unanalyzed changes" checkbox.

To learn how to reanalyze your document when there are unanalyzed changes, see Section 3.2, "Updating Analysis" on page 22.

If Word temporarily becomes unresponsive when quitting on a computer with a touchscreen or a stylus, see Section 16.18, "Quitting Word Takes a Long Time on a Computer with a Touchscreen or Stylus" on the next page.

16.17   An Alert about Building Blocks Appears When Word Quits

What happens: When you quit Word, this alert message appears: "You have modified styles, building blocks (such as cover pages or headers) or other content that is stored in "Building Blocks". Do you wish to save changes to "Building Blocks"?" This alert message appears even though you didn't modify content stored in Building Blocks.

What this means: By default, starting Contract Tools causes Word to load building blocks (search for "building block" in Word Help to learn more). When some versions of Word 2016 and later (including Word for Microsoft 365) load building blocks, they incorrectly assume that building blocks stored in a file named Building Blocks.dotx have been modified. Visit *Archived Release notes for Monthly Channel releases, Version 1912: January 08* (https://docs.microsoft.com/ en-us/officeupdates/monthly-channel-archived#version-1912-january-08) for a description of this issue and its resolution by Microsoft Support.

What you should do: To dismiss the alert message and quit Word, click Save or Don't Save. To stop the alert message from appearing, update Word; search for "install Office updates" in Word Help to learn how. If you can't update Word, you can mitigate this issue by configuring Contract Tools not to load snippets when it starts.

To configure Contract Tools not to load snippets when it starts:

- Show the Contract Tools pane, click the Preferences button, click Snippets File, and then deselect the "Load when Contract Tools starts" checkbox.

Note: Even if Contract Tools is configured not to load snippets when it starts, causing affected versions of Word to load building blocks (for example, by showing the Snippets view, or by choosing Insert > Quick Parts) will cause the Building Blocks alert message to appear when Word quits.

For general information about snippets, see Chapter 13, "Working with Snippets" on page 53. To learn how snippets in Contract Tools relate to building blocks in Word, see Section 13.5, "Snippets and Building Blocks" on page 55.

16.18   Quitting Word Takes a Long Time on a Computer with a Touchscreen or Stylus

What happens: When you quit Word on a computer with a touchscreen or a stylus, Word temporarily becomes unresponsive (freezes, hangs).

What this means: Most likely, this behavior is attributable to an issue with some versions of Visual Studio 2010 Tools for Office Runtime (see Section 1.10, "Prerequisites for Installing Contract Tools" on page 12 to learn about other Contract Tools prerequisites). Visit *Update rollup for Visual Studio 2010 Tools for Office Runtime* (https://support.microsoft.com/en-us/help/3001652/update-rollup-for-visual-studio-2010-tools-for-office-runtime) for a description of this issue and its resolution by Microsoft Support.

What you should do: Update Visual Studio 2010 Tools for Office Runtime to a more recent version. An installer for version 10.0.60917, released February 22, 2024, is available at https://www.microsoft.com/en-us/download/details.aspx?id=105890.

If Word temporarily becomes unresponsive when closing documents while using Contract Tools and other Word add-ins, see Section 16.16, "Closing a Document Takes a Long Time When Using Multiple Add-Ins" on page 70. If Word quits unexpectedly on a computer with a touchscreen or a stylus, see Section 16.19, "Word Quits Unexpectedly When Using Multiple Add-Ins on a Computer with a Touchscreen or Stylus" on this page.

16.19   Word Quits Unexpectedly When Using Multiple Add-Ins on a Computer with a Touchscreen or Stylus

What happens: While using Contract Tools and other Word add-ins on a computer with a touchscreen or a stylus, Word quits unexpectedly (crashes).

What this means: Because of a problem with Windows Presentation Foundation (WPF) and Microsoft software used on touch and stylus devices, Word may quit unexpectedly while using multiple Word add-ins on tablet computers and similar devices if some add-ins require .NET Framework 4 or later and others require .NET Framework 3.5 or earlier. (Contract Tools requires .NET Framework with a version between 4.5.2 and 4.8; to learn about other Contract Tools prerequisites, see Section 1.10, "Prerequisites for Installing Contract Tools" on page 12.)

What you should do: Disable add-ins that require .NET Framework 3.5 or earlier. The documentation for your add-ins should specify which version of .NET Framework they require. To learn how to disable a Word add-in, see Section 16.22, "Disabling Word Add-Ins" on page 74. As an alternative, contact the developers of these add-ins and ask them to update their add-ins to require .NET Framework 4 or later.

If Word temporarily becomes unresponsive when quitting on a computer with a touchscreen or a stylus, see Section 16.18, "Quitting Word Takes a Long Time on a Computer with a Touchscreen or Stylus" on this page.

16.20   Contract Tools Won't Install Updates

What happens: When you click "Check for Updates" in the Subscription view, this alert message appears: "Checking for Updates - Access is denied."

What this means: Most likely, your system administrator used an administrator account to install Contract Tools for everyone who uses your computer, and your account does not permit updating Contract Tools when it's installed in this way.

What you should do: Ask your system administrator to update Contract Tools using an administrator account. Installation resources are available at https://papersoftware.com/support.

To learn more about updating Contract Tools, see Section 1.9, "Updating Contract Tools" on page 11.

16.21   Finding Information about Your Computer

To help you resolve an issue with Contract Tools, we may need information about your computer and the software you use.

To learn how to find information about this	Go to
Windows	Section 16.21.1, "Finding Windows Version Information" on this page
Word	Section 16.21.2, "Finding Word Version Information" on this page
Contract Tools	Section 16.21.3, "Finding Contract Tools' Version Number" on the next page
Other Word add-ins	Section 16.21.4, "Finding Information about Other Word Add-Ins" on the next page

16.21.1   Finding Windows Version Information

You can find information about your version of Windows.

Windows 10 and later: Open Settings and choose System > About.

Windows 8.1: Open Settings and choose Change PC settings > PC and devices > PC info.

Any version of Windows: Open Control Panel and choose System and Security > System.

16.21.2   Finding Word Version Information

You can find information about your version of Word.

Word 2013 and later (including Word for Microsoft 365):

1. To find the version number, choose File > Account.

2. To confirm whether you use the 64-bit or 32-bit version of Word, click the About Word button; *64-bit* or *32-bit* appears at the top of the About Microsoft Word dialog.

   Word 2010:

- Choose File > Help. The version number and *64-bit* or *32-bit* appears below About Microsoft Word.

   Word 2007:

1. Click the Office button at the top left of the Word window, and then click Word Options at the bottom right of the menu that appears.

2. Click Resources on the left of the Word Options dialog. The version number appears below "about Microsoft Office Word 2007". (The 32-bit version of Word 2007 is the only one available.)

16.21.3   Finding Contract Tools' Version Number

You can find Contract Tools' version number.

Here are ways to find Contract Tools' version number:

- Show the Contract Tools pane, and then click the Subscription button. Contract Tools' version number appears at the bottom of the Subscription view.

- Open Control Panel, click "Uninstall a program" at the bottom left, and then find Paper Software Contract Tools in the list of programs. Contract Tools' version number appears in the Version column.

16.21.4   Finding Information about Other Word Add-Ins

You can find information about other Word add-ins.

To show a list of Word add-ins:

- Choose File > Options > Add-ins to show the Add-ins pane of Word Options.

More information about add-ins (like version numbers) may be available in Control Panel.

To find more information about a Word add-in:

- Open Control Panel, click "Uninstall a program" at the bottom left, and then examine the add-in's entry in the list of programs.

If you use many Word add-ins, creating screenshots of the Add-ins pane and the Control Panel window may be faster than creating a list of add-ins; search the internet for "Windows screenshot" to learn how to create screenshots.

16.22   Disabling Word Add-Ins

You can disable Word add-ins.

To disable a Word add-in:

1. Choose File > Options > Add-ins to show the Add-ins pane of Word Options.

2. Find the add-in you want to disable in the table that appears, examine its entry in the Type column, and then choose the suitable option from the Manage pop-up menu at the bottom of the Add-ins pane. For example, choose COM Add-ins if COM Add-in appears in the Type column, and choose Templates if Template appears in the Type column. Click Go.

3. Use the controls in the dialog that appears.

Appendix A

Finding Amounts of Money

Learn detailed information about the currencies you can find using the money token.

You can use the `money` token to find dollars (for example, *1 dollar* and *10 dollars*), cents (for example, *1 cent* and *10 cents*), and amounts of money denominated with a dollar sign ($).

You can also use `money` to find amounts of money denominated in the following currencies:

Currency	Symbol	ISO 4217 code	For example
Argentine peso	AR$, Ar$	ARS	AR$100 100 Argentine pesos 100 Argentinian pesos 100 ARS ARS 100
Australian dollar	A$, AU$, Au$	AUD	A$100 AU$100 100 Australian dollars 100 AUD AUD 100
Brazilian real	R$	BRL	R$100 100 Brazilian reais 100 Brazilian reals 100 BRL BRL 100
British pound sterling	£	GBP	£100 100 pounds 100 British pounds 100 pounds sterling 100 GBP GBP 100

Currency	Symbol	ISO 4217 code	For example
Canadian dollar	C$, CA$, Ca$, CAN$, Can$, CDN$, Cdn$	CAD	C$100 Can$100 CDN$100 100 Canadian dollars 100 CAD CAD 100
Chilean peso	CH$, Ch$	CLP	CH$100 100 Chilean pesos 100 CLP CLP 100
Chinese renminbi yuan	¥, RMB	CNY	¥100 RMB 100 100 Chinese yuan 100 renminbi 100 renminbi yuan 100 yuan 100 yuan renminbi 100 CNY CNY 100
Czech koruna	Kč	CZK	100 Kč 100 Kc 100 Czech korunas 100 Czech korunys 100 CZK CZK 100
Danish krone	kr, DKr	DKK	kr100 100 DKr 100 Danish krone 100 Danish kroner 100 DKK DKK 100
Egyptian pound	£E, E£, LE	EGP	£E100 E£100 LE100 100 Egyptian pounds 100 EGP EGP 100
Euro	€	EUR	€100 100 euros 100 EUR EUR 100

Currency	Symbol	ISO 4217 code	For example
Georgian lari	₾, ლ	GEL	₾100 ლ100 100 Georgian lari 100 GEL GEL 100
Hong Kong dollar	HK$, H.K.$	HKD	HK$100 100 Hong Kong dollars 100 HKD HKD 100
Hungarian forint	Ft	HUF	100 Ft 100 forints 100 HUF HUF 100
Indian rupee	₹, ₨	INR	₹100 ₨100 100 Indian rupees 100 INR INR 100
Indonesian rupiah	Rp	IDR	Rp100 100 Indonesian rupiahs 100 IDR IDR 100
Israeli new shekel	₪, NIS	ILS	₪100 NIS 100 100 shekels 100 new sheqels 100 new Israeli shekels 100 Israeli new shekels 100 sheqalim 100 ILS ILS 100
Japanese yen	¥	JPY	¥100 100 Japanese yen 100 yen 100 JPY JPY 100
Kenyan shilling	KSh	KES	KSh100 K. Sh. 100 100 Kenyan shillings 100 shillings 100 KES KES 100

Currency	Symbol	ISO 4217 code	For example
Malaysian ringgit	RM	MYR	RM100 100 Malaysian ringgits 100 MYR MYR 100
Mauritian rupee	Rs	MUR	Rs100 100 Mauritian rupees 100 MUR MUR 100
Mexican peso	MEX$, Mex$	MXN	Mex$100 100 Mexican pesos 100 MXN MXN 100
New Zealand dollar	NZ$, N.Z.$	NZD	NZ$100 100 New Zealand dollars 100 NZD NZD 100
Nigerian naira	₦	NGN	₦100 100 Nigerian naira 100 NGN NGN 100
Norwegian krone	kr, NKr	NOK	kr100 100 NKr 100 Norwegian krona 100 Norwegian krone 100 Norwegian kroner 100 Norwegian kronor 100 NOK NOK 100
Pakistani rupee	Rs	PKR	Rs100 100 Pakistani rupees 100 PKR PKR 100
Philippine peso	₱, PhP, Php, P$	PHP	₱100 P$100 100 Philippine pesos 100 Philippine pisos 100 PHP PHP 100
Polish złoty	zł	PLN	100 zł 100 zl 100 zlotys 100 złotys 100 PLN PLN 100

Currency	Symbol	ISO 4217 code	For example
Qatari riyal	QR	QAR	QR100 100 riyals 100 QAR QAR 100
Romanian leu	L	RON	L100 100 leus 100 lei 100 RON RON 100
Russian ruble	₽, руб, PP, pp, P, p, RR, rr, Rub, rub	RUB	₽100 100 руб 100 RR 100 rubles 100 roubles 100 RUB RUB 100
Saudi riyal	SR	SAR	SR100 100 Saudi riyals 100 Saudi Arabian riyals 100 SAR SAR 100
Singapore dollar	S$	SGD	S$100 100 Singapore dollars 100 SGD SGD 100
South African rand	R	ZAR	R100 100 rand 100 ZAR ZAR 100
South Korean won	₩	KRW	₩100 100 Korean won 100 KRW KRW 100
Swedish krona	kr, SKr	SEK	100 kr 100 SKr 100 Swedish krona 100 Swedish kronor 100 SEK SEK 100
Swiss franc	FR, Fr, SFR, SFr	CHF	Fr100 SFr 100 100 Swiss francs 100 CHF CHF 100

Currency	Symbol	ISO 4217 code	For example
Taiwan new dollar	NT$, N.T.$	TWD	NT$100 100 New Taiwan dollars 100 Taiwan new dollars 100 Taiwan dollars 100 TWD TWD 100
Thai baht	฿	THB	฿100 100 Thai bahts 100 THB THB 100
Turkish lira	₺, TL	TRY	₺100 100TL 100 Turkish lira 100 TRY TRY 100
Ukrainian hryvnia	₴, грн, hrn	UAH	₴100 100 грн 100 hrn 102 hryvni 100 hryven' 100 UAH UAH 100
United Arab Emirates dirham	DH, Dh, dh	AED	Dh 100 100 dh 100 dirhams 100 AED AED 100
United States dollar	US$, U.S.$	USD	US$100 U.S.$100 100 US dollars 100 U.S. dollars 100 United States dollars 100 USD USD 100

To learn more about finding text, see Chapter 12, "Finding Text" on page 48.

Appendix B

Configuring iManage Software

Learn about compatibility with iManage Office integrations.

An issue with iManage Integration for Office, a Word add-in distributed with some versions of iManage FileSite and DeskSite, can cause Word to temporarily become unresponsive when documents close while using Contract Tools. A solution is available in versions of iManage Integration for Office distributed with FileSite and DeskSite 9.3.5 and later.

When a document closes, iManage Integration for Office sets the property of a *range* (similar to a selection in Word) to the property's current value. In computer programming, this is called a *self-assignment*. A self-assignment typically has no effect, but in this case, it causes Word to perform a time-consuming and unnecessary task with data that Contract Tools uses to sync analysis results with documents while there are unanalyzed changes. As a result, Word may temporarily become unresponsive.

iManage tracks this issue using reference number NT-72170. For more information, see *Quick Update CSAR-2626 for FileSite and DeskSite 9.3.5 with Office Integration*, available at https://imanage.com.

With versions of iManage Integration for Office distributed with FileSite and DeskSite 9.3.5 and later, you can resolve this issue by creating this Registry value:

Name	Type	Data
RemoveRangeSelfAssignment	REG_SZ	Y

You create this Registry value in the HKEY_LOCAL_MACHINE hive. The key path of this Registry value depends on whether you use 64-bit or 32-bit software.

- If you use the 64-bit version of Windows with 64-bit versions of iManage software, or the 32-bit version of Windows with 32-bit versions of iManage software, the key path is SOFTWARE\Interwoven\WorkSite\8.0\Integration\Options.

- If you use the 64-bit version of Windows with 32-bit versions of iManage software, the key path is SOFTWARE\WOW6432Node\Interwoven\WorkSite\8.0\Integration\Options.

See Section 16.21.1, "Finding Windows Version Information" on page 73 to learn how to find information about your version of Windows.

Here are ways to create a Registry value:

- Use Registry Editor; visit *Open Registry Editor in Windows 10* (https: //support.microsoft.com/en-us/help/4027573/windows-open-registry-editor-in-windows-10) to learn more.

- Use a file with the .reg filename extension (known as a REG file, Registry Entry file, Registry Entries file, Registration Entry file, and so on). For example, create a file named iManageRemoveRangeSelfAssignment.reg with the following contents:

```
Windows Registry Editor Version 5.00

[HKEY_LOCAL_MACHINE\SOFTWARE\Interwoven\WorkSite\8.0\Integration\Options]
"RemoveRangeSelfAssignment"="Y"
```

Then, double-click iManageRemoveRangeSelfAssignment.reg in File Explorer to create a Registry value. Visit *How to add, modify, or delete registry subkeys and values by using a .reg file* (https://support.microsoft.com/en-us/help/310516) to learn more.

- Use PowerShell or Command Prompt. For example, enter in PowerShell:

```
$keyPath = 'HKLM:\SOFTWARE\Interwoven\WorkSite\8.0\Integration\Options'
if (!(Test-Path $keyPath)) { New-Item $keyPath -Force }
New-ItemProperty $keyPath RemoveRangeSelfAssignment -Value Y -Force
```

or in Command Prompt:

```
set keyPath=HKLM\SOFTWARE\Interwoven\WorkSite\8.0\Integration\Options
reg add %keyPath% /v RemoveRangeSelfAssignment /d Y /f
```

If you use versions of iManage Integration for Office distributed with FileSite and DeskSite 9.3.4 or earlier, see Section 16.16, "Closing a Document Takes a Long Time When Using Multiple Add-Ins" on page 70 for alternatives to creating a Registry value.

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