Contract Management and Document Intelligence

Product Summary

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workday™

Contents

Getting Started

Modify Personal User Settings

Context

You can manage your account information, update your password, and upload an image.

Steps

1. Click **User Profile**.
2. Click **Settings**.
3. (Optional) Update your account information.

   Note: Contact Workday to update your email address.
4. (Optional) To upload or replace a picture, click **Upload Picture or Drag and Drop**.
5. Click **Save Changes**.
6. (Optional) Create a new password.
7. Click **Update Password** .

   Note: Ensure you follow Contract Management and Document Intelligence password security guidelines.

Concept: Platform Overview

Contract Management and Document Intelligence unifies and analyzes contracts that are stored across different file management systems using AI. You can use AI to manage contracts end-to-end, automate processes, and extract information.

Documents

Search

Dashboards

Workflow

Automation

Admin

The user interface includes these key features:

- Dashboard
- Documents
- Search
- Workflow

The **Document** tab provides an overview of the contracts on your account. To configure the **Document** tab, see Create Custom Views on page 16.

- When clicking into individual documents, Contract Management and Document Intelligence populates the **Overview** tab with key information, such as the type of agreement, parties involved, and renewal details.
- The **Contents** tab displays the document content. As you scroll through the document, you can edit the metadata and view a summary of key clauses highlighted by our AI.
- The **Key Provisions** tab shows you a summary of the highlighted key clauses. For details, see Manage Clauses on page 17.
- The **Versions** tab displays the document history. See Manage Document Versions on page 16.
- The **Related Documents** tab displays related documents. Example: Supporting parent or child document groups. See Manage Document Groups on page 15
- **Download** button enables you to download the contract.

See Concept: Documents Overview on page 20

The **Search** tab enables you to search and report based on your contract metadata, such as expirations and indemnification clauses. We recommend you save your reports for future use.

You can also configure automatic email notification alerts based on data in your documents.

The **Dashboards** tab provides visibility into contract intelligence and generation. Contract Management and Document Intelligence generates documents, expirations, open tickets, and completed tickets. You can also save your dashboards.

The **Workflow** tab streamlines contract creation and workflow approvals, enabling businesses and their employees to quickly submit time-sensitive documents to legal, contract, and procurement teams. It also gives managers full visibility into the approval process.

The **Automation** tab provides users more visibility and control over their bulk tagged clauses. It enables users with admin permissions to track and manage clauses created through Quick AI. You can tag a clause in 1 contract and find similar language across all your contracts. You can also identify clauses that are unique to your business and are not part of the out-of-the-box clauses.

The **Admin** tab enables you to add and edit users, manage departments, set up email intakes, customize data fields, and configure integrations.

Concept: System Requirements

Contract Management and Document Intelligence supports these platforms. We recommend that you use an internet connection with a speed of 1 MB/s or greater and a device with 16 GB of RAM or more.

Note: Contract Management and Document Intelligence isn't optimized for mobile devices yet, but it is accessible on mobile.

Supported browsers:

- Apple Safari
- Google Chrome (preferred)
- Microsoft Edge
- Mozilla Firefox

Syncing Requirements

Before implementation, identify and consolidate documents. Add your documents by uploading them directly or through a cloud system integration.

To integrate and sync the documents with Contract Management and Document Intelligence, you need a cloud storage account with 1 of our supported cloud system providers, along with a storage account. We offer a self-service sync tool that enables admins to configure the sync. See Set Up Document Synchronization with EviSync.

Supported cloud systems:

- Box
- Dropbox
- Google Drive
- OneDrive
- SharePoint

Language Support

Contract Management and Document Intelligence fully supports English across the platform, but it may return inconsistent results when processing non-English documents. Languages using Latin alphabets are supported by all other features, including the Document Viewer and Advanced Search.

Concept: Duplicate Files

You can search, identify, manage, and update duplicate files. Contract Management and Document Intelligence bills for unique contracts, not duplicate files.

Duplication applies only to file contents, not to document properties such as:

- File name.
- File location.
- Upload date.

Example: When 2 files have the same content but different document properties, they are still considered duplicates.

Contract Management and Document Intelligence automatically links duplicates when you upload documents to provide these benefits:

1. **Simplified search results.** When you search for a contract with duplicate files, Contract Management and Document Intelligence shows a single result. You can click to view and select which file to access.

   Note: Contract Management and Document Intelligence applies actions such as moving, deleting, or copying from search to the original file and all duplicates.
2. **Auto-propagate file updates.** When you update a file, Contract Management and Document Intelligence applies your changes to all duplicate files automatically. Changes made to 1 duplicate file are reflected in the other files, regardless of the file names, file locations, or upload times. Changes to a file name or location don't affect duplicate files; they keep their own names and locations.
3. **Easy-to-read export reports.** When you export a list of contracts to Excel, Contract Management and Document Intelligence displays only 1 file in the output. This eliminates confusion by avoiding multiple file names for the same contract. You can include duplicates in the export if needed.

Reference: Smart Fields and Clauses

Smart fields and clauses are AI-powered data fields and clauses that populate when you upload a document. Contract Management and Document Intelligence includes many of these fields by default and prevents you from deleting or editing them.

Contract Management and Document Intelligence organizes the lists of fields and clauses into these categories:

- Standard AI data fields, which are AI-based fields that work out of the box.
  - General Information
  - Operational Information
  - Legal Information
  - Additional Information

Standard AI Data Fields

Contract Management and Document Intelligence uses these fields to analyze documents:

- General Information (Default Section)

Name	**Definition**
Contract Type	Contract Management and Document Intelligence identifies more than 240 contract types by default. The most common are services agreements, amendments, nondisclosure agreements, order forms, and statements of work.
Title	The title of a contract as found in the heading and body text of the document. This is different from the file name shown in the file browser.
Internal Parties	When we provide a list of internal entities, Contract Management and Document Intelligence separates the **Internal Party** and **Counterparty** fields.
Counterparties	The other parties in the agreement. Example: Vendors or suppliers.
Executed	Indicates if the agreement includes at least 1 signature, either handwritten or electronic.
Text Quality	Displays the optical character recognition (OCR) quality of an English-language document as high, medium, or low.
Language	The language of a contract.

- Operational Information

Name	**Definition**
Effective Date	When Contract Management and Document Intelligence doesn't detect an effective date, it uses the last signature date as default. In some cases, this may be earlier than the start date for services. **Note:** Use the **Effective Date** with the **Executed** field to confirm that the contracts are legally effective on the dates extracted by the AI.
Start Date	Indicates when services, such as subscriptions, leases, or project work, begin. It matches the effective date unless the contract explicitly specifies a different start date.
Initial Term	The length of the agreement initial period before any renewals.
Initial Expiration Date	The expiration date of the contract before any potential renewal. This is the last valid date of the contract's term. Example: For a 1-year contract starting on January 1, the expiration date is December 31 of that year.
Renewal Type	• Automatic: No action is needed to extend the contract after expiration. • Option to Renew: One party can renew if they want to continue with the agreement; otherwise, it expires. • Manual: Renewal requires mutual consent, is explicitly forbidden, or is not mentioned.

Name	Definition
Renewal Term	The length of a renewal, applicable when the renewal type is automatic or there's an option to renew.
# of Renewals	The number of renewals available when the renewal type is automatic or there's an option to renew.
Upcoming Expiration Date	For a renewal, displays the next upcoming expiration date of the contract. The date is the last valid date of the contract's effective term. Example: For a 1-year contract starting on January 1, the expiration date is December 31 of the same year.
Renewal Notice Period (Days)	The number of days before expiration that a party must give notice of their intention not to renew, if the renewal type is automatic or there's an option to renew.
Renewal Notice Date	The calendar date by which a party must give notice of their intention not to renew, before the upcoming expiration date.
Termination For Convenience Notice (Days)	The number of days a party must provide notice before exercising their right to terminate the agreement for convenience.
Payment Term (Net Days)	The number of days within which payment is due after receiving an invoice.

- Legal Information

Name	Definition
Liability Cap Text	The liability cap language in the limitation of liability clause.
Liability Cap Type	• Amount Paid: The liability cap is based on the total amount paid under the contract. Example: When the cap is defined as *equal to the amount paid*, and the customer pays $100,000, the liability cap is $100,000. When it’s *two times the amount paid*, the cap is$200,000. • Fixed Amount: An explicit, fixed cap.
Liability Cap Amount	For a fixed cap, the total liability cap amount.
Liability Cap Currency	For a fixed cap, the total liability cap currency.
Liability Cap (Multiple)	When the liability cap type is **Amount Paid**, Contract Management and Document Intelligence applies the multiplier to the amount paid to calculate the liability cap.
Governing Law	The state (in the United States) or country (outside the United States) whose laws govern the terms of the contract.
Breach Notice	The number of days that a data custodian has to provide notice following a data breach or security incident.

- Additional Information

Name	Definition
Contract Owner - Individual	The owner of the contract.

Name	Definition
Tags	Use tags to track a specific keyword.
Comments	Additional comments.
File Attachments	Files that supplement or are associated with the document. Read more about attachments.

These are not smart fields.

Standard AI Clauses

Contract Management and Document Intelligence uses these clauses to analyze documents:

Name	Definition
Assignment	Affects the ability of 1 or both parties to sell or transfer their rights under the agreement to another party.
Change of Control	A clause in an agreement giving a party certain rights, such as consent, payment, or termination, in connection with a change in ownership or management of the other party to the agreement.
Confidentiality	A clause that requires certain information to be kept confidential, barring the receiving party from disclosing that information.
Data Breach	Details what actions the parties must take upon the occurrence of any unauthorized access or theft of online data.
Force Majeure	Establishes that the agreement will be suspended in the event of unforeseen disasters such as earthquakes, hurricanes, floods, or pandemics.
Governing Law	The state (in the United States) or country (if outside the United States) whose laws govern the terms of the contract.
Indemnification	Either or both parties agree to reimburse the other for losses incurred due to their actions or performance.
Jurisdiction and Venue	Designates the location and governing body responsible for resolving legal disputes arising from or related to the agreement.
Limitation of Liability	Limits the types of damages that may be awarded to either or both parties in a contract dispute.
Non Compete	Clause under which 1 party agrees not to enter into or start a similar profession or trade in competition against another party.
Non Solicitation	An employee agrees not to solicit a company's clients or customers, for their own benefit or for the benefit of a competitor, after leaving the company.

Name	Definition
Publicity	Prevents each party from issuing press releases, making any public announcements, or communicating with the media without the consent of the other party.
Term	Defines the period during which the agreement is effective, unless terminated earlier according to its terms.
Termination	Enables ending the agreement under circumstances specified in the clause.
Termination for Breach	Defines how to provide notice and the termination process when 1 party believes the other party has breached the contract.
Termination for Convenience	Enables the specified party to terminate the contract at its discretion for any reason or no reason at all.

Related Information

Concepts

Concept: Best Practices for Training Algorithms with Contract Clauses on page 20

Tasks

Manage Clauses on page 17

FAQ: Security in Contract Management and Document Intelligence

- Where are contracts stored?
- Does Contract Management and Document Intelligence provide data backup?
- How secure is Contract Management and Document Intelligence and what measures are in place to keep my documents secure?

Where are contracts stored?	Our database is hosted on Amazon Web Services.
Does Contract Management and Document Intelligence provide data backup?	Yes, we back up data stored in the Contract Management and Document Intelligence storage environment, but clients that host their data in their own environments are responsible for their security and backup. We don't copy data stored outside of the Contract Management and Document Intelligence or VPC locations.
How secure is Contract Management and Document Intelligence and what measures are in place to keep my documents secure?	We don't store or maintain personally identifiable data or credit card information. Contract Management and Document Intelligence has a security program based on ISO 27001 standards, and a formal, corporate-wide information security policy that is subject to regular reviews and updates on areas such as encryption, incident response, and patch management.

Security Measure	Description
SOC 2 Certified	Contract Management and Document Intelligence is SOC 2 certified and uses automated monitoring.
Vulnerability Management	We carry out regular penetration tests by third parties and use continuous internal scans to monitor for vulnerabilities.
Data Control and Monitoring	Contract Management and Document Intelligence has continuous monitoring in place, including network and host intrusion detection. We keep full audit logs and conduct vulnerability scans regularly.
Encryption Standards	Data is encrypted at rest and in transit (AES-256).
Access Control	Contract Management and Document Intelligence allows clients to create and manage access privileges for users such as administrators and read-only users. Administrators can also manage individual users' access to specific documents and folders.
Bounty Program	We run a bounty program that offers rewards to white-hat hackers when they discover vulnerabilities in Contract Management and Document Intelligence.

FAQ: Contract Management and Document Intelligence Platform

- How long does an account remain in Deactivated status before deletion?
- How can I improve Contract Management and Document Intelligence load times when I'm connected to my VPN?

How long does an account remain in Deactivated status before deletion?

For audit trail purposes, we hide deactivated user accounts in the Contract Management and Document Intelligence UI, but don't delete them. When a deactivated user account is still associated with data (such as a workflow ticket), the account remains visible in the UI with an appended **Deactivated** label.

How can I improve Contract Management and Document Intelligence load times when I'm connected to my VPN?

If load times are slow when you're connected to a VPN, we recommend that you disconnect from the VPN and try to reload the Contract Management and Document Intelligence platform. You can continue to do this as a workaround if it speeds up load times.

If you can't disconnect from the VPN, contact your administrator to request that they add your IP address to the allowlist.

Note: Your connection to the Contract Management and Document Intelligence platform is secure, even if you aren't connected to a VPN. This is because the data is encrypted at rest and in transit using AES-256 security.

Does Contract Management and Document Intelligence support two-factor authentication (2FA)?

We currently support 2FA through single sign-on (SSO), so you can set up SSO through Contract Management and Document Intelligence and use 2FA through your identity provider.

Some of our users only handle workflow tickets. Can I restrict what those users see when they navigate the UI?

Yes, the administrator can assign the Workflow User Only role to these users. This role streamlines Contract Management and Document Intelligence by:

- Removing access to areas that the users don't need.
- Directing users to the **Workflow** > **Tickets** console immediately after logging in.

The *Workflow User Only* role enables users to:

- Submit new tickets.
- Take action on and view the status of tickets.
- Send reminders and read or interact with the activity log.

- Download, view, and upload new versions of documents on tickets.

Note: Workflow administrators may further configure the actions you can take on a ticket depending on each individual workflow. See Concept: Workflow Builder Overview on page 53 for more information about configuring permissions.

When I'm restricted to a specific folder and use the Contract Management and Document Intelligence search function, do the search results show only items from that folder?

In the search results, you only see documents that you have permission to view based on their folder location. See Set Up Users on page 70 for more information.

How long does a session last before timing out?

Your administrator configures settings in **Admin** > **More Settings** > **Session Timeout** to determine:

- The length of time a user must be inactive before their session times out.
- How often users must log in to the Contract Management and Document Intelligence platform.

The **Idle Session Timeout** value is automatically set to 1 hour, and the **Reauthentication Frequency** is 24 hours.

The link in my signup email expired. How do I get a new one?

When the link in your signup email expires, contact either your administrator or Workday support to request a new link. The link stays active for 1 week.

Why am I unable to update my password though it meets the requirements?

A password must meet these minimum security requirements:

- At least 8 characters.
- An uppercase character.
- A lowercase character.
- A numeric digit (0-9).
- At least 1 of these special characters: @ * _ - . ! & ‘

Note: You can't use a special character that isn't included in this list. Example: # $ % ^ ( ) { } [ ] < > , ? / \ ~ `

Why am I automatically signed out of the Contract Management and Document Intelligence platform?

For security reasons, Contract Management and Document Intelligence sessions time out when a user is inactive for a certain length of time. This helps to secure sensitive data and ensures that only authorized users can access it by reentering their password.

Why can't I access certain folders?

Administrators determine which folders your account can access. You can request access to a specific folder by contacting your account administrator. See Set Up Users on page 70 for more information. For further assistance, contact Workday Support.

Documents

Manage Document Groups

Prerequisites

Upload documents to Contract Management and Document Intelligence.

Context

You can organize and link related documents in Contract Management and Document Intelligence by groups. You can:

- Create a new document group and add documents to it.
- Add documents to an existing group.

Document groups help you:

- Find documents more easily by organizing them into logical structures.
- Assign projects more effectively by linking related documents such as agreements, amendments, MSAs, and supporting documents.
- Streamline workflows for project management and tracking.

Steps

1. Click **Documents**.
2. (Optional) Select a folder.
3. Select the check box for the document you want to add to a group.
4. From the **More** menu on the document, select *Add to Group*.
5. Add the document to a group.

   To add the document to:

   - An existing group, select a group. You can use the search bar to locate a group.
   - A new group, click **New Group**. Enter a group name and notes for future identification.
6. (Optional) You can select a parent file on the **Structure** page.

   You must designate a parent file in the group before you can make a selection. If you do not select a parent file:

   - The group structure remains flat, and the document will not inherit any hierarchical relationships.
   - You can assign a parent file at a later stage if needed.

Result

After you add documents to your group, we return you to the document folder. To manage views, See Create Custom View.

We display the documents in the group in a parent-child relationship tree.

You can undo a parent-child document relationship without removing it from the document group. Select the document check box, and from the **Actions** menu, select *Detach from parent file*.

Manage Document Versions

Prerequisites

Access to the document with editing permissions.

Context

Version control enables you to track the evolution of a document by maintaining a history of its changes. You can see who made edits and when, compare versions, and revert to a previous state, essential for collaboration and ensuring that you don't lose important work.

Customers can also upload new versions of a document as part of managing document versions.

Steps

1. Click **Documents**.
2. Select the document you want to work with.
3. Click **Versions**.
4. (Optional) From the related actions menu on a version, select:
   - *Edit*
   - *Replace*
   - *Download*

   We update the version number and last modified details based on the new order.

   You can also:

   - Expand the row to view the version details.
   - Drag and drop the rows to reorder the versions.
5. (Optional) Click **New Version**.

   Select a new file to upload.
6. (Optional) Click **Download**.

   Download the latest version of the file.
7. (Optional) From the related action menu, click **Rename**.

   Change the name of the latest version of the file.
8. (Optional) From the related actions menu, click **Delete**.

   Delete the latest version of the file.

Create Custom Views

Prerequisites

Enable access to Contract Management and Document Intelligence with appropriate permissions.

Context

You can create custom views to personalize the document list data display by selecting, ordering, and saving specific columns for quick access.

Steps

1. Click **Table Settings**.

2. Complete the task:

Option	Description
Add or Delete Columns	Select or clear check boxes to add or remove columns from the view.
Reorder Columns	Adjust the order of the columns.
Save View	In the **View Name** field, enter the desired name to preserve the current view for future reference.
Load View	Select the desired view from the list.
Show Up To	Set the number of rows displayed per page.

Result

When you save a view, the view is available for selection in the future.

When you select the row display adjustment, the number of rows per page matches the setting you selected.

Explore the Data Fields for more column options.

Related Information
Tasks

Explore the Data Fields for more column options on page 70

Manage Clauses

Prerequisites

Upload documents into Contract Management and Document Intelligence.

Context

You can tag and associate clauses in Contract Management and Document Intelligence to save time, ensure compliance, streamline your contract review process, and support better management of contractual stipulations.

Steps

1. Click **Documents**.
2. Select the document that contains the clause that you would like to tag.
3. Click **Contents**.
4. Find and highlight the clause.
5. Select:
    - **Tag a Clause** for PDF documents.
    - **Edit > Quick AI** for Word documents.
6. In the **Clause** field, select or create a clause tag.

7. From the **Apply Sample To** prompt, select:
    - *This and other documents*: Contract Management and Document Intelligence locates and tags the same clause across all current and future documents in your collection.
    - *Only this document*: Contract Management and Document Intelligence doesn't apply the tag to other documents.

    If you apply the tag to current and other documents, Contract Management and Document Intelligence can locate and tag the same clause across all current and future documents within your collection.
8. From the **Apply Sample to** prompt, select *This and other documents*.

    To apply the tags to this document only, select *Only this document*.
9. Click **Save**.

Result

The newly tagged clauses are searchable within 30 minutes.

Use the Contract Management and Document Intelligence Search console to monitor and refine the tagged clauses.

Example

Your company has historically used 2 versions of the same IP ownership clause:

- Version 1 (V1): Intellectual Property Ownership. Both Customer and Genesys Blue will own and retain all rights to any of their pre-existing inventions, patents, copyrights, trademarks, or other intellectual property rights and any intellectual property developed independently of services performed under this Agreement.
- Version 2 (V2): Intellectual Property Ownership. Both Customer and Genesys Blue will own and retain all rights to their pre-existing IP and any IP developed independently of services performed under this Agreement.

Instead of training 2 separate models for V1 and V2, train 1 model to identify all instances of the IP Ownership clause. Use search to distinguish between V1 and V2 by looking for key phrases. To find contracts with V1, search for “pre-existing inventions, patents, copyrights, trademarks, or other intellectual property rights.” If this phrase is present, it indicates the clause is V1; otherwise, it's likely V2.

You can detect publicity clauses by:

- Using Contract Management and Document Intelligence's built-in algorithm. You can expand the model's recognition by tagging more clauses. When the Contract Management and Document Intelligence model and your new model tag the same text, the tags merge into a single Publicity tag.
- Creating a separate model. Example: Create a model named Publicity - Genesys Blue. You can use this when you need a more specific version of the clause to capture only what's relevant to you.

Related Information
Concepts

Concept: Best Practices for Training Algorithms with Contract Clauses on page 20

Reference

List of out-of-the-box clauses on page 7

Attach Supplemental Documents

Prerequisites

Have the documents to which you want to attach supplemental documents.

Context

You can attach supplemental documents such as W-9s, certificates of insurance, email threads, and images to any document in Contract Management and Document Intelligence, enabling better organization and easier reference of relevant materials.

Steps

1. Click **Documents**.
2. Select a document.
3. Click **Contents**.
4. In the **File Attachments** field on the **Additional Information** subsection of the **Key Information** section, click **Edit**.
5. Click **Upload documents** or drag and drop the files you want to add.
6. Click **Save**.

Result

Contract Management and Document Intelligence uses the attachments for reference and organization purposes. Contract Management and Document Intelligence doesn't analyze them with AI.

Manage Comments

Prerequisites

Upload documents to Contract Management and Document Intelligence.

Context

You can access the document viewer to writer comments and tag users who have view permissions to take action directly on the PDF contract.

Steps

1. Click **Documents**.

   You can also access documents by clicking:

   - **Dashboards**
   - **Search**
2. Select a document.
3. In the document viewer, click **Comments**.
4. (Optional) Highlight specific content in the document and add comments to it.
5. (Optional) Enter @ followed by a username.
6. Click **Send**.

   The user receives an email notification, and we save the comment.

Result

You can view and filter comments in the side panel.

You can resolve, edit, delete, or copy the link to the comment.

The tagged user can directly reply to a comment by clicking into it and view the entire conversation thread by clicking the reply or replies link at the bottom.

Concept: Ask AI

Ask AI lets you ask questions about your contracts using natural language and receive clear, reasoned answers. Questions can range from basic, such as “Does the contract reference data privacy regulations?”, to more analytical, like “How much would we get back in rebates if we spend $X?”. Answers include references to the source text in the document to help you act with confidence.

Concept: Best Practices for Training Algorithms with Contract Clauses

Contract Management and Document Intelligence creates algorithms based on the contract clauses you create. We use the algorithms to better identify key phrases. Using the QuickAI feature, you can tag clauses and train models to recognize similar language across all your documents. You only need 1 example to get started, and adding more samples over time helps improve accuracy. The search feature lets you validate results and discover additional clauses to strengthen your model. These are a few best practices for training algorithms with contract clauses:

- You can help Contract Management and Document Intelligence improve accuracy by submitting more examples, especially for clauses with varied wording in contracts. These examples show data privacy clauses can take different forms:
    - Example 1: Roles of the Parties and Compliance with Information Protection Laws

      GEM acts as the principal, and Supplier as its agent for collection, when using, processing, and disclosing confidential and personal information. Both parties must fulfill their respective legal obligations under applicable data privacy, information security, and breach notification laws (Information Protection Laws).
    - Example 2: Data Privacy

      Both parties must protect the personal data of each other's employees, customers, and suppliers. They must implement security measures, avoid third-party disclosure without written consent, and comply with applicable data privacy laws.

  When training a general algorithm to find all data privacy clauses, tag both examples and as many known variations as possible.
- Tag clauses to train the algorithm: Tag all variations of a clause to ensure the algorithm recognizes different ways the clause can be written.
- Use full sentences: Sample clauses must be complete sentences, without cut-off phrases, to ensure proper training.
- Train 1 model per clause type: Training a single model for each clause type helps prevent confusion between similar clauses and improves tagging accuracy.
- Leverage existing models when appropriate: Use existing Contract Management and Document Intelligence Search models to save time and take advantage of proven accuracy. Create a new model only if your clause contains company-specific language that isn't covered by existing models.

Related Information
Tasks

Manage Clauses on page 17

Reference

List of out-of-the-box clauses on page 7

Concept: Documents Overview

You can view, organize, add, and remove folders, and upload or delete files on the **Documents**.

When you access the **Documents** tab from the navigation bar, you can:

- Manage folders.
- Upload documents.
- Search folders.
- Customize views.
- Display document details.
- Add comments to documents.
- Access Ask AI.

Manage Folders

Upload Documents

Search Folders

Customize Views

Display Document Details

Add Comments to Documents

Access Ask AI

You can organize your documents using folders and subfolders. Admin set up folder structures. You can sync folder structures with company file systems such as Google Drive, Box, SharePoint, or Dropbox, using either no sync (all files are uploaded into Contract Management and Document Intelligence) or 2-way sync options. See Set Up Document Synchronization with EviSync on page 81 for more information.

You can view only the folders and files you have permission to access. See Manage Roles for more information.

You can upload documents to a destination folder using the **Upload** button or the **Upload** tab. While uploading, Contract Management and Document Intelligence displays a processing status bar. You cannot edit the uploaded document until processing is complete.

Note: When an upload fails, you can click **Process Document Again** to reprocess the document.

You can view the history of all your uploaded documents in the **Upload Log** section on the **Upload** tab. See Document Statuses in Contract Management and Document Intelligence for more information.

You can use the **Search Folder** button to find specific folders. Select a folder in the search results to access its contents directly.

When you select a folder or file, Contract Management and Document Intelligence displays an **Action** menu with these options:

- *Add to Group*: Available for documents only. You can use it to associate documents with a group. See Manage Document group for more information.
- *Copy* : Duplicate selected items and save them in a folder of your choice.
- *Delete* : Remove selected items.
- *Edit* - Update or add data fields to selected documents.
- *Move* : Transfer selected items to a folder of your choice.

See Are there bulk file action limits? for limits on certain actions.

You can change the display by accessing the *Table Settings* menu. You can add, delete, and reorder columns; save your view for later use or load a previously saved view; and adjust the number of rows per page. See Create Custom Views for more information about creating custom views.

You can access the **Details** button when you hover over a document. Contract Management and Document Intelligence displays a quick look panel where you can view key document information, navigate to other documents, download the document, or open the document in a new tab.

You can also click on a specific document to open the document details, organized on these tabs:

- **Overview** : Provides a summary of document characteristics using custom fields. These fields are a combination of Smart and custom fields. You can view smart fields that are automatically populated by Contract Management and Document Intelligence in the Smart Fields and Clauses. For more details, see Set Up Data Fields.
- **Contents** : Displays a fully searchable PDF that combines PDF and text views. Contract Management and Document Intelligence overlays OCR-translated text on the PDF. You can use the toolbar to search the document, zoom in and out, and adjust page width. Contract Management and Document Intelligence extracts and displays metadata fields and key clauses in a side panel in the **Key Information** and **Contract Summary** sections. You can edit metadata fields in the **Key Information** section.
- **Key Provisions** : Provides an overview of important clauses that your organization tagged and the Contract Management and Document Intelligence AI found in the document. For details, see Find and Tag New Clauses.
- **Versions** : Provides the history of document. For details, see Creating and Managing Versions.
- **Related Documents** : Lists related documents (example: supporting, parent, or child documents). For details, see information on Document Groups.

You can navigate to multiple documents that are grouped in the same folder.

You can leave comments and tag other users who have view permissions directly on a PDF contract. You can use comments for future reference by team members and for assigning tasks.

Ask AI enables you to ask simple, natural language questions about your contracts and receive clear, reasoned answers. The questions can range from basic to analytical. Contract Management and Document Intelligence automatically links answers to textual sources in the contract.

When Ask AI generates an answer, you can view the number of sources it references and highlight the corresponding text in the document. You can also copy the answer and clear the chat history.

Watch the video: 1m 47s

Reference: Document Statuses in Contract Management and Document Intelligence

A document upload progresses through these statuses as Contract Management and Document Intelligence processes it:

Status	Description
Uploading	Your file is currently uploading. **Note:** Don't refresh the page when an upload is currently in *Uploading* status.
Queued	Your file was uploaded and is in the processing queue. A file typically remains at this status for 20 minutes or less. If it gets stuck in *Queued* status, contact Workday Support for assistance.
Processing	OCR is converting your document and identifying SMART fields and clause tags.
Complete	Processing is complete and your document is now ready for indexing, analysis, and monitoring.

Status	Description
Completed with Errors	If 1 or more algorithms fails during processing, a yellow alert triangle displays this status.

You can view your upload history in **Upload** > **Upload Log**, regardless of whether you uploaded documents in the **Documents** or **Upload** tab. This is a list of your uploads only and doesn't include uploads performed by other users in your organization.

Note: When document processing fails, you can try to reprocess it by clicking **Process document again** in the red banner that displays when you access the document.

FAQ: Contract Intelligence (CI) in Contract Management and Document Intelligence

- Can I remove a provision from a document?
- What does **Auto Sync** mean in the **Last Modified** column of the **Versions** tab when viewing a document's details?
- Is it possible to view a list of documents in my workspace that failed optical character recognition (OCR) processing?
- Why are some folders within my restricted folder visible to a power user with no assigned department?
- Does Contract Management and Document Intelligence support password-protected files?
- Is a document's **Status** field a SMART field?
- Are there bulk file action limits?
- Why is the **View** button unavailable on a clause in the **Contract Summary** panel?
- Can Contract Management and Document Intelligence standardize internal party names?
- Why is the **Upcoming Expiration Date** field populated on some documents and not on others?
- Why is the **Executed** field set to **Yes** when there's only one signature?
- Does email intake support ZIP files?
- When I edit a **Counterparties** field, why does it save under **Internal Parties**?
- Can a user create and save a search query that's available to other users?
- When I select specific documents for exporting, are they the only items that are exported?
- How does Contract Management and Document Intelligence calculate the **Text Quality** data field?
- How does Contract Management and Document Intelligence’s OCR handle dual or multi-column agreements?
- Does the Contract Management and Document Intelligence AI read any information from documents included as attachments?
- How does Contract Management and Document Intelligence handle poorly-scanned or blurry documents? Can I get notified when an unreadable document is detected?
- Can Contract Management and Document Intelligence send alerts to the contract owner listed on a field?
- How does the AI tool work and what does it do?
- Can you display the number of documents that are uploaded to the system?
- Can I add my own clauses for Contract Management and Document Intelligence to identify?
- Does Contract Management and Document Intelligence automatically identify duplicate documents?
- When 2 files have minor differences only, does Contract Management and Document Intelligence automatically identify them as duplicates?
- What's the difference between muting an alert and making it inactive?
- When a user adds a duplicate document to the platform, is it included in the document count for billing purposes?

- How long does it take an emailed document to appear in Contract Management and Document Intelligence?
- If I upload a new version of a document, does Contract Management and Document Intelligence detect the changes and update the corresponding data fields?
- My organization uses multiple different storage providers to store our contracts. Can Contract Management and Document Intelligence still analyze them?
- Does Contract Management and Document Intelligence integrate with existing document storage solutions?
- How quickly does Contract Management and Document Intelligence analyze contracts?
- What document formats can Contract Management and Document Intelligence analyze?

Can I remove a provision from a document?

Yes.

1. Access the document in Contract Management and Document Intelligence.
2. In the **Contract Summary** section on the **Contents** tab, click **View** to highlight the provision in the document.
3. Click the pencil icon and select **Remove Provision**.

Note: This action only removes the provision for that document.

What does Auto Sync mean in the Last Modified column of the Versions tab when viewing a document's details?

Auto Sync can mean that the document was synced through a storage provider or uploaded through email intake.

Is it possible to view a list of documents in my workspace that failed optical character recognition (OCR) processing?

You can use these filter settings in **Search**, **Alerts**, and **Dashboards** to view a list of documents that might have failed OCR processing:

Filter	Value
Upload Date	The scope of your report.
Text Quality	Is blank.
File Type	Is equal to PDF, or any of the file formats that Contract Management and Document Intelligence processes (TIFF, PDF, DOCX, and DOC).

You can use **Alerts** and **Dashboards** for continuous tracking instead of running ad hoc **Search** reports. If you have a list of DocIDs, you can access each individual document that failed OCR and attempt reprocessing by clicking **Process document again**.

Note: Some older documents might have a blank **Text Quality** and, as a result, get included in the filtered list.

Why are some folders within my restricted folder visible to a power user with no assigned department?

When a user navigates to a folder that they have permission to access, but that's contained inside a restricted folder, the entire path from the root folder is visible to them. This includes restricted folders. However, the user is unable to view or see the list of documents within the restricted folders.

Does Contract Management and Document Intelligence support password-protected files?

Contract Management and Document Intelligence can't process password-protected files or bypass their security settings.

Is a document's Status field a SMART field?

A document's **Status** field doesn't interact with our AI. All documents have an initial automatic status of *Unknown*, but you can also manually set this field to *Active* or *Inactive* status.

Note: The **Status** field doesn't impact billing.

Are there bulk file action limits?

For performance purposes, there are maximum file limits when performing certain bulk actions. If you attempt an action that exceeds these limits, Contract Management and Document Intelligence warns you that the action can't be completed. These limits apply to both the **Documents** and **Search** areas:

Action	Document Limit
Move	2,000
Edit	10,000
Copy	500
Delete	500

Note: Although we don't enforce a limit on the number of files that you can manually upload in 1 transaction, we do recommend that you upload no more than 100 files at a time. To upload more than 100 files in 1 transaction, use our sync tool instead. See Set Up Document Synchronization with EviSync on page 81 for more information.

Why is the View button unavailable on a clause in the Contract Summary panel?

The **View** button is unavailable because the document text that we currently use to detect clauses through our AI doesn't match the text in the PDF. However, the clause is still visible in **Documents** > **Key Provisions**. To optimize performance, Workday recommends using unformatted, single-column text, instead of elements and formatting such as tables, forms, overlapping text, odd line breaks, and columns.

Can Contract Management and Document Intelligence standardize internal party names?

Customers can provide a list of internal party names that they want to extract from contracts during upload. This list is managed by Workday.

Why is the Upcoming Expiration Date field populated on some documents and not on others?	**Upcoming Expiration Date** is a dynamic field that is populated on active contracts, depending on a document's next expiration date. If the next expiration date is in the future, this date populates the **Upcoming Expiration Date** field. If there is no longer an upcoming expiration date (the latest expiration date is in the past), the date is removed, leaving the **Upcoming Expiration Date** field blank.
Why is the Executed field set to Yes when there's only one signature?	The **Executed** field is set to *Yes* when there's at least 1 manual or electronic signature on the document. This field doesn't indicate whether or not a document is fully executed because the number of expected signatures on a document varies.
Does email intake support ZIP files?	This functionality doesn't support ZIP files.
When I edit a Counterparties field, why does it save under Internal Parties?	The **Internal Party** values are determined by the list of internal party names that you provide, and are maintained by Workday. If a party name matches or contains a name on the list, that party name populates the **Internal Party** field. Example: Your internal party list contains the name *Acme*, so Contract Management and Document Intelligence lists *Acme LLC* and *Acme International Inc.* in the **Internal Party** field. As a result, it's possible for the party name to move under **Internal Party** when you try to edit and save a counterparty.
Can a user create and save a search query that's available to other users?	You can create a saved search by accessing **Search** > **Add Filters**. Click **Save Search** after configuring the search criteria, and specify the users who can access the search query using the **Who can see and use this search?** field.
When I select specific documents for exporting, are they the only items that are exported?	When you export documents from a search query in the Search console, all documents are exported. This is the case even if you selected specific documents.
How does Contract Management and Document Intelligence calculate the Text Quality data field?	The **Text Quality** field applies to text in English only and analyzes the percentage of words that belong to an English dictionary to determine the text quality. It then uses this percentage to assign 1 of 3 text quality scores: • *Low* • *Medium* • *High* Example: A blurry document typically receives a score of *Low*.
How does Contract Management and Document Intelligence's OCR handle dual or multi-column agreements?	We support multi-column documents in DOCX and PDF format. The AI displays and analyzes text columns linearly. Contract Management and Document Intelligence doesn't display the text columns in the preview.

Does the Contract Management and Document Intelligence AI read any information from documents included as attachments?	Attachments are considered supplemental documents and are not scanned by the AI.
How does Contract Management and Document Intelligence handle poorly-scanned or blurry documents? Can I get notified when an unreadable document is detected?	When a document receives a text quality rating of *Low*, you must review it and you may need to enter data fields manually. To search for low text quality documents: 1. Access **Search**. 2. Click **Add Filters**. 3. Select the **Text Quality** filter and click **Add**. 4. Set the search criteria so that it is equal to **Low**. To receive notifications when a low-quality document scan is uploaded to the Contract Management and Document Intelligence: 1. Access **Search** > **Alerts**. 2. Click the **+ Add Alert** button. 3. Complete the alert fields, specifying whether the alert should apply to certain folders. 4. Click **Add a Filter**. 5. Select **Text Quality** and specify that it should be equal to a value of **Low**. 6. Add the relevant users to receive the alerts.
Can Contract Management and Document Intelligence send alerts to the contract owner listed on a field?	When the contract owner is listed on a user field and is a registered Contract Management and Document Intelligence user, they can receive alerts. Set up the filter criteria to check the **Contract Owner** field for that specific user, and then enter the username in the alert recipients.
How does the AI tool work and what does it do?	The AI tool scans your documents and extracts key information. It automatically extracts a list of standard, Workday-delivered data fields and clauses from every contract. You can also train the system to find additional clauses across all your documents. For more information, see: • Reference: Smart Fields and Clauses on page 7 • Manage Clauses on page 17 • Create Clauses on page 65
Can you display the number of documents that are uploaded to the system?	You can find the total number of uploaded documents when you: 1. Access the **Search** console. 2. Run a blank search. 3. Export your results. The **Total Documents** value in the **Export Settings** window displays the total number of unique documents in Contract Management and Document Intelligence.

Can I add my own clauses for Contract Management and Document Intelligence to identify?	You can add clause types and identify new clauses. For more information, see Manage Clauses on page 17
Does Contract Management and Document Intelligence automatically identify duplicate documents?	When you upload a file, Contract Management and Document Intelligence analyzes it and automatically compares it to existing files on the platform. When it identifies duplicates, the files are automatically linked to each other.
When 2 files have minor differences only, does Contract Management and Document Intelligence automatically identify them as duplicates?	Contract Management and Document Intelligence identifies duplicates only when they are exactly the same. To verify duplicates, Workday uses a hashing algorithm to compare bit sizes between documents. This is due to contracts often sharing very similar language, and sometimes differing only on 1 specific word. **Note:** Contract Management and Document Intelligence doesn't reference filenames when determining duplicates and only analyzes the file contents. Even when filenames are identical, the files aren't considered duplicates unless the file contents are exactly the same.
What's the difference between muting an alert and making it inactive?	Muting an alert stops notifications for you only. Making an alert inactive stops the alert for all recipients.
When a user adds a duplicate document to the platform, is it included in the document count for billing purposes?	Only unique documents are taken into account for billing purposes.
How long does it take an emailed document to appear in Contract Management and Document Intelligence?	It typically takes 10 minutes or less for emailed documents to appear in Contract Management and Document Intelligence. For more information, see Set Up Email Intake on page 72.
If I upload a new version of a document, does Contract Management and Document Intelligence detect the changes and update the corresponding data fields?	Our AI detects new information (including effective dates), each time you upload a new version of an existing document. However, if you previously updated an AI field manually, the AI doesn't overwrite the manual edit with new information. For more information on document versions, see Manage Document Versions on page 16.
My organization uses multiple different storage providers to store our contracts. Can Contract Management and Document Intelligence still analyze them?	Contract Management and Document Intelligence can work with files that are stored across several different locations at one time. Contract Management and Document Intelligence can sync from a supported cloud storage provider and analyze all of your documents, regardless of where they're stored (Example: Box, SharePoint, and OneDrive). For more information about our sync tool, see Set Up Document Synchronization with EviSync on page 81.
Does Contract Management and Document Intelligence integrate with existing document storage solutions?	Contract Management and Document Intelligence integrates with many of the most popular software

	solutions. See Contract Management Overview for more information on document storage integrations.
How quickly does Contract Management and Document Intelligence analyze contracts?	The length of time it takes to analyze a document varies. However, Workday can analyze and extract metadata from contracts in seconds. After contracts are uploaded to the platform, the data is typically accessible within a few minutes.
What document formats can Contract Management and Document Intelligence analyze?	We can perform OCR analysis on these file formats: • TIFF • DOCX • DOC • PDF (including scanned PDFs) You can still upload other file formats, but they aren't subject to OCR analysis.

Search

Search for Clauses

Prerequisites

Add documents and clauses in Contract Management and Document Intelligence.

Context

Contract Management and Document Intelligence enables you to use search filters to quickly find documents that contain or exclude specific clauses.

Steps

1. Click **Search**.
2. Click **Add Filters**.
3. Select **Clause Type**.
4. Click **Add Filters**.
5. From the **Clause Type** menu, select a clause.

   The clause list includes standard clauses identified by the clause model.
6. Choose a clause to include or exclude in your search.

   You can repeat these steps to add multiple clauses to your search. Example: Add a Clause Type filter for documents that contain Limitation of Liability clauses. Add another Clause Type filter for documents that don't contain Indemnity clauses.
   a) (Optional) Click **Search Within Clause Text**.

      Select an operator for words or phrases to include or exclude in your search.

Add Alerts

Prerequisites

Ensure your profile has access to the documents and data fields you want to track with alerts.

Context

The Alerts feature enables you to set up automated email notifications, initiated by data within documents. You can configure alerts for purposes such as contract management, reviews, and assignments. Notifications can be sent hourly, daily, or weekly, and you can apply them to all documents in the workspace. You select which document fields, such as expiration date and review status, launch the alerts. You can select individuals, contract owners, or departments as recipients. Users see alert results for only documents where they have access.

Steps

1. Click **Search**.
2. Click **Alerts**.
3. Click **Add Alert**.
4. Set up basic details.
    a) Enter a name for the email subject line and a message for the email body.
    b) Set the notification frequency.
    c) (Optional) Select the folders containing the documents you want to track for changes.

       When you don't select a folder, Contract Management and Document Intelligence tracks all documents and alerts for changes.
5. Click **Next Step: Filters**.
6. Set the filters.
    a) Click **Add a Filter**.

       Select the criteria for Contract Management and Document Intelligence to use when tracking document changes. These criteria determine which documents are included in the alert notification.
    b) (Optional) Click **Add a Section**.

       After adding a section, you must add at least one filter within it to define the condition for that group.
7. Click **Next Step: Recipients**.
8. Select users to receive the alert.

   You can select individuals, contract owners, or departments. Optionally, you can also exclude users or allow recipients to edit the alert.

Example

Watch the video: 3m 31s

Build Search Queries

Context

You can use the Advanced Query Builder to run more complex searches, enabling you to:

- View and search from all filters. Drag and drop chosen filters from the left panel into a filter section or move them between sections.
- Build complex search queries using logical operators such as OR and AND. Example:
    - *Initial Expiration Date is after today* OR
    - Upcoming Expiration Date is after today AND
    - *Governing Law = Delaware*

Note: We don't support mixing AND/OR in the same section.

Advanced Query Builder is backward compatible, so you can edit saved searches created with Contract Management and Document Intelligence's previous tool, Analyzer, directly from the Search page.

Steps

1. Click **Search**.
2. Click **Add Filters**.
3. Click **Advanced Query Builder**.
4. Drag and drop a filter into the filter bar.

   You can add multiple filters and operators to your query.
5. Select the filter you added and set the conditions.

   Example: Add the *Renewal Notice Date* filter. Select a date and the conditions for the date.
6. (Optional) Click **Add Section**.

   You can add 1 or more sections of filters to use in your query.
7. (Optional) Select the operators to use between sections.

   Example: Create 1 filter group with these conditions: Initial Expiration Date is after today OR Upcoming Expiration Date is after today AND Governing Law = Delaware.

   Create another filter group with these conditions: Renewal Type is blank.

   Select the OR operator. Contract Management and Document Intelligence searches for documents that meet either set of conditions.

   Note: We don't support multiple nested sections with mixed AND/OR operators.
8. Click **Apply**.

   Note: You can use **Advanced Query Builder** with saved searches created using Contract Management and Document Intelligence’s previous complex search. Example: You can open a saved search from the **Search** tab and edit it using **Advanced Query Builder**.

Result

You can edit queries after you build them. You can also use **Advanced Query Builder** with saved searches.

Bulk Edit Data Fields

Prerequisites

Upload documents to Contract Management and Document Intelligence.

Context

Contract Management and Document Intelligence enables you to simultaneously edit a data field across multiple documents from the search results page.

This functionality helps you:

- Tag archived documents.
- Exclude documents.
- Simplify searches for documents with similar characteristics.

You can edit any data field in an individual document by selecting **Edit** on the **Overview** tab. You can also create custom data fields on the Admin Console. For details, see Set Up Data Fields.

Workday currently limits bulk editing to approximately 10,000 documents and bulk deleting or copying to 500 documents.

Steps

1. Click **Search**.
2. Run a search.
3. Select the check boxes of the documents you want to edit.

   You can select the **Name** check box to select all documents on the page. You can also click **Select all items** to select all search results.
4. From the **Actions** menu, select *Edit Fields*.
5. From the **Data Fields** prompt, select the field you want to edit.
6. Select 1 of these options:
   - *Add to/Replace existing values*. You must enter or select a new value for the field.
   - *Delete existing values*. Contract Management and Document Intelligence deletes the value from all selected documents.
7. Click **Save**.

Result

Contract Management and Document Intelligence updates all selected documents with the added, replaced, or deleted data fields you specify.

Export Search Results to Excel

Context

You can customize and export search results to Excel to analyze document, clause, and field information. By default, Contract Management and Document Intelligence preselects the fields to include on the Excel file, based on the search results. You can also save multiple export configurations for future searches.

Steps

1. Click **Search**.
2. Run a search.
3. Select **Export Excel**.
4. From the search results, select **Export Excel**.

   The Excel file includes all documents that come up in the search results. You don't need to select or clear the check box for an individual document.

5. (Optional) Select the fields and clauses you want to include in the Excel file.

   By default, a few fields are preselected based on the search results. Example: The Folders field is always selected by default.

   Use the **Search** field to find fields and clauses by name.

   Select **Select All** to include all available options on the Excel file.

   Select **Include Duplicates** to include duplicate items on the Excel file.

   We display the number of:

   - Filters you select
   - Resulting documents.
   - Duplicates
6. Click **Export Excel**.

Result

If your workspace has fewer than 100,000 documents and you are exporting 5,000 rows or fewer, you can download the file to your computer. Otherwise, we display a notification that the export has started and send an email with a unique download to your registered email when the export is complete.

The Excel file export contains these fields:

- **Document Info:** Metadata with unique document URLs.
- **Clause Info**: Lists clauses and document names.
- **Table Info**: Includes table data if applicable (requires table algorithms enabled).
- **Note:** If you don't see the **Table Information** tab on the Excel file, table algorithms may not be enabled in your workspace. Contact support@evisort.com for assistance.
- When you include duplicates, we display these fields on the Excel file:
  - **DocSetID**: You can use this ID to filter or group copies of a particular document and run data patches.
  - **Duplicate Status**: This will either be Primary or Duplicate.
    - The Primary copy of the document is the first version uploaded to the platform. If that document is deleted from the platform, the next most veteran document in the platform becomes the Primary document.
    - An Admin might see 1 Primary and 1 Duplicate version of the same documents, but a Power User sees only 1 Primary document. The documents could be in different locations based on access settings for the Power User.
  - *Duplicate List*: This list includes the DocID, File Name, and URL of the duplicate documents. When you exclude duplicate documents, the report displays the Primary document.

Modify Alerts

Prerequisites

Enable permission to edit alerts.

Context

You can create and modify alerts in Contract Management and Document Intelligence, enabling you to monitor relevant document data automatically and ensure alerts remain accurate as needs evolve. Alerts help track time-sensitive or workflow-specific conditions without manual effort. You may need to create or update alerts to begin monitoring certain types of documents, adjust the filter criteria, or change who receives the notifications.

Steps

1. Click **Search**.
2. Click **Alerts**.
3. From the related actions menu of the alert you want to modify, complete the task:

Option	Description
Edit Info and Schedule	Update the title of the and the body of the message for the alert, along with the frequency of the alert. You can also select the folders with the documents you want to track for changes.
Edit Filters	Update the filters for your alert. You can also add filters and sections for the alert.
Edit Recipients	Update the recipients, including users and departments, for the alerts.
Duplicate	Update an existing configuration to create a new alert.
Mute	Select when you no longer want to receive notifications for the alert.
Make Inactive	Select to stop the alert from running for all users without deleting it.
Send Email Now	Select to immediately test or run an alert outside of its normal schedule.
Delete	Select when the alert is no longer needed or relevant. You can't undo this action.

Result

We send out the modified alerts on the next scheduled run.

Concept: Search

The search feature in Contract Management and Document Intelligence enables you to generate text-based and filtered searches, which you can save, share, or export as Excel spreadsheets. You can refine document searches using metadata filters for any contract data field and add multiple filters to narrow a search.

You can access the search feature from the main navigation bar for these functions:

- Boolean text search
- Advanced search
- Filter management
- Saved and shared searches
- Result review and actions

Boolean Text Search

Advanced Search

Filter Management

Saved and Shared Searches

Result Review

You can access recently viewed files and searches, input text queries, and use Boolean operators to include, exclude, and combine search terms.

You can build search queries using a combination of text and filters for any contract data field. You can use Boolean operators in the search bar, and you can add data fields as filters. You can access Advanced Query Builder for complex queries.

You can pin filters for easy access, restrict search results to contracts in specific folders, and search for documents that do or do not contain a specific clause. For details about searching for key clauses, see Search for Clauses on page 29

You can save searches, customize viewer permissions, and use dedicated links to access, bookmark, and share saved searches.

When you run a search, you can perform these actions on the documents in your search results:

- Add documents to a group. You can group documents that share the same counterparty to manage related contracts more efficiently. For details, see: Manage Document Groups on page 15
- Move documents: You can move documents to a secure location, often for review by a separate team.
- Copy documents: You can copy documents to another location, often to share with a different team or retain a version for reference.
- Edit document metadata: You can edit document metadata fields in the Overview tab, often to correct or update key information. For details, see: Bulk Edit Data Fields
- Delete documents: You can delete documents from the workspace, often to remove outdated or incorrect files that are no longer needed.
- Export results: You can export search results to an Excel file for further analysis or reporting. For details, see: Export Search Results to Excel on page 32

Note: Moving, deleting, or copying a document may also affect any duplicates created from it. For details about duplicates, See Concept: Duplicate Files on page 7.

Reference: Boolean Text Search Definitions and Examples

You can use these Boolean operators to refine your search results in document searches. These connectors help you combine or exclude terms to narrow down what you're looking for.

Note: We don't support Boolean operators on the **Search within clause** filter option.

Term / Connector	Description	Examples
AND	Require both search terms	*Example: california AND privacy* Return documents that contain the words *california* and *privacy*.
OR	Require either search term	*Example: publicity OR trademark*

Term / Connector	**Description**	**Examples**
		Return documents that contain the words *publicity* or *trademark*
NOT	Return results that contain 1 search term and don't contain the other search term	*Example: termination NOT convenience* Return documents that contain the word *termination* and do not contain the word *convenience*.
OR NOT	Return results that contain 1 search term or don't contain the other search term	*Example: left OR NOT right* Return documents that contain the word *left* or do not contain the word *right*.
/n	Return results within *n* number of words from the search term	*Example: data /5 breach* Return documents that contain the word *data* within 5 words of the word *breach*.
-n	Return results within *n* number of words before the search term	*Example: indemnify -5 supplier* Return documents where the word *supplier* appears within the 5 words preceding the word *indemnify*.
+n	Return results within *n* number of words after the search term	*Example: supplier +5 indemnify* Return documents where the word *indemnify* appears within the 5 words following the word *supplier*.
" "	Returns results that contain the exact phrase	*Example: New York* Return documents that contain the exact phrase *New York*.
()	Specify the order of operations in a search	*Example: 2020 AND (extend OR renew)* Return documents that contain*2020*, plus either the word *extend* or the word *renew*.
*	Return results that treat the search word as stem	*Example 1: service** Return documents that contain: *service, services, serviced, servicing*. *Example 2: *post* Return documents that contain: *post, repost, lamppost*. *Example 3: *post**

Term / Connector	Description	Examples
		Return documents that contain: *post lamppost, repost, poster, posted, posting*.
fuzzy ()	Return results that contain slight variations of the search term	*Example: fuzzy (confidential)* Return documents that contain *confidntial*, *confidentil*, *onfidential*. *Example: fuzzy ("contract renewal date")* Return documents that contain phrases similar to *contract renewal date*, *contract renual date*, *contract renewal dat*.

Dashboards

Create Custom Dashboard Charts

Prerequisites

- Admin or Power User permissions.
- You must have access to the **Dashboards** tab and permission to view the data fields you want to visualize.

Context

You can create and customize charts to display specific contract data in a format that best meets your needs. You can select which charts to display, remove charts you don't need, and rearrange them to prioritize the most relevant information. You can also save the selected charts as a dashboard for quick access later or share them with others in your workspace to support collaboration.

Steps

1. Click **Dashboards**.
2. Select 1 of these tabs:
    - **Documents**
    - **Expirations**
    - **Saved Dashboards**. Select the dashboard you want to customize.
3. Click **Edit Charts**.

    You can search for and select fields to add to your dashboard.

    We add selected fields as new charts and remove a chart from the dashboard when you deselect a field.
4. Click **Apply Changes**.
5. (Optional) Click **Save Dashboard**.

    You can name the dashboard and access it in future sessions on the **Saved Dashboards** tab.

Result

We update the dashboard with the selected charts.

Next Steps

You can rearrange the charts on the dashboard by clicking and holding the header and dragging it to a new position.

You can also access the **More Actions** menu to delete a chart and change the chart width.

You can manage and review saved dashboards, including renaming, sharing, and deleting them.

Concept: Dashboards Overview

Contract Management and Document Intelligence displays contract and workflow data on dashboards. Dashboards visually display contract and workflow data. You can explore contract metadata and workflow activity using charts, tables, and filters. We show only the documents and workflow tickets you have access to and removes duplicates by displaying only the first uploaded version of each document.

We deliver these dashboards:

- **Documents** : Displays contract volume and related metadata.
- **Expirations** : Shows upcoming expiration dates, renewal types, and notice periods. You can customize the date range and apply additional filters.
- **Open Tickets**: Lists active workflow tickets along with their current stages.
- **Completed Tickets**: Provides workflow metrics, including cycle time and backlog trends.

Note: The **Open Tickets** and **Completed Tickets** dashboards require the **Workflow** feature and do not support text search or **Advanced Query Builder**.

Charts in Dashboards

You can use charts to visually summarize filtered data, helping you analyze trends and key metrics. You can create charts using supported metadata fields such as **Contract Type**, **Document Status**, and **Internal Parties**.

You can't use text fields, clause types, and folders to create charts.

Charts are interactive; when you click on a segment (example: in a pie chart), we update the data to show only the related contracts or tickets.

Filtering and Search

Dashboards enable you to filter data using metadata fields, such as date ranges, **Contract Type**, and **Internal Parties**. Contract Management and Document Intelligence supports Boolean search, and we apply all filters with AND logic by default.

For more detailed filtering, you can use the **Advanced Query Builder** to:

- Combine filters with AND/OR logic.
- Group filters into sections.

It allows:

- Combining filters with AND/OR logic
- Grouping filters into sections

Some filtering capabilities such as OR logic and nested filters are available only through the Advanced Query Builder. See Build Search Queries for more details.

Reviewing and Exporting Your Data

We display a results table that lists the contracts matching your filters on the dashboards. You can:

- Configure the table to show any contract data fields in your preferred order.
- Click the **Details** link on each row to view the selected metadata.
- Click a contract name to view the full document.

Add, delete, or reorder columns and adjust the number of rows on the table using the **Table Settings** menu. See Create Custom Views for more details.

You can also export the results to Excel with specific field and clause data that you select. You can do the same on the **Search** tab. See Export Search Results to Excel for more details.

Saved and Shared Dashboards Overview

You can save dashboards to preserve a customized view of contract and workflow data in Contract Management and Document Intelligence. Instead of reapplying filters and rearranging charts every time, you can quickly reload a saved configuration from the **Saved Dashboards** tab. Each saved dashboard retains your applied filters, chart formats, and table configurations.

Users who receive shared dashboards can access them directly from their **Saved Dashboards** view.

You can configure permissions to determine user access for dashboards. Admins can view, edit, or delete dashboards that have been shared, but cannot access dashboards marked as private.

See the article to find out how you can use your dashboard data to improve your business processes.

Example: Create a Net 360 Payment Terms Chart

This example illustrates how to create a chart for payment terms and apply filters to view customers with payments due within 360 days.

Context

Your sales team wants to shorten payment terms to improve cash flows and reduce delays in revenue recognition. To help them, you want to create a chart that enables you to identify customers with extended terms, such as net 360, that the sales team can adjust.

Prerequisites

- Enable access to dashboards.
- Ensure documents with payment terms (example: net 30, net 60, net 360) are uploaded to populate the Payment Terms field automatically.
- Verify data is available for the current fiscal year.
- Link customer payments and contract data to the dashboard.

Steps

1. Click **Dashboards**.
2. On the **Documents** tab, click **Edit Chart**.
3. In the **Operational Information** section, select **Payment Term (Net Days)**.
4. Click **Apply Changes**.
5. Click **Add Filters**.
6. In the **Operational Information** section, select **Payment Term (Net Days)**.
7. Click **Add Filters**.

8. On the *Payment Term (Net Days)* filter, select:
    a. **Contains any of**
    b. **Net 360**

Result

You can view payment terms, including net 360, and how many contracts are affected. When you select a bar on the chart, you can find details of the contracts that use those terms.

Example: Filter Service Contracts by Renewal Notice Dates

This example illustrates how to use the Query Builder on the Expirations dashboard to find service contracts with upcoming renewal notice dates in the next 1 year.

Context

You want to identify service contracts that have upcoming renewal notice dates within the next 1 year to proactively manage vendor relationships and avoid automatic renewals.

Prerequisites

- Enable access to dashboards.
- Upload service contracts with renewal notice dates.
- Verify data is available for the relevant time periods.
- Link contract data to the dashboard.

Steps

1. Click **Dashboards**.
2. Click the **Expirations** tab.
3. Click **Edit Query**.

    We automatically populate the advanced queries with *Upcoming Expiration Date in the next 1 year* and *Renewal Notice Date in the next 1 year* filters.
4. Click **Add Section**.
5. From the **General Information** section, drag and drop *Contract Type* to the newly added section.
6. On the *Contract Type* filter, select *Contains any of* and *Services Agreement*.
7. Click **Apply**.

Result

We now display only service contracts with upcoming renewal notice dates on the Expirations dashboard, allowing you to focus on relevant agreements for your vendor management.

Example: Track and Customize Upcoming Renewal Notices

This example illustrates how to use the Renewal Notice Date dashboard to identify agreements with upcoming renewal notice periods and customize the displayed date ranges.

Context

You want to proactively manage your organization's agreements by tracking upcoming renewal notice periods. To support this, you need to identify agreements that require manual renewal, focus on those expiring in the next 6 months, and analyze the volume of such agreements by month.

Prerequisites

- Enable access to dashboards.
- Upload agreements with renewal notice dates to populate the dashboard.
- Verify data is available for the relevant time periods.
- Link agreement data to the dashboard.

Steps

1. Click **Dashboards**.
2. Click the **Expirations** tab.

   Contract Management and Document Intelligence displays these charts by default:

   - **Renewal Notice Date** , where you can view the number of agreements requiring notice by month.
   - **Renewal Type** , where you can view a breakdown of automatic, manual, and option to renew agreements.
   - **Upcoming Expiration Date** , where you can view the number of agreements expiring by month.
3. Click **Edit Query**.
4. We automatically populate the advanced queries with *Upcoming Expiration Date in the next 1 year* and *Renewal Notice Date in the next 1 year* filters.
5. On the *Upcoming Expiration Date* filter, select *In the next* ,*6*, and *Month*.
6. Click **Add Section**.
7. From the **Operational Information** section, drag and drop *Renewal Type* to the newly added section.
8. On the *Renewal Type* filter, select *Is equal to* and *Manual*.
9. Click **Apply** .

Result

We can now view upcoming manual renewal agreements expiring in the next 6 months on the Expirations dashboard and analyze their monthly volume, helping you stay ahead of key renewal notice periods.

Workflow

Edit Workflow Tickets

Prerequisites

Set up an intake form.

Create a workflow ticket.

Context

To initiate a workflow process, you can submit an intake form to create a workflow ticket.

Ticket submitters view and act on all workflow items, but you can configure Contract Management and Document Intelligence to restrict their access to:

- Activity logs
- Documents (during specific stages)

- Downloads
- Sharing
- Review steps
- Uploads

Note: When the workflow prohibits further form edits, the document moves directly to the Review stage.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select **In-Progress**.
3. Select the ticket you want to edit.
4. Click **Download**.
5. Click **Edit** to make any final changes.
6. Click **Send for Review**.

Review Workflow Tickets

Prerequisites

Set up an intake form.

Context

In the **Review** stage, reviewers assess and approve documents in the workflow. The review coordinator manages this stage, overseeing review phases and their criteria.

The review coordinator can reassign specific review steps and send reminders to reviewers to keep tasks moving forward.

Any workspace user or the ticket submitter can be the review coordinator.

The **Review** stage comprises:

- Phases: Sequential segments of the review process. When you complete 1 phase, Contract Management and Document Intelligence progresses to the next phase.
- Criteria: In each phase, individuals perform tasks. Users can reassign these tasks as needed.

Reviewers complete the criteria assigned to them. The ticket submitter or any user in the workspace can serve as a reviewer.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a ticket from **In-Progress**.
3. Click the name of the document.

   Contract Management and Document Intelligence opens the document in the Document Viewer.
4. Click **Download**.
5. Click **Document Details**.
6. Click **Assigned to me** to view your specific steps.

   See Redline a Document on page 50 for more information.
7. Approve or reject the criteria.

Sign Workflow Tickets

Prerequisites

Accept all criteria.

Complete all review phases.

Fill out counterparty signer details and contact information in the intake form.

Context

The signing coordinator owns this stage. They collect signatures from signatories.

You can:

- Collect signatures electronically using Docusign or Adobe Sign.
- Upload the document after the signer provides an ink-based signature or other eSignature methods.
- Use a combination of these methods in 1 workflow.

eSignature:

When your company has a Docusign license with API capabilities or an Adobe Sign account, you can collect signatures directly from Contract Management and Document Intelligence. When you click **Collect Signatures**, we launch your integrated eSignature tool.

Note:

- When you send the document for signature to Docusign directly from the Contract Management and Document Intelligence Workflow Ticket, signatures appear.
- When you set up the signers and parties fields to include eSignature tags, the recipient can reassign envelopes to the correct signers, and the signature block shows the new signer's information. Otherwise, the signing coordinator places signatures in Docusign before sending the document.

You can replace the default internal signatories in each workflow with any associated internal signatories.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a ticket.
3. Click **Collect Signatures**.
4. As you complete the **Sign** stage, consider:

Option	Description
Default internal signatories	Replace the predefined signatories in each workflow with any internal signatories associated with that workflow.
Signatories	The eSignature tool sends an email with a signature request. Once you sign the document, we update the **Sign** stage to indicate execution.

5. Click **Upload Signed**.

   Contract Management and Document Intelligence asks the user to indicate which signatures they have collected in the uploaded document.
6. Click **Back to Review**.

   You can send the document for further editing.

7. [Optional] Click **More Settings**.

   Reset all signatures and nullify any outstanding eSignature requests.

Finalize Workflow Tickets

Prerequisites

Set up the signed document.

Context

The stage owner of this process is a finalizer. They oversee this stage and fulfill their assigned criteria.

They can reassign different post-signature steps and send reminders to participants in the **Finalize** stage to keep the post-signature checklist process moving forward. Any user in the workspace or the ticket submitter can do this.

Steps

1. Click **Workflow**.
2. On the **Workflow Builder** tab, select a ticket.
3. On the **Finalize** tab, select a task list coordinator.
4. Click **Add Finalize Phase**.

Result

Contract Management and Document Intelligence archives the document in the repository. You can configure each workflow to place archived documents into folders using a specified naming convention.

Example

[Workflow Name][Counterparty Name][Effective Date].

Next Steps

When you record an effective date in the workflow, we autopopulate that date in the **Effective Date** field for that document in the repository.

Automate Redlining With AI Drafting Tools

Context

AI drafting tools include:

- Automated Redlining.
- Clause Creator.
- Large language models to make drafting and editing contract clauses more efficient and consistent.

Note: Contract Management and Document Intelligence doesn’t conduct legal analysis or provide legal advice when you use Automated Redlining and Clause Creator; we merely aid legal teams in enhancing efficiency. Users can continue their due diligence and legal consultation when using our tool.

Steps

1. Click **Workflow**.

2. On the **Tickets** tab, select a ticket.
3. Click the document name.

   Contract Management and Document Intelligence opens the document in Document Viewer.
4. Highlight a clause and click **AI Drafting Tools**.

   On PDF files, click **Convert to Docx** to edit the document.
5. Complete the **Automated Redlining** tab:

   Enter instructions for the AI to modify the clause.

   (Optional) Select a **Clause Type** and **Clause Variation** to populate instructions from the Clause Library.
6. Click **Generate**.
7. Complete the task:
   - Select **Edit Mode** to change the draft redlines.
   - Click **Accept Edit** to apply the redlined changes to your document.

Create Clauses With AI Drafting Tools

Context

AI Drafting Tools include:

- Automated Redlining.
- Clause Creator.
- Large language models to make drafting and editing contract clauses more efficient and consistent.

Contract Management and Document Intelligence doesn’t conduct legal analysis or provide legal advice; we merely aid legal teams in enhancing efficiency when you use Automated Redlining and Clause Creator. Users can continue their due diligence and legal consultation when using our tool.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a ticket.
3. Click the document name.

   Contract Management and Document Intelligence opens the document in Document Viewer.
4. Highlight a clause and click AI Drafting Tools.

   When the file is a pdf, click **Convert to Docx** to edit the document.
5. On the **Clause Creator** tab, add instructions to briefly describe the edits you want to make.
6. Click **Generate**.
7. Click **Insert Clause**.

   Contract Management and Document Intelligence adds the clause to your document.

Steps: Edit Templates

Prerequisites

Enable access to **Workflow Builder**.

Upload templates with field mappings.

Context

You can manage field mappings on uploaded templates and configure conditions to automate workflows efficiently.

Steps

1. Click **Workflow**.
2. On the **Workflow Builder** tab, select a workflow.
3. On the **Fields** tab, edit fields.

   Click **Add Field**, select a field, and enter a field name.

   Click **Remove** to remove a field or a link.
4. Update the source file and re-upload it using the **Replace Template** link in the document interface.
5. On the **Conditions** tab, click **Add Condition**.

   You can:

   - Enter a name for the condition.
   - Configure logic for the condition in the **Expression** section.
   - Add a rule or a section to build the condition.

Result

We update the template with new field mappings based on your configurations.

Finalize Workflows

Prerequisites

- Enable access to Workflow Builder.
- Upload signed contract documents.
- Identify finalization steps to complete the workflow.

Context

You can define post-signature tasks required to complete a contract in Workflow Builder. You can assign a task list coordinator, and add finalization phases and tasks. You can also configure the workflow to automatically skip unnecessary steps, enabling participants to focus on relevant steps. When you skip a stage, Contract Management and Document Intelligence removes all related tasks and approvals from that part of the workflow.

Steps

1. Click **Workflow**.
2. On the **Workflow Builder** tab, select a workflow.
3. Select a task list coordinator.
4. Click **Add Finalize Phase**.

   You can enter a name and a description for the phase.
5. Click **Add Task**.

   Configure actions to complete the phase.
6. (Optional) Select **Skip Stage**.

   Configure the conditions to skip the stage.

   Repeat for any other stages that are not required.

Next Steps

- Monitor the progress of finalization tasks from the workflow dashboard.
- Notify participants when the contract is fully finalized and archived.

Set Up Signing Workflows

Prerequisites

Enable access to **Workflow Builder**.

Upload documents to workflows.

Identify users, groups, or departments as signers.

Context

You can configure who signs a document, establish the signing order, and manage signer responsibilities in Workflow Builder. You can apply conditions to dynamically add or remove recipients, and track signing status throughout the workflow.

Steps

1. Click **Workflow**.
2. On the **Workflow Builder** tab, select a workflow.
    a) Select a user, group, or department as the recipient.
    b) (Optional) Click **Specify Condition**. You can define conditions to dynamically add or remove signers.
3. Click **Sign**.
4. Assign a signing coordinator by selecting *Ticket Submitter* or a workspace user.

    The signing coordinator monitors the signing process and ensures all signers complete their actions.

    Note: Avoid modifying the signing order or recipients directly in the eSignature tool such as Docusign, as it may cause discrepancies in the workflow.

    The application automatically routes signers in the order of workflow stages.
5. In Docusign, specify the signing order.

    You can maintain the signing order or modify it to allow all recipients to sign simultaneously.

    eSignature Statuses

    Use the eSignature status indicators to track each signer's actions during the signing phase.

Status	Description
Signature Request Not Sent	The sender didn't send the document for signature.
Signature Pending	The sender sent the document and is waiting for the signer to act.
Signed	The signer completed the e-signature.
Signed via Upload	The person who signed the document externally and uploaded it manually using wet ink or an unsupported tool.

Result

You configure the signing process, and the workflow tracks the signer's progress based on the defined conditions and signing order.

Next Steps

Monitor signer progress using the **eSignature Status** field.

Test the workflow to verify expected signer behavior.

Proceed to the next workflow phase once all signers have completed their action.

Set Up Reviews in Workflows

Prerequisites

Enable access to workflows.

Upload document templates to workflows.

Identify users, groups, or departments as reviewers.

Context

You can specify who reviews a document, when the review applies, and how the workflow proceeds based on the outcome in Workflow Builder. Each phase includes a coordinator and 1 or more reviewers, and you can set optional conditions to apply to the review when needed.

You can assign individual users, groups, or departments as reviewers. The coordinator manages the review process.

Steps

1. Click **Workflow**.
2. On the **Workflow Builder** tab, select a workflow.
3. Click **Review**.
4. From the **Review Coordinator** prompt, select **Ticket Submitter** or a user.
5. Click **Add Review Phase**.
6. Enter a name and a description.
7. Click **Add Review**.
8. Select **Specify Condition**.
9. Select a condition and the logic.
10. From the **Reviewers** prompt, select users, groups, or departments.

    When assigning a group, you can enter the number of reviewers required to complete the review.
11. Click **Save**.

Result

When a review phase is active, we send an email notification to assigned reviewers with the document and three available actions:

- **Approve:** Confirms the update and allows the workflow to continue.
- **Reject:** Declines the update and halts progression.
- **View Ticket:** Opens the workflow item for more detail.

After a reviewer selects an action, we display a confirmation page in a new tab.

When you select a group as a reviewer, Contract Management and Document Intelligence randomly selects 1 reviewer. That reviewer must complete the task before the workflow can proceed.

Set Up a Document Template in Workflow Builder

Prerequisites

Enable access to Workflow Builder.

Context

To generate customized documents in a workflow, you can upload a .docx template and define placeholders for variable data and conditional logic for optional content.

You can:

- Automate the creation of personalized documents.
- Streamline document generation, ensuring accuracy and consistency across all customized outputs.
- Improve efficiency and scalability in document production.

Steps

1. In a Microsoft Word .docx file, insert a placeholder for each piece of variable information you want to pull from the intake form.

   Use the {{variableName}} for the placeholder and include each placeholder in a single paragraph.
2. Mark conditional text for optional clauses or sections.

   Use the {{SectionName.}}[[Text to include conditionally]] syntax.
3. (Optional) Prepare a dynamic table.

   Follow the instructions in the linked video resource to structure your table in the .docx file.
4. Save your document as a .docx file.
5. In Contract Management and Document Intelligence, click **Workflow**.
6. On the **Workflow Builder** tab, click **New Workflow**.
7. Configure the document type allowances. See Concept: Document Type Allowances on page 56 for more information.
8. Upload your .docx template.
9. On the **Source** tab on the workflow, configure intake form fields and conditions.
10. (Optional) Modify your template.

    If you need to add or remove placeholders or conditional text, click **Edit** and download the .docx file. You can edit the file on your computer and reupload when you're done.

Result

Workday uses your document to generate a contract.

Create Ticket for Contract Review

Prerequisites

Enable access to workflows.

Context

You can initiate contract reviews by creating tickets based on available workflow templates.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, click **New Ticket** to view a list of available workflow templates.
3. Select a workflow.
4. Complete the form.
5. Click **Create Ticket**.

Result

You can find the new ticket in the **Edit** stage on the **In Progress** tab.

Next Steps

Select whether to send your ticket to review, as well as share the contract or view your ticket before submitting it for review.

Redline a Document

Prerequisites

Have your document in the **Edit** or **Review** stage.

Context

You can use redlining to compare 2 contract versions. You can then create a *redline*, a third version of the contract that displays the text you added or removed as tracked changes. You can accept or reject these changes.

This redline version is the same as the revised version, but it highlights all changes from the original as tracked changes that a reviewer can accept or reject.

You can’t edit PDF files directly in the document editor. You can use the Convert_to_Docx.png function in our document viewer to create a new .docx version. You can then edit the .docx version in our editor using the features outlined in this article.

You can only convert the latest version of your document. We generate a .docx file, and this file becomes the new version in your workflow ticket.

Steps

1. Click **Workflow**.
2. On the **Workflow** tab, click **Tickets**.
3. Select a ticket.
4. Select a version of the document.

   You can review tracked changes in 1 document version or review a redline of changes between 2 document versions with these modes:

   - *Show All Markup*
   - *Show Original Document*
   - *Show Final Document*

   The current version is the most recent saved version.

5. From the **Compare To** prompt, select a version of the document to compare and generate a redline.

   You can only compare .doc(x) files.
6. Click **Save as a New Version**.
7. Click **Upload New Version**.

   You can:

   - Add notes.
   - Attach a new document.
   - Indicate when this is a counterparty document.
   - Upload and generate redlines.

   You can't currently share a redline preview. To share a redline, you need to save it as a new version.

   When you can't access the **Share Current Version** option, you need to click the **Compare To** prompt and select **Stop Comparing**.

Next Steps

Click **Download** to download the redline version.

Click **Share** to distribute the current version internally or externally.

Edit Documents

Context

In Contract Management and Document Intelligence, you can add or remove text and download documents.

The edit mode provides various options, including:

- *Accessing edit options.*
- *Comparing 2 document versions to generate a redline.*
- *Configuring view settings.*
- *Downloading, sharing, and deleting the current version.*
- *Managing side panel options.*
- *Saving and uploading new versions.*
- *Toggling between document versions.*

See Redline a Document on page 50 for more information.

You can edit the document with 1 of these editors:

- Document Editor for Contract Management and Document Intelligence.
- Microsoft Word for the Web.

Note: You need to convert PDF documents to .docx files before you can edit them.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a ticket.
3. Click the document name.

4. Click **Edit**.

   You can edit only the most recent internal version. When the most recent version is Counterparty, you can't edit the document.

   New or modified text appears in red.

   You can manage tracked changes from the side panel.
5. Click **Done Editing**.

Edit Documents Using Microsoft Word for the Web

Context

Microsoft Word for the Web integrates with workflows, offering an alternative editing experience to the native editor for Contract Management and Document Intelligence.

Word for the Web provides a streamlined set of capabilities compared to Word for Desktop. The Web version supports document drafting directly in a web browser or on a mobile device, such as a tablet or iPad.

Note:

- Word for the Web does not support features such as columns and section breaks. For a full feature comparison between the 2 editors, see Word Features Comparison: Web vs Desktop.
- For a list of supported web browsers for using Word for the Web, see What browsers does Microsoft 365 for the web support?
- Word for the Web is developed by Microsoft and does not contain any of the side panel options as seen in the Editor for Contract Management and Document Intelligence, such as Automated Redlining, Clause Library, and so on.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a ticket.
3. Click the document name.
4. Click **Edit Online**.
5. From the **Edit Online** menu, select **Microsoft Word for the Web**.

   You can:

   - Edit only the most recent internal version.
   - Manage tracked changes using the **Review** menu.

Cancel, Delete, or Rename Workflow Tickets

Context

You can manage workflow tickets that are in progress for better organization and identification.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a workflow.

3. From the **More** menu, complete the task:

Option	Description
Rename Ticket	Enter a new name for the ticket, and click **Rename Ticket**.
Delete Ticket	Click **Delete Ticket**. You can't undo a ticket deletion.
Cancel Ticket	Click **Cancel Ticket.** You can enter a comment regarding the ticket cancellation. You can't undo a cancellation, but you can access the ticket details on the **Cancelled** tab. Contract Management and Document Intelligence doesn't progress the ticket through the remaining stages.

Concept: Workflow Builder Overview

You can use Workflow Builder to define and automate each stage of a document's lifecycle. You can help ensure consistent and efficient document processing with proper configuration of each stage before deployment. Example: A contract approval workflow can include stages for document intake, review, signing, and finalization.

Workflow Configuration Stages

Each workflow includes these configuration points that determine how documents progress through Contract Management and Document Intelligence:

Document type allowances: Define the types of documents the workflow supports. Example: Users can upload existing documents, generate documents from a template, or do both.

Form: Configure intake form questions. You can specify that responses populate template fields when applicable. You can also apply conditions that show or hide fields, clauses, or requirements based on submitted answers.

Review: Assign reviewers and approvers for each item. Specify when approvals must occur.

Sign: Identify signers and configure the required e-signature integration.

Finalize: Specify actions that occur after the document is signed. Example: Create a billing record or set up a customer account.

Settings: Configure additional workflow settings such as archive destinations, file naming conventions, data field mappings, notification preferences, and user access permissions.

Concept: Forms in Workflows

You can use the **Form** tab in Workflow Builder to configure questions that collect information from submitters. Contract Management and Document Intelligence uses these responses to populate fields in the document template and support workflow actions.

Upload a template to start setting up the form so all required fields are available during document creation.

Form Components

You can add sections to forms using these components:

- Linked fields

- Predefined responses
- Default values
- Conditions

Linked fields: You can link a question to a template field to automatically populate the document. *Example:* Link “Who will be the counterparty signer?” to the **Counterparty Signer Name** field.

Predefined responses: You can enter custom responses in the **Available Options** field.

Enter each option in **Available Options**.

Default values: You can enter a default value for text fields. Other field types support defaults based on their format.

Conditions: Click **Specify Condition** and configure a condition. Contract Management and Document Intelligence displays a question when these conditions are met.

Manage Questions and Sections

You can update the form structure by reordering, removing, or deleting the section or question using the related actions menu.

Concept: Cycle Time Tracker

The cycle time tracker feature enables users to set and track which party is responsible for a workflow ticket. You can use the **Enable Cycle Time Tracking** check box on the **Settings** tab for the workflow to show or hide cycle time tracking on the intake form when users create a workflow ticket.

With the cycle time tracking feature, users can:

- Set the responsible internal or external party when creating a ticket, uploading a new workflow document version, or sharing a workflow document.
- View the responsible party on the **Workflow Tickets** tab or the ticket detail page.
- Track the history of responsible parties and edit start and end times on the **Tickets** tab or the ticket detail page.
- Analyze data on the **Open Tickets** and **Completed Tickets** dashboards.

Date Fields Mapping

To preserve specific answers from form questions when you move a document to the contracts repository, you can map intake form fields to custom fields in the repository.

To map custom field entries to fields in the document repository, select the appropriate field from the workflow process and link it to an existing document repository field. The available mapping options depend on matching field types.

Example: Date fields in the contract repository are available as mapping options only for date fields in the workflow.

Notifications

You can configure notifications to send alerts to individuals or groups upon workflow completion. In the **Notifications** section, you can specify recipients and include a custom message with the notification.

Permissions

You can configure permissions to control who can view and access tickets.

Concept: Workflow Access Controls

Workflow access controls enable you to determine which users can access submitted tickets.

You can configure access for:

- All users
- All users except specific users
- Specific users

Submitter Access

You can enable full or limited access for ticket submitters throughout the workflow. When you select Limited Access, you can specify the actions that submitters can perform on the **Edit**, **Review**, **Sign**, and **Finalize** phases.

Submitters must have View access on a stage to have additional permissions on that stage. Example: To enable submitters to edit form information on the **Review** stage, you must also enable View access on the **Review** stage. You can override limited access settings with the **See Submitted Tickets** option. We don't apply limited access settings when all users can view submitted tickets. We limit submitter access settings when you select **only specific users**.

Intake Form Link

Workday generates a direct link to the intake form after you complete and save the workflow. You can copy this link on the **Settings** tab and share it with users for direct form access.

Concept: Workflow Settings

When you access workflows in Workflow Builder on the **Workflow** tab, you can use the **Settings** tab to configure:

- Archive locations.
- Cycle time tracking.
- Data field mappings for the contract manager repository.
- File naming systems.
- Notification settings.
- Permissions.
- Ticket naming conventions.

Ticket Naming Conventions

When creating or modifying a workflow, you can use either the system name (**Workflow Name + Counterparties + Ticket Created Date**) or define a custom naming format for each ticket generated by the workflow.

To specify a naming format, clear the **Keep System Default Name** option and define the rules for ticket names.

Naming formats include:

- Fixed text (text that remains the same across tickets)
- Dynamic tags (represented by the # symbol) that populate ticket data. We support these dynamic tags:
    - Paper Type
    - Submitter Department
    - Submitter Name
    - Ticket Created Date

Workflow names or fields include:

- **User**
- **Department**
- **Date**

- **Text (Single line)**
- **Dropdown (Choose 1)**

Archive Location

Destination: Select a folder in the Contract Manager to store the executed document.

Subfolder: Define a system to generate or locate the appropriate subfolder for storing the executed document. You can use metafields to customize folder names by entering # to access available metafields.

Naming Format: Establish a naming system to generate a file name for the executed document. You can also use metafields for customization by entering # to access available metafields. Once you complete the ticket and move the document to the contract repository, apply this naming format.

Concept: Document Type Allowances

When you create a workflow in Workflow Builder, you can configure document type allowances that enable users to upload documents, generate them from templates, or use both methods.

You can configure 1 of these options:

- **Upload existing documents:** Users can upload .doc or .docx files. You can enable additional formats as needed.
- **Generate documents from templates:** Users can create documents with predefined templates. We support clause placeholders and custom fields in templates for controlled customization.
- **Enable both methods:** Users can upload documents and generate them from templates in the same workflow.

Fields and Conditions

You can use templates that include preset and custom fields that capture data from intake forms.

You can configure these fields on the **Fields** tab during workflow setup.

Preset Fields

We recommend including these commonly used fields in legal and contract documents:

- Agreement Date
- Contract Type
- Governing Law
- Master Agreement Date

Parties (internal or counterparty):

- Address
- Contact Name
- Contact Phone
- Name
- Text

Signers (internal or counterparty):

- Date Signed
- Email
- Text
- Title
- Signer Initials
- Name
- Signature

Custom Field Types

Custom fields enable greater flexibility. We initially label fields as **Unassigned** and you must name them to incorporate in the workflow.

You can select these custom field types:

- Address
- Attachments
- Checkbox
- Date
- Department
- Dropdown (choose multiple)
- Dropdown (choose one)
- Email
- Initials
- Monetary Value
- Number
- Percentage
- Radio
- Text (paragraph)
- Text (single line)
- Time Period
- User

When you assign these fields, we display them in the **Contract** section with their designated field type.

e-Signature Options for Signature Fields

When the workflow integrates with **Docusign** or **Adobe Sign**, you can configure signature fields to:

- **Prepopulate with form data:** Workday retrieves signer and party information from the intake form responses.
- **Use placeholder tags:** Tags from the e-signature platform support features such as signer reassignment and ensure accurate placement in the signature block.

Concept: Skipping Workflow Stages

You can streamline workflows by configuring skipped stages so that ticket participants focus only on necessary steps. This feature enhances efficiency by either excluding unnecessary stages or including stages under specific conditions.

Unconditional Stage Skipping

You can permanently exclude any unnecessary stage from your workflow with the **Skip Stage** option on workflows in Workflow Builder. This feature prevents ticket participants from viewing the selected stage.

Conditional Stage Skipping

You can also limit stage availability based on certain criteria by setting a condition that determines if the workflow skips or includes a stage.

Example: Create a condition based on responses to your intake form. In an NDA workflow, set the workflow to skip the **Review** stage unless the submitter responds Yes to the question Does this require review from Legal? The legal team is only contacted when necessary, enabling you to submit, sign, and complete standard NDAs quickly.

You can also configure the workflow to skip the **Edit** and **Finalize** stages to further streamline the ticket lifecycle.

For more information on creating conditions, see Concept: Document Type Allowances on page 56

You can also view a video demonstrating an NDA workflow where the **Review** stage is not needed from the participant's perspective.

Concept: Workflow Tickets Overview

The **Tickets** tab on the workflow console provides a centralized location for users to view tickets across all stages, act on tickets where they hold the current responsibility, and initiate new workflow tickets.

To access information about your completed and ongoing workflow tickets, navigate to the workflow console and select the **Tickets** tab. You can view all your ticket data on a convenient tabbed interface. You can utilize the search function on any tab to locate specific tickets. The **Assigned To** column indicates who is currently working on a ticket. The **Participants** column lists other users assigned to the ticket.

Needs Action Tab

On this tab, you can view a list of open tickets requiring your action. You can also view a current count, enabling a quick assessment of tickets needing your attention. When the current user sees a ticket on their **Needs Action** tab during the **Review** stage, based on their role as coordinator or assignee and the task status (pending or complete).

In Progress Tab

This tab displays all your active tickets and a count of the tickets currently in progress. You can track the current stage of each ticket on this tab. Click a ticket to view details, identify the next action owner, and read any comments from stakeholders. Note that the items you can view in the ticket details vary depending on how workflow administrators configure the access settings.

Done Tab

On this tab, you can view a list of all completed tickets. These tickets are signed and executed, and associated documents are located in your contracts repository.

All Tab

This tab consolidates all tickets that are visible on the **Needs Action**, **In Progress**, and **Done** tabs.

Concept: Document Templates in Workflow Builder

Document templates enable controlled customization of documents that workflows generate. By uploading a .docx template and defining placeholders and conditional logic, you can create dynamic documents populated by intake form responses.

Supported File Types

Contract Management and Document Intelligence supports .docx files created with recent versions of Microsoft Word in Workflow Builder. Exported .docx files from Google Docs are not always compatible. If you encounter an issue with a .docx file from Google Doc, recreate the document in Word and save it as a .docx file.

Document Fields and Placeholders

You can create placeholders in your template to allow custom text or variable values, which ticket submitters provide with the intake form. Consider these factors when you create placeholders:

- **Syntax:** You can enclose placeholders in double braces. Example: {{variable}}.
- **Limitations:** Your placeholders reside in the body of the document and can’t span multiple paragraphs. You can’t create placeholders in headers or footers.
- **Workflow:** After you upload the template, Contract Management and Document Intelligence identifies these placeholders for review, and you subsequently link them to specific intake form answers.

Conditional Text

You can use conditional text to include clauses or exhibits in the generated document based on logic that you define on the intake form customization step.

Indicate conditional sections by enclosing a name in single curly brackets followed by a period, and the conditional text itself in double brackets. Example: {{Section.}}[[Conditional Text]].

Nested Conditionals

You can create conditional statements in other conditional statements. While nesting is unlimited, table structures impose specific limitations:

- Conditionals cannot begin outside a table and end within it, or vice versa.
- In tables with multiple columns, all conditionals in a table must be confined to a single cell; they can’t span rows or columns. Within a single cell, you can have unlimited nested conditionals.
- In single-column tables, conditionals can span multiple rows.

Dynamic Rows on Tables

You can configure tables to dynamically add rows based on user selections in the intake form. Refer to the video for detailed instructions on how to implement this in your source document.

Concept: Best Practices for the Contract Management and Document Intelligence Document Editor

In Contract Management and Document Intelligence, you can:

- Use tables for placeholders.
- Use images instead of shapes when appropriate.
- Use PNG or JPG files instead of vector images.
- Ensure graphics do not overlap before you use the compare feature.
- Delete unwanted text for redlining.
- Save documents as .docx files. Contract Management and Document Intelligence automatically converts .doc files to .docx for editing.
- Adjust or remove misplaced headers or footers to move forward.
- Place page breaks inside double brackets to avoid blank pages.
- Turn on **Show Formatting** in Word to view page break locations.
- For multiple editors, use Microsoft Word on the Web.

Contract Management and Document Intelligence Document Editor does not support:

- Shapes.
- Vector images.
- Strikethrough formatting for redlining.
- Editing .rtf files.
- Multiple users editing a document at the same time.
- Documents with Content Control.
- Cross-references.
- Word documents created from HTML. Contract Management and Document Intelligence does not fully support documents converted from PDF. You might see formatting differences.
- Documents with watermarks; Contract Management and Document Intelligence might remove them.
- Documents with XHTML content.
- Overlapping text and graphics that cause issues when generating red lines.
- Formatting changes such as fonts or highlights. Contract Management and Document Intelligence only records tracked changes when characters change.

- Times for tracked changes made in Microsoft Word outside of Contract Management and Document Intelligence because Word does not attach time zones.

When you work with content in Word, XHTML can surface. You might incorporate XHTML content into a Word document with these methods:

- **Copy-pasting**: When you copy content from a website and paste it into Word, the XHTML-based formatting remains.
- **Opening .XHTML files:** Word opens .XHTML files directly, converting them into a .docx format.
- **Embedding in Add-ins or Macros:** Some add-ins or macros inject XHTML content into a Word document.

Reference: Ticket and Document Comments

Ticket comments are general notes you make directly on the workflow ticket, and document comments specifically tie to the content in the ticket document.

Ticket Document Comments	**Visibility:** Side panel. **Availability:** Viewing or editing a ticket document in the Editor for Contract Management and Document Intelligence. **Note:** • When you view a ticket document or edit it in the Editor for Contract Management and Document Intelligence, you find comments made in Word for the Web. • The right-hand side panel does not appear while you actively edit in Word for the Web. **Note:** You cannot: • Share ticket comments with non-contract management and document intelligence users. Instead, use document comments for external sharing. • You can only create document comments in Word for the Web.
Workflow Ticket Comments	**Visibility:** Side panel. **Availability:** Viewing or editing a ticket document in the Editor for Contract Management and Document Intelligence.

Contract Management and Document Intelligence delivers a quick reference for inserting and replying to document comments.

Option	Description
Inserting and replying	Available when editing in the Editor for Contract Management and Document Intelligence using either option: • **Edit**

Option	Description
	• **Edit online # Microsoft Word for the Web.**
Comment persistence	Document comments persist in a copy of the document when you use these options unless you delete them: • Save as new version • Download new version • Share current version
Visibility	Comments made using the Editor for Contract Management and Document Intelligence appear in the right-hand side panel in **Comments** when you view or edit a document.
Ticket-level visibility	Document comments don't appear at the main ticket level.

Reference: Workflow Intake Form Links

You can share a direct link to a workflow intake form and enable users to navigate directly to the form to submit a new ticket. You can embed the links in external platforms or internal resources.

You must have access to Workflow Builder and own a published workflow to share workflow intake form links.

You can obtain the unique link for a workflow intake form using these methods:

Option	Description
New Tickets	Click **Workflow**, and on the **Tickets** tab, click **New Ticket**. Select either the: *Copy Intake Form Link* option on the workflow. Workflow, then the *Copy Intake Form Link* option on the **Create Ticket** tab.
Workflow Builder	Click **Workflow**, and on the **Workflow Builder** tab, select either the: Copy *Intake Form Link* from the **More** menu on the workflow you want to share. Contract Management and Document Intelligence automatically copies the link to your clipboard. Workflow you want to share. On the **Settings** tab, you can copy the intake form link.

Reference: Workflow Ticket Chart Notifications

Contract Management and Document Intelligence sends email notifications during the workflow process to:

- Creates accountability.
- Drives engagement.
- Notifies individuals.

Note:

- You can't customize workflow email notifications; this includes the content, timing, and recipients.
- Contract Management and Document Intelligence doesn't send an email when the user advancing the page is also the recipient.

This table outlines the specifics for each email notification in the **Review** stage.

Initiating Action	Recipient	Email subject	Message
The submitter moves the ticket from **Edit** to **Review**.	Review coordinator	New assignment	The document moved from **Edit** to **Review**.
You are the next reviewer, or the review coordinator reassigned the current step to you.	Reviewer	You were assigned as a reviewer.	You were assigned as a reviewer.
Users create a new version by uploading a new document or changing the form information.	Review coordinator	[Username] created a new version.	[Username] created a new version.
The review coordinator reassigns an approval step to a new user.	The review coordinator assigns an approval step	[Coordinator] or [Admin] removed you as a reviewer.	[Coordinator] or [Admin] removed you as a reviewer.
The review coordinator marks an item as approved.	Review coordinator	[Username] approved an item.	[Username] completed the following item. Review Stage: [Stage name] / Review Criteria: [Criteria name]
The review coordinator marks an item as rejected.	Review coordinator	[Username] rejected an item.	[Username] rejected the following item. Review Stage: [Stage name] / Review Criteria: [Criteria name] Note: [Note content]
All items are approved, and the ticket is ready to move to the **Sign** stage.	Review coordinator	Awaiting confirmation	The document has completed the **Review** stage and is awaiting confirmation.

This table outlines the specifics for each email notification in the **Sign** stage.

Initiating Action	Recipient	Email subject	Message
The review coordinator moves the ticket from **Review** to **Sign**.	Ticket submitter	Document moved from **Review** to **Sign**.	The document moved from **Review** to **Sign**.
The review coordinator moves the ticket from **Review** to **Sign**.	Signature coordinator	You were assigned as the signature coordinator.	You were assigned as the signature coordinator.

Initiating Action	Recipient	Email subject	Message
The review coordinator moves the ticket from **Review** to **Sign**.	An internal party signs this document. We exclude counterparty signers.	You were assigned as a signer.	You were assigned as a signer.
A signer completes the document through e-signature.	Signature coordinator	[Signer name] signed the document.	[Signer name] signed the document.
All signatures are collected, and the ticket awaits movement to the **Finalize** stage.	Signature coordinator	Awaiting confirmation.	All signers have signed [Workflow Ticket Name].

This table outlines the specifics for each email notification in the **Finalize** stage.

Initiating Action	Recipient	Email subject	Message
The signature coordinator moves the ticket from **Sign** to **Finalize**.	Ticket submitter	The document moved from **Sign** to **Finalize**.	The document moved from **Sign** to **Finalize**.
The signature coordinator moves the ticket from **Sign** to **Finalize**.	Finalize coordinator	You were assigned as the checklist coordinator.	You were assigned as the checklist coordinator.
You are the next finalizer, or the finalize coordinator reassigned the current step to you.	Finalizer	You were assigned as a finalizer.	You were assigned as a finalizer.
The finalize coordinator reassigns a finalize step to a new user.	The user previously assigned to the step.	[Coordinator] or [Admin] removed you as a finalizer.	[Coordinator] or [Admin] removed you as a finalizer.
The finalize coordinator approves or rejects the item.	Finalize coordinator	[Username] marked items as done.	[Username] marked the following item as done. Finalize criteria: [Criteria name]
All items are marked as done, and the ticket is ready for archiving.	Finalize coordinator	Awaiting confirmation.	The document has completed the **Finalize** stage and is awaiting confirmation.
The finalize coordinator moves the ticket from **Finalize** to **Done**.	Ticket submitter	The document was moved from **Finalize** to **Done**.	The document was moved from **Finalize** to **Done**.

This table outlines the specifics for each email notification in all stages.

Initiating Action	Recipient	Email subject	Message
Finalizer mentions you in the comments	Finalizer mentions you	[Username] mentioned you in a comment.	[Username] mentioned you in a comment.

Initiating Action	Recipient	Email subject	Message
			[Comment content]
Finalizer adds you as a participant	Finalizer adds you	Ticket name	You were added as a participant.

Library

Add Clauses

Context
You can add clauses to the library, organize them and modify them as needed for reuse, saving time on redrafting.

Steps

1. Click **Library**.
2. Click **Add Clause**.
3. Enter a **Clause Name**.
4. (Optional) Add guidance text.
5. Click **Add Clause**.

   You can insert clauses from the library directly into your documents using workflows.

Access the More menu on the clause name to edit and delete clauses.

6. From the **More** menu on the clause, select *Edit* or *Delete*
7. Edit the clause and save.

Add Clause Variations

Prerequisites
Add a Clause.

Context
You can add clause variations to organize them easily within the clause library.

Steps

1. Click **Library**.
2. On the clause name, click **Add Clause Variation**.
3. Select a Position
4. (Optional) Add guidance notes.
5. Enter the clause text .
6. Click **Add Clause Variation**.

Concept: Library

We enable users to create and organize a library of clauses with guidance on when to use each. You can access the library from our top navigation, where you can:

- Add, copy, edit or delete the clause. Organize and label them based on its type.
- Use the cause Library as a reference for markups and requested edits, instead of redrafting from scratch.
- With just 2 clicks, you can drop in preferred language or acceptable fallback clauses, which administrators can designate for each clause type.
- To ensure legal and business best practices, provide contract negotiators with guidance on preferred and fallback clauses, flag unacceptable or non-negotiable terms, and supply admin-generated guidance on using context-specific clause variations.
- Document terms that are never acceptable to help negotiators avoid:
  - Agreeing to risky terms and conditions.
  - Wasting time on negotiations that are unlikely to benefit the business.

Once logged into your Contract Management and Document Intelligence workspace, you will see the Library console. Clauses added to the Library can be filtered by using the clause name or position labels

- *Preferred* for clauses that are the first choice for contracts. We display preferred clauses with a green background. [Note: We can change this language.]
- *Fallback* for acceptable clauses that aren't the primary option. We display fallback clauses with a gray background.
- *Walk away* for clauses that are unacceptable for any contract. We display walk-away clauses with a red background.

Automation

Create Clauses

Context

You can create a clause with specific text and train the AI to recognize that language, allowing it to automatically find similar clauses in your other executed contracts.

Steps

1. Click **Automation**.
2. Click **New Clause**
3. Enter a name for the clause.
4. Enter the **Sample Text**.

   You can add more samples after you create the clause

We automatically generate the sample name based on the clause name and date. Customize the sample name for a more descriptive label.

5. Click **Create**.

Result

We display the clause on the Contract Summary section on the document's Contents tab and use it to identify related language on your documents.

Build a Document X-Ray Model

Prerequisites

Context

Steps

Result

Example

Next Steps

Reference: Document X-Ray Limitations

Concept: Automation Hub

The Automation Hub's bulk tag management feature enables Contract Management and Document Intelligence administrators to track and manage clauses created with Quick AI. Quick AI lets users tag a clause in a contract and find similar language across all contracts. This helps identify and track business-specific clauses not included in Contract Management and Document Intelligence standard clause library.

You can access the Automation Hub on the **Automation** tab in Contract Management and Document Intelligence to view and manage all clauses identified using Quick AI.

You can use these features on the Automation Hub:

- Quick AI: Tag a clause in 1contract and find similar language across all contracts. For more information see Manage Clauses.
- Clauses: Identify specific contract language for tracking and searching using sample text. You can create Quick AI clauses by bulk tagging text in a document.
- Samples: We use the sample text you enter to find similar language and create Quick AI clauses.
- Identifications: When we identify text that matches a sample, we highlight and label the text on the **Contents** tab of the document.

Concept: Clause List

On the Automation Hub, we display a list of clauses created in Contract Management and Document Intelligence. You can view these details for each clause:

- Clause name.
- Creator.
- Date of last identification in a document.
- Total number of identifications across all documents.
- Current status.

You can select the Active and Suspended options on the Status filter to view specific types of clauses.

We also display the clause count message above the clause list. The clause count message displays the number of custom clauses you can manage in the Automation Hub, based on your current license.

The message shows the:

- Maximum number of clauses allowed by your license.
- Number of clauses you can still create.

The count includes only active clauses. Contract Management and Document Intelligence removes deleted clauses from the count.

We don't display the total number of created clauses in the clause count message. You can find this number in the Automation Hub clause table or calculate it by subtracting remaining clauses from the maximum licensed number.

On the Fields tab, we display your custom clause usage percentage.

When clause usage reach:

- 100 percent, we display the message in red. You can continue creating custom clauses after exceeding your licensed limit. A customer success representative will contact you to discuss your options.
- 80-99 percent, we display the message in yellow.
- 79 percent or less, we display the message in gray.

Concept: Automation Hub Permissions

You can configure access to the Automation Hub by assigning Admin permission to users on the Admin Console. See the Set Up Users on page 70.

You can restrict users from tagging clause samples across documents by selecting the check box on the **Clause Tagging section** from the **More Settings** tab on the Admin Console.

When you enable this restriction, users can highlight and tag text in a document, but these tags only apply to that specific document. Contract Management and Document Intelligence doesn't treat these tags as samples for use across all documents, and they don't appear in the Automation Hub.

Watch the video: 1m 44s

Concept: Document X-Ray

Admin Console

Manage Roles

Context

You can manage and create custom roles with specific permissions.

On the **Roles** tab, you can:

- Edit roles.
- Delete roles.
- Duplicate roles (available for the Advanced Administration paid add-on only).
- View active roles from the related actions menu.

Additionally, you can only view the details of prebuilt roles.

Contract Management and Document Intelligence provides these prebuilt roles:

- **Administrator:** Can access all of Contract Management and Document Intelligence and the Admin Console settings pages.
- **Owner:** Can access all features and functionality as the administrator role and manage permissions for other users with the owner role.
- **Power User:** Can access all feature pages on the platform and run reports on the Search and Dashboards pages.
- **Workflow-only:** Can access workflow tickets (when enabled) with all of the same abilities as a power user on a ticket.

Steps

1. Click **Admin**.
2. (Optional) Click **New Role**.
3. Add a role name, description, and assign permission settings.

   Note:

   The Workflow permissions in this section do not affect workflow permissions in Builder Settings.
4. Click **Save**.
5. (Optional) From the **More** menu on a custom role, select these Advanced Administrator paid add-on options:
   - *View details*
   - *Edit role*
   - *Duplicate role*
   - *Delete role*
6. (Optional) From the **More** menu on a prebuilt role, select these Advanced Administrator paid add-on options:
   - *View details*
   - *Duplicate role*

Manage Departments

Context

You can:

- Create departments and subdepartments.
- Add users to subdepartments.
- View and edit the documents.

When you create a department, you can more easily manage settings for users in the department.

Steps

1. Click **Admin**.
2. Click **Departments**.
3. (Optional) Click Add **Department**.

4. (Optional) From the related actions menu of a department, select:
    - *Add Subdepartment*. You can also add subdepartments to a subdepartment.
    - *Rename*. You can also rename the department when you click the department name.
    - *Delete*. You can't undo this action.
5. (Optional) Click the subdepartment name.
    a) Click **Add Users**.

    Select users and click **Add Users**.

    - You can also add subdepartments.
    - You can also assign users to a department and select their permissions on the **Users** tab.

Manage Deleted and Restored Documents

Context

In the **Restoration Hub** in Contract Management and Document Intelligence, you can:

- Download copies of deleted documents.
- Restore deleted documents to any folder.

Admins can:

- Locate and find deleted documents using the **More Settings** prompt.
- Provide a reason for deleting a document.
- View deleted documents and who deleted them.
- When we perform an active sync, we don't display documents deleted from the storage provider site in the **Restoration Hub**.

You can only restore deleted files, not deleted folders. You can re-create deleted folders and apply filters by folder path to restore filter files.

Note: Contract Management and Document Intelligence permanently deletes files 90 days after deletion. You can't restore permanently deleted files.

Steps

1. Click **Admin**.
2. Click **Restoration Hub**.
3. From the **Restoration Hub** grid, you can:
    - Customize the column view.
    - Export results.
    - Navigate between pages.
4. Select the check box next to the file name.
5. (Optional) From the related actions menu, select:
    - *Restore* - You can select the folder for the restored document.
    - *Download*
    - *Delete permanently* - When selected, it confirms your selection in another pop-up.

Set Up Users

Prerequisites

Create users.

Context

In Contract Management and Document Intelligence, you can:

- Manage users from the Admin Console.
- Manage users with a simple Excel template.
- Edit and deactivate existing users.

You can use the *Import Users* and *Export Users* options to:

- Identify users who need their data updated.
- Perform periodic reviews of users.
- Provide information to other systems and coworkers in the organization.
- Remove users.

You can't deactivate users with single sign-on in Contract Management and Document Intelligence.

Steps

1. Click **Admin**.
2. Click **Users**.
    a) On the **Users** tab, add and remove users and set up access control features. See Manage Roles on page 67 and Manage Departments on page 68
3. Select **New User**.
4. From the related actions menu of a user, select:
    - Edit user
    - Deactivate user
    - Reset password

    In Contract Management and Document Intelligence, you can assign a role to the user to grant permissions. See Manage Roles on page 67 for more information.
5. (Optional) To export a user list to Excel, click **Export Users**.
6. (Optional) To make bulk user changes and additions, click **Import Users**.

    Note: We recommend that you export and save a separate copy of your current users list before performing bulk import actions. This gives you a restore point to go back to should an error arise during your user list import.

Set Up Data Fields

Prerequisites

In Contract Management and Document Intelligence, you can:

- Add custom fields to individual contracts.
- Bulk update fields from the Search Console.
- Create custom data fields to manually label documents.

Context

By adding custom fields, you can drill down on your contract data for more refined searching and a greater understanding of document contents.

On the **Data Fields** tab in Contract Management and Document Intelligence, you can add new custom data fields and edit existing fields to:

- Design upload and intake forms.
- Set up approval workflows.
- Track document information.

You can also:

- Manage post signature QA.
- Manage organization processes.
- Track information.

You can apply data fields:

- On a contract-type basis.
- Systemwide.

Contract Management and Document Intelligence provides these primary data field types:

- **General:** You can create as many additional data fields as you want using Workday-delivered fields.

Examples:

- Contract author.
- Contract owner.
- Tags.

- **SMART**: You can't delete SMART fields. See Reference: Smart Fields and Clauses on page 7.

Steps

1. Click **Admin**.
2. Click **Data Fields**.
3. Click **Add Section**.
4. Click **Create Section**.
5. In the new section, select **Add Data Field**.
6. Complete the task.

Option	Description
Field Type	Select a data field type.
Advanced Options	Select to add default values or to add help text. Default value is not available for the **Attachments** field type. *Display this field on upload*: When you select this option, the field appears every time a document is uploaded. The system limits this selection to 2-3 fields.
Document Types	Select to add data fields to document types. Indicate whether this field should be restricted to documents of a specific type.

7. (Optional) To move a data field within a section, select the multiline icon and drag the field to a new location.
8. (Optional) To move a data field to a different section, select **Move to Section** from the related actions menu, select the new section, and click **Move**.
9. (Optional) To move sections, click **Reorder Sections**, click and drag sections as needed, and click **Save Order**.

   Note: Include a clarifier in the field name to indicate custom fields. Example: When a new field name is **Title**, name it **Title_Company Name**.

Related Information
Tasks
Create Custom Views on page 16

Set Up Bulk Import Document Data

Context

You can:

- Create new fields and populate them with data.
- Migrate documents from another system.
- Perform actions beyond the capabilities of our platform bulk edit feature, such as deleting values for data fields.
- Replace a specific value in a data field.
- Standardize file names to comply with your organization's standards.

You cannot make changes to:

- Data about clauses.
- Document IDs.
- Importing data for unavailable documents in Contract Management and Document Intelligence.

Steps

1. Click **Admin**.
2. Click **More Settings**.
3. In the **Documents Metadata Bulk Upload** section, click **Upload**. See Bulk Edit Data Fields on page 31

   You can preview the document after upload to ensure it displays the correct information.
4. The exported spreadsheet:
   - Includes all data fields. See Set Up Data Fields on page 70.
   - Includes all documents in the client environment.
   - Includes DocSetID.
   - Excludes duplicates and clauses or any other secondary tabs.

Set Up Email Intake

Context

With email intake in Contract Management and Document Intelligence, you can:

- Configure your email to receive new documents. See Set Up Email Intake for Documents on page 102.
- Manage email rules to determine access.
- Set up a designated email folder for users to send documents to Contract Management and Document Intelligence.

Steps

1. Click **Admin.**
2. Click **Email Intake**.
3. Complete the task:

Option	Description
Email Settings	Set up email intake for new documents. **Note:** The intake email address is system-generated with a series of random characters that make it difficult to guess and submit documents without approved access.
Folder Settings	Set up a designated folder to upload emailed documents automatically.
Permissions and Whitelisting	Set up permissions to enable all users or particular groups of users to email documents to Contract Management and Document Intelligence.

Concept: Single Sign-On

On the **Single Sign-On (SAML)** tab on the Admin Console, you can set up access controls for your organization. We offer additional functionality with the Advanced Administration paid add-on, Integrated User Provisioning (SSO/SAML), wherever applicable.

To set up SSO, you need to meet these requirements:

- Your identity provider (IdP) must support SAML 2.0.
- You must configure Owner, Admin, or a custom role with Single Sign-On (SSO): Manage permission.

Your setup might vary depending on your IdP. See Steps: Configure Single Sign-On (SSO) for Contract Management and Document Intelligence on page 103 to set up SAML SSO.

Note: We don't support setting up SSO in multiple workspaces, as the entity ID is the same. We recommend setting up SSO in only 1 workspace.

Concept: More Settings

From the **Admin Console** in Contract Management and Document Intelligence, you can use the **More Settings** tab to configure additional settings for your organizational needs.

Root Folder Access Settings

You can configure access permissions for your root, or documents, folder to determine which documents users can view and interact with. You can provide all users or selected users with permissions to view and edit folders and their contents. See [Users hyperlink to be added].

When you set access permissions:

- The permissions are inherited by root folders, enabling you to maintain baseline access restrictions for folders.
- You can adjust the permissions for individual folders from your documents page.

Documents Metadata Bulk Upload

You can use the bulk upload feature to:

- Make large data adjustments to documents. See Set Up Bulk Import Document Data on page 72.
- Upload document metadata in bulk using our metadata template.

You can use these file formats for document updates:

- .xls
- .xlsx

Note: Bulk upload is not yet available in all workspaces.

Clause Quick AI

You can use this feature to disable custom clause tagging. You can:

- Prevent all users from tagging custom clause samples in contract documents.
- Restrict users from applying clause tags to documents in the Document Viewer.
- Select users to manage custom clause samples for viewing document details in the Automation Hub. Hyperlink to be added [Automation Overview: Administering and Managing Your Clauses]

Session Timeout

When you enable this setting, you can set an idle session timeout and reauthentication frequency. Contract Management and Document Intelligence applies the setting globally and to all users in the workspace.

You can:

- Configure the amount of time that users can be inactive before a session times out, which should be less than or equal to the reauthentication frequency.
- Select a reauthentication frequency to set the amount of time that elapses before users must sign in again.

When you change timeout settings, the changes take effect on new sessions only.

Watch the video: 0m 41s

Deleted Documents

You can use this option to require users to input a reason when they delete a document.

Concept: Integrations

You can set up customer relationship management (CRM) and storage sync integrations in Contract Management and Document Intelligence. When you use integrations to connect with external platforms and services, you can configure:

- CRM and sales systems such as Salesforce.
- Email intake.
- eSignature methods such as Adobe Sign and DocuSign. For details, see Concept: E-Signature Account Types on page 78.
- Third-party storage solutions. For details, see Use Public APIs to Create Integrations on page 105.

Best Practices

Search Documents

Context

You can quickly search for a subset of documents to perform a bulk edit or review duplicate entries by using document IDs (docIDs).

Steps

1. Click **Search**.
2. Enter a search term and run the search.
3. Click **Export Excel**.
4. Copy the document IDs from your Excel sheet.
5. Format the IDs into a comma-separated list.

   This format is required for the search filters.
6. Click **Add Filters**.
7. In the **Others Field** section, select Document Id.
8. On the Document ID filter, select *Contains Any* and enter the format IDs.
9. Click **Apply**.

Result

You can edit or review the records of the duplicate entries in bulk.

Export to Excel and Move Clauses to Documents Tab

Prerequisites

Ensure exported excel file containing clauses is available for moving.

Context

Contract Management and Document Intelligence enables you to export search results to Excel. Though we don't support the feature directly, you can further refine the search results by matching clauses from the Provision Information tab with their corresponding DocID on the Document Information tab for easier analysis.

You can combine them in Excel after exporting.

Steps

1. Click Search.
2. Enter a search term and run the search.
3. Click **Export Excel**.

4. Access the Excel file.

   Enter 1 of these formulas in a cell to

   - Include duplicates:

     ```
     =TRANSPOSE(FILTER('Provision Information'!$D$2:D$101, 'Provision
      Information'!$A$2:A$101 ='Document Information'!D2,"No Term
      Found"))
     ```
   - Exclude duplicates:

     ```
     =TRANSPOSE(FILTER('Provision Information'!$D$2:D$101, 'Provision
      Information'!$A$2:A$101 ='Document Information'!B2,"No Term
      Found"))
     ```
5. Update the row and cell numbers to match the data on the **Provision Information** tab of your file.

Result

You can view all of your data organized by DocID on 1 tab in Excel.

Integrations

E-Signature

Set Up Adobe Sign for E-Signatures

Prerequisites

- Configure a paid, enterprise-level Adobe Sign account. Adobe Sign requires a separate subscription from Acrobat Pro for enterprise.
- Set up the Adobe account to sign in to Adobe Sign. See Concept: E-Signature Account Types on page 78.
- Enable Workflow in the Contract Management and Document Intelligence account to access the E-Signature section.

Context

You can streamline contract management and automate e-signature collection by integrating Adobe Sign with Contract Management and Document Intelligence. You can integrate only 1 e-signature solution with a unique Contract Management and Document Intelligence account.

Steps

1. Click **Admin**.
2. Click **Integrations**.
3. On the **3rd Party Integrations** tab, click **Connect** for Adobe Sign.

Next Steps

1. On the Workflow tab, open an active ticket that has reached the *Sign* stage.
2. Click **Collect Signatures**.

3. Prepare the document for signature. Depending on the type of Adobe Sign account, when collecting signatures, coordinators sign in to:
    a. Individual accounts manually every time a contract is sent for electronic signature.
    b. Company accounts automatically using the account of the company.
4. Send the document for signature.
5. Adobe Sign emails the signatories in the order listed on the **Sign** page. Once signatories sign the document, Adobe moves the document from the *Sign* stage to indicate execution.

Counterparty signatory information pre-populates from the intake form or from e-signature tags. These tags enable the recipient of the signature request to reassign envelopes to appropriate signatories and update the signature block with the newly assigned signatory's information.

Internal signatories are predefined in each workflow. You can replace them with any internal signatory associated with that workflow. These fields can also use e-signature tags, enabling the recipient of the signature request to reassign envelopes to appropriate signatories and update the signature block with the new signatory's information.

Contract Lifecycle Management Workflow automatically places signatures on documents sent through Contract Management and Document Intelligence. When users send documents outside Contract Management and Document Intelligence, the signing coordinator must manually place fields in Adobe Sign before sending them.

Related Information
Concepts
Concept: E-Signature Account Types on page 78

Set Up Docusign for E-Signatures

Prerequisites

- Configure a paid, Docusign with API capabilities. This account can't be an FDA Part 11 account or a free account.
- Set up the Docusign account to sign in to Docusign. See Concept: E-Signature Account Types on page 78.
- Enable Workflow in the Contract Management and Document Intelligence account to access the E-Signature section.

Context

You can streamline contract management and automate e-signature collection by integrating Docusign with Contract Management and Document Intelligence. You can integrate only 1 e-signature solution with a unique Contract Management and Document Intelligence account.

Steps

1. Click **Admin.**
2. Click **Integrations**.
3. On the **3rd Party Integrations** tab, click **Connect** for Docusign.

Next Steps

1. On the Workflow tab, open an active ticket that has reached the *Sign* stage.
2. Click **Collect Signatures**.

3. Prepare the document for signature. Depending on the type of Docusign account, when collecting signatures, coordinators sign in:
    a. Individual accounts manually every time a contract is sent for electronic signature.
    b. Company accounts automatically using the account of the company.
4. Send the document for signature.
5. Docusign emails the signatories in the order listed on the **Sign** page. Once signatories sign the document, Docusign moves the document from the *Sign* stage to indicate execution.

Counterparty signatory information pre-populates from the intake form or from e-signature tags. These tags enable the recipient of the signature request to reassign envelopes to appropriate signatories and update the signature block with the newly assigned signatory's information.

Internal signatories are predefined in each workflow. You can replace them with any internal signatory associated with that workflow. These fields can also use e-signature tags, enabling the recipient of the signature request to reassign envelopes to appropriate signatories and update the signature block with the new signatory's information.

Contract Lifecycle Management Workflow automatically places signatures on documents sent through Contract Management and Document Intelligence. When you configure the **Signers** and **Parties** fields with e-Sign tags, recipients can reassign envelopes to the correct signatories and the signature block will populate with the new signatory's information. Otherwise,, the signing coordinator must manually place signatures in Docusign before sending the document for signature.

Related Information
Concepts

Concept: E-Signature Account Types on page 78

Concept: E-Signature Account Types

To use Contract Management and Document Intelligence e-signature integrations, you need to select 1 of these account types for signing in and collecting signatures.

- **Individual account:** Each signature coordinator signs in manually with their username and password every time they send a contract for electronic signature.
- **Company account:** All signature coordinators sign in automatically using the company account. The account administrator enters the company account details once, so individual coordinators don't need to provide their username and passwords during the contract signing workflow.

Related Information
Tasks

Set Up Adobe Sign for E-Signatures on page 76

Set Up Docusign for E-Signatures on page 77

FAQ: eSignatures in Contract Management and Document Intelligence

- Why isn't my ticket showing as signed in Contract Management and Document Intelligence, though it was signed using DocuSign/Adobe Sign?
- Can I change the password of the administrator account that's connected to our eSignature integration without disruption?
- Why am I not redirected to my eSignature provider when I click Collect Signatures?
- Why do I get an authentication error when I collect signatures on a workflow ticket and then sign in to Adobe Sign through Okta?
- Why do some recipients not receive my custom DocuSign message?
- In Workflow, what name is used on the eSignature request when collecting signatures?
- Are changes to the signing order in DocuSign reflected on my ticket?
- Do all signers, including the signing coordinator, have to sign in to the eSignature provider when collecting signatures in Workflow?

- Which eSignature providers integrate with Contract Management and Document Intelligence, and what are the account/license requirements?

Why isn't my ticket showing as signed in Contract Management and Document Intelligence, though it was signed using DocuSign/Adobe Sign?

A signature status might fail to update due to several possible reasons. From the ticket, click the **Check Signature Status** button to check for and, if applicable, update the signature status so that the ticket reflects it.

Can I change the password of the administrator account that's connected to our eSignature integration without disruption?

If you change the password for the administrator account that was used to connect the eSignature integration in Contract Management and Document Intelligence, we suggest that you follow these steps to avoid issues:

1. Delete the current integration connection in Contract Management and Document Intelligence.
2. Reconnect the integration using the same account and the updated password.

Note: Deleting the current connection cancels any active envelopes. This means that any existing signatures are removed.

Why am I not redirected to my eSignature provider when I click Collect Signatures?

This might happen if you previously clicked **Collect Signatures** on a workflow ticket, were redirected to the eSignature provider, and exited the platform before clicking **Send** to distribute the envelope.

We recommend that you:

- Ensure that you click **Send** in Adobe Sign or DocuSign before exiting the platform. When you don't do this, the **Collect Signatures** button remains clickable in Contract Management and Document Intelligence, but you aren't redirected to Adobe Sign or DocuSign if you click it again.
- Reset your signatures by returning to the previous page (typically, the *Review* stage) if the problem persists. Proceed to the *Sign* stage to restart the process.

Why do I get an authentication error when I collect signatures on a workflow ticket and then sign in to Adobe Sign through Okta?

This can occur if you're using Okta for your Adobe Sign account login and have not logged into Adobe Sign through Okta outside of Contract Management and Document Intelligence. To resolve this, sign in to Adobe:

1. Directly through your Okta integration outside of the Contract Management and Document Intelligence platform.
2. Through your Okta integration from within your Contract Management and Document Intelligence workflow ticket.

Why do some recipients not receive my custom DocuSign message?

When you use the **Actions** > **Edit Message** option to customize an email message for signers,

	this custom message might not append to your signature requests. You likely need to configure the **Enable custom email and language for each recipient** DocuSign setting in the **Sending Settings** area, and your DocuSign administrator must enable this option. **Note:** We recommend that you confirm with DocuSign Support or your in-house DocuSign administrator that enabling this feature won't impact your existing DocuSign processes.
In Workflow, what name is used on the eSignature request when collecting signatures?	We use the name configured on the account. In cases where signatures are collected by an individual user (each user has their own DocuSign/ Adobe Sign login credentials), then the name differs depending on the user. If configured to use a company account (a single account for the entire client), then the name associated with that account is used on the signature request.
Are changes to the signing order in DocuSign reflected on my ticket?	Changes to the signing order in DocuSign are reflected in Contract Management and Document Intelligence only for signer fields that must be completed during the signing process. For more information on configuring eSignature fields, see Concept: Workflow Builder Overview on page 53. If configured to use a company account (a single account for the entire client), then the name associated with that account is used on the signature request.
Do all signers, including the signing coordinator, have to sign in to the eSignature provider when collecting signatures in Workflow?	Unless you're the signing coordinator, you don't need to sign in to the eSignature provider when collecting signatures. When configuring the eSignature integration, you can require signing coordinators to sign in either individually or using the provided company account from the **Admin Console**. For both options, only the signing coordinator on a specific workflow must sign in to the eSignature provider when collecting signatures using either their individual account or company account credentials. They aren't required to sign in each time they collect signatures and aren't prompted to sign in again if they're already signed in. Other signers don't need to sign in.
Which eSignature providers integrate with Contract Management and Document Intelligence, and what are the account/license requirements?	Contract Management and Document Intelligence integrates with DocuSign and Adobe Sign. Signed documents are automatically added back to the workflow. Contract Management and Document Intelligence doesn't support free DocuSign or Adobe Sign accounts, and accepts only paid, enterprise-level DocuSign or Adobe Sign accounts/licenses.

Document Synchronization

Set Up Document Synchronization with EviSync

Prerequisites

Configure the storage provider account. Example: Box, Dropbox, Google Drive, SharePoint 365, or OneDrive. See: Reference: Storage Provider Requirements on page 82.

Context

You can use EviSync to synchronize documents between a storage system and Contract Management and Document Intelligence. EviSync supports two-way synchronization, enabling updates within 10 minutes, depending on the provider, or one-time synchronization.

Steps

1. Click **Admin**.
2. Click **Integrations**.
3. On the **Storage** tab, click **Add Sync Pair**.
4. Select your storage provider.
5. Log into the storage provider.
6. Choose the folders and file types you want to synchronize.

   Don't include ZIP as a file type. Contract Management and Document Intelligence doesn't extract the docs from a ZIP folder during this process.
7. Click **Set Up Sync Pair**.

Result

We first display the sync status as *Initializing.* Once syncing is complete, Contract Management and Document Intelligence changes the status to *Active*.

Set Up Docusign for Document Synchronization

Prerequisites

- Ensure you have Docusign administrator access.
- Enable **Connect** and **Publish** in the Docusign account.

Context

You can synchronize new documents executed in Docusign with Contract Management and Document Intelligence. This integration ensures that your team has access to the most recent versions of documents. Once you complete the configuration, all new documents executed in Docusign automatically appear in a dedicated sync folder in Contract Management and Document Intelligence. This helps maintain a centralized and up-to-date repository of all executed agreements.

Steps

1. Click **Documents** in Contract Management and Document Intelligence.
2. Click **New Folder**.
3. Create a folder in your connected cloud storage account (example: OneDrive, Box).

   This folder serves as the destination for signed Docusign documents.
4. Click **Settings** in Docusign.

5. Click **Connect** in the **Integrations** section.
6. (Optional) Perform a one-time publish. See How to Perform a Manual Publish of Connect Data in Low of High Volumes.

   Publish all completed envelopes to Contract Management and Document Intelligence to sync previously completed documents.
7. From the **Connect** page, click **Add Configuration.**
8. Complete the configuration:

Option	**Description**
Add Configuration	Select *Box* or *OneDrive*.
Enable Log (maximum 100)	Select this check box.
Require Acknowledgement	Clear this check box.
Certificate of Completion	Clear this check box.
Envelope Voided Reason	Clear this check box.
Folder to Publish	Select the folder you created in step 2.

Next Steps

After you configure your connection between Docusign and your cloud storage, set up a sync pair between the designated Docusign folder in your cloud storage and the folder you created in Contract Management and Document Intelligence. See Set Up Document Synchronization with EviSync on page 81

Reference: Storage Provider Requirements

When you are ready to synchronize documents between Contract Management and Document Intelligence and a storage system, consider these requirements and expectations for each storage provider:

- Box on page 82
- Dropbox on page 83
- Google Drive on page 83
- SharePoint 365 on page 83
- OneDrive on page 84

Box

Requirement	**Description**
Drive Type(s) Supported	Personal and shared folders.
Permission Requirements **Note:** The permission levels outlined must apply to all folders that will be part of your sync.	Enable Owner, Co-owner, or Editor access to the folder. **Scopes:** Read/write all files and folders.
Sync Time per ~5,000 documents (Provider to Contract Management and Document Intelligence)	~20 minutes.
Inactive Sync Pairs	If the sync pair is inactive for 60 days or more, you will need to recreate the sync pair.
Additional Notes	If your Box admin disallows third-party apps that haven't been approved, ensure you approve Contract Management and Document Intelligence in Box first.

Dropbox

Requirement	Description
Drive Type(s) Supported	Personal and shared folders.
Permission Requirements **Note:** The permission levels outlined must apply to all folders that will be part of your sync.	Enable Edit access for shared folders.
Sync Time per ~5,000 documents (Provider to Contract Management and Document Intelligence)	~10 minutes.

Google Drive

Requirement	Description
Drive Type(s) Supported	Personal and team drives.
Permission Requirements **Note:** The permission levels outlined must apply to all folders that will be part of your sync.	**Personal:** You must transfer ownership of all folders and files to the service account. **Team:** We strongly recommend that you enable Content Manager permissions for the account. You can enable Contributor or Viewer permissions, but those access levels lack privileges such as Delete and Upload, so you might run into issues with actions on our platform that break the sync.
Sync Time per ~5,000 documents (Provider to Contract Management and Document Intelligence)	~15 minutes.
Additional Notes	Refrain from creating a sync pair in Contract Management and Document Intelligence until all files and folders have been transferred to Google Drive. Make sure there are no extra spaces in the Google Drive root folder name.

SharePoint 365

Requirement	Description
Permission Requirements **Note:** The permission levels outlined must apply to all folders that will be part of your sync.	The user account you authenticate with must be a member though not necessarily an owner of the site you wish to sync from and must be excluded from conditional access controls. The account must have read/edit access to the root of the SharePoint site. Without this access, the site does not appear in the list of available sites when setting up your sync pair. You don't need to have access to the SharePoint root, which enables access to all SharePoint sites in your organization. You only need access to the root of the SharePoint site you wish to sync from. **Scopes:**

Requirement	Description
	• Files.ReadWrite.All • offline_access • Sites.Read.All • User.All
Sync Time per ~5,000 documents (Provider to Contract Management and Document Intelligence)	~1 hour, 10 minutes.
Inactive Sync Pairs	When the sync pair is inactive for 90 days or more, you need to recreate the sync pair.
Additional Notes	Renaming the SharePoint site breaks an active sync. Disconnect the sync first and recreate it when you need to make this change.

OneDrive

Requirement	Description
Permission Requirements **Note:** The permission levels outlined must apply to all folders that will be part of your sync.	Only Admins of the organization can approve the Contract Management and Document Intelligence app. This integration only supports setting up sync pairs that target folders in your personal OneDrive. **Scopes:** • Files.ReadWrite.All • offline_access • Sites.Read.All • User.All
Sync Time per ~5,000 documents (Provider to Contract Management and Document Intelligence)	~1 hour.
Inactive Sync Pairs	When the sync pair is inactive for 90 days or more , you need to recreate the sync pair.

When you change the name of a file or a folder in either Contract Management and Document Intelligence or the storage provider, that name change carries over to the other platform. These behaviors apply to the root folder in Contract Management and Document Intelligence but not the storage provider root folder:

- End-users can't delete root folders in Contract Management and Document Intelligence
- You can rename sync pair roots on Contract Management and Document Intelligence. This doesn't change the name of the folder on the provider side.
- You can move sync pair roots on Contract Management and Document Intelligence only, but you can't move sync pair root folders into folders that are part of another sync pair.

FAQ: Syncing in Contract Management and Document Intelligence

- The Storage section of the 3rd Party Integrations tab in the Admin area shows a message that the provider isn't enabled for my account. What does this mean?
- What should I do if I receive an alert that administrator approval is required when setting up a SharePoint sync?
- Why can't I find the SharePoint site that I want to sync to when using the SharePoint site search term option?

- Why does my SharePoint site not appear in the list when I'm setting up my sync with Contract Management and Document Intelligence?
- What does the Disabled By Administrator error mean when syncing with my Box account?
- If I edit a synced document, when does the version in Workday update?
- Why can't I find the Google Drive folder that I want to sync when trying to create my sync pair in Contract Management and Document Intelligence?

The Storage section of the 3rd Party Integrations tab in the Admin area shows a message that the provider isn't enabled for my account. What does this mean?

This section of the **3rd Party Integrations** tab is currently not in use. To sync with a storage provider, navigate to the **Storage** tab instead.

What should I do if I receive an alert that administrator approval is required when setting up a SharePoint sync?

An administrator can grant tenant-wide administrator access to an application in advance so that non-administrator users can activate it. When an administrator is configuring SharePoint access permissions, they can grant administrator access to their entire tenant (all users), and then a non-administrator user can sign in normally through OAuth. For more information, see Microsoft's documentation about reviewing administrator consent requests.

Why can't I find the SharePoint site that I want to sync to when using the SharePoint site search term option?

Some SharePoint sites may have a large number of sites and require you to search using the site ID instead of the site name. For more information, see Set Up Document Synchronization with EviSync on page 81.

Why does my SharePoint site not appear in the list when I'm setting up my sync with Contract Management and Document Intelligence?

To sync with SharePoint, you must ensure that the account you use for authentication:

- Is an administrator account.
- Has Edit access to the SharePoint site.

For more information about syncing, see Set Up Document Synchronization with EviSync on page 81

What does the Disabled By Administrator error mean when syncing with my Box account?

Your Box administrator might have set restrictions for third-party applications in your Box account settings.

If you receive this error, contact your Box administrator to request that they allow the Contract Management and Document Intelligence app. See Box's documentation about authorizing or allowing applications for more information.

You can use this client ID when allowing the Workday CLM app: 7rwcplrj4804wm8m4qkuuclqw5x93ksh.

If I edit a synced document, when does the version in Workday update?

We currently don't support new document versions in Workday unless you rename the source file in the storage provider. When you make changes to a synced document in the storage provider and update the file name, the document syncs and updates to the latest version in Contract Management and Document Intelligence.

	However, when you edit a source document in the storage provider and the file name remains the same, Workday doesn't sync the document and update to the latest version.
Why can't I find the Google Drive folder that I want to sync when trying to create my sync pair in Workday CLM?	You can only create a sync pair with shared folders that are located in the My Drive folder of the Google account that you use to authenticate the sync pair. If a folder is located in your My Drive on Google Drive, it displays in the **Personal** Contract Management and Document Intelligence folder when you're prompted to select a Google Drive folder to sync. When you have multiple shared folders that you want to sync to, but only want to create 1 sync pair, you can create a subfolder in your My Drive, place the shared folders in it, and then sync to the subfolder. Alternatively, you can also set up separate sync pairs for each shared folder that you want to sync with Contract Management and Document Intelligence. For information on granting access to folders, see Set Up Document Synchronization with EviSync on page 81.

Troubleshooting: Sync Pair Errors

When Contract Management and Document Intelligence can't synchronize documents, we display an error message. You can fix the errors with these actions:

Cause	Solution
Automation error: You are using expired credentials, possibly due to 1 of these reasons: • The password for the account has changed. • The user that initiated the sync had their account deactivated. • The storage provider requires reauthentication. • The system revoked user permissions for the synced site.	Click **Reauthenticate** in the sync pair row and sign in with the updated credentials.
Provider error: You are experiencing transient issues connecting to your cloud provider.	Click **Retry** in the sync pair row to attempt the sync again.
Data access error: The provider renamed, deleted, or moved a sync pair root folder.	Verify your storage provider settings and permissions. If these are correct, contact your storage provider to troubleshoot further. Once the issue is resolved, click **Retry**.
Out-of-space error: The provider has reached its storage limit.	1. Free up space in the storage account or upgrade the storage plan to increase capacity. 2. Resume syncing.

Salesforce Connector

Setup Considerations: Salesforce Connector for Contract Lifecycle Management and Contract Intelligence

You can use this topic to help make decisions when planning your configuration and use of [feature]. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

The Salesforce Connector for CLM and CI provides a seamless two-way connection between Salesforce Sales Cloud and Contract Management and Document Intelligence. This integration includes an installable Managed Package for Salesforce and supports metadata synchronization configured from Contract Management and Document Intelligence.

Contracts transfer from Salesforce to Contract Management and Document Intelligence for AI-powered data extraction. The extracted information then synchronizes back to Salesforce. This enables Salesforce to serve as a central hub for managing, searching, and reporting on contract data.

Key capabilities include:

- **Legacy Document Import:** Import existing Salesforce documents in Contract Intelligence for centralized contract management.
- **Real-time Document Syncing:** Automatically synchronize new documents from Salesforce to Contract Management and Document Intelligence, ensuring up-to-date contract data.
- **CLM Workflow Integration:** Utilize Contract Lifecycle Management (CLM) workflows directly within Salesforce to submit intake forms, create tickets, and manage the contract lifecycle.
- **Two-way Data Syncing:** Maintain synchronization between Salesforce and Contract Management and Document Intelligence data through configurable field mappings and automated updates.
- **Extend Contract Management and Document Intelligence Data:** Populate other Salesforce objects with Contract Management and Document Intelligence data using tools such as Flow Builder.
- **E-signature Integration:** Enable e-signatures directly within Salesforce using existing DocuSign or AdobeSign integrations configured in Contract Lifecycle Management.

Business Benefits

- Access, review, and edit any Salesforce contract directly within the Contract Management and Document Intelligence platform, regardless of when it was uploaded
- Eliminate time wasted searching for documents and Salesforce data, allowing your team to focus on closing deals.
- Initiate contract processes directly from Salesforce for a seamless transition between lead management and contract management.
- Leverage Contract Lifecycle Management specialized tools for smart template creation and integrated e-signatures.
- Natural language processing algorithms automatically identify key terms and provisions, saving you hours of manual review.

Use Cases

The Salesforce Connector for CLM and CI enables organizations to:

- Generate sales contracts efficiently from pre-approved templates.
- Streamline contract collaboration by negotiating terms with customers directly within Salesforce, tracking all changes and revisions centrally.
- Accelerate sales cycles by executing contracts electronically with integrated e-signatures.
- Centralize contract storage by maintaining a secure and organized repository for all sales contracts within Salesforce for easy access and searchability.
- Gain valuable contract insights by extracting key data such as pricing, renewal dates, and obligations to inform sales strategies and track performance.
- Monitor sales performance by generating reports on contract data and tracking key metrics, such as deal cycle times and contract values.
- Proactively manage renewals by tracking upcoming contract renewals and automating the renewal process.
- Ensure sales compliance by centralizing and standardizing contract processes.

Questions to Consider

Question	Consideration
What Salesforce edition are you using?	The Salesforce Connector for CLM and CI is compatible with Enterprise and Unlimited editions.
Do you have a dedicated Salesforce service account for installation and setup?	This account ensures continuity and prevents disruptions due to user account changes.
What is your existing data structure for contracts in Salesforce?	This will influence the necessary steps for syncing contracts and metadata with Contract Intelligence.
Are there any custom objects or fields related to contracts in Salesforce?	You will need to map these to corresponding fields in Contract Intelligence.
How do you want to handle legacy contracts already stored in Salesforce?	You can perform a legacy export to bring these into Contract Intelligence.
What specific contract types and data fields do you want to sync between Salesforce and Contract Management and Document Intelligence?	You will need to configure sync criteria and field mappings.

Recommendations

- Create a user account with administrator permissions in Contract Management and Document Intelligence and use this account to set up the API key.
- Create a system or integration user in Salesforce to schedule Apex jobs to avoid disruptions if a user's account is deactivated. Schedule Apex jobs to run at least once daily.
- Disable debug logs after the integration is fully operational.
- Use the latest version of the Managed Package, as updated versions are automatically pushed to your Salesforce organization.
- When configuring the Managed Package E-signature Integration for use directly from Salesforce, ensure the configured account matches the Contract Management and Document Intelligence account for the Salesforce API key.
- Test the Managed Package in a sandbox environment before deploying to production. To simulate production, connect your Salesforce sandbox to your production Contract Management and Document Intelligence client, which allows testing with live workflows and data.

Requirements

- You must have Salesforce Enterprise or Unlimited Edition to install the Salesforce Connector for CLM and CI.
- Configure API access and set up the integration to enable synchronization between Contract Management and Document Intelligence and Salesforce. See Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91.

Limitations

Copying managed package data from production to a sandbox (e.g., via a refresh) is not supported.

Security

- Contract Management and Document Intelligence is SOC 2 Type II certified, conducts regular penetration testing, runs a worldwide bug bounty program, and maintains an up-to-date disaster recovery plan.
- The Salesforce Connector for CLM and CI runs on the AppExchange infrastructure and has passed Salesforce's security review.
- Data in transit between Salesforce and Contract Management and Document Intelligence is encrypted with TLS 1.2+.

Domain	Considerations
Connected App and IP Restrictions	The Managed Package uses a Connected App (OAuth) for secure two-way communication between Salesforce and Contract Management and Document Intelligence. Workday recommends **Relax IP Restrictions** in the Connected App's settings.
API Key Authentication	The Managed Package uses a Contract Management and Document Intelligence API key (stored in Salesforce as a Named Credential) to communicate with Contract Management and Document Intelligence. This API key determines the Contract Management and Document Intelligence user associated with all Salesforce-initiated API actions.
Salesforce System Account for Integration	The integration user in Salesforce requires these system permissions: • Access Libraries • Apex REST Services • API Enabled • Manage Custom Permissions • Manage Public Documents • Modify Metadata Through API Functions • View All Data • View Developer Name • View Setup and Configuration Also: • Evisort Admin Permission Set • Evisort Custom Metadata Field Permission Set

Reporting

You can create custom reports in Salesforce using the Evisort object and its related fields. This enables you to track key contract metrics, such as:

- Contract Value
- Contract Type
- Renewal Dates
- Key Obligations
- Compliance Status

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence

Prerequisites

- Ensure your Salesforce organization meets these requirements:
    - Use the Enterprise or Unlimited editions of Salesforce. You can verify your Salesforce edition in the **Company Information** section in **Setup**.
    - Use Salesforce Sales Cloud.
- Sign in to Salesforce with an administrator account and create a dedicated Salesforce service account specifically for installing and managing the Managed Package. This practice ensures continuity and prevents disruptions due to user account changes or deactivations.
- Sign in to Contract Management and Document Intelligence with administrator access and create a dedicated administrator account for the Salesforce Connector. Sign out and then sign in with the new account.

Context

The Salesforce Connector for CLM and CI integration establishes a two-way synchronization between Salesforce and Contract Management and Document Intelligence. It allows documents to flow from Salesforce into Contract Management and Document Intelligence. The document intelligence fields and provisions return to Salesforce. Salesforce can then serve as the system of record for searching and reporting on sales contract data.

Steps

1. In the Salesforce AppExchange, access the **Evisort Contract Intelligence for Salesforce**.
2. Complete the package installation in Salesforce:
    a) During the installation, select **Install for Admins Only** when asked to grant access to users.
    b) If an **Approve Third Party Access** screen pops up, select **Continue** to proceed.
    c) If installation takes longer than expected, click **Done** and wait for an email confirmation.
3. Click on the App Launcher and access the **Evisort Admin** app.
4. Select **Post-install Script** from the left-hand menu.

    This page guides you through required and optional configuration steps. Green checkmarks dynamically reflect the successful completion of each configuration step, providing visual confirmation of your progress.

5. (Optional) On the **Post-install Script** page, click **Go To Log Settings** and enable both **Enable Logging** and **Log to System Debug**.

   After confirming all functionality, we recommend you disable logs to reduce storage consumption and improve performance.
6. On the **Post-install Script** page, click **Go To Evisort Admin Permission Set** and assign the **Evisort Admin**Permission Set to system administrators.
7. On the **Post-install Script** page, click **Go To Evisort Admin Permission Set** and assign the **Evisort User Permission Set** to end users.

   New Salesforce users won't automatically receive these Permission Sets. As you onboard new users, return to this screen and repeat these steps.
8. On the **Post-install Script** page, click **Create Metadata Field Permission Set** and then wait or refresh the page so the button updates.
9. Click **Go To Metadata Custom Field Permission Set** and assign the **Evisort Metadata Custom Field Permission** Permission Set to both system administrators and end users.

Next Steps
Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence
Related Information
Concepts

Concept: Salesforce Connector Permission Sets in Salesforce on page 96

Tasks

Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91

Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence

Prerequisites

Install **Salesforce Connector for CLM and CI** package. See Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence on page 90

Context

By connecting Salesforce to Contract Management and Document Intelligence and enabling Contract Management and Document Intelligence to call Salesforce APIs, you can establish a two-way connection to share workflow tickets, documents, and document metadata.

Contract Management and Document Intelligence API keys don't expire, but Workday recommends that you periodically replace your API keys to maintain optimal security.

Steps

1. In Workday CLM & CI, login with the Salesforce Connector admin account and set up an API key in Contract Management and Document Intelligence.

   See Generate a Contract Management and Document Intelligence API Key on page 105
2. On the **Post-install Script** page, for the first time, go to the section **Evisort Admin App - Create Named Credential**.
3. Click **Go To Salesforce Setup**.
4. Click **Named Credential**.
5. Create a new item named **Evisort**.

6. Complete the task:

Option	Description
Label	Evisort
Name	Evisort **Note:** The Name must exactly match this text.
URL	**Note:** The URL must exactly match this text.
Certificate	Leave blank
Identity Type	Named Principal
Authentication Protocol	Password Authentication
Username	EVISORT-API-KEY
Password	Paste the Workday CLM & CI API Key created in previous step
Generate Authorization Header	False
Allow Merge Fields in HTTP Header	True
Allow Merge Fields in HTTP Body	False
Outbound Network Connection	Leave blank.

7. On the **Post-install Script** page, after refreshing the page, go to the section **Evisort Admin App - Create Named Credential**.
8. Click **Check Validation** to test the connection to Workday CLM & CI.
9. In Workday CLM & CI, sign in with the Salesforce Connector admin account, and connect to Salesforce through OAuth.
    a) Access the **Integrations** tab in the Admin Console.
    b) Access the Salesforce integration from the **CRM/Sales** tab and click **Connect a Salesforce Account** to add the Salesforce organization and grant permission to Contract Management and Document Intelligence.

Next Steps

Set up the intake form for Contract Lifecycle Management workflow.

Related Information
Concepts

Concept: Salesforce Connector Permission Sets in Salesforce on page 96

Tasks

Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence on page 90
Set Up Intake Forms Button for Contract Lifecycle Management Workflow on page 93

Steps: Set Up Contract Lifecycle Management Workflows

Prerequisites

- Install the **Salesforce Connector for CLM** and **CI** package. See Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence on page 90.
- Set up a two-way connection between Salesforce and Contract Management and Document Intelligence. See Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91.

Context

You can set up the Salesforce Connector to allow your users to seamlessly create and manage contracts without leaving the Salesforce user experience.

Steps

1. Set Up Intake Forms Button for Contract Lifecycle Management Workflow on page 93.
2. Map Intake Forms from Salesforce to Contract Lifecycle Management on page 94.
3. Enable the enforcement of per-workflow user access permissions.

   Select **Enforce Content Permissions** field in the Evisort Workspace Setting custom settings to enforce the permissions defined in the Evisort workflow. When this setting is disabled, all users with Evisort User permission set will be able to view workflows and their related documents.

Set Up Intake Forms Button for Contract Lifecycle Management Workflow

Prerequisites

- Install **Salesforce Connector for CLM** and **CI** package. See Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence on page 90.
- Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence. See Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91.

Context

To initiate new workflow tickets directly from Salesforce, you can set up intake forms for the desired workflows. By adding the button to Salesforce record layouts, you can start new tickets and automatically populate the intake form with mapped data or files from the active Salesforce record.

You can configure Contract Lifecycle Management intake forms, create a button to initiate new tickets, and enable field history tracking for the Evisort Ticket object to streamline contract management.

Steps

1. Set up custom settings for the Base URL and Workspace Settings for Intake Forms.
   a) Access **Custom Settings** from **Setup**.
   b) Go to **Evisort Workspace Settings** and click **Manage**.
   c) In the section Default Organization Level Value, click **New** or **Edit**. Complete the task:

Option	Description
Workspace	Enter your client workspace name.
Subdomain	clients
Domain	com

   You can find your client workspace name, subdomain and domain in the URL when you access documents in CLM & CI. Example: https://clients.evisort.com/globalmodern/documents/20d6304b-e19b-4469-a949-33be90d4527a

2. Create the **Intake Form** button.
   a) Access **Object Manager** from **Setup**.
   b) Search for the Salesforce object where you want to add the button, such as **Opportunity**, and click **Buttons**, **Links**, and **Actions**.
   c) Click **New Action** and complete the task:

Option	Description
Object Name	Opportunity
Action Type	Lightning Web Component
Lightning Web Component	evisort:intakeForm **Note:** This must be the exact text.
Standard Label Type	None
Label	Intake Form
Name	This field automatically populates with an api-friendly button name based on the label you provide.
Description	Creates or Edits the CLM Intake Form for this record.

3. Add the **Intake Form** button to the Page Layout.
   a) Access **Object Manager** from **Setup**.
   b) Search for **Opportunity**.
   c) Click **Page Layouts**.
   d) Go to each active page layout and place the button on the layout.

      You must navigate to each page layout because placing the button on one page layout does not place that button on every single page layout.
   e) Access the **Mobile & Lightning Actions** and drag the **Intake Form** to the first position below **Salesforce Mobile and Lightning Experience Actions**.
   f) Click **Save** .
4. Enable **Field History** for the Evisort Ticket object. See Track Object Field History

Related Information
Tasks

Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91

Map Intake Forms from Salesforce to Contract Lifecycle Management

Prerequisites

- Install **Salesforce Connector for CLM and CI** package. See Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence on page 90
- Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence. See Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91
- Set up intake forms in Salesforce. See Set Up Intake Forms Button for Contract Lifecycle Management Workflow on page 93

Context

This task explains how to create workflow tickets directly from Salesforce, enabling you to manage contracts and related tasks seamlessly.

Steps

1. On your Salesforce instance, navigate to the Evisort Admin app and click **Map Intake Forms** from the left panel.
2. Click the **Pull from Evisort** button to refresh the list of workflows.
3. If this is the first time you are mapping this workflow, click **Map New Intake Form**. Otherwise, click the arrow next to the workflow and select **Edit**.
4. From the drop-down, select a **Salesforce Object** to provide fields as inputs for the Evisort ticket.
5. For each of the destination Contract Lifecycle Management (CLM) Workflow fields, choose a source Salesforce field.

   If the Workflow has not changed from the CLM side, you can edit the form and save updates. If the Workflow has changed from the CLM side, you must delete the mapping and recreate it.

Related Information

Reference

Reference: Salesforce Field Type Mapping on page 99

Add or Delete Field Sync Mapping Rows

Prerequisites

- Install **Salesforce Connector for CLM and CI** package. See Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence on page 90.
- Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence. See Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91.

Context

You can add and delete field sync mapping rows in the **Sync Fields Form** to control which Salesforce and Contract Intelligence fields are synchronized.

Steps

1. Add new field mappings:
   a) Access the **Sync Fields** tab in the Evisort Admin app.
   b) When you are creating a new object mapping, click the **Set Object Mapping** button.

      When you are editing an existing mapping, select an existing mapping row in the Sync Fields table, and click **Edit**.
   c) For new mappings, select an object from the **Salesforce Object** drop-down menu and click the **New Field Mapping** button.
   d) Select a Salesforce field and the Contract Intelligence field you want to map it to.

2. Delete a field mapping:
    a) To delete a single field mapping, click the trash icon to the right of the field mapping row in the open form. After deleting the unwanted rows, click **Save** to save the updated mapping.
    b) To delete the entire object mapping, click the down arrow in the table entry for the mapping and click **Delete**.

    We support Salesforce Files, ContentDocument/ContentVersion, and Enhanced Notes, ContentNote, used by Salesforce orgs created after April 2016. The integration fully supports Files, including files stored in Libraries or directly associated to records.

    We don't support legacy Notes and legacy Attachments.

Concept: Salesforce Connector Permission Sets in Salesforce

Permission Set: Evisort Metadata Custom Field Permission

You must manually assign the Evisort Metadata Custom Field Permission permission set to all Salesforce Connector users. This assignment is required to grant the correct access to Contract Management and Document Intelligence features within Salesforce.

This permission set is dynamically updated when synchronizing Contract Management and Document Intelligence fields.

Field Permissions: Users can edit and read Contract Intelligence fields related to the Evisort__c object.

Permission Set: Evisort Admin

This permission set grants comprehensive access to the Contract Management and Document Intelligence app in Salesforce, enabling configuration, file processing, record management, and log viewing, with granular control over user actions for data security and integrity.

Access	Description
General Permissions	• **Access Contract Management and Document Intelligence Apex classes:** Users can run various parts of the Contract Management and Document Intelligence code to use app features. • **Configure Contract Management and Document Intelligence:** Users can set up and customize the Contract Management and Document Intelligence app within their Salesforce org. • **Send files to Contract Management and Document Intelligence:** Users can send files from Salesforce to Contract Management and Document Intelligence for processing, such as extracting contract dates or clauses. • **Edit Contract Management and Document Intelligence records:** Users can change details in Contract Management and Document Intelligence records directly from Salesforce.
Specific Object Permissions	• **Full access to some objects:** Users have complete control (create, view, edit, and delete) over objects such as

Access	Description
	Attachment__c, Evisort_Export_Filter__c, Intake_Form_Mapping__c, and Intake_Form__c. • **Limited access to other objects:** Users can typically create, view, and edit records for objects such as Evisort_Export_Document__c, Evisort_Export_Object__c, Evisort_Field_Definition__c, Evisort_Field_Value__c, Evisort_Ticket__c, and Evisort__c. With this permission, users might not be able to delete or see all records in the org. • **Read-only access to logs:** Users can view log files for troubleshooting or monitoring purposes but can't make changes.
Tab Visibility	• **Access to Contract Management and Document Intelligence tabs:** Several Contract Management and Document Intelligence-related tabs are visible in Salesforce, providing easy navigation within the app.
Field Permissions	• **Edit and read most fields:** Users can edit and read most fields related to Contract Management and Document Intelligence objects. • **Read-only access to some fields:** Certain fields, particularly those automatically generated or calculated, are read-only.

Permission Set: Evisort User

This permission set enables users to actively use the Contract Management and Document Intelligence app in Salesforce, including sending files, managing records and tickets, and editing field values and definitions. Access to certain objects and fields is limited to prevent overarching configuration changes or viewing sensitive data.

Access	Description
General Permissions	• **Use Contract Management and Document Intelligence features:** Users can utilize the core functionality of the Contract Management and Document Intelligence app through access to its Apex classes. • **Send files to Contract Management and Document Intelligence:** Users can send files from Salesforce to Contract Management and Document Intelligence for processing and analysis.

Access	Description
	• **Edit Contract Management and Document Intelligence records:** Users can modify details within Contract Management and Document Intelligence records directly from Salesforce.
Specific Object Permissions	• **Manage Contract Management and Document Intelligence field values:** Users can create, edit, and delete records related to Contract Management and Document Intelligence field values. • **Work with Contract Management and Document Intelligence records:** Users can create, edit, and delete Contract Management and Document Intelligence records associated with Salesforce objects. • **Manage Contract Management and Document Intelligence tickets:** Users can create, edit, and manage Contract Management and Document Intelligence tickets for file tracking and processing. • **Edit Contract Management and Document Intelligence field definitions:** Users have full control over Contract Management and Document Intelligence field definitions, allowing customization of data capture and display. • **Limited access to export objects and filters:** Users have read access to export objects and filters but can't create or delete them. They can edit certain fields in these objects. • **Edit intake forms:** Users can modify existing intake forms but can't create or delete them. • **View-only access to mappings:** Users can view how Salesforce objects and fields are mapped to Contract Management and Document Intelligence but can't make changes to these mappings.
Tab Visibility	• **Access to key Contract Management and Document Intelligence tabs:** Several Contract Management and Document Intelligence-related tabs are visible in Salesforce, providing easy access to different parts of the app.
Field Permissions	• **Edit and read most fields:** Users can edit and read most fields related to Contract Management and Document Intelligence objects. • **Read-only access to some fields:** Certain fields, especially those that are system-generated or calculated, are read-only.

Related Information
Tasks

Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence on page 90

Set Up Two-Way Connection Between Salesforce and Contract Management and Document Intelligence on page 91

Reference: Salesforce Field Type Mapping

When mapping fields, field types must be compatible between Contract Management and Document Intelligence and Salesforce to update the values. If you map fields with mismatched data types, Salesforce may skip the value and leave the Intake Form field blank when creating a new ticket.

Salesforce Data Type	Contract Management and Document Intelligence Data Type: Allows mapping	Contract Management and Document Intelligence Data Type: Mapping not allowed
STRING	TEXT, TEXTAREA	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
TEXTAREA	TEXT, TEXTAREA	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
BOOLEAN	None (doesn't allow mapping)	It doesn't apply
PICKLIST	DROPDOWN (choose 1)	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
ADDRESS	ADDRESS	All except ADDRESS
INTEGER	NUMBER, PERCENTAGE	All except NUMBER, PERCENTAGE
DOUBLE	NUMBER, PERCENTAGE	All except NUMBER, PERCENTAGE
PERCENT	NUMBER, PERCENTAGE	All except NUMBER, PERCENTAGE
ID	TEXT, TEXTAREA	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
DATE	DATE	All except DATE
DATETIME	DATE	All except DATE
URL	TEXT, TEXTAREA	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
EMAIL	TEXT, TEXTAREA	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
PHONE	TEXT, TEXTAREA, NUMBER	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD

Salesforce Data Type	Contract Management and Document Intelligence Data Type: Allows mapping	Contract Management and Document Intelligence Data Type: Mapping not allowed
LONG	TEXT, TEXTAREA	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
MULTIPICKLIST	DROPDOWN (choose multiple)	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
ENCRYPTEDSTRING	TEXT, TEXTAREA	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD

Related Information
Tasks

Map Intake Forms from Salesforce to Contract Lifecycle Management on page 94

Reference: Flow To Create Ticket Custom Actions

Context

You can automate the creation and submission of intake forms for mapped Contract Management and Document Intelligence workflows using the **Flow to Create Ticket** custom flow action, included in the Salesforce Connector for CLM and CI Package. This enables you to configure automatic intake form submissions based on field values from a Salesforce record and its related records.

How to Use

When using this flow action, you need to provide these inputs:

recordId	The dynamic Salesforce record ID of the opportunity, or other Salesforce record, containing the fields mapped to the intake form. Example: Opportunity ID.
workflowId	The 36-character Workflow ID from Contract Lifecycle Management. You can find this in the workflow URL in Contract Management and Document Intelligence. Example: https://clients.evisort.com/…/workflow/builder/ **20d6304b-e19b-4469-a949-33be90d4527a**

Guidelines and limitations:

When using the **Flow to Create Ticket** flow, consider:

- When a new version of the workflow in Contract Management and Document Intelligence is published the ID will change. You must update the workflowId in all flows referencing that workflow.
- All field values for the intake form must exist on the triggering Salesforce record, or related records.
- You can't use child relationships in the workflow mapping because they require user interaction to select a child record. Mapped child fields remain blank in the intake form.
- When a required field in the Contract Management and Document Intelligence workflow doesn't have a corresponding value in the Salesforce record, Salesforce still submits the intake form but the field will be empty in Contract Management and Document Intelligence.

- When no workflow mapping exists in Evisort Admin for the specified object and workflows, Salesforce submits the intake form with blank or default values.
- When mapped fields are not populated on the Salesforce record and default values for those fields are specified in Contract Management and Document Intelligence, the fields are populated with the default values.

FAQ: Salesforce Connector for Contract Lifecycle Management and Contract Intelligence

Why doesn't the Contract Management in Salesforce show any data at the Account Level?

The Contract Management record component in Salesforce displays only Contract Management records directly associated with the selected account record. To access Contract Management records associated with an opportunity, navigate directly to the opportunity record.

Can I change the fields displayed in the Evisort Record Page in Salesforce?

No. The Evisort Record Page is a static layout for the Document Intelligence and related records (Evisort__c) in Salesforce. This view shows all active Contract Intelligence metadata fields and provisions.

During installation and configuration, you can configure metadata fields as Active or Inactive in Salesforce using the Sync Fields tab in Evisort Admin.

Can I edit values for fields displayed in the Evisort Record Page in Salesforce?

Yes, except for read-only fields, users with the Evisort User permission set can update Document Intelligence fields using the Evisort record page.

When you edit a field value on the Evisort record custom component in Salesforce, the component immediately updates that field in Evisort. However, if you update the same metadata field elsewhere, outside of the custom component, the data doesn’t export to Document Intelligence.

Can I configure Salesforce integration with any object?

Yes, the integration is designed to work with any Salesforce object, standard or custom.

Do I need to map all intake form fields?

No, mapping fields is optional.

	Salesforce record fields that are mapped automatically pre-fill the intake form. Fields that aren’t mapped remain blank.
If I delete a contract in Salesforce, does it delete in Contract Management and Document Intelligence?	No, deleting a contract in Salesforce does not delete it in Contract Management and Document Intelligence.
Can I uninstall and reinstall the Evisort App in Salesforce?	Workday doesn’t recommend this for production orgs. Contact your support representative to discuss your specific needs. This may be necessary in a Salesforce Sandbox following a data refresh. Uninstalling the Managed Package deletes all data and metadata related to the integration. You must also remove the connection from Integrations in Evisort Admin. Considerations for the re-installation: • All Salesforce files will require re-synchronization to re-establish the link with the Contract Intelligence metadata. This action creates duplicate document handlers. However, both are linked to the original document in Contract Intelligence. • You must reconfigure all setup steps, including workflow mapping, named credentials, authentication, synchronization criteria, layout changes, and the intake form button. • All Evisort Ticket data in Salesforce, especially in progress tickets, will be lost and can’t be recovered. However, the ticket will remain valid in Contract Lifecycle Management and you can continue to work on it from that interface.
Can I report on Contract Management and Document Intelligence metadata in Salesforce?	You can include Contract Intelligence metadata fields in your custom reports; however, you can’t include provisions due to their length.

Technical Guides

Set Up Email Intake for Documents

Context

You can configure email intake to enable users to send new documents to a designated folder within Contract Management and Document Intelligence. This provides an alternative to direct document upload.

Steps

1. Click **Admin.**

2. Click **Email Intake.**
3. Select **Copy to Clipboard** in the Email Settings section.

   Access and share the email address for document intake. Workday recommends adding the intake email address as a contact in your email inbox.
4. In the **Folder Settings** section, designate a specific folder for all emailed files.

   This setting applies across the organization. Example: Create a folder named Inbound Email Files.
5. In the **Permission and Whitelisting** section, choose whether to allow all users or only specific users to email files.

   To accept files from non-users or emails from other domains, add individual emails and/or email domains to the whitelist. This ensures that emailed documents from those domains are allowed into Workday. For example, if documents will be arriving from external email domains, such as an e-signature provider, add those to your whitelist. Example: Docusign.com

Result

Users can now send documents to the designated folder by emailing them to the provided address. Workday appends _[timestamp] to the end of the file name when ingesting documents to prevent overwriting.

Steps: Configure Single Sign-On (SSO) for Contract Management and Document Intelligence

Prerequisites

- Your Identity Provider (IdP) must support SAML 2.0.
- Enable the owner, admin, or custom role with the **Single Sign-On (SSO): Manage permission** in Contract Management and Document Intelligence.

Context

You can set up SSO to enable users to access Contract Management and Document Intelligence using their existing identity provider credentials. This simplifies the login process for users by eliminating the need to remember separate usernames and passwords. SSO enhances security by centralizing authentication through a trusted identity provider.

Steps

1. In your Identity Provider (IdP), sign in as an administrator.
   a) Add a new SAML application.
   b) Select **SAML 2.0**.
   c) Enter these details:

Option	Description
Application Name	Contract Management and Document Intelligence
(Optional) **Application Logo**	You can link the Contract Management and Document Intelligence logo.

2. In Contract Management and Document Intelligence, enable SSO.
    a) Click **Admin**.
    b) Click **Single Sign-On**.
    c) Click **Add Configuration**.
    d) Copy these values and paste them into the IdP SSO configuration:
        - **Assertion consumer service (ACS) URL:** The IdP uses the ACS URL to redirect authenticated users after signing in.
        - **Service provider (SP) entity ID:** Contract Management and Document Intelligence uses the SP identity ID as a unique identifier. Workday doesn't support setting up SSO in multiple workspaces as the Entity ID is the same.
3. In your IdP SSO configuration, find these details and enter them in Contract Management and Document Intelligence

Option	Description
IdP name	The name of your Identity Provider. This is for display purposes only on the Workday sign-in page.
SSO URL (SAML 2.0 Endpoint)	The URL where Contract Management and Document Intelligence redirects users to sign in to your IdP.
IdP ID (Identity Provider Issuer or Entity ID)	Your IdP unique identifier.
(Optional) **IdP metadata URL**	Enter this if your X.509 Certificate is variable or rotating. In some cases, providing this information may eliminate the need to enter the X.509 certificate directly, but this depends on your setup.

4. In your IdP, open the metadata XML file, copy the X.509 certificate code and paste it into Contract Management and Document Intelligence.

    You can find the X.509 code between the **Begin Certificate** and **End Certificate** fields, but don't copy the field names.
5. In Contract Management and Document Intelligence, select **Authentication context class.**

    For Azure, we don't support various Microsoft AuthnContext, so set this to *None*.
6. In your IdP, configure **Attribute mappings**.

    Copy these attribute names or URLs from your IdP and paste them into Contract Management and Document Intelligence:

    - Email
    - First name
    - Last name
    - Job title
    - Department
    - Role

    Attributes are typically text unless your IdP is Azure, in which case they are URLs.
7. In Contract Management and Document Intelligence, select **Enable SSO**.

    In Contract Management and Document Intelligence, select Enable SSO.
8. Assign a default role to new users who sign in through SSO.

Generate a Contract Management and Document Intelligence API Key

Prerequisites

Have a subscription to the Contract Management and Document Intelligence API integration.

Context

You can use our public REST APIs to establish an integration between your internal system and Contract Management and Document Intelligence. Your administrator first needs to generate an API key for your environment. See developers.evisort.com for more information about our REST API.

Steps

1. Click **Admin**.
2. Click **Integrations**.
3. On the **API Management** tab, click **Generate new API key**.

   You can find a list of existing generated keys in this section. Active keys are indicated by an *Enabled* value in the **Status** column. You can use the trash icon next to any generated key in the list to delete it.

Use Public APIs to Create Integrations

Context

Developers can use Contract Management and Document Intelligence Public APIs to create an integration between a CRM of choice and Contract Workflow in Contract Management and Document Intelligence.

Steps

1. GET

   /v1/contracts/workflow/available This API endpoint returns a list of available workflows.
2. GET

   /v1/contracts/workflow/<workflow_id>/intake-form This API endpoint returns all the information for the specified workflow that you need to construct a proper data object for the next step.
3. POST

   /v1/contracts/persist/ This API endpoint expects an application/json request body.

   For the data object, provide the desired field values mapped to field ids that you received in step 2. You can provide the field values in 2 different shapes. One is what we call a native shape. The other supported shape is Salesforce. That's the shape that Salesforce formats its data in.

   For the meta object, the following keys are required:

   - Type: Its value must be intake_form
   - Workflow_id
   - Format: Its value depends on the shape of data you're providing. If you're providing data in the native shape, pass *native*. For Salesforce, pass *salesforce*.

   The endpoint will return a string which we'll call a Persist Key.
4. Generate a URL for your users.

Result

You can generate a URL that will link to the intake form for the workflow in question with the persisted values prefilled in the UI for your users. The URL should look like this: clients.evisort.com/<workspace>/workflow/<workflow_parent_id>/intake-form/link?eviPersistKey=<PersistKey> Where workflow_parent_id is the parent id of the workflow in question, or the id of the workflow itself if its parent_id is null

FAQ: The Contract Management and Document Intelligence Public API

- Why was my API key automatically disabled?
- How do I use the external API?
- What are the API throttling limits?

Why was my API key automatically disabled?	The Contract Management and Document Intelligence user who created the key was most likely removed from the workspace.
How do I use the external API?	For developer API documentation and instructions (including both post-signature and pre-signature Workflow details), see developers.evisort.com.
What are the API throttling limits?	The API throttling limits for each customer within a 1-minute period are: • 600 requests for updates. • 50 requests for uploads. For everything else, the limit is 100 within a 1-minute period across all other endpoints (not for each endpoint).

FAQ: Single Sign-On (SSO) in Contract Management and Document Intelligence

- Can an administrator set a default single sign-on (SSO) role for all users and pass through specific role attributes for individual users?
- What happens when a user is manually deactivated in Contract Management and Document Intelligence but is still active through SSO?
- Does mapping the Department attribute through SSO create departments in Contract Management and Document Intelligence?
- Can an administrator edit user attributes that were mapped through SSO (example: Job Title, Role, or Department)?
- When a user's SSO access to Contract Management and Document Intelligence is removed through their identity provider (IdP), is that user account also automatically deactivated in Contract Management and Document Intelligence?
- Can 1 client support multiple concurrent SSO configurations?
- When a user is manually added and then deleted, does Contract Management and Document Intelligence provision them on their first login?
- When and what does Contract Management and Document Intelligence provision when a user first logs in?
- Does Contract Management and Document Intelligence support Single Logout through SSO?

Can an administrator set a default single sign-on (SSO) role for all users and pass through specific role attributes for individual users?	Yes, this is possible using the Integrated User Provisioning (Advanced SSO) feature included in the Advanced Administration add-on product.

	When you map the Role attribute at the client level and pass through a role attribute value at the user level, the user's role attribute value overrides the default SSO role. When you map the Role attribute at the client level but don't pass through a value at the user level, the user is reassigned to the default SSO role the next time they log in. This applies to both new and existing users. When you map the Role attribute at the client level but don't pass through a value at the user level and don't configure a default SSO role, all users are reassigned to the Power User role on their next login. When you don't map the Role attribute at the client level, all existing users maintain their current role when logging in through SSO.
What happens when a user is manually deactivated in Contract Management and Document Intelligence but is still active through SSO?	When you manually deactivate a user in Contract Management and Document Intelligence and they still have access through their IdP, they can still log in using the URL, which creates a new user in the instance. When you manually deactivate a user account in Contract Management and Document Intelligence, we recommend that you also revoke their access to the app in the IdP.
Does mapping the Department attribute through SSO create departments in Contract Management and Document Intelligence?	Mapping the Department attribute through SSO doesn't automatically create departments. Users leveraging the Integrated User Provisioning (Advanced SSO) feature need to manually create the same departments directly in Contract Management and Document Intelligence so that there's an exact match between the value being passed through and the value in Contract Management and Document Intelligence.
Can an administrator edit user attributes that were mapped through SSO (example: Job Title, Role, or Department)?	Yes, an administrator can manually edit user attributes directly in Contract Management and Document Intelligence. **Note:** If these attributes are mapped through the Advanced SSO configuration, any manual updates made in Contract Management and Document Intelligence are automatically overwritten the next time the modified user logs in. This ensures that the customer's IdP remains the primary data source.
When a user's SSO access to Contract Management and Document Intelligence is removed through their identity provider (IdP), is that user account also automatically deactivated in Contract Management and Document Intelligence?	No, the user account remains active until it's manually deactivated in Contract Management and Document Intelligence by an administrator. However, they won't be able to log in if that SSO is enforced for all users.
Can 1 client support multiple concurrent SSO configurations?	A single client can't support multiple SSO configurations at one time. However, it is possible

	to configure multiple active directories to the same IdP (example: Azure AD multitenant clients to Okta) and then configure a single SSO integration through Okta.
When a user is manually added and then deleted, does Contract Management and Document Intelligence provision them on their first login?	No. If a user tries to log in through SSO for the first time and they receive a login error, they were most likely added and then deleted in the workspace. We don't provision a user when they were deleted from the system through SSO; in this case, an administrator needs to add them to Contract Management and Document Intelligence.
When and what does Contract Management and Document Intelligence provision when a user first logs in?	When a user first logs in to Contract Management and Document Intelligence, our SSO integration fetches user data only: email, first name, and last name. However, using the Integrated User Provisioning (Advanced SSO) feature included in the Advanced Administration add-on product, Contract Management and Document Intelligence retrieves user data on every login and updates attributes (such as Role or Department) as modified in the IdP.
Does Contract Management and Document Intelligence support Single Logout through SSO?	We don't currently support Single Logout through SSO.

Release Notes

Concept: About Contract Management and Document Intelligence Release Notes

In September 2025, Contract Management and Document Intelligence Help Center moved to the doc.workday.com site.

We offer 2 ways of accessing release notes.

Users Without Workday Community Sign-In Access

Examples: Local administrators, senior leaders, managers, employees.

We publish release notes in the Release Notes section of the Contract Management and Document Intelligence Help Center, which doesn't require sign-in access.

We publish release notes content every other week, on even weeks. Example: We will publish updates on week 32, but not on week 33. This means that every 2 weeks you can access new Contract Management and Document Intelligence release notes if there were updates during that period.

It's not currently possible to subscribe to email alerts in this section.

Users With Workday Community Sign-In Access

Examples: Named Support Contacts (NSCs) and global administrators that the NSC or a Workday CSM has added to Workday Community.

Workday publishes release notes for its products each Wednesday and Friday in the Release Center on the Workday Doc site. Signed-in users can access release notes at any time, and subscribe to email notifications.

Action	Steps
Accessing Contract Management and Document Intelligence release notes	**1.** Click the **Release Center** in the header of the doc.workday.com site. **2.** Click on the **All Release Notes this Week** in the **What's Changed This Week** card. **3.** Select *Contract Management and Document Intelligence* in the **Product** section of the left sidebar. **Note:** When *Contract Management and Document Intelligence* doesn't display as an option in the **Product** section, this means there aren't any release notes in the filtered timeframe. To access older release notes, you can expand the default timeframe in the **Last Updated** section at the top of the sidebar.
Subscribing to Contract Management and Document Intelligence release notes	**1.** Click the profile picture icon on the top right corner of the doc.workday.com site. **2.** Go to **Subscriptions**. **3.** Click **Go to Add subscription**. **4.** Select *Release Note* from the **Content Type Tag** drop down menu. **5.** Select *Contract Management and Document Intelligence* from the **Product Tag** drop down menu. **6.** Select your preferred option from the **Email Frequency** drop down menu. **7.** Click **Subscribe**.

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