Contract Management and Document Intelligence

Product Summary

July 23, 2026

Contents

Getting Started

Setup Considerations: Contract Intelligence

You can use this topic to help make decisions when planning your configuration and use of Workday Contract Intelligence, powered by Evisort AI. 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

Contract Intelligence transforms fragmented documents into a centralized engine of searchable insights, using AI to uncover hidden risks and savings across your entire organization.

Business Benefits

- Enable visibility across all your documents to proactively identify and manage financial, legal, and operational risks.
- Identify and act on key data points such as renewal dates, revenue opportunities and indemnification clauses to drive favorable business outcomes and support compliance.
- Streamline access to documents and data for better collaboration between legal and business teams.
- Automatically synchronize documents and data points across repositories, eliminating time-consuming and error-prone manual reviews.
- Save time by providing self-service access to contract data insights for all teams that need it.
- Convert poor-quality scans into searchable, structured data using the optical character recognition (OCR) technology.
- Use the Ask AI feature to ask questions in simple, natural language and receive clear answers, linked to source documents for immediate verification.

Use Cases

- Synchronize contracts and data points from shared drives, cloud repositories such as Box or SharePoint, and enterprise solutions, such as Salesforce, to maintain a centralized, searchable source of truth for all agreements across the enterprise.
- Leverage AI to automatically analyze contracts for key clauses and obligations. Example: renewals, SLAs, payment terms, data protection, liability caps.
- Configure alerts and reminders so legal, procurement, or business owners are notified well before renewals or key milestones.
- Turn static documents into structured data that can be searched, filtered, dashboarded, or exported to Excel, across tens of thousands of agreements.
- Build dashboards to monitor payment milestone tracking, deliverables, notice periods, upcoming expirations, termination clauses, breach notice requirements, total contract value, clause auditing, etc.
- Translate operational gains into financial terms. Example: hours saved converted to faster deal cycles tied to accelerated revenue recognition, savings from avoided renewals.

- Build custom AI models to track terms specific to your business.

Questions to Consider

Question	Consideration
Which cloud storage providers do you currently use for contract storage?	You must identify and consolidate your documents before implementation. You can upload documents directly or through supported cloud system integrations for syncing. Contract Intelligence supports cloud systems such as Box, Dropbox, Google Drive, OneDrive, and SharePoint. You need a storage account with 1 of the supported providers to integrate and sync documents. Each provider has specific permission requirements that you should evaluate. See Reference: Storage Provider Requirements
What document formats do you want Contract Intelligence to analyze?	You can use OCR analysis on these file formats: • • DOC • DOCX • JPG • PNG • PDF (includding scanned PDFs) • TIFF You can upload other file formats, but they aren't subject to OCR analysis.
Do you plan to leverage AI to capture highly specific or unique contract data?	You can use standard AI fields and clauses to capture common data, but Custom AI enables you to turn your questions into AI models to extract and categorize unique data points across agreements.
Do you use security on your source documents?	Contract Intelligence can't process or bypass the security settings of password-protected files. You can establish an ingestion process that requires the removal of document security measures, such as password protection, before you upload files to the platform for AI analysis.
Do you need to handle non-English documents?	You can use these methods to process non-English documents: • **OCR and full text search**: Contract Intelligence recognizes characters in more than 150 Latin-script languages. This enables you to search for terms in the original language of the document. • **Ask AI and Custom AI models**: Contract Intelligence offers non-English conversational interactions and model training, subject to the capabilities of the LLM.

Question	Consideration
	Contract Intelligence doesn't provide an English-translated version of the non-English document.
How do you want to back up your data?	We host our database on Amazon Web Services. We back up data stored in the customer's tenant.
How do you want to protect your data?	Workday Contract 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.

Recommendations

- When training custom AI models for clauses, tag as many known variations of a clause as possible, use full sentences as samples, and train a single model per clause type to improve accuracy.
- For bulk uploads exceeding 100 files in a single transaction, use the self-service sync tool instead of manually uploading to save time and effort. See Set Up Document Synchronization with EviSync .
- Leverage the standard AI models, or build custom AI field models for rapid, structured data that you can visualize, report on, and plug into other systems. For quick insights and answers to day-to-day questions about 1 or many contracts, use Ask AI.

Requirements

- To integrate and sync documents from a cloud system, you need a cloud storage account with 1 of the supported cloud system providers.
- Your identity provider must support SAML 2.0 to configure Single Sign-On.

Limitations

- When you upload attachments to an existing repository record, Workday automatically classifies them as supporting documents. Contract Intelligence doesn't run AI analysis on these files and excludes them from your billable document count.
- Contract Intelligence is accessible on mobile devices, but it is not yet optimized for them.
- Contract Intelligence can successfully process documents of up to 1,000 pages or 500MB in size.

Tenant Setup

No impact.

Security

Contract Intelligence uses access control, so customers can create and manage access privilege for users, including administrators and read-only users. Administrators can manage individual users' access to specific documents and folders.

Reporting

Report or Dashboard	Description
Documents	Displays document volume and related metadata.
Expirations	Displays upcoming expiration dates, renewal types, and notice periods. You can customize the date range and apply additional filters.

Integrations

Integration	Considerations
Third-party Storage Solutions	You can use Contract Intelligence to access files stored across several different locations at one time. Contract Intelligence enables you to sync documents and data points from supported cloud storage providers such as Box, Dropbox, Google Drive, OneDrive, and SharePoint.
Salesforce Connector	You can use Contract Intelligence to transfer documents from Salesforce Sales Cloud to Contract Management and Document Intelligence for AI-powered data extraction. You can then synchronize the extracted information back to Salesforce and create a central hub for managing, searching, and reporting on contract data.

Connections and Touchpoints

Contract Lifecycle Management (CLM) enables you to create contracts. CLM streamline the pre-signature process by consolidating intake, redlining, reviews, and signature collection steps in one place.

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.

Related Information

Concepts

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

Tasks

Set Up Email Intake for Documents

Reference

Reference: Storage Provider Requirements

FAQ: Contract Management and Document Intelligence Platform

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.
8. (Optional) Update your language and local preferences.

   Under the **Global Preferences** section, select your desired language and locale. Note: Locale settings dynamically format date, number, and monetary fields.

Concept: Contract Management and Document Intelligence 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 .

- 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 Clauses** tab shows you a summary of the highlighted key clauses. For details, see Manage Clauses .
- The **Versions** tab displays the document history. See Manage Document Versions .
- **Download** button enables you to download the contract.

See Concept: Documents Overview

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.

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

You can use Contract Management and Document Intelligence on these browsers:

Browser	Supported Version
Apple Safari	The 2 latest versions.
Google Chrome (preferred)	The 5 latest versions.
Microsoft Edge	The 5 latest versions.
Mozilla Firefox	The 5 latest versions.

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 is accessible on mobile. However, mobile browsers aren't the focus of the quality assurance team and we recommend that you don't use them for normal use.

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.

Contract Management and Document Intelligence supports these cloud systems:

- Box
- Dropbox
- Google Drive
- OneDrive
- SharePoint

Language Support

Contract Management and Document Intelligence fully supports English across the platform. For non-English documents, results may vary depending on the feature:

Product Feature	Languages Supported
User Interface	The platform interface and key system emails are available in English, French, German, and Spanish. Date, number, and monetary values format dynamically based on the user's selected Preferred Locale.
OCR Processing, Search, and Ask AI	Available in languages using Latin alphabets.
AI models to extract key terms	Standard AI fields and clauses are available for extraction in English. Additionally, 13 Standard AI fields and 9 Standard AI clauses are available for extraction in French, German, and Spanish.
Custom AI models	Field name and instructions configuration are available in English, French, German, and Spanish.
AI drafting tools	Automated redlining and clause creation are available in multiple languages, subject to the capabilities of the underlying LLM. Clause Creator requires the document text and instructions to be in the same language for best results. If they are different, the output matches the instruction language.

To update your language and locale preferences see Modify Personal User Settings .

Concept: Duplicate Files

Workday Contract Management and Document Intelligence identifies duplicate documents during the upload and AI processing pipeline to ensure data consistency and accurate document counts.

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:

Deduplication Logic

Workday bills for unique contracts, not duplicate files. Adding a duplicate doesn’t increase your total document count.

Example: When 2 files have the same content on a pixel-by-pixel basis, they are considered duplicates.

Example of documents that are treated as unique documents:

- A Word (.docx) draft versus a final PDF version.
- A document with 1 signature versus the same document with 2 signatures.
- Files with different content but the same file name, location, or upload date.

AI Pipeline and Data Sets

Duplicate documents skip the AI processing pipeline. Instead, they inherit all data field values from the original document and point to one backend copy. Consequently, all documents in a duplicate set share exactly one set of data.

Automatic Linking

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

- Simplified search results: Search results display unique documents only. When you select a document, you can view a pop-up modal displaying all copies across different folder paths or with different filenames.
- 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.

  If you manually change a field, it appears as *manually* changed across the entire set.
- 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.

File Management

Because duplicates share a single data set, actions taken in the UI affect the entire group. Deleting a document directly from search results deletes all copies in the duplicate set. To reduce the number of duplicates without losing all copies, use the API to delete individual copies by their specific document ID.

We recommend you contact Customer Support for guidance before performing bulk deletions.

Reference: Standard AI Fields and Clauses

Standard AI 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:

- General Information
- Operational Information
- Legal Information
- Additional Information

Standard AI Data Fields

Standard AI data fields are pre-built AI models that autormatically extract and classify common contract data points.

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,

Name	Definition
	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.
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.

Name	Definition
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.
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 Standard AI 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.
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.

Name	Definition
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

Tasks

Manage Clauses

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.

Security Measure	Description
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?
- FAQ: Contract Management and Document Intelligence Platform
- FAQ: Contract Management and Document Intelligence Platform
- 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?
- How long does a session last before timing out?
- The link in my signup email expired. How do I get a new one?
- Why am I unable to update my password though it meets the requirements?
- Why am I automatically signed out of the Contract Management and Document Intelligence platform?
- Why can't I access certain folders?

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 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 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 your administrator 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: • Length: At least 15 characters long. • Characters: Must include at least 1 uppercase letter, 1 lowercase letter, 1 number (0-9), and 1 of these special chracters: @ * _ - . ! & ‘ • Exclusions: It can't contain any other special characters, be the same as your user ID, or include 3 consecutive alphanumeric characters. Example: 123.
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 for more information. For further assistance, contact Workday Support.

Related Information

Concepts

Setup Considerations: Contract Intelligence

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

Tasks

Set Up Email Intake for Documents

Documents

Manage Document and Ticket Groups

Prerequisites

Ensure the **Groups** > Edit permission is enabled for your role.

Context

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

- Create a new group and add documents and workflow tickets to it.
- Add documents / tickets to an existing group or to multiple groups.
- Define parent-child hierarchical relationships between documents and tickets.

Groups help you:

- Find documents and tickets 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** > Groups, or **Workflow** > Groups.
2. Click **New Group**, or select an existing group to add documents to it.
3. Click **Add Items**.
4. Search for and select 1 or more documents or tickets..
5. Click **Next: Link**.
6. (Optional) Choose a **Parent Node** from the dropdown to establish a hierarchy, then click **Add Items**.

   As needed, drag and drop items to establish parent/child relationships.

Result

Within the group, you can navigate to individual documents and click **Details** to find all the groups to which the document or ticket belongs.

To remove an item, select it and choose **Unlink** to remove it from that group only, or **Remove from group**. Removing a parent item will not affect its children, which remain in the group to maintain context.

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.

Bulk Update Document Metadata

Prerequisites

- Documents must exist in Contract Intelligence with an assigned DocSetID and DocID.
- Ingestion files must contain no more than 50,000 records.
- For file renaming or refoldering, if you rely on AI-extracted data, verify the accuracy of that data before creating the ingestion file.
- For legacy metadata imports, ensure you have a unique identifier, such as a unique file name, to map values.
- Create any required custom fields in the **Admin Console** before import. New fields created during import default to multi-select dropdowns.
- Security: Ensure you have administrator access or a custom role with access to Application Administration.

Context

The Bulk Metadata Updater (BMU) allows you to update metadata field values, rename contracts, or refolder documents in bulk. Each of these functions requires different templates and has unique requirements.

Before proceeding, consider this:

- AI citations: Overwriting metadata field values causes the original hyperlinks to AI citations to be lost permanently.
- Data formatting: Ensure values conform to the designated data types. Example: Modify EU dates.

- Empty folders: Moving files to new folder paths may result in empty folders that you can't delete in bulk or filter in the UI.
- Field Mapping: Ensure metadata field names match the **Admin Console** exactly; any deviation creates new fields as multi-select dropdowns.
- Rollback: Always keep the original export file as a failsafe rollback.
- Special Characters: In the **Filepath** column, using a forward slash (/) creates nested folders.

Steps

1. Search for the documents requiring changes and export the results as an Excel file.

   If you rename or refolder based on metadata, include that metadata in your base export for easier mapping.
2. Save the original export file as a failsafe rollback.
3. Prepare the ingestion file.

   Complete the task:

Option	Description
Update Metadata	a. Transform data into the desired state. Example: Modify EU dates to yyyy-mm-dd. b. Map the data to the correct **DocSetID**. c. Remove all columns except for **DocSetID** and the metadata fields. d. Remove all duplicate **DocSetID** rows.
Rename Files	a. (Optional) If relying on metadata, quality check the data before changing the **File Name**. b. Update the **File Name** column. c. Remove all columns except for **DocSetID**, **DocID**, and **File Name**. d. Remove all duplicate **DocSetID** rows.
Refolder Files	a. (Optional) If relying on metadata, quality check the data before changing the **Filepath**. b. Update the **Filepath** column. c. Remove all columns except for **DocSetID**, **DocID**, and **Filepath**. d. Remove all duplicate **DocSetID** rows.

4. If you have duplicate file copies that require unique names or paths, split them into separate ingestion files.

   Repeat the preparation and ingestion steps for each set of duplicate copies.
5. Save the file.
6. Access **Admin** > **More Settings** and ingest the file.
7. Verify the metadata, file names, and file paths in the UI.

Result

Workday updates the metadata, file names, or paths as specified in your ingestion file. If you restructured folders, it is a best practice to verify folder access and permissions for the new taxonomy.

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

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.
8. 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.

Related Information
Concepts
Concept: Best Practices for Training Algorithms with Contract Clauses
Reference
Reference: Standard AI Fields and Clauses
Examples
Example: Train an IP Ownership Clause Model

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 enables you to ask questions in natural language and receive a summary answer based on information across all or selected documents that you have permission to access. Unlike traditional search, where you manually read through individual documents, Ask AI summarizes the most relevant information with links to the source documents in seconds. You can also save, group, and share your questions to streamline contract reviews.

Search Scope

When you open Ask AI, Contract Management and Document Intelligence automatically sets the search scope based on the page you're currently viewing. You can change this scope. The available scopes depend on your current page and can include these search options:

- *All Documents*: All accessible documents.
- *This Folder*: Only in the current folder.
- *This Group*: In a specific document group.
- *This Document*: The current document.
- *Search Results*: Your current search results.
- *Dashboards: (Contract Intelligence only)*: Dashboard results.
- *Workflow Documents* (most recent version only): Only the current version of a workflow document.
- *Workflow Routing*: Within Ask AI you also have the ability to find the correct workflow through a simple conversation. See Access Workflows with Ask AI

Ask AI follows all folder-level access controls, so you see results from only the documents you have permission to view.

Additionally, Ask AI searches document data fields, including custom fields that may not be in the document text.

Status Indicators

Ask AI gives you transparency into the process of generating an answer and the sources being searched. It can also include prompts to clarify questions when needed.

Once Ask AI generates the response, we no longer display the status indicators and instead display the answer with source citations.

Source Verification

Ask AI offers transparency into the generated response allowing you to verify the source documents that informed the generated answer. You can:

- Hover over a source button to preview the text excerpt from the cited document.
- Select a source button to open the document, which automatically scrolls to the cited text.
- Select a source button to open the Fields side panel and highlight the relevant data field, when the source is referencing a custom field.

When you ask a question about a single document, Ask AI includes inline citations and a Sources section in its response.

Conversations

You can interact with Ask AI in a conversational chat by:

- Asking a follow-up question in the same conversation.
- Changing the conversation's scope. Example: You can narrow your search from all documents to a single document.
- Starting a new conversation to clear the previous chat history.

Saved Questions

You can save and organize questions for future use by:

- Saving previously asked questions.
- Organizing saved questions into groups.
- Filtering between your private groups and groups shared with you.
- Running a single saved question or all questions in a group at once.

Best Practices for Queries

To get the most relevant answers from Ask AI, follow these best practices:

- Be specific. Provide as much context as possible, including document types, date range, parties, locations, or specific clauses.
- Use natural language. You don't need to use special syntax or Boolean operators such as AND/OR. Phrase your query as a complete question.
- Iterate on your questions. Start with a broad question and use the Conversations feature to ask follow-up questions that narrow the results and refine the answer.

Effective Query Structure

A well-formed query provides multiple points of context for Ask AI. Example: Show me all Master Service Agreements governed by California law that are set to expire in the next 90 days.

This query is effective because it specifies a document type (Master Service Agreements), a legal condition (governed by California law), and a time frame (expiring in the next 90 days).

Considerations

Ask AI:

- Provides representative examples, not an exhaustive list of all matching documents. For exhaustive results, use Search.
- Cites up to 25 documents to generate an answer.
- Can’t answer all types of questions. It doesn’t answer:
    - Factual questions outside the document context. Example: weather forecast.
    - Counting or aggregation questions. Example: Total contract value or counting documents.
    - Requests for legal advice.
    - Questions about proprietary, technical, or confidential information. Example: writing code.
- For Workflow documents:
    - Can only answer questions about the most recent version of a single document.
    - Can’t determine redlines.
    - Doesn’t consider document edits unless you save them as a new version.
    - Can’t answer questions about the workflow ticket, intake form, or comments.

Related Information
Reference
Build Better Prompts with C.A.R.E.

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

Reference

Reference: Standard AI Fields and Clauses

Examples

Example: Train an IP Ownership Clause Model

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:

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

Manage Folders

Root Folder Access Settings

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 for more information.

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

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.

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.

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.

Note: For environments with high folder volumes (more than 75,000 folders), scrolling through the folder list to find a specific destination may result in a session timeout. To optimize performance, always type a partial name into the folder filter or search bar to narrow the results rather than scrolling through the complete list.

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 Clauses** : 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.
- **Groups**: This side panel shows the specific documents that belong to a group. See Manage Document and Ticket Groups

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.

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.

Status	Description
Processing	OCR is converting your document and identifying Standard AI fields and clause tags.
Complete	Processing is complete and your document is now ready for indexing, analysis, and monitoring.
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.

Example: Train an IP Ownership Clause Model

This example shows how to tag the clauses, train the model, and use search to distinguish between the two versions.

Context

Your legal team is standardizing how to track Intellectual Property (IP) Ownership clauses across contracts. Over time, your team has used 2 versions of the clause:

- V1: Long-form listing inventions, patents, copyrights, and trademarks.
- V2: Short-form using “IP.”

Instead of training 2 models, you train 1 IP Ownership model with samples of both. Then, use the Search feature to distinguish versions. Example Search for “pre-existing inventions, patents, copyrights, trademarks” to find V1; clauses without this phrase are V2.

This saves time, avoids duplicate models, and ensures accurate reporting on both clause versions.

Prerequisites

- You have permissions to create and train custom clause algorithms.
- Upload documents that contain different versions of the IP Ownership clause into Contract Management and Document Intelligence.

Steps

1. Click **Documents**.
2. Select the document that contains the V1 IP Ownership clause.
3. On the **Contents** tab, find and highlight the full clause text.
4. Select:
    a. **Tag a Clause** for PDF documents.
    b. **Edit** > **Tag** a Clause for Word documents.
5. In the **Clause** field, create the IP Ownership clause tag.
6. From the **Apply Sample To** prompt, select *This and other documents*.
7. Click **Save**.
8. Repeat steps 2–8 for documents that contain V2 of the IP Ownership clause.

9. In the **Clause** field, select the IP Ownership clause tag.

   Contract Management and Document Intelligence tags both versions under the same clause name.
10. From the **Apply Sample To** prompt, select *This and other documents*.
11. Click **Save**.

Result

We train the IP Ownership clause model to recognize both versions of the clause across your contracts. In search, all variations are tagged as IP Ownership. You can then run a phrase search to distinguish between V1 and V2 for reporting or analysis.

Next Steps

Related Information

Concepts

Concept: Best Practices for Training Algorithms with Contract Clauses

Tasks

Manage Clauses

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

- FAQ: Contract Intelligence (CI) in Contract Management and Document Intelligence
- 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 Standard AI 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?

<table>
<tr><td>Can I remove a clause from a document?</td><td>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 clause in the document.
3. Click the pencil icon and select Remove Clause.</td></tr>
<tr><td>What does Auto Sync mean in the Last Modified column of the Versions tab when viewing a document's details?</td><td>Auto Sync can mean that the document was synced through a storage provider or uploaded through email intake.</td></tr>
<tr><td>Is it possible to view a list of documents in my workspace that failed optical character recognition (OCR) processing?</td><td>You can use these filter settings in Search, Alerts, and Dashboards to view a list of documents that might have failed OCR processing:
<table>
<tr><td>Filter</td><td>Value</td></tr>
<tr><td>Upload Date</td><td>The scope of your report.</td></tr>
<tr><td>Text Quality</td><td>Is blank.</td></tr>
<tr><td>File Type</td><td>Is equal to PDF, or any of the file formats that Contract Management and Document Intelligence processes (TIFF, PDF, DOCX, and DOC).</td></tr>
</table>
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.</td></tr>
</table>

<table>
<tr><td></td><td>Note: Some older documents might have a blank Text Quality and, as a result, get included in the filtered list.</td></tr>
<tr><td>Why are some folders within my restricted folder visible to a power user with no assigned department?</td><td>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.</td></tr>
<tr><td>Does Contract Management and Document Intelligence support password-protected files?</td><td>Contract Management and Document Intelligence can't process password-protected files or bypass their security settings.</td></tr>
<tr><td>Is a document's Status field a Standard AI field?</td><td>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.</td></tr>
<tr><td>Are there bulk file action limits?</td><td>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:

<table>
<tr><th>Action</th><th>Document Limit</th></tr>
<tr><td>Move</td><td>2,000</td></tr>
<tr><td>Edit</td><td>10,000</td></tr>
<tr><td>Copy</td><td>500</td></tr>
<tr><td>Delete</td><td>500</td></tr>
</table>

Note: We enforce a hard limit on the number of files that you can manually upload in 1 transaction, which is 500. We do however 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 for more information.</td></tr>
<tr><td>Why is the View button unavailable on a clause in the Contract Summary panel?</td><td>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 Clauses. 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.</td></tr>
</table>

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: Standard AI Fields and Clauses • Manage Clauses • Create Clauses
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
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 .
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 .
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 .
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: • DOCX • DOC • JPG • PDF (including scanned PDFs) • PNG • TIFF 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.

      The character limit for the email body is 500.

   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. The character limit for the message body is 500.
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.

The search interface displays the complete count of matching documents returned by your query, providing full visibility into your entire dataset.

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

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 and Ticket Groups
- 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

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

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* 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*

Term / Connector	Description	Examples
		Return documents that contain: *post, repost, lamppost*. *Example 3: *post** 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

Workflow Builder

Steps: Set Up Contract Lifecycle Management Workflows

Prerequisites

- Enable access to Workflow Builder.
- You need administrator access or have a custom role with the Workflow Builder: Manage permission.

Context

With Contract Lifecycle Management (CLM) you can configure contract workflows with conditions that activate defined events. In CLM, you can use Workflow Builder to define and automate each stage in the lifecycle for a contract, from intake to finalization.

Steps

1. Set Up a Document Template in Workflow Builder .

   In the Workflow creation form, select the **Workday Source to Pay** toggle and select:

   - **Procurement** to pass the contract to Procurement as a supplier contract.
   - **Workday Strategic Sourcing** to create supplier contracts that are not passed to Procurement.
2. Select document type allowances.

   Indicate if workflow users can upload existing documents, generate them from templates, or both. See Concept: Document Type Allowances .
3. Map template fields to intake form questions.

   Use the **Form** tab to link placeholders in your .docx template to specific user responses. Configure any conditional fields, clauses, or requirements based on submissions. See Concept: Forms in Workflows .
4. Set Up Reviews in Workflows .
5. Set Up Signing Workflows .
6. Finalize Workflows .

   Define post-signature tasks such as verifying the documents.
7. Configure workflow settings.

   Set the archive destination, file naming conventions, and user access permissions on the **Settings** tab. See Concept: Workflow Settings .

   Select a **Contract Type** to determine which procurement contract type Workday creates when the CLM ticket is finalized.
8. Publish the workflow.

Next Steps

Share the workflow intake form to enable users to submit new tickets. See Reference: Workflow Intake Form Links .

Related Information

Concepts

Concept: Workflow Builder Overview

Concept: Skipping Workflow Stages

Tasks

Create Contract Lifecycle Management Supplier Contracts in Strategic Sourcing

Create Contract Lifecycle Management Supplier Contracts Amendments

Steps: Manage Contract Lifecycle Management Supplier Contracts in Workday Procurement

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.
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 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. See Edit Templates

    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.

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 and ensures the document is reviewed and processed in a timely manner.

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 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.
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.

    Contract Management automatically routes signers in the order of workflow stages.
5. Select a user, group, or department as the recipient.

6. (Optional) Click **Specify Condition**. You can define conditions to dynamically add or remove signers.
7. In Docusign, specify the signing order.

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

Result

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

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.

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.

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. Click **Finalize**.
4. Select a task list coordinator.

5. Click **Add Finalize Phase**.

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

   Configure actions to complete the phase.
7. (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.

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.

Set Up Dynamic Table Rows

Prerequisites

Have a table with the initial content rows you want to make dynamic.

Context

You can configure tables to dynamically add rows based on user selections in the intake form. This setup ensures that the dynamic rows only appear when a user makes a specific selection in the template's intake form questions.

Steps

1. Open the .docx source document that contains the table.
2. Place your cursor in the cell immediately following the rows you want to make dynamic.
3. Click the **Table Layout** tab and select **Split Table**.
4. In the new line created between the 2 parts of the table, enter the opening condition placeholder {{variable}}.[[
5. Enter the closing condition]] on the line immediately below the row you want to make dynamic.
6. Hide the condition placeholders:
   a) Select the opening condition placeholder.
   b) Press **Ctrl+D** (Windows) or **Cmd+D** (Mac) to open the **Font** dialog box.
   c) In the **Effects** section, select the **Hidden** check box.
   d) Repeat the steps to hide the closing condition.
7. (Optional) You can click the **Show/Hide Paragraph Mark** button to make the hidden conditions visible.

Result

Example

Next Steps

Copy Workflows

Prerequisites

Enable access to Workflow Builder.

Context

You can create a new, separate draft workflow or instantly copy the configuration to create a new version of an existing, published workflow.

Steps

1. Click **Workflow**.
2. On the **Workflow Builder** tab, locate the workflow you want to copy.
3. From the related actions menu to the right of the row, select **Make a Copy**.
4. In the <Workflow Name> prompt, select your desired action:

Option	Description
Copy as new workflow	Workday copies the selected workflow as a new, *Draft* workflow named *Copy of <workflow name>*. Example: You select to duplicate your *Master Service Agreement* workflow. By choosing **Copy**

Option	Description
	as new workflow, Workday generates a separate, new draft named *Copy of Master Service Agreement*, which you can then edit without affecting the original.
Copy onto another workflow	Workday copies the selected workflow as the newest version onto any workflow you have access to. Example: You have a complex *Master NDA Workflow* (Workflow A) and a simple *Regional NDA Workflow* (Workflow B). You want to replace the current design of Workflow B with the complex structure of Workflow A. When duplicating Workflow A, you select **Copy onto another workflow** and choose *Regional NDA Workflow* (Workflow B) from the list. Workday then creates a new draft version for Workflow B that is an exact copy of the *Master NDA* Workflow's configuration.

5. Click **Make a Copy**.

Result

The copied template retains the same Source, Form, Review steps, Sign, Finalize steps, and Settings as the original, including all associated users and fields.

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:

Source: Define the types of documents the workflow supports. Example: Users can upload existing documents, generate documents from a template, or do both. From this section you can also modify the name of the workflow.

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.

Related Information
Tasks
Steps: Set Up Contract Lifecycle Management Workflows

Create Contract Lifecycle Management Supplier Contracts in Strategic Sourcing
Create Contract Lifecycle Management Supplier Contracts Amendments
Steps: Manage Contract Lifecycle Management Supplier Contracts in Workday Procurement

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: 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: 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. See Set Up Dynamic Table Rows .

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 Templates in Workflow Builder

Related Information

Tasks

Steps: Set Up Contract Lifecycle Management Workflows

Create Contract Lifecycle Management Supplier Contracts in Strategic Sourcing

Create Contract Lifecycle Management Supplier Contracts Amendments

Steps: Manage Contract Lifecycle Management Supplier Contracts in Workday Procurement

Concept: Workflow Visibility and Permissions

You can manage Workflow access and permissions at several levels to ensure users only have access to the information and functions they need.

Ticket Viewing and Creation

Submitter Access

Submitter Access controls the permissions a ticket submitter has throughout the workflow phases. You can configure these settings on the **Settings** tab of the workflow.

You can grant either **Full Access** or **Limited Access**. 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.

General Access

Indicates which users can have access to see the tickets that have been submitted via this workflow. The options are:

- Only
- All users except
- All users

You can override limited access settings with this 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. See Reference: Workflow Intake Form Links

Workflow Access Controls

Workflow Access Controls enable you to determine which workflows are available to which users or departments when generating a new ticket or using Workflow Builder. This helps ensure users only see the workflows they need to access.

You can set these controls by managing the **Share** settings of a workflow template. The options for sharing are:

- Your own view (private)
- Specific departments or users
- Anyone at a specified workspace

Workflow Tickets

Steps: Manage Contract Lifecycle Management Workflow Tickets

Prerequisites

Set up a Contract Lifecycle Management Workflow. See Steps: Set Up Contract Lifecycle Management Workflows .

Context

Workflow tickets track a document through the stages of drafting, review, and execution. You can use tickets to streamline the lifecycle management processes for a contract to allow for faster and more intelligent transactions.

Steps

1. Create Ticket for Contract Review .
2. Edit Workflow Tickets .

   Perform this step if the workflow allows an initial round of edits before the formal review begins.
3. Review Workflow Tickets .
4. Address redlines and comments.

   Use the Document Reviewer to manage tracked changes and @user mentions.
5. Sign Workflow Tickets .
6. Finalize Workflow Tickets .

   Workday archives the executed document in the repository with a status of **Done**.

Access Workflows with Ask AI

Prerequisites

- A workflow administrator must have at least 1 workflow routing active. See Set Up Workflow Routing
- Ask AI must be enabled for your workspace.
- Security: You must have permissions to create tickets and access to the workflow according to the Workflow Access Control Lists.

Context

Instead of manually searching for the right intake form, you can use Ask AI to find the correct workflow through a simple conversation.

Steps

1. Access **Ask AI** and select the **Workflow Routing** option to initiate the request and get routed to the correct workflow.

2. Ask AI will then dynamically generate and display up to 5 initial questions to help with the selection process.

   These questions are derived directly from the instructions defined by workflow administrators in the **Routing Table**.
3. As you keep interacting with the model, Ask AI will ask targeted follow-up questions based on previous responses to narrow down the workflow.

   Throughout the process, Ask AI provides real-time reasoning, explaining which workflows is considering.
4. Once the correct workflow is identified, Ask AI presents the workflow name as a clickable link, which brings you directly to the intake form with the workflow already pre-selected.

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.

Edit Workflow Tickets

Prerequisites

Set up an intake form.

Create Ticket for Contract Review

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 for more information.
7. Approve or reject the criteria.

Review Documents with AI Playbooks

Prerequisites

Note: Your organization must opt in to the Universal Main Service Agreement (UMSA) to use AI Review as part of the Full Document Review skill. you might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the UMSA. To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA.

Note: Standalone Contract Lifecycle Management customers (Evisort) should contact their Account team to confirm that this feature is included in their subscription.

Your user role must have *AI Review & Editing: Access*.

Context

Reviewers run AI Review within a workflow ticket to receive a clause-level assessment of risks, missing terms, and suggested redlines based on playbook requirements. They can apply changes with tracked edits and rerun AI reviews at any stage of the negotiation process to ensure evolving drafts remain aligned with company standards.

Steps

1. Open a document in the in-app editor within a workflow ticket.

   If the document is a PDF, you must convert it to DOCX before running the review.
2. Click **AI Review** from the right-hand menu panel.

   You must run AI Review before making manual edits to the document to ensure accurate redline placement.
3. Select the appropriate Playbook and click **Run AI Review**.

   The AI reads the full document and compares it against every guideline in the selected playbook.
4. Assess results in the AI Review panel:
   - **Review Required**: Items that deviate from company standards and need attention.
   - **No Issues Found:** Clauses that the AI validated as compliant.
5. Address findings by reviewing the AI Reasoning and suggested redlines.

   For each finding you can:
   - Accept the suggested redline to apply the change to the document with tracked edits.
   - Reject if the suggestion isn't applicable, with optional feedback on why.
   - Modify the suggestion before applying.
6. Verify that the changes appear in the document as tracked changes.

   You can continue editing, accepting additional suggestions, or making manual changes as needed.
7. Click **Save as a New Version** to preserve the edits.

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 **Send to E-signature**, 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 **Send to E-signature**.
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

Complete document signatures.

Context

The finalizer owns this stage. 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.

Finalizing a document ensures that all post-signature activities are accounted for and that metadata captured during the workflow correctly populates the repository fields.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a ticket that is on the **Finalize** stage.
3. Complete all outstanding items in the **Tasks** section.
4. Click **Mark as Complete**.

Result

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

A **View Completed Document** button appears on the ticket details page. This option allows you to directly access the document created by the workflow ticket.

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.

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.

Note: 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.

Edit Documents

Context

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

The edit mode provides various options, including:

- *Accessing edit options.*
- *Running AI Review: Automated analysis of the document against published Playbooks.*
- *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 and Automate Redlining With AI Drafting Tools 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 and Microsoft Word for Desktop.

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

Prerequisites

A system admin must configure the Word Connector for Contract Lifecycle Management. See Set Up Microsoft Word Connector for Contract Lifecycle Management

Context

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

The connector provides 2 distinct editing options: **Microsoft Word for Desktop** and **Microsoft Word for the Web**. While Word for the Web offers a streamlined experience for browser-based drafting, the desktop version supports advanced formatting and local application features:

- **Core Editing**: Provides a seamless launch of documents from Workday CLM into the local Microsoft Word desktop application.
- **Synchronization**: Automatically synchronizes document edits from Microsoft Word back to Workday CLM both during and after the editing session.
- **Document Content**: Supports synchronization of document-level comments and content, including icons, tables, and images.
- **Highlighting**: Ensures native text highlighting applied in the desktop application successfully syncs back to Workday CLM.
- **Multi-User Access**: Supports both single-user and multi-user desktop launches for document editing, with a recommendation of 10 or fewer simultaneous users.
- **Version Integrity**: While a document is open in Microsoft Word for Desktop, Workday enforces a version lock to prevent conflicting uploads and deletions. Authorized users can initiate a force unlock to terminate a session.
- **AI capabilities (Add-In)**: Find core capabilities from the Workday CLM side panel in Word Desktop. These include:
    - Ask AI
    - Standard AI clauses and highlighting
    - Ticket commenting and collaboration

Note: Microsoft Word is developed by Microsoft and, on its own, doesn't provide the side panel capabilities found in the Editor for Contract Management and Document Intelligence. To use these advanced, contract-specific AI features directly within the Microsoft Word experience, you need the Workday CLM AI Tool Add-In.

Considerations:

- These options are only available on the Workday CLM editor:
    - Saved questions
    - Batch processing
    - Automate with Custom AI
    - Document level comment highlighting and redirect: Clicking a document-level comment in the Add-In doesn’t highlight or jump to the corresponding text in the document.
- Comments sync:
    - Document-level comments made during a Word editing session don’t appear in the Add-In until the document has synced back to CLM. Once synced, users must also click the refresh icon in the Add-In to find them.
    - Comments made during an editing session don’t appear in the web platform in real time. Users with the page open need to refresh to see updates.

Steps

1. Click **Workflow**.
2. On the **Tickets** tab, select a ticket.
3. Click the document name.
4. Click **Edit with Microsoft** at the bottom-right of the document viewer.
5. Select **Microsoft Word for the Web** to edit your document in the web version or **Microsoft Word for Desktop** to work on the desktop version.

   For the **Microsoft Word for Desktop** integration, the first time you access the connector, you must enter your Microsoft credentials to authorize access. If your browser asks to **Open Microsoft Word**, confirm the request.
6. (Optional) To access CLM AI capabilities in Microsoft Word for Desktop, open **Word Desktop**, select **Add-ins**, and then click **CLM AI Tool**.

Result

The document opens in the chosen version of Microsoft Word. Changes auto-save and synchronize back to CLM automatically throughout the session and upon completion of the editing task.

Opening the document in 1 editor locks the other editing sessions (such as the native CLM editor or Word for the Web) to prevent version conflicts. While a Word desktop session is in progress, you can't upload, delete, or create new versions of that document in the platform.

If a Microsoft Word desktop session remains open or appears stuck after editing has ended, users with Edit rights for the current workflow stage can initiate a force unlock to terminate a session. Workday records every force unlock action in the document's activity log.

Related Information

Concepts

Friday, 10th July

Examples

Microsoft Word Connector AI Tool - Tickets Comments and Standard AI Clauses

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.

Automate Redlining With AI Drafting Tools

Context

AI drafting tools use large language models to make drafting and editing contract clauses more efficient and consistent. These tools include:

- **AI Review (Playbooks)**: Automatically flags risks and suggests redlines based on pre-defined organization standards (Playbooks).
- **Automated Redlining (Manual)**: Allows you to provide specific instructions to the AI to modify a selected clause on the fly.
- **Clause Creator:** Assists in drafting new clauses from scratch based on your requirements.

Note: Contract Management and Document Intelligence doesn't conduct legal analysis or provide legal advice; 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.

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 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 and its filters 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.

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.

Option	Description
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** • **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 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.

Initiating Action	Recipient	Email subject	Message
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.
A signer completes the document through e-signature.	Signature coordinator	[Signer name] signed the document.	[Signer name] signed the document.
A signer declines to sign the document.	Signature coordinator	[Signer name] declined to sign the document.	[Signer name] declined to sign 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**.

Initiating Action	Recipient	Email subject	Message
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** by clicking **Mark as Complete**.	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
User mentions you in the comments	Mentioned user	[Username] mentioned you in a comment.	[Username] mentioned you in a comment. [Comment content]
User adds you as a participant	Added user	Ticket name	You were added as a participant.

Concept: Workflow Settings

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

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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.

Contract Type

If you have selected a Workflow for Procurement integration, you will find a **Contract Type** field on the Settings page. This field enables you to configure the association between a Workflow and a Workday Contract Type.

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 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.

Data 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. See Concept: Workflow Visibility and Permissions

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)

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.
Ask AI	Go to the **Automation** tab and define routing rules to let Ask AI dynamically identify the correct workflow and provide users with a direct, clickable link to the intake form. See Set Up Workflow Routing

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**.

Set Up AI Playbooks

Prerequisites

- Configure the *Clause Library* with approved variations if you intend to reference them in your Negotiation Requirements.
- Ensure you have *Library: Manage* role-based access.

Context

Administrators create Playbooks to ensure AI guidance and suggested redlines are specific to the organization's legal requirements rather than generic best practices.

Steps

1. Click the **Library** tab and select the **Playbooks** subtab.
2. Click **Create Playbook**.
3. Choose a creation method:
    a) **Start from an Example**: Select a pre-configured template for Non-Disclosure Agreements (NDAs), Software License Agreements (SLA/EULA), or Master Services Agreements (MSAs). Best for: New customers, trials, or teams that don't have a documented Playbook to start from.

       Note: Examples are only available in Sandbox accounts by request.
    b) **Input Negotiation Requirements Manually**: Build a Playbook from scratch for specific, non-standard requirements. Best for: Teams with specific, non-standard negotiation requirements or those who want complete control over every Playbook input.
4. Enter a unique name and description.

    Playbooks and Negotiation Requirements require unique names; you can't reuse names from deleted items.
5. In **Scope**, define the specific workflows or contract types you want to target.
6. Add or create **Requirements** for the playbook:
    a) **Clause Name**: enter the clause name.
    b) **Review Criteria**: enter the prompt instructions for the AI.
    c) (Optional) Select **Suggest Redlines** and click **Add Existing Clause Variation** to link language from your Clause Library.
7. Click **Create**.
8. Open the playbook and click **Publish** to change the state from Draft to Published and make the playbook available for reviewers in workflow tickets.

Result

Workday adds the clause requirements to the **Negotiation Requirements** subtab located under the **Library** tab. You can modify these clause requirements as many times as you need and reuse them across other playbooks.

If you need a variation that applies only to a specific playbook, without affecting shared instructions, create a new clause requirement with a distinct name and link it to that playbook only.

Concept: Library

Library enables administrators to create a repository of approved clauses and negotiation playbooks that ensure consistency across all contract reviews.

You can access the Library from the top navigation, where you can manage 3 key components: **Clauses**, **Negotiation Requirements**, and **Playbooks**.

Clause Library

- Use the Clause 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.
- 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.

AI Playbooks and Requirements

Playbooks and AI Requirements enable you to transform the Library from a static reference tool into an automated AI review engine.

- **Negotiation Requirements**: These are reusable, auditable instructions that tell the AI exactly what to look for. You can define specific logic for the AI to evaluate, such as checking for required terms or flagging language that deviates from a preferred position. Negotiation Requirements can be linked directly to your Clause Library to suggest automated redlines.
- **Playbooks**: These act as the orchestration layer. You can group specific Requirements into a Playbook and scope them to certain contract types or specific workflows.

Concept: AI Playbooks and Review

AI Playbooks and Review transforms contract review from a manual, reviewer-dependent task into an automated process that's clear and predictable. It enables you to apply company-defined negotiation standards to contracts at any point in the negotiation lifecycle.

Key Components

- **Playbooks**: The top-level configuration that defines when and how AI review runs. Playbooks define which instructions to apply and which contract types or workflows the AI should target, as well as the order and logic used during document analysis and risk identification.
- **Negotiation Requirements**: Reusable, auditable instructions that tell the AI what to evaluate for specific terms, such as checking for required clauses or flagging language that deviates from a preferred position.
- **Clause Library Integration**: Negotiation requirements can reference Clause Library variations to anchor AI analysis to approved company language. Note that these references are currently static; updates to the Clause Library require manual updates to the Negotiation Requirements.

Access Control

Role-Based Access Control rules define the permissions to access this functionality.

- *Libraries: View:* Provides read-only access to Playbooks, Negotiation Requirements, and the Clause Library, once AI Playbooks is enabled.
- *Libraries: Manage:* Provides full create and edit access to Playbooks and Negotiation Requirements, once AI Playbooks is enabled.
- *AI Review & Editing: Access*: Enables users to run AI Review in workflow tickets using published Playbooks, once AI Playbooks is enabled.

The CLM Power User role includes *Libraries: View* by default. To restrict a user to *AI Review & Editing: Access* only, with no Libraries visibility, create a custom role.

How AI Playbooks Work

- **Playbooks and Requirements**: An admin configuration step to define how the company negotiates. See Set Up AI Playbooks .
- **AI Review**: An in-workflow experience for contract reviewers to apply those standards to documents. See Review Documents with AI Playbooks .

Related Information
Concepts
Friday, 01st May

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.

Configure a Custom AI Model

Prerequisites

- Enable Custom AI in your workspace.
- Identify the field you want to automate.
- Gather the set of documents for analysis.
- Identify the data point you want to track for each document.

Context

Configure a custom AI field model to automatically extract and populate data from business documents into a custom field. Contract Management and Document Intelligence uses natural language instructions to identify and extract the specified information.

You can also use the Custom AI Model Library to save time and effort by eliminating the need to manually build your own data fields. If you don't see what you need in the Model Library, you can still configure your own Custom AI model. See Add Models from the Custom AI Model Library

Steps

1. Click **Automation**.
2. On the **Fields** tab, click **New Field Model**.
3. Click **Get Started**.
4. Select a custom field.

   The AI model populates this field automatically. **Contract Management and Document Intelligence** extracts data in these formats based on the field type:

Field Type	Use When
Date	You want to extract specific dates.
Number	You want to extract numerical values for reporting and calculations.
Text	You want to extract text in various formats.
Drop-down	You want to categorize the extracted information into a predefined list of values.

5. Define the set of documents for the model to analyze.

   You can apply these filters to documents:

   - Clause Type (presence or absence)
   - Contract Management and Document Intelligence Standard AI Fields
   - Contract Type
   - Effective Date
   - Folders
   - Upload Date

   You can improve model accuracy and manage processing costs by applying filters. Contract Management and Document Intelligence runs the AI model only on documents that match all filter criteria. Contract Management and Document Intelligence processes the entire document, even when you scope it to a specific clause type.
6. Enter natural language text that describes the data you want to extract in the instructions field.

   You can use these examples of effective instructions:

   - What to extract: The specific data point or answer you need. Example: Extract the total contract value.
   - How to find it: The logic to use to identify the correct value. Example: Sum the values from the annual fee schedule. Exclude one-time implementation fees.
   - Output format: The desired format for the answer, especially for text or drop-down fields. Example: Return Yes if the customer can use our logo. Return No if they can't. Return Not Mentioned if the topic isn't referenced.
   - Context: Your company's name or role in the document to clarify obligations. Example: Identify if we, Global Modern Services Inc., have the right to assign the agreement.
   - Edge cases: How to handle ambiguity or conflicting information. Example: If the agreement spans multiple years with different payment amounts, extract the value for the first year only.
7. Select **Save and Evaluate**.

8. Review each document and rate the model's result.

   Select these values:

   - Correct: The model returned the correct value.
   - Incorrect: The model returned an incorrect value. Enter the correct answer when prompted. You can optionally provide an explanation.
   - Skip: You want to ignore the document during evaluation.

   If you receive incorrect results, update your instructions to provide more clarity or address ambiguity. Select **Save and Evaluate** again to test your changes against the same set of documents.

   Repeat the evaluation process until the model consistently returns accurate results. We recommend you review 10 to 25 documents.
9. Select **Review & Publish**.

   Finalize and activate the model.

Result

Workday creates and deploys the custom AI model. The model runs on all existing documents within the defined scope and on all new documents that meet the scope criteria. The model populates the selected custom field with the extracted data.

Next Steps

Use the **Custom AI Models** report to monitor model accuracy and usage. You can edit the model to refine instructions or change the scope at any time.

Add Models from the Custom AI Model Library

Prerequisites

Your account must have Custom AI enabled. You can request it by contacting your Customer Success Manager.

Context

The Custom AI Model Library is a searchable, categorized repository of over 120 pre-configured Custom AI models. This feature offers instant access to fully tested models across functions like Legal, HR, Finance, IT, and Sales, saving time by eliminating the need to manually build fields.

You can browse models tailored to specific contract types and industries, preview their details, and publish them instantly, or first save them as a draft for testing and custom refinement.

Steps

1. Click **Automation**.
2. On the **Fields** tab, click **Browse Model Library**.
3. Search for models or use the filters to browse categories.
4. Click on the model(s) you would like to use and click **Add Model** to add it to your cart. Alternatively, click **Add All Models** to bulk-add models from a category.
5. Set the scope.

   Choose between **Apply to All** (applies filters to all selected categories), or **Set Custom Scope**, (defines a scope for each category).
6. Define which documents the models should run on by adjusting the available filters.

7. Click **Save & Test** to test the models before publishing, or click **Confirm & Publish** to publish the models to your environment.

   Note: Publishing models from the library affects your account balance.

Result

Publishing a model automatically creates a corresponding data field under the **Data Fields** section in the **Admin** tab.

If a field with the same name already exists in your environment, Workday appends **(Custom AI Library Model)** to the name of the new field added with the model.

Next Steps

Once you publish a model or save it as a draft, you can **Add Instructions** to the model to provide additional guidance and customize it to your context and documents. These instructions don't replace or overwrite the existing library model instructions.

After evaluating 10 samples, a model added from the Library is eligible for **AI Boost** to improve accuracy based on customer feedback.

Related Information

Concepts

Concept: Custom AI

Reference

Reference: AI Model Library Fields

Set Up Workflow Routing

Prerequisites

- You must ensure **Ask AI** is enabled for your workspace.
- Security: You must have **Workflow Builder: Manage** role.

Context

Workflow Routing is an intelligent routing engine that helps users identify the correct contract intake forms through a conversational interface. By defining routing rules, you can prevent rework caused by users submitting requests through incorrect forms.

Steps

1. Click **Automation**.
2. Open the **Routing Table** subtab.
3. Click **Create New Route** and select a workflow from the **Route Name** menu. The prompt displays only workflows that are published and don't have routing rules already configured.

   The **Route Status** toggle is enabled by default. Disabling it prevents the workflow from being suggested as a result for end-users.

4. In the **Route Instructions** field, enter natural language descriptions that help the AI distinguish when a specific workflow should be selected.
    - Try to define when the workflow should be selected. Example: *Use this route when a user wants to request a hardware upgrade or replace a broken laptop*.
    - Differentiate from similar tasks. Example: *Only use this for internal staff; for external contractors, use the 'Vendor Access' route instead*.
    - Use natural language and avoid technical jargon that a user might not use when asking for help.

    Examples:

    Route Name: MSA - LATAM (Local language). **Route Instructions**: *Use this for entities in South or Central America where a Spanish or Portuguese translation is required. Avoid this if the vendor is a US-based company with a small satellite office in LATAM.*

    Route Name: NDA - Mutual. **Route Instructions**: *Use this when both parties will be sharing confidential information. This is our default for partnership discussions. Avoid this if only one side is disclosing data, as it adds unnecessary obligations for us.*

    Route Name: Termination Agreement . **Route Instructions**: *Use this when we are ending a relationship early and need to settle final payments. Do not use if the contract is simply expiring on its own; use this only for active break-ups.*

    Route Name: Referral Agreement (Outbound). **Route Instructions**: *Use this when we are paying a partner a commission for sending us new customers. Do not confuse this with a Reseller Agreement where the partner actually sells the product on their own paper.*
5. Click **Create**.
6. Access the **General Routing** subtab to configure a welcome message that appears in the Ask AI interface, or a fallback response for unmatched queries.
7. Click **Test Routing** to test the routing logic before enabling it for the end-users.
8. Enable the **Activate Routing for All Users** toggle to launch the workflow routing in Ask AI and make it available for end-users.

Result

Ask AI uses your instructions to guide users to the specified workflow. See Access Workflows with Ask AI

Reference: AI Model Library Fields

These fields are available in the Workday Contract Intelligence AI Model Library.

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Billing and Invoicing

Model	Description
Buyer's Billing Address	This model extracts the billing address for the Buyer from the agreement.
Initial Payment Due Date	This model extracts the date that the first payment is due under the agreement.
Order / Invoice Date	This model extracts the invoice date from the agreement.
Order / Invoice ID	This model extracts the invoice id from the agreement.
Payment Frequency	This model extracts the frequency by which payments are due under the agreement.
Shipping Address	This model extracts the address where goods should be shipped under the agreement.
Total Amount	This model extracts the total amount due under the agreement.
Total Discount (Amount)	This model calculates the total amount of discounts in the agreement.

Construction Contractor / Sub-contractor

Model	Description
Flow Down Clause Summary	This model summarizes the flow down clause for subcontractors under the agreement.
Hazardous Materials	This model extracts the types of hazardous materials specified in the agreement.
Insurance Coverage Requirements	This model extracts the type and amount of insurance coverage required under the agreement.
Liens by Subcontractors	This model determines whether subcontractors may attach liens under the agreement.
Liens by Subcontractors Summary	This model summarizes the liens available to subcontractors under the agreement.
Project Cost	This model calculates the total cost of the project under the agreement.
Project End date	This model extracts the project end date from the agreement.
Project Start Date	This model extracts the project start date from the agreement.
Right to Stop Project	This model determines whether the agreement has a right to stop project clause.

Model	Description
Right to Withhold Payment	This model determines whether the agreement has a right to withhold payment clause.
Right to Withhold Payment Summary	This model extracts the conditions under which a party may withhold payment under the agreement.

Customer Support and Service

Model	Description
Audit Report Summary	This model summarizes the type(s) of audit reports that must be furnished under the agreement.
Certificate of Insurance	This model determines whether a certificate of insurance is required to be produced under the agreement.
Counterparty Notice Address	This model extracts the address for counterparty notice from the agreement.
Delivery Requirements	This model determines whether delivery requirements are specified under the agreement.
Furnish Audit Reports	This model determines whether a requirement to furnish audit reports is specified in the agreement.
Response Time	This model determines the time frame in which the service provider must respond to issues or service requests under the agreement.
Support Channels	This model extracts the available support channels under the agreement.

Data Privacy

Model	Description
Access Rights	This model identifies provisions that grant users the right to access, view, or obtain copies of their personal data held by the organization.
Data Minimization Clause	This model determines whether the agreement contains a data minimization clause.
Data Privacy Regulation Requirements	This model determines the data privacy regulations the parties are subject to under agreement.
Data Security Commitments	Ths model determines the data security commitments of the vendor under the agreement.
Deletion Procedures	This model identifies the specific methods, timelines, and requirements for securely removing or destroying user data upon request or after retention periods expire.
Types of Data Collected	This model identifies and categorizes the specific types of personal data, behavioral information,

Model	Description
	and other data categories that will be collected from users under the agreement.

Employment Agreements

Model	Description
Base Salary	This model extracts the base salary from the employment agreement.
Benefits Package	This model identifies all of the benefits specified in the employment agreement.
Employment Duration Type	This model determines the employment duration type under the employment agreement.
Employment End Date	This model identifies the end date of employment under the employment agreement.
Employment Start Date	This model identifies the start date of employment under the employment agreement.
Employment Type	This model determines the type of employment under the employment agreement.
Location Restriction	This model determines whether the employee is subject to location restrictions under the agreement.
Non-Compete Clause	This model determines whether the agreement has a non-compete clause.
Non-Compete Clause Summary	This model summarizes the non-compete clause of the employment agreement.
Non-Disparagement Clause	This model determines whether a non-disparagement clause is provided under the employment agreement.
Pay Type	This model lists all of the types of payment an employee will receive under the employment agreement. Reimbursements and benefits are not included.
Sick Leave	This model extracts the number of sick days granted to an employee under the agreement.
Term of Employment Summary	This model summarizes the terms of employment (e.g., start date, termination date) found in the employment agreement.
Termination Conditions Summary	This model summarizes the conditions for terminating employment under the agreement.

Energy Service Agreements

Model	Description
Backup Power Provisions	This model extracts the backup power provisions from an energy service agreement.
Baseline Energy Usage	This model determines the value of the baseline energy usage for the energy service agreement.
Billing Period	This model determines the billing period for the service agreement.
Energy Rate Scheme	This model determines whether the energy rate is fixed or variable under the energy service agreement.
Energy Type	This model determines the type of energy specified in the service agreement.
Gas Price Rate	This model extracts the gas price from the energy service agreement.
Rate Per Kwh	This model extracts the rate per Kwh for electricity from the agreement.
Transmission Charges	This model summarizes the transmission charges under the energy service agreement.
Unit of Measurement (Gas)	This model determines the unit of measurement specified for the gas provided in the energy service agreement.
Usage Requirements	This model determines the usage requirements under the energy service agreement.

ESG Third Party Management

Model	Description
ESG Anti-Bribery and Corruption Standards Summary	This model summarizes the anti-bribery and corruption standards that require compliance under the agreement.
ESG Diversity & Inclusion Standards Summary	This model summarizes the diversity and inclusion standards that require compliance under the agreement.

Financial Services Industry

Model	Description
Indemnification	This model extracts and summarizes the indemnifications found in the custodial agreement.
Scope of Services	This model summarizes the scope of services listed in the custodial agreement.
Overdraft	This model extracts the overdraft provisions found in the custodial agreement.

Model	Description
Setoff	This model extracts the setoff provisions found in the custodial agreement.
Loan Term Length	This model extracts the term length for the loan in the loan agreement.
Maturity Date	This model extracts the maturity date for repayment of the loan under the loan agreement.
Interest Rate	This model extracts the applicable interest rate for the loan.
Loan Type Summary	This model concisely summarizes whether the loan is fixed or floating, revolving facility, term, bilateral or syndicate, etc.

Healthcare Industry

Model	Description
Safeguards Summary	This model extracts the safeguard provisions found in the business associate agreement.
Permitted Uses and Disclosures of PHI	This model extracts the direct permitted uses and disclosures of PHI found in the business associate agreement.
Prohibited Uses and Disclosures of PHI	This model extracts the direct prohibited uses and disclosures of PHI found in the business associate agreement.
Business Associate Audit Obligations	This model summarizes the audit obligations under the business associate agreement.
Responsibilities of the Covered Entity	This model extracts the responsibilities of the covered entity under the business associate agreement.
Minimum Necessary Standard	This model extracts the minimum necessary standard from the business associate agreement.
Compliance Requirements	This model extracts all of the compliance requirements under the agreement.
Sponsor Name	This model extracts the sponsor name from the agreement.
Investigator Name	This model extracts the investigator name(s) from the agreement.
Publication Rights	This model extracts the publication rights specified in the agreement.
Claims Payment Period	This model extracts the number of days within which a claim must be paid after it is submitted under the agreement.
Correction Period for Reimbursements	This model extracts the time frame within which reimbursement corrections must be made under the agreement.

Model	Description
Credentialing Requirements	This model extracts the credentialing requirements from the agreement.
Reimbursement Methodology	This model extracts the reimbursement methodologies applicable under the agreement.
Insurance Programs	This model extracts the insurance programs applicable under the agreement.
Information Required on Claims	This model extracts the types of information that must be included when submitting a claim under the agreement.

Insurance Information

Model	Description
Insurance Type	This model extracts the type of insurance that is provided under the agreement.
Name of Insured	This model extracts the name of the insured party from the document.
Policy Number	This model extracts the policy number from the document.

IT Asset Management

Model	Description
Uptime Percentage	This model determines the Uptime percentage for SLAs under the agreement.

Lease Agreements

Model	Description
Commencement Date	This model extracts the commencement date of the lease.
Landlord Name	This model extracts the name of the landlord from the lease.
Landlord Repair and Maintenance	This model determines whether repairs and maintenance are required of the landlord under the lease.
Landlord Repair and Maintenance Summary	This model summarizes the landlord's requirements for repairs and maintenance under the lease.
Leased Space Address	This model extracts the address of the leased space from the lease.
Monthly Base Rent	This model extracts the base rent from the lease and converts it to the monthly amount if necessary.

Model	Description
Property Tax Obligation	This model determines which party pays for property taxes under the lease.
Rent Escalation Summary	This model summarizes the rent escalation specified in the lease.
Rent Frequency	This model determines the frequency by which rent is due under the lease.
Square Footage	This model extracts the square footage of the leased premises from the lease.
Tenant Name	This model extracts the name of the tenant from the lease.
Tenant Repair and Maintenance	This model determines whether repairs and maintenance are required of the tenant under the lease.
Tenant Repair and Maintenance Summary	This model summarizes the tenant's requirements for repairs and maintenance under the lease.
Tenant Right of First Refusal	This model determines whether the tenant has a right of first refusal under the lease.

NDA Terms

Model	Description
Confidentiality Markings Requirement	This model determines whether information must be marked or labeled as Confidential to be covered by the NDA.
Destruction/Return of Data	This model extracts the requirements to destroy or return confidential data under the NDA.
NDA Purpose	This model summarizes the purpose of the the NDA.
NDA Risk Summary	This model provides a risk summary for the NDA.
No Reverse Engineering	This model determines whether reverse engineering is permitted under the NDA.

Receipts and Expenses

Model	Description
Credit Card - Last 4 Digits	This model extracts the last four (4) digits of the credit card found on the receipt.
Transaction Date	This model extracts the transaction date from the receipt.
Merchant Name	This model extracts the merchant's name from the receipt.
Receipt Line Items	This model extracts a list of all goods and/or services along with prices purchased on the receipt.

Model	Description
Subtotal Amount	This model extracts the subtotal from the receipt.

Sales

Model	Description
Agreement Termination Options	This model summarizes the options for terminating the agreement.
Notice for Change of Control	This model determines whether notice is required for a change of ownership under the agreement.
Customer Notice Address	This model extracts the customer's physical address(es) for notices from the agreement.
Customer Notice Email	This model extracts the customer's email address(es) for notices from the agreement.
Logo Rights	This model classifies the logo rights under the sales agreement.
Minimum Quantity Purchased	This model extracts the minimum quantity of units that must be purchased under the agreement.
Products and Services Included	This model extracts a list of the products and services (and the quantity of each) purchased in the sales agreement.
Publicity Rights Summary	This model summarizes the publicity rights under the sales agreement.
Termination Rights upon Assignment	This model determines whether a party may terminate the agreement upon assignment.
Uplift on Renewal	This model determines whether the agreement has an uplift on renewal provision.
Uplift on Renewal Percentage	This model extracts the percentage of the uplift on renewal provision in the agreement.
Vendor Notice Address	This model extracts the vendor's physical address(es) for notices from the agreement.
Vendor Notice Email	This model extracts the vendor's email address(es) for notices from the agreement.

Related Information

Tasks

Add Models from the Custom AI Model Library

Reference: Unsupported Custom AI Question Types

Contract Management and Document Intelligence includes security measures and design limitations to prevent the Custom AI model from answering certain types of questions. The model can't answer questions that require information outside the context of the provided documents or that fall into restricted categories.

This topic provides examples of unsupported question types and the model's expected response.

Question Type	Sample Question	Expected AI Response
Factual (External)	What is the weather in San Francisco today?	I can’t provide real-time information such as weather forecasts.
Factual (Tenant Data)	How many users are in this tenant?	I can’t access tenant-level administrative data, such as user counts.
Counting	How many documents in the system are NDAs?	I can’t perform cross-document counting. To count documents, create a report with the same scope criteria used by the model.
Aggregation	What's the total contract value of all active contracts expiring in the next 90 days?	I can’t aggregate data across multiple documents. To calculate totals, create a report that sources this data.
Legal Advice	Can you provide a legal opinion on which contracts are risky?	I can’t provide legal advice or risk assessment. Consult with a legal professional.
Proprietary	What large language model are you using?	What large language model are you using? I am a large language model developed by Workday. I cannot share details about my underlying architecture.
Technical	Can you write Python code for me?	I can’t generate code in any programming language.
Confidential	List all documents in folders that I can't access.	I can’t access or report on information that you do not have the security permissions to view.

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 .

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: Custom AI

Custom AI enables you to automate the extraction and population of contract fields using natural language queries. Custom AI combines OpenAI, Anthropic, and Contract Management and Document Intelligence large language models (LLMs), all orchestrated by Contract Management and Document Intelligence AI to help ensure accuracy.

Custom AI offers these benefits for contract management:

- Track and manage obligations, risks, and opportunities to streamline your contract lifecycle.
- Extract detailed insights from your contracts to support strategic decision-making.
- Enable non technical users to build and train AI models using the natural language interface.
- Prioritize data security.
- Handle large volumes of documents efficiently.
- Summarize topics, score risks, calculate amounts, answer complex queries, and generate actionable insights.

The Custom AI model training process follows an iterative workflow:

1. **Instruct**: Provide instructions on what to find, where to search within your documents, and where to save the extracted information.
2. **Evaluate**: Test the model's performance using a small set of sample documents.
3. **Refine and publish**: When the results are satisfactory, publish the model for production use. When the results aren't satisfactory, iteratively improve the instructions using real-time visual feedback until the model meets your requirements.

Related Information
Tasks
Add Models from the Custom AI Model Library

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.
- 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 options:
   - *View details*
   - *Edit role*
   - *Duplicate role*
   - *Delete role*
6. (Optional) From the **More** menu on a prebuilt role, select these Advanced Administrator 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.

   Note: In large-scale tenants (Example: more than 3,000 departments and 10,000 users), manually adding users to a department via the user interface can result in a 15–20 second wait while the list populates. For optimal performance when managing large numbers, use the Import Users functionality to assign users to departments in bulk. See Set Up Users

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 and Manage Departments
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 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.

   You can work from an exported user list you have been editing and updating, or you can download a blank user import template using the link on the **Import Users** page. As you complete the template, consider:

Option	Description
User ID	This is a unique number assigned to a user. Leave this option blank for new users, as Workday assigns a unique number upon import.
Department	• Enter the existing department you want this user to be assigned. • When you need to assign the user to multiple departments, use a semicolon to separate them. Example: Legal;HR. • When you need to assign the user to a sub-department, use a double forward slash to separate them. Example: Enter HR//Recruitment to assign a user to the Recruitment sub-department of HR. • If the department or sub-department is not already in your workspace, Workday creates it upon import. • Complete the user import with departments set up before configuring SSO.
Status	Enter the desired status for the user account. For new users, leave the Status column blank.

Option	Description
	Upon import, Workday sets their Status to Pending until they sign in for the first time

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.

- **Standard AI**: You can't delete Standard AI fields. See Reference: Standard AI Fields and Clauses .

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

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
   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 .
   - 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 .
- 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 and 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 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.

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 .
- 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.

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

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.
- Document editing.
- Email intake.
- eSignature methods such as Adobe Sign and DocuSign. For details, see Concept: E-Signature Account Types .
- Third-party storage solutions. For details, see Use Public APIs to Create Integrations .

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.

Concept: 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.

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 .
- 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.

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.

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 **Send to E-signature**.
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.

Related Information
Concepts
Concept: E-Signature Account Types

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 .
- 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.

By default, Contract Management and Document Intelligence leverages captive signers so that signatories can sign directly from the Contract Management interface, bypassing standard DocuSign email authentication. However, administrators can choose to remove captive signers globally for their organization. This allows signers to manage, track, and execute their agreements directly via their standard DocuSign inbox on the DocuSign website.

Steps

1. Click **Admin.**
2. Click **Integrations**.
3. On the **3rd Party Integrations** tab, click **Connect** for Docusign.
4. (Optional) To bypass captive signing and route signing packages directly to your signers' native DocuSign inboxes, complete the Workday Community application form.

    Note: This capability is a global setting that applies across the entire workspace once active.

Next Steps

1. On the Workflow tab, open an active ticket that has reached the *Sign* stage.
2. Click **Send to E-signature**.
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.

When captive signing has been removed, the **Sign Document** and **View on E-Sign Platform** buttons aren't available on the ticket screen in Contract Management.

Related Information

Concepts

Concept: E-Signature Account Types

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

Set Up Docusign for E-Signatures

FAQ: eSignatures in Contract Management and Document Intelligence

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

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 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 . 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 .

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

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:

- Reference: Storage Provider Requirements
- Reference: Storage Provider Requirements
- Reference: Storage Provider Requirements
- Reference: Storage Provider Requirements
- Reference: Storage Provider Requirements

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.

Requirement	Description
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. Delegated permissions are used, not application permissions. 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:** • 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. Delegated permissions are used, not application permissions. This integration only supports setting up sync pairs that target folders in your personal OneDrive.

Requirement	Description
	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.

Related Information

Concepts

Setup Considerations: Contract Intelligence

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

Tasks

Set Up Email Intake for Documents

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 .
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
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 .

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
Authentication 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 **Try connecting again** 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 the Salesforce Connector. 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.
- 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.
- 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.
- To prevent connection errors, you must populate the **First Name** and **Last Name** fields in the Salesforce system account.
- 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 . You must ensure the **API Enabled** check box is selected for the integration account.

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 • Enforce Content Permission

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.

Related Information

Concepts

Setup Considerations: Contract Intelligence

Tasks

Set Up Email Intake for Documents

Reference

Reference: Storage Provider Requirements

FAQ: Contract Management and Document Intelligence Platform

Setup Considerations: Salesforce Connector CPQ

You can use this topic to help make decisions when planning your configuration and use of Salesforce Connector CPQ. 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 Contract Lifecycle Management integration with Salesforce CPQ (Configure, Price, Quote) allows you to either embed a dynamic table of quote information directly into a contract draft or append a CPQ generated quote document to the contract for e-signature. This integration works with quotes that have been finalized through the standard CPQ business rules and approval processes.

Business Benefits

- Reduce errors and increase efficiency by automatically adding quote data to a contract without manual copy-pasting.
- Ensure CPQ-generated quotes are legally binding by including them in the e-signature package.
- Make merged documents fully searchable and ready for AI-powered data extraction within Contract Lifecycle Management.

Use Cases

This integration addresses the business problem of manually transferring quote details into a contract. You can:

- Dynamically create a table in a contract draft using data from a Salesforce Quote record.
- Automatically attach a CPQ-generated quote document (PDF or Word) to a primary contract document for e-signature.

Questions to Consider

Question	Consideration
What fields from the Salesforce Quote Lines view do you need to display in the generated document?	When rendering the quote data into the document, Contract Lifecycle Management uses the fields shown in the Quote Lines view in Salesforce.

Question	Consideration
	Contract Lifecycle Management supports these data types: • Boolean • Currency • Double • Integer • Number • String
Are you going to display the quote as a dynamically generated table or attach it as a separate document for e-signature?	If you need to conditionally suppress some rows while showing others, you will have to use CPQ templates, which support a variety of use cases. In this case, you would first generate the quote in CPQ, store it as a Quote file, then attach it to the ticket as a file attachment.

Recommendations

Before you begin the integration steps in Salesforce, create and configure a workflow in Contract Lifecycle Management.

Requirements

- Install and configure the CPQ managed package in your Salesforce environment.
- Install the **Evisort Contract Intelligence for Salesforce** package and configure it with the appropriate permissions.
- To use the Quote Document integration, set the output format for the quote document to PDF or DOCX. The merge process doesn't append other file types.

Limitations

- You can only add 1 quote table to a single template document.
- The table construct doesn't support nested tables.
- Contract Lifecycle Management can't use a CPQ template. You must generate the quote document in CPQ and attach it as a file.
- When a quote is longer than 1 page, the table header row only displays on the first page.

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

Tasks

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

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

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

In Workday CLM & CI

1. Sign in 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

In Salesforce

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 **New Legacy Named Credential** from the drop down.
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	https://api.evisort.com/ 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.

In Workday CLM & CI

9. 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

Tasks

Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence

Set Up Intake Forms Button for Contract Lifecycle Management Workflow

Steps: Set Up Contract Lifecycle Management Workflows for the Salesforce Connector

Prerequisites

- Install the **Salesforce Connector for CLM** and **CI** package. See Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence .
- 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 .

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 .
2. Map Intake Forms from Salesforce to Contract Lifecycle Management .
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 .
- 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 .

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

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
- 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
- Set up intake forms in Salesforce. See Set Up Intake Forms Button for Contract Lifecycle Management Workflow

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

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 .
- 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 .

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.

You'll receive an **Invalid mapping: destination field '(deleted field Name)' is not found** error if a previously mapped field in Contract Management and Document Intelligence has been deleted or renamed. As a result, Salesforce can no longer sync data to this field.

To resolve this error, identify the invalid field in the error message and edit the existing field sync mapping row to connect the Salesforce field to the correct Contract Intelligence. Or, delete the field sync mapping row if the field is no longer needed for syncing.

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.

Set Up Scheduled Jobs

Prerequisites

1. Your batch jobs must be configured to use an account with Salesforce System Administrator access and these custom permission sets:

    - **Evisort Admin** permission set.
    - **Evisort Metadata Custom Field Permission** permission set.
2. Select the check box **Custom Log Send Diagnostic Data**. See Enable Custom Log Send Diagnostic Data .

Context

You must set up scheduled jobs to keep Salesforce and Contract Intelligence in sync for field and provision updates. By automating these processes, you ensure that both Contract Intelligence users and Salesforce users have access to the most current contract information, including AI-extracted fields and provisions.

This task involves scheduling Apex Classes as jobs, also called Apex batch jobs.

Steps

1. In Salesforce, access Setup > **Scheduled Jobs**.
2. Click **Schedule Apex**.
3. Schedule the **Import Custom Field and Provision Definitions** job.

   This job imports any new or deleted definitions for custom fields and provisions from Contract Intelligence. It also re-validates any object field mappings to check for any deleted or renamed Contract Intelligence fields. This job requires the *Modify All Data* permission because it modifies the data structures within the Salesforce Connector schema.

Field	Value
Job Name	Suggested Name: Import Custom Field and Provision Definitions
Apex Class	CustomFieldSyncSchedulable (namespace: evisort)
Frequency	Daily

4. Schedule the **Import Document Field and Provision Values** job:

   This job imports updates to active fields and provisions for linked Salesforce documents in Contract Intelligence and stores those values in the Salesforce Connector Evisort objects.

   It pulls document metadata from Contract Intelligence and creates/updates corresponding Evisort__c records in Salesforce.

Field	Value
Job Name	Suggested Name: Import Document Field and Provision Values
Apex Class	DocumentSyncSchedulable (namespace: evisort)
Frequency	• Minimum: Daily • Best Practice: Hourly If you can run this job more frequently, end users will be able to see AI data more quickly.

   Field and provision values are only imported if they are marked **Active**.
5. Schedule the **Export Object Fields to Contract Intelligence Documents** job:

   This job exports Object fields values to the linked Contract Intelligence document. This occurs when a document is first linked and also whenever the field values change.

Field	Value
Job Name	Suggested Name: Export Object Fields to Contract Intelligence Documents

Field	Value
Apex Class	EvisortMetadataSyncBatchV2 (namespace: evisort)
Frequency	• Minimum: Daily • Best Practice: Hourly

When using Salesforce simple scheduling, send the end date far into the future (100 years). This prevents the job from eventually stopping, ensuring data continues to synchronize with Contract Intelligence.

Set Up Imports from Contract Intelligence Fields and Provisions

Prerequisites

You need Salesforce System Administrator access and these custom permission sets:

- *Evisort Admin*
- *Evisort Metadata Custom Field Permission*

Set up scheduled jobs for **Import Custom Field and Provision Definitions** and **Import Document Field and Provision Values**. See Set Up Scheduled Jobs

Context

You can import Contract Intelligence field and provision values into Salesforce Connector's custom **Evisort__c object**. You can use these fields in reporting or custom scripts to ensure the contract data in Salesforce is updated with the latest information extracted from Contract Intelligence.

Steps

1. From the **Evisort Admin** page in Salesforce, navigate to **Sync Fields** in the left menu, then scroll down to the **Sync Fields** section.

   This section shows the list of available Contract Intelligence fields.

Option	Description
Label	The label of the field from Contract Intelligence.
Type	The data type of the field in Salesforce.
Active	A check box that indicates whether the field is active for syncing metadata to Salesforce.
Field Status	A check box that indicates whether the field is available in Salesforce.

2. If you can't access the expected Contract Intelligence fields, you can manually force a refresh to update the list of fields.
   a) Click **Pull from Evisort**.
   b) Click **Assign Field Permission**.

   There may be a small time lag before the fields are visible.
3. To prevent unneeded data being imported into Salesforce, de-activate fields as needed.
4. From the Evisort Admin page, navigate to **Sync Provisions** in the left menu, then review the **Sync Provisions** section.
5. If you can't see the expected Contract Intelligence provisions, you can manually force a refresh to update the list. Click the **Pull from Evisort** button.

6. To prevent unneeded data being imported into Salesforce, de-activate provisions as needed.

Set Up Object Field Mappings

Context

As Contract Intelligence completes AI processing, you can import the document metadata fields back into the Salesforce object which contains the document. You must map fields from Contract Intelligence to the appropriate Salesforce object field using Object Mappings. You can choose Salesforce object fields of up to 5 levels in the object hierarchy.

Steps

1. From the **Evisort Admin** page in Salesforce, navigate to **Sync Fields** in the left menu.
2. The first section is **Sync Object Mapping**. To add a new object mapping, click **New Object Mapping**.
3. Choose a Salesforce Object.
4. Add a row to the mapping for each Salesforce Object field that should be automatically populated with Contract Intelligence data.
5. Select the desired Contract Intelligence field on the right to complete the mapping.

   You can configure mappings to Salesforce object fields with datetime or numeric data types only for Contract Intelligence fields with a compatible data type.
6. Save the changes.

   You can edit an existing Object Mapping from the menu icon on the right side of the mapping row in the list view.

Create Custom Object Filters for the Salesforce Connector

Context

Object-level filters enable you to ensure that the Salesforce Connector only imports relevant business documents into Contract Management. By defining specific field criteria, you can automate the synchronization of documents based on their parent record status.

Steps

1. From the **Evisort Admin** tab, access the **Sync Criteria** page.
2. Click **Add Object** in the **Object Specific Settings** section and enter the name of the Salesforce object you want to filter.
3. (Optional) To narrow the scope, enter a specific object path.
4. Select the Salesforce field and relational operator to trigger a sync. Example: Status__c EQUALS Executed.
5. Click **Save**.

Result

Workday initiates the evaluation process when a file is uploaded or updated in Salesforce. The connector performs these automated checks:

- **Sync Status**: Verifies the **Evisort__c** field. When the field is populated, Salesforce skips the file to prevent duplicate processing.
- **Global Flags**: Checks the **Sync_Criteria__c** setting for universal sync requirements.
- **Filter Evaluation**: The **evalContentCreation** method queries the **Evisort_Export_Filter__c** records to match the file and parent record against your defined rules.

- **File import**: when all the criteria matches, Salesforce generates a **QueueItem** for the file to be imported into Contract Management.

Steps: Set Up Contract Lifecycle Management Integration for Salesforce CPQ

Prerequisites

- Install and configure the CPQ managed package in your Salesforce environment.
- Install the **Evisort Contract Intelligence for Salesforce** package and configure it with the appropriate permissions. See Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence .
- Create a workflow in Contract Lifecycle Management.

Context

You can configure Contract Lifecycle Management to automatically create a table in a contract draft using Salesforce CPQ quote data. This enables you to embed a single quote into a contract template.

Steps

1. Access a document editor, like Microsoft Word or Google Docs and create the template document for the contract. As you complete this task, consider:

Option	Description
Format	Add a new table placeholder for the CPQ quote information using a specific syntax. See Reference: Table Syntax and Formatting
Fields	The field placeholder in the template must match the field name you define in the workflow.
Amount of Tables	Contract Lifecycle Management supports only 1 quote table in a template document.
Conditionally Hide the Quote	You can suppress the quote table from appearing in the document by wrapping it in conditional placeholders. If you need to conditionally suppress some rows while showing others, you will have to use CPQ templates.

2. Update the existing workflow in Contract Lifecycle Management to define the quote field.
   a) Upload the document template that you created in the previous step.
   b) Create a new custom field type. You must set the field type to *Text (Paragraph)*.
   c) Map the field to a question on the intake form.
3. In Salesforce, signed in as a Salesforce admin, update the **Salesforce Object Type** field.
   a) Access the **Object Manager**.
   b) Search for *mapping* in the **Quick Find** and select **Intake Form Mapping**.
   c) Navigate to **Fields & Relationships** and select **Salesforce Object Type**.
   d) Scroll down to the **Values** section and click New, type *Relationship* in the text box, and save.

4. In Salesforce, map the intake form.
    a) Access the **Evisort Admin** page from the App Launcher.
    b) Navigate to **Map Intake Forms** and click **Pull from Evisort** if you don't see your workflow listed.
    c) Click **Map New Intake Form** if this is the first time mapping this workflow. Otherwise, click the arrow next to the workflow and select **Edit**.
    d) In the mapping form, select the correct workflow and set the Salesforce Object to **Opportunity**.
    e) Locate the Evisort field for the Quote, click the dropdown, and select **Relationship**.
    f) Enter *SBQQ_Quotes2_r* in the text box that appears.
5. In Salesforce, define the Quote Lines View.
    a) Access the **Object Manager** and select **Quote**.
    b) Navigate to **Page Layouts**, find the **Quote Lines** and click the wrench icon to edit the view.
    c) Change the view to reflect the fields you want to appear in the quote table. The fields will be output in the same order they are shown in the view.

Result

When a user creates a new ticket from Salesforce, they will be able to select from a list of available quotes. When the ticket is created, the contract draft will contain the quote information in a table format.

Steps: Set Up Quote Document Integration for Contract Management

Prerequisites

- Create a workflow in Contract Lifecycle Management.
- Create CPQ templates. See Building Your CPQ Documents with CPQ Templates

Context

You can use this integration to streamline the e-signature process by automatically appending CPQ-generated quote PDFs to the primary contract document in Contract Lifecycle Management. The combined document (contract + quote PDF) is then included in the e-signature package, ensuring the quote is legally binding. After signing, Contract Lifecycle Management stores the complete document in the post-signature repository where it becomes searchable, previewable, and available for AI-powered data extraction.

Steps

1. In Contract Lifecycle Management, define the quote document field.
    a) Click **Workflow**.
    b) Select a workflow.
    c) Click **Add Field**.
    d) Click **Custom Field**.
    e) Select **Attachments**.
    f) On the **Form** tab of the workflow, click **Add Question**.
    g) Select the field.
    h) From the **Allow users to attach** menu, select **One attachment**.
    i) Select the **Settings** tab of the workflow.
    j) In the **Append a Document to the Contract** section, select the attachment field you just created.
    k) Click **Publish**.

2. In Salesforce, map the intake form.
    a) Access the **Evisort Admin** page from the App Launcher.
    b) Navigate to **Map Intake Forms** and click **Pull from Evisort** if you don't see your workflow listed.
    c) Click **Map New Intake Form** if this is the first time mapping this workflow. Otherwise, click the arrow next to the workflow and select **Edit**.
    d) In the mapping form, select the correct workflow and set the Salesforce Object to **Opportunity**.
    e) Locate the Evisort field for the quote, click the dropdown, and select **Add Relationship**.
    f) Enter *SBQQ__R00N700000029COgEAM__r i* in the text box that appears.
3. In Salesforce, enable User Option for Quote Document Format.
    a) Click **Setup** and search for **Users**.
    b) Select the desired user and click **Edit**.
    c) Select **Allow Output Format** check box and click **Save**.
    d) Go to the User object and add the **Allow Output Format** field to the User Layout so it's visible on the user profile page.
4. In Salesforce, generate a Quote Document.
    a) On the **Quotes** page, click **Generate Document** .
    b) Configure the document elements, including template, output format, and document name.
    c) Click **Save** and select **Send via DocuSign** or **Send via email**.

Result

Once a user creates a new ticket and selects a quote document, the chosen CPQ quote PDF or Word document is automatically combined with the primary contract draft, creating a single, merged document. This merged document is included in the e-signature package and stored in Contract Lifecycle Management post-signature repository.

Enable Custom Log Send Diagnostic Data

Prerequisites

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

Context

The Custom Log Send Diagnostic Data feature helps resolve your issues faster by automating error log reporting and management. It automatically sends the necessary diagnostic data from Salesforce directly to Workday, eliminating the time-consuming, manual process of collecting logs through the Salesforce AppExchange License Management Application (LMA). This automation streamlines troubleshooting, leading to quicker resolutions.

To protect your privacy, the feature only collects the minimal, non-sensitive data required for troubleshooting and doesn't gather any personally identifiable information (PII).

The feature also includes 2 settings that control an automated log cleanup task, which prevents logs from accumulating indefinitely. These settings work together to automatically delete old or excessive logs.

Workday recommends that you enable the Custom Log Send Diagnostic Data feature at all times for better error management.

Steps

1. Enable Evisort logging in Salesforce.
    a) From **Setup**, go to **Custom Metadata Types**.
    b) Click **Manage Records** for the entry labelled evisort **Log_Settings**.
    c) Click **Edit** for the entry labelled **Default**. Create this entry if it is not there.
    d) Select the **Enable Logging** check box.
2. Allow API connections to the Evisort web services.
    a) From **Setup**, go to **Remote Site Settings**.
    b) Click **Edit** for the entry labelled **AstroApiProd**.
    c) Select the **Active** check box and ensure the **Remote Site URL** value is *https://astro.evisort.com/*
3. Enable sending log data to Evisort.
    a) From **Setup**, go to **Custom Settings** .
    b) Click **Manage** for the entry labelled **Evisort Workspace Settings**, then click **Edit**.
    c) Select the **Custom Log Send Diagnostic Data** check box.
    d) (Optional) Set the **Custom Log Retention Period (Days)** to reduce the volume of storage consumed by logs. If you don’t set it, Salesforce defaults the retention period to 30 days.
    e) (Optional) Set the **Custom Log Max Entries (Count)** to any number between 100 and 2000. If you don’t set it, this setting has no effect.
4. Schedule automated log transmission in **Schedule Apex**.
    a) From **Setup**, go to **Scheduled Jobs**.
    b) Click **Schedule Apex**.
    c) In the **Job Name** field, enter *Send Logs To Evisort*.
    d) In the **Apex Class** field, enter *SendErrorLogsToExternalBatch* .
    e) Schedule the job to run once a day by selecting the check boxes for each day of the week. Enter today's date for the start date and enter the furthest possible date in the future for the end date.
    f) Click **Save**.

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

Access	Description
	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 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. • **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.

Access	Description
	• **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.

Enforce Content Permissions

This permission ensures a consistent experience across both Salesforce and Evisort platforms by preventing users from performing actions in Salesforce that they aren't permitted to do in Evisort.

Select the **Enforce Content Permissions** check box in the Evisort Workspace Setting custom settings to enforce the permissions defined in the Evisort workflow.

By default, this permission is turned off to maintain existing workflows

Check Box State	Description
Checked	Honors the Evisort permissions associated with each workflow stage. Users are restricted from accessing the **Download**, **Upload New Version**, and **Share** buttons within Salesforce, ensuring only authorized users can perform these actions.
Unchecked	The **Download**, **Upload New Version**, and **Share** buttons are enabled for users who submit tickets, allowing them to use these functions without restriction.

Related Information
Tasks

Set Up Salesforce Connector for Contract Lifecycle Management and Contract Intelligence

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

Concept: The Evisort Admin App in Salesforce

The Evisort Admin app is a central hub for managing your**Evisort Contract Intelligence for Salesforce** integration. You can use the app to configure and control which documents and metadata are synced between the two platforms. The Evisort Admin app provides access to these functions:

- **Configure Sync Criteria**: Set rules to determine which files and metadata are synced between Salesforce and Contract Intelligence.
- **Manage Sync Fields**: Control which fields are synced from Contract Intelligence to Salesforce.
- **Set Up Sync Clauses**: Configure which contract clauses are extracted and synced from Contract Intelligence to Salesforce.
- **Other Options:** Access additional features and settings, such as user assignments, reports, and custom notifications.

You can access the Evisort Admin app from the App Launcher or the Setup menu. If you encounter access issues with the Evisort Admin app, verify that the 'Evisort Admin' permission set has been assigned to your user account.

Concept: Salesforce Document Sync Criteria

The Salesforce Connector for CI and CLM uses a *capture-all* synchronization architecture for files to ensure data integrity. Rather than monitoring UI components, the connector monitors underlying data objects to maintain a complete audit trail of all file-related activities.

Contract Management uses **Universal Triggers** to monitor these Salesforce data objects to identify new or updated files:

- **ContentVersion**: Captures new file uploads and actual file content.
- **ContentDocumentLink**: Identifies when an existing file links to a new record, such as an Opportunity or Account.
- **Legacy Attachment**: Monitors the older Salesforce Attachment object for legacy data.

Note: In Salesforce Lightning, Salesforce captures files uploaded via the **Notes & Attachments** related list by monitoring the **ContentVersion** record. Since Contract Management monitors this record directly, your files are captured regardless of which related list or UI component is used for the upload.

Global Sync Criteria

At the highest level, the connector uses a global setting to determine the baseline behavior for all file discoveries.

When you select the Sync All check box in the **Evisort_Status__c** setting, Salesforce syncs every valid file the connector discovers, regardless of other defined criteria. When the check box isn't selected, Salesforce only processes files that explicitly match defined export filters and object-specific settings. See Create Custom Object Filters for the Salesforce Connector

Duplicate Prevention

The connector uses 2 layers of protection to ensure workspace data remains clean:

- **Intelligent Bypass Logic**: When Salesforce captures a file during the initial upload (via the ContentVersion trigger), it automatically ignores subsequent linking events for that file.
- **Sync Status Verification**: The connector skips documents that already contain an Evisort ID in the Evisort__c field.

Requirements

For a document to be eligible for automated synchronization, it must meet this criteria:

Option	Description
Supported Formats	PDF Word (.doc, .docx)
File Size	Maximum of 5MB per file.

Option	Description
Parent Linkage	For Lightning Orgs, Salesforce uses the **ContentDocumentLink** object to find the parent record and evaluate your filters. For Classic Orgs (legacy), Salesforce evaluates the filter directly against the record the attachment is inserted to.

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

Salesforce Data Type	Contract Management and Document Intelligence Data Type: Allows mapping	Contract Management and Document Intelligence Data Type: Mapping not allowed
PHONE	TEXT, TEXTAREA, NUMBER	DATE, MONETARY_VALUE, NUMBER, PERCENTAGE, TIME_PERIOD
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

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.

Reference: Table Syntax and Formatting

Context

This topic explains the syntax and formatting options for table placeholders used to embed Salesforce CPQ quote data into Contract Lifecycle Management contract templates.

Syntax

The basic syntax for a table placeholder is:

```
{{#field_name
  formatting options; (line separated)
/}}
```

- The table placeholder must start with {{#
- The field_name must match the name of the field on the intake form that is mapped to the quotes from Salesforce.
- Formatting options are optional.
- The table placeholder must end with /}}

For example, if the field name is quoteTable, the placeholder tag would be:

```
{{#quoteTable
          /}}
```

The table is dynamic and uses the Quote Lines view to build columns, so there is no syntax for specifying columns. The table construct doesn't support nested tables.

Table Sections

The table construct has 3 main sections:

- **Header:** The top row containing the field names.
- **Rows:** The details for the quote items.
- **AggregateRows:** Summary calculations from the quote record, such as Subtotal, Discount, and Grand Total.

Supported Formatting Options

Formatting options control the look and feel of the text within the table and must have a prefix indicating the table section to which they apply: Header, Rows, or AggregateRows. Each option must be on a new line and end with a semicolon.

These are the options available:

- **font-size:** The absolute size in pixels (e.g., 12px).
- **font-style:** Supported values are normal, bold, underline, or italic.

- **font-family:** The font name as it appears in document editors (e.g., Arial, Times New Roman).
- **border-style:** Supported values are solid or dash.
- **text-align:** Supported values are left, right, or center.

Example

```
{{#quoteTable
Header-font-size:14px;
Header-font-style:bold;
Rows-font-size:12px;
Rows-border-style:solid;
AggregateRows-text-align: right;
/}}
```

If a placeholder contains an unsupported value for a style, Contract Lifecycle Management will use the default styling instead of generating an error.

FAQ: Salesforce Connector for Contract Lifecycle Management and Contract Intelligence

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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.

FAQ: Contract Lifecycle Management Integration with Salesforce CPQ

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What happens if the quote data changes during the legal review process?	The Contract Lifecycle Management integration assumes all quote negotiations were completed before the legal review process begins. If the data changes, the salesperson must manually update the Quote record in CPQ, get it approved, and then create a new workflow ticket with the updated Quote record.
Can I group the table by Product Groups?	No, Contract Lifecycle Management does not support grouping by Product Groups. You will need to generate the quote document using Salesforce CPQ and attach it as a file to the ticket instead.
Can Contract Lifecycle Management use my existing CPQ template?	No, Contract Lifecycle Management cannot use CPQ templates. You can create a quote document using your CPQ template and attach it as a file to the ticket instead.
Can this integration be used with Salesforce Products instead of Quotes?	No, the integration is designed to work with Salesforce Quotes, which are part of the Salesforce CPQ add-on.
Can I use a field type other than Attachments for the Custom Field Type?	No, using any other field type will cause the Quote Document Processing to fail.
Can an admin create multiple mappings for the same workflow and salesforce object?	No, creating duplicate mappings will corrupt the quote document template selection.
The table produced in the contract contains more data than I want. How do I fix this?	If this is a one-off situation, you can manually edit the table in the contract draft. For a permanent change, a Salesforce admin should change the view in Salesforce.
Is there a way to control the display of each aggregate field?	Contract Lifecycle Management displays all aggregate fields. To remove 1, you must manually edit the document after the contract draft is created.
Can I add custom aggregate fields to the table?	You will need to generate a quote document using Salesforce CPQ and attach it as a file to the ticket.
My quote table placeholder isn't getting replaced with the quote data.	First, verify that you've mapped the intake form field to the template using the correct field name and placeholder.

When I create a new workflow ticket, the question mapped to Quote records doesn't show Add Relationship.	You must add a new value to the custom Evisort field in Salesforce. After making this change, refresh the page so Salesforce can pick up the change.
When creating a ticket, I'm getting an error: Status 400: Bad Request: Invalid Quote Table structure.	This error occurs when the Quote Line Items view contains a field with an unsupported data type, such as a Picklist field or Picklist (Multi-Select) field. To fix this, remove the unsupported field from the view.
What causes the Attempt to de-reference a null object error when I try to generate a quote document?	This error can occur when a required field is missing from the Quote record or Quote Line records. You must ensure that **Quantity** and either **List Price** or **Special Unit Price** fields are populated on all Quote Line Records.

Set Up Microsoft Word Connector for Contract Lifecycle Management

Prerequisites

- Have an active license for Microsoft Word desktop.
- Have a valid Microsoft 365 or Office 365 subscription with Microsoft SharePoint Online provisioned and active in your tenant.
- A SharePoint administrator must authorize Workday Contract Lifecycle Management (CLM) to read, edit, and sync documents via SharePoint Embedded.
- End-users must have Edit permissions on the workflow associated with the document they would like to edit.

Context

The Microsoft Word Connector enables end-users to launch contract documents from Workday Contract Lifecycle Management (CLM) directly into their local Microsoft Word desktop application for editing. You can synchronize updates, including document content, icons, tables, images, and native text highlighting, back to the CLM platform. The connector also supports Track Changes and an Activity Log within CLM to capture modifications made during desktop sessions.

Steps

1. Go to the **Admin** tab and access the **Integrations** page.
2. On the **Document Editing** section, go to the **Microsoft Word** card and click **Configure**.
3. Click **Connect** to grant Workday CLM the necessary permissions to read, edit, and sync documents via SharePoint Embedded.

   Note: If you are not a SharePoint administrator, copy the provided link and send it to your IT Administrator for consent.
4. Enter the connection details provided by the SharePoint administrator:

   SharePoint Site URL. Example: https://www.yourcompany-admin.sharepoint.com

   Microsoft Tenant ID.
5. Click **Save Configuration**.

Result

The Microsoft Connector is now configured. Your users can now edit CLM documents in the Microsoft Word desktop application. See Edit Documents Using Microsoft Word

Considerations:

- Documents edited in the desktop application don’t appear in the **Recently Edited** list within **Microsoft Word.** Users must return to Workday CLM to re-open the file.
- Documents opened in Microsoft Word will have an expanded name that differs slightly from the name shown in the Workday CLM user interface. It’s a UUID required for the integration appended to the document name. The title of the document can’t be edited.

Next Steps
To enable AI-driven capabilities for the Microsoft Word Connector, you also need to configure a CLM Add-In.

1. In the **Microsoft 365 admin center**, navigate to **Settings** > **Integrated apps** and select the **Deployed apps** tab.
2. Select **Upload custom apps**.
3. Choose **Office Add-in** and select **Provide link to manifest file**.
4. Include the link corresponding to your region:
   a. Non-EU: https://scribyl.evisort.com/addin/manifest.production.xml
   b. EU: https://scribyl.eu1.evisort.com/addin/manifest.eu1.xml
5. Assign the add in to the appropriate audience:
   a. Entire Organization
   b. Specific users/groups (e.g., your Legal Team)
   c. Just me
6. Review and accept the app permissions to finalize the deployment. To complete the connection, a user in your organization must open the Workday CLM Add-in within Microsoft 365 (Word, Excel, or PowerPoint). It may take up to 24 hours for the add-in to appear in the Word ribbon for designated users.

Related Information
Concepts
Friday, 10th July

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.

Related Information

Concepts

Setup Considerations: Contract Intelligence

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

Reference

Reference: Storage Provider Requirements

FAQ: Contract Management and Document Intelligence Platform

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.

Depending on the identity provider you choose, specific configuration details and considerations may apply. Refer to the provider specific content for more information:

- Reference: Microsoft Azure SSO Configuration
- Reference: Okta SSO Configuration
- Reference: OneLogin SSO Configuration

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**.

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 plain text. However, if your IdP is a Microsoft self-hosted server or cloud server (Azure), the attributes might format as URLs. Because attribute field names can be customized or overwritten, verify the exact field names used in your specific setup.

   Note: You can assign multiple departments to the same user. Create a new field designed to store a **comma-separated string array** of department names. Example: ["Department1", "Department 2", "Department 3"]. The departments must already exist in Contract Management and Document Intelligence for the user to successfully sign in.
7. In Contract Management and Document Intelligence, select **Enable SSO**.
8. Select which users must use SSO to sign in. If you select enforcing SSO for all users, the recommended method for user provisioning is to create or assign the user directly in the Identity Provider (IdP).
9. Assign a default role to new users who sign in through SSO.

Related Information
Concepts
Friday, 12th December

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

Reference: Microsoft Azure SSO Configuration

This topic provides additional information about configuring Microsoft Azure as your identity provider (IdP) for Single Sign-On (SSO). For general SSO configuration steps, see Steps: Configure Single Sign-On (SSO) for Contract Management and Document Intelligence

Considerations for Microsoft Azure Configuration

- **Application type**: When adding a new SAML application in Azure, select the option to integrate any other application that is not in the gallery.
- **X.509 Certificate**: You must download the Base64 certificate from Azure. Open the downloaded file with a text editor to copy and paste the certificate into the Contract Management and Document Intelligence SSO configuration.
- **Authentication Context Class**: Set the **Authentication Context Class** to None in the Contract Management and Document Intelligence SSO configuration, as we don't support various Microsoft AuthnContext.

- **Attribute mappings**: Unlike other IdPs where attributes are typically text, attributes in Azure are URLs. You need to copy the entire URL value for each attribute, such as first name or email address, and paste it into the Contract Management and Document Intelligence SSO configuration.

Reference: Okta SSO Configuration

This topic provides additional information about configuring Okta as your identity provider (IdP) for Single Sign-On (SSO). For general SSO configuration steps, see Steps: Configure Single Sign-On (SSO) for Contract Management and Document Intelligence

Considerations for Okta Configuration

- **Attribute statements**: You must use the attribute names you choose in Okta, typed exactly as they are, when you configure Contract Management and Document Intelligence SSO.
  - The name field for each attribute is the key, not the value.
  - Example: a name attribute of *email* corresponds to the user's email address as the value.

Reference: OneLogin SSO Configuration

This topic provides additional information about configuring OneLogin as your identity provider (IdP) for Single Sign-On (SSO). For general SSO configuration steps, see Steps: Configure Single Sign-On (SSO) for Contract Management and Document Intelligence .

Considerations for OneLogin Configuration

- **Application type**: When adding a new app in OneLogin, search for custom SAML and select **SAML Custom Connector (Advanced)**.
- **ACS Reply / Recipient URL** in Contract Management and Document Intelligence is the same as the **OneLogin ACS (Consumer) URL**. The **Identifier URL** in Contract Management and Document Intelligence is the same as **ACS (Consumer) URL Validator**.
- When completing the configuration in OneLogin, select:

Option	Description
SAML Initiator	Service Provider
SAML name ID	Transient
SAML Issuer Type	Specific
SAML signature element	Both
SAML encryption method	AES-256-CBC

- **Attribute mappings**: In OneLogin, you must add and configure parameters for each attribute, such as first name, last name, and email. Select **Include in SAML assertion** check box for each parameter. The names you provide for these parameters are the keys, not the user's personal information, and you must use them exactly as typed in the Contract Management and Document Intelligence SSO configuration..
- **Signature algorithm**: Ensure that the signature algorithm is set to **SHA-256** in both OneLogin and Workday.

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

Mutiple Departments in SSO Configuration

- 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?

Mutiple Departments in SSO Configuration

- FAQ: Single Sign-On (SSO) in Contract Management and Document Intelligence
- FAQ: Single Sign-On (SSO) in Contract Management and Document Intelligence
- 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?	Yes, this is possible using the Integrated User Provisioning (Advanced SSO) feature included in Advanced Administration. 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

<table>
<tr><td></td><td>Okta) and then configure a single SSO integration through Okta.</td></tr>
<tr><td>When a user is manually added and then deleted, does Contract Management and Document Intelligence provision them on their first login?</td><td>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.</td></tr>
<tr><td>When and what does Contract Management and Document Intelligence provision when a user first logs in?</td><td>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 Advanced Administration, Contract Management and Document Intelligence retrieves user data on every login and updates attributes (such as Role or Department) as modified in the IdP.</td></tr>
<tr><td>Does Contract Management and Document Intelligence support Single Logout through SSO?</td><td>We don't currently support Single Logout through SSO.</td></tr>
</table>

<table>
<tr><td>After changing my SSO configuration to support department synchronization, users can't sign in. How do I fix this?</td><td>Ensure that the custom attribute mapping in your Identity Provider is correct. We still require first name, last name, and email claims to be sent with the department.
Secondly, check that the department names in your Identity Provider match exactly as they are spelled in Contract Management and Document Intelligence.
If the issue persists, send the specific error message to Workday Support to receive additional troubleshooting guidance.</td></tr>
</table>

<table>
<tr><td>Which Identity Providers (IdP) support multiple departments?</td><td>This feature is supported by any SAML 2.0-compliant Identity Provider capable of sending a comma-separated string array. Azure, Okta, and Ping Identity all support this array format.</td></tr>
</table>

<table>
<tr><td>Are departments in Contract Management and Document Intelligence always overwritten with the values from the IdP?</td><td> Yes. When departments are explicitly mapped in the SSO configuration, the Identity Provider always serves as the source of truth. This table illustrates the synchronization behavior for different values received from the IdP, assuming all departments exist in Contract Management and Document Intelligence. <table><tr><th>Field Value in IdP</th><th>Is this supported?</th><th>What happens in Contract Management?</th></tr><tr><td>"Department 1"</td><td>Yes. This is our current behavior</td><td>The user</td></tr></table></td></tr>
</table>

Field Value in IdP	Is this supported?	What happens in Contract Management?
	for a single department, maintained for backwards compatibility.	signs in. • Workday assigns the user to Department 1.
""	Yes. This is our current behavior for a single department, maintained for backwards compatibility.	• The user signs in. • Workday removes the user from all departments because the string is empty.
["Department 1", "Department 2"]	Yes. This is the new format we support.	• The user signs in. • Workday assigns the user to Department 1 and Department 2.
["Department 1"]	Yes. This is the new format we support.	• The user signs in. • Workday assigns the user to Department 1.
[]	Yes. This is the new format we support.	• The user signs in.

Field Value in IdP	Is this supported?	What happens in Contract Management?
		• Workday removes the user from all departments because the string array is empty.
Any other format not provided above	No. This is not using the correct syntax.	• The user can't sign in.

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**.

2025

October

Friday, 31st October

Enhanced Search of Workflow Tickets

With this release, we provide new filtering and sorting functionality for the Workflow Tickets table.

Business Benefits

This enhancement improves efficiency by allowing users to quickly narrow down high-volume ticket tables to focus on what's most relevant to their tasks.

Changes

Search filters: We add these search filter options to the Workflow Tickets table list:

- **Ticket Stage**
- **Submitted Date**
- **Completed Date**
- **Canceled Date**
- **Submitter**

- **Assignee**
- **Participating Users**

Some filters are read-only based on the tab selected. Example: on the **Needs Action** tab, the **Assignee** filter will be read-only and default to *Me*.

Your filter selections persist until you manually clear them or clear your browser's cache.

Sorting results: Additionally, we add sort options to the column headers for **Assigned to** and **Participants**.

What do I need to do?

To access the new filters:

1. Navigate to the **Workflow** tab and click **Tickets**.
2. On the filter panel, select criteria from the dropdown menus for the desired fields and click **Apply Filters**.
3. If you wish to clear your filters, click **Reset Filters** within the filter panel. Alternatively, you can manually open individual filter fields and click the **Clear** button within each one.

To sort results:

Click on the **Assigned to** or **Participants** column headers. You can sort the results in ascending and descending order.

November

Friday, 14th November

Ask AI - Unified Search and Enhanced Intelligence

With this release, Contract Management and Document Intelligence introduces a series of improvements in Ask AI, such as better source citations, enhanced accuracy, and the ability to reference data contained in custom fields.

Ask AI is a conversational AI tool that enables you to ask questions in natural language and receive a summary answer based on information across all your documents, a specific subset, or a single document.

Business Benefits

These enhancements help streamline the contract review and information gathering processes. By acting as a single conversational interface, Ask AI significantly reduces the need for manual, in-depth search. This allows you to get answers, not just a table of search results, leading to faster, more reliable, and verifiable insights.

Changes

The primary changes are focused on improving the core AI model and enhancing the user experience:

- **Performance**: By enhancing the AI model, Workday offers accuracy improvements and better source citation quality.
- **Data field references**: For questions related to a single document, Ask AI can now reference data from custom data fields. By clicking the source button, users can automatically access the field's metadata.
- **Status indicators while generating answers**: Workday replaces generic progress indicators with detailed and transparent information into the process followed by Ask AI while generating an answer and the sources being searched.

Considerations:

- If you're looking to find answers across multiple documents, Ask AI can provide a list of representative documents. For an exhaustive list, continue to use Search. See Concept: Search

- Ask AI doesn't support questions about Workflow ticket data, intake forms, or comments in a Workflow document context. Additionally, it doesn't support keyword search and/or boolean operators, counting, aggregation, or answering questions that require legal advice, factual information outside of documents, proprietary information, or technical requests.

Related Information: Concept: Ask AI

Custom AI Model Library

Contract Intelligence introduces a Custom AI Model Library, a searchable, categorized collection of pre-configured Custom AI models that you can publish and use immediately to extract data from documents.

Business Benefits

The Custom AI Model Library saves you time and effort by eliminating the need to manually build your own data fields. This new feature allows you to select, review, and publish models tailored to specific contract types and industries.

The models are pre-trained and ready to deploy, enabling you to immediately gain insights and flag risks earlier.

Changes

The Custom AI Model Library provides access to more than 120 custom models organized into categories based on industries and contract types, such as employment agreements, billing & invoicing, and healthcare.

The library enables you to:

- Search models by name and filter by status.
- Define the scope of the model.
- Save the model as a draft to test it before publishing, or publish the model directly.

Once you publish the model, Contract Intelligence populates the field name, field type, scope and model configuration. You can edit the model to add instructions; however, these instructions are added to the existing library model instructions and don't replace or overwrite them.

What's Coming Next

We will continue to expand the models and categories offered in future releases.

What Do I Need to Do?

See Add Models from the Custom AI Model Library

What Happens If I Do Nothing?

While you can still browse the Custom AI Model Library, if you don't select a pre-configured model, you'll need to continue manually building your custom models.

Friday, 28th November

- Friday, 28th November
- Friday, 28th November
- Friday, 28th November
- Friday, 28th November

More Settings Page

We relocate 2 settings from the More Settings page to the contextually relevant pages in the product.

Business Benefits

This enhancement improves the administrator user experience by increasing the discoverability of important settings.

Changes

- The **Root Folder Access Settings** are now available on the **Documents** page. Administrators can access this setting by selecting the ellipsis on the root **Documents** folder page.
- The **Deleted Documents** setting is now located on the **Restoration Hub** settings page. Administrators can access this setting by selecting the ellipsis on the root **Restoration Hub settings** page.

Note: These settings are only visible to users with an Admin role.

Link Signed Contracts to Tickets

This new feature provides direct links between a finalized **Contract Workflow Ticket** and the corresponding executed **Document** in the repository. It allows for bidirectional navigation: you can view the completed document directly from the ticket page and view the ticket from the document page.

Business Benefits

This enhancement provides quick access between tickets and their corresponding documents saving time and providing full lifecycle visibility of the contracting process.

Changes

On the **Ticket Details page** we add a **View Completed Document** button that appears once the workflow ticket reaches the finalized stage and is sent to the repository. This option allows you to directly access the document created by the workflow ticket.

On the **Document Details page** we add a **View Ticket** option to the related actions menu. This option provides a direct link back to the originating workflow ticket.

What Do I Need to Do?

1. Complete a workflow ticket to finalize a contract.
2. From the **Ticket** page, click **View Completed Document** to access the final contract.
3. From the **Document** page, click the related actions menu and select **View Ticket** to return to the original workflow ticket.

Note: If the link between the ticket and document is broken (Example: if the document is deleted and restored), it can’t be manually relinked or recreated.

Copy Workflows

Workflow builders can now duplicate an existing workflow template in Contract Lifecycle Management (CLM).

Business Benefits

Instead of rebuilding common, complex configurations, Workflow Builders can now instantly copy an existing template ensuring accuracy, saving time, and minimizing errors.

Changes

We add a new **Make a Copy** option to the Workflow Builder to enable users to:

- **Create a new workflow**: Workday copies the selected workflow as a new, *Draft* workflow named *Copy of <workflow name>*. Example: You select to duplicate your *Master Service Agreement* workflow. By choosing **Copy as new workflow**, Workday generates a separate, new draft named *Copy of Master Service Agreement*, which you can then edit without affecting the original.
- **Update an existing workflow**: Workday copies the selected workflow as the newest version onto any workflow you have access to. Example: You have a complex *Master NDA Workflow* (Workflow A) and a simple *Regional NDA Workflow* (Workflow B). You want to replace the current design of Workflow B with the complex structure of Workflow A. When duplicating Workflow A, you select **Copy onto another workflow** and choose *Regional NDA Workflow* (Workflow B) from the list.

Workday then creates a new draft version for Workflow B that is an exact copy of the *Master NDA* Workflow's configuration.

For both options, the copied template contains the same *Source*, *Form*, *Review* steps, *Sign*, *Finalize* steps, and Settings as the original, including all associated users and fields.

Note: You can only copy the most recent version of a workflow.

What Do I Need to Do?

If you are an administrator or have a custom role with the *Workflow Builder: Manage* permission, you can start using this feature immediately. To copy a workflow template:

1. Click **Workflow**.
2. On the **Workflow Builder** tab, locate the workflow you want to copy.
3. From the related actions menu to the right of the row, select **Make a Copy**.
4. In the <Workflow Name> prompt, select your desired action:
    a. Select **Copy as new workflow** to create a separate copy.
    b. Select **Copy onto another workflow** to copy the current workflow as a new version onto a published workflow. You will then select the target workflow from the provided list.
5. Click **Make a Copy**.

Queue Item Cleanup Tool for Salesforce Connector

With this release, we introduce a new self-service option that allows Workday Contract Management administrators to manually process all pending queue item records in Salesforce on demand.

Business Benefits

The Queue Item Cleanup Tool allows administrators to immediately address backlogs of stuck queue items resulting in faster data synchronization, a reduction in permanently stuck items, and less reliance on customer support.

Changes

We create a new Scheduled Job to process all pending **evisort_QueueItem__c**records. Salesforce administrators can schedule this job to run on demand.

What Do I Need to Do?

Prerequisites

Before scheduling or running the job, ensure the Queue Item trigger is bypassed:

1. Click on **Setup**.
2. In the **Quick Find** box, search for and select **Custom Settings**.
3. Find **Evisort Workspace Settings** and click **Manage**.
4. Select the **Bypass QueueItem Trigger** check box.

Steps

Scheduling the Job: Recommended for Daily Use. This option allows the batch job to run automatically at a set time, processing any pending items.

1. From the **Salesforce Home** screen, go to **Setup**.
2. In the **Quick Find** box, search for and select **Scheduled Jobs**.
3. Click the **Schedule Apex** button on the **All Scheduled Jobs** screen.
4. Fill in the required values:
    a. **Job Name**: *Process Queue Items* (or another descriptive name).
    b. **Apex Class**: Select the *ProcessQueueItemBatch.Scheduler* class.
    c. **Schedule Apex Execution**: Select the days of the week you want the job to run and choose the preferred start time.

5. Click **Save**.

Note: You can always delete, pause, or modify the recurrence of this scheduled job from the **Scheduled Jobs** screen at any time.

Ad-Hoc Execution: Use this option to immediately process the queue items on demand. Example: To clear unexpected backlog.

1. Open the **Developer Console** in Salesforce.
2. Go to **Debug** > **Execute Anonymous Window**.
3. Paste and run the command to process all pending items immediately in batches of 10:

```
Database.executeBatch(new ProcessQueueItemBatch(), 10);

// Optional: To run only for a specific item type (e.g., 'FILE_UPLOAD'):
// Database.executeBatch(new ProcessQueueItemBatch('FILE_UPLOAD'), 10);
```

Verification and Monitoring: Use the Developer Console to confirm the effectiveness of the job.

1. Once the job is complete, confirm that all processed queue items have an **evisort_Status__c** of Complete.
2. To monitor pending items while the batch runs, execute the following query in the Developer Console and observe the record count decrease:

```
SELECT Id, Name, evisort_Status__c, CreatedDate
FROM evisort_QueueItem__c
WHERE evisort_Status__c = 'NEW'
ORDER BY CreatedDate DESC
```

December

Friday, 12th December

Multiple Departments in Single Sign-On Configuration

Security administrators can now assign multiple Contract Management and Document Intelligence (Evisort) departments to a user through the Single Sign-On (SSO) configuration.

Business Benefits

This change enhances security and improves user experience by automatically assigning users to all relevant departments on login, ensuring they immediately gain appropriate access to the folders that are secured by those departments.

Changes

Contract Management and Document Intelligence (Evisort) now processes multi-valued department data sent by the Identity Provider (IdP) when security administrators configure the IdP to use a **comma-separated string array** for the **Department** field. This enables Contract Management to assign a user to multiple **existing** departments upon login.

Considerations:

- Department names in the IdP must match exactly (including case-sensitivity) with existing department names in Contract Management.
- If a department in the IdP list doesn't exist in Contract Management, the user won't be able to sign in.
- Departments aren't automatically created.

What Do I Need to Do?

To use this feature, you must update your SSO configuration in your Identity Provider (IdP). See Steps: Configure Single Sign-On (SSO) for Contract Management and Document Intelligence

What Happens If I Do Nothing?

Your existing SSO configuration will continue to work as before, assigning a user to only a single department.

Custom AI: Highlighting Improvements

We introduce enhancements to Custom AI highlighting functionality that make the feature more accurate and aligned with user expectations.

Business Benefits

Highlighting now precisely matches source text more accurately and precisely, which increases confidence and trust in Custom AI outputs.

Changes

- **Highlight only extracted text:** Highlighting is now limited to the exact or near-exact text that matches the extracted values. This change applies automatically to all new documents processed by all models.
- **No highlights when no result is found**: Workday doesn't return any highlights when Custom AI finds that there is no answer in a document. This applies automatically to newly-created models and to all new documents processed by all models.

What Do I Need to Do?

If you are publishing a **new Custom AI model**, the highlighting improvements will be automatically applied to all documents in scope.

If you have **existing Custom AI models**:

- For new documents added to the platform: Highlighting updates will automatically apply when the document is processed.
- For previously processed documents: You must republish the model to reprocess documents and apply the new highlighting. To reprocess all documents:
    - Click **Edit** to suspend the model.
    - Click **Save** and **Evaluate**.
    - (Optional) Review additional samples.
    - Click **Review and Publish**.
    - Select *I want to re-publish on all documents*. Note that for customers who are configured for Custom AI credit billing, credits will be consumed by re-publishing the model.

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

2026

January

Friday, 9th January

E-Signature Integration for Contract Lifecycle Management

Workday enhances the e-signature experience to create a more robust and advanced connection between Contract Lifecycle Management (CLM) and third-party e-signature providers (DocuSign, Adobe Sign).

Business Benefits

This enhancement provides several benefits for signing coordinators:

- **Data integrity**: You no longer need to leave CLM to check signer data and envelope status. This ensures a single source of truth, making the e-signature process highly reliable for audit trails.
- **Increased productivity and faster execution**: We provide a seamless, intuitive, and highly stable e-signature experience, leading to streamlined workflows and quicker executed contracts.
- **Improved error resolution**: We introduce clear error handling, enabling you to self-serve and resolve integration issues quickly, minimizing operational downtime.

Changes

Envelope access and voidance:

- We add a **View on E-sign Platform** button on the Ticket details page. This option appears after the envelope is created and allows you to directly view the envelope information in the e-signature platform.
- We rename the **Collect Signatures** button to **Send to E-signature** for clarity when initiating an e-signature request.
- Ticket deletion in CLM will now automatically void the corresponding e-signature envelope if it hasn't been signed yet.

Recipient management:

- Signing coordinators can now directly add, remove, update, reorder signers, and customize envelope details, such as email subject, body, and CCs, within the e-signature platform.
- We remove the **Edit CC** and **Add CC** buttons from CLM since they are no longer needed.

Status:

- The Ticket details page now displays the e-signature provider's **Signer** and **Envelope status** for all recipients, including those added externally. As part of this change, we remove the **Check Signature Status** button.

Audit trail:

- We add the signer's audit trail directly to CLM, eliminating the need to navigate to the external e-sign platform to track progress. Authorized users can navigate to the **Activity Logs** to view the complete audit trail. This includes detailed actions by the signers, such as who viewed the document and the exact time the document was signed.

Notifications:

- We introduce a new notification to inform the signing coordinator when any signer declines to sign the document.
- We remove the *You were assigned a Signer* e-mail notification that was sent out to internal signers from CLM, as they now receive a notification from the e-signature provider

Connection status:

- The **Integrations page** now clearly shows the connection status for each e-signature provider, along with a validation error and detailed error message if a connection fails.
- If the connection fails, Workday also shows a banner on the **Workflow**, **Tickets** tab and on the **Ticket details page** to alert users before they attempt to initiate e-signature. We also send an email on the impacted tickets and the recommended action to take.

What Do I Need to Do?

These changes are automatically available. You may need to update training materials and internal documentation.

Friday, 16th January

Workflow Tickets - Add Task Assigned to Email Notifications

We update the automated email notification that Workday sends to workflow reviewers to include the name of the task assigned.

Business Benefits

This change makes it easier for reviewers to identify tasks when they have multiple review notifications in their inboxes.

Changes

We update the body of the email notification that Workday sends to reviewers when they are assigned a workflow task in the **Review** or **Finalize** stage. The email now explicitly includes the **Task Name** and, when populated, the **Description** of the work required.

What Do I Need to Do?

Nothing, this change is automatically available.

February

Friday, 20th February

Contract Management Globalization and Multilingual AI Support

- Friday, 20th February
- Friday, 20th February

Workday Contract Intelligence (CI) and Contract Lifecycle Management (CLM) are now available in multiple languages and support multilingual AI document understanding and data extraction.

Business Benefits

This update improves the user experience for non-English speaking users by allowing them to use Contract Management in their preferred language and locale. It also enables globally distributed teams to collaborate effectively while meeting regional formatting and regulatory requirements.

Changes

UI Localization

- We translate the Workday CI and CLM interfaces and some system-generated emails into French, German, and Spanish.
- We add a new **Global Preferences** section to the user **Settings** page so that users can set their language preferences individually.
- Considerations:
    - Some system-generated emails such as user account activation & password reset, and workflow notifications are not yet translated.
    - You can configure Custom AI data field names and set them to any single language of your choice.
    - To facilitate translations into other languages, you can't edit Standard AI fields and field section names.

Numerical Data Fields

- Fields for date, number, and monetary values now format dynamically based on the selected **Preferred Locale**. Example:
    - *Date fields: Displays as Month/Day/Year for US English and* Day/Month/Year for French or UK English locales.
    - Number fields: Displays as 1,234.56 for English and 1 234,56 for French.
- Considerations:
    - Numerical field input, when editing values, is not yet localized and requires the system default English format.

Multilingual Support for AI

- We update these **Standard AI fields** to support multilingual extraction:
    - Counterparties
    - Effective Date
    - Initial Expiration Date
    - Initial Term
    - Internal Parties
    - Number of Renewals
    - Renewal Notice Date
    - Renewal Notice Period (Days)
    - Renewal Term
    - Renewal Type (Automatic, Option to Renew, Manual)
    - Start Date
    - Title
    - Upcoming Expiration Date
- We now update these **Standard AI clauses** to support extraction in French, German, and Spanish:
    - Assignment
    - Change of Control
    - Force Majeure
    - Governing Law
    - Indemnification
    - Jurisdiction and Venue
    - Term
    - Termination for Breach
    - Termination for Convenience
- We update the **Custom AI** models to support field naming, instructions, and outputs in French, German, and Spanish.

- Considerations:
  - Multilingual AI support is available by default to customers hosted in the European data center, followed by rollout in other regions. Customers not hosted in the European data center can contact their Customer Success Manager to request early access.
  - Multilingual AI support applies to new documents only. For existing documents, you can contact Customer Support to request a reprocessing.
  - Standard AI outputs only English values for:
    - Initial Term
    - Renewal Type
    - Renewal Term
    - Number of Renewals (if indefinite)

    Example: Example: Standard AI correctly identifies & highlights the Renewal Term from a Spanish contract as *seis (6) meses* but the field value is recorded as *6 month(s)*, rather than *(6) meses*.

Ask AI

- Ask AI now supports real-time conversational interactions in multiple languages.
- Users can ask questions in one language about a contract written in another and receive an answer in their chosen query language.

AI Drafting Tools

- Automated redlining and clause creation are now available in multiple languages, subject to the capabilities of the underlying LLM.
- Considerations:
  - Clause Creator currently requires the document text and instructions to be in the same language for best results. If they are different, the output matches the instruction language.

What's Coming Next

Workday will progressively add support for more languages and expand the list of fields and clauses that support multilingual extraction.

What Do I Need to Do?

Configure UI and Locale preferences:

1. Select your profile avatar and navigate to **Settings**.
2. Scroll to the **Global Preferences** section.
3. Select your desired **Language** and **Preferred Locale**.
4. Click **Save Preferences**.

Access multilingual support for AI:

- **Standard AI**: You will continue to see existing **Standard AI** fields in the UI as before. The primary change is that the outputs for supported fields are now accurate on French, German, and Spanish documents.
- **Custom AI**: When building new models, you can enter **Field Names** and instructions in English, French, German, and Spanish to receive localized outputs.
- **Reprocess existing documents**: To apply multilingual AI support for existing documents, submit a reprocessing request to Customer Support.

Update Terminology from Provision to Clauses

With this release, Contract Management and Document Intelligence updates the user interface to replace the term Provision with Clauses in several areas of the product.

Business Benefits

This change ensures consistent terminology across the platform, impacting the **Document Viewer**, **Analyzer**, and various system-generated error messages and warnings.

Changes

We have updated several UI elements to reflect the new naming convention:

- **Tabs**: In the **Document Viewer,** the **Key Provisions** tab is now renamed to the **Key Clauses** tab.
- **Filters**: In **Analyzer**, the **Provision** filter is now renamed to the **Clause** filter.
- **System Messages:** Various error messages and warnings that previously referenced *provisions* now use clauses to maintain consistency with the updated UI.

What Do I Need to Do?

Nothing, this feature is automatically available.

April

Friday, 3rd April

Workflow Routing

With this release, Workday introduces Workflow Routing, an intelligent routing engine that helps users identify and access the correct contract intake forms through the Ask AI interface.

Business Benefits

Workflow Routing enables end-users to quickly identify the relevant intake form by using AI to guide them through a simple, step-by-step conversation. This removes the guesswork for your team and prevents the re-work loop where requests get rejected and restarted weeks later because the wrong form was chosen.

Changes

Automation Tab: We add a new **Routing Table** subtab under the **Automation** tab where users with the *Workflow Builder: Manage* role can define routing rules.

Ask AI

- The Ask AI interface now includes a **Workflow Routing** option to initiate guided requests.
- Ask AI generates up to 5 initial questions derived from the **Routing Table** instructions to begin the discovery process.
- Once identified, Ask AI displays the workflow name as a clickable link that takes the user directly to the intake form with the workflow pre-selected.

Note: The routing engine utilizes *Workflow Access Control* Lists to ensure users are only suggested workflows they have permission to access.

What Do I Need to Do?

Routing Configuration

Prerequisites

The user must have *Workflow Builder: Manage* role.

Steps

1. Navigate to the **Routing Table** subtab under the **Automation** tab.
2. Click **Create New Route** and select a published workflow in the **Route Name** field.
3. Enter detailed **Route Instructions** to help the AI distinguish this workflow from others. Use natural language to define when a user should use this route (Example: "Use this route when a user wants to request a hardware upgrade").
4. Navigate to the **General Routing** sub-tab to configure a **General Routing** Instructions welcome message or a **Fallback Response** for when Ask AI doesn’t find a match.

5. Enable the **Activate Routing for All Users t**oggle to launch the Workflow Routing feature within the Ask AI interface for all end-users.

Workflow Selection (end-users)

Prerequisites

- Ask AI must be enabled for your workspace.
- End-users must have *Ticket Access* role.
- The toggle *Activate Routing for All Users* must be enabled for at least 1 workflow routing.

Steps

1. Access **Ask AI** and select the **Workflow Routing** option to initiate the request and get routed to the correct workflow.
2. Ask AI will then dynamically generate and display up to 5 initial questions to help with the selection process. Note: These questions are derived directly from the instructions defined in the **Routing Table**.
3. As the end-user interacts, Ask AI will ask targeted follow-up questions based on previous responses to narrow down the workflow.
4. Once the correct workflow is identified, Ask AI presents the workflow name as a clickable link, which brings the end-user directly to the intake form.

What happens if I do nothing?

If you don’t configure the **Routing Table**, users will continue to manually select intake forms from the library without AI-guided recommendations, and Ask AI won’t provide workflow suggestions.

Friday, 17th April

Salesforce Connector - API Update

Workday updates the backend architecture of the Salesforce Connector to improve the stability and performance of data transfers between Salesforce and Workday Contract Management and Document Intelligence.

Business Benefits

- **Increased sync reliability**: Optimized background data processing handles large datasets efficiently, reducing the risk of synchronization interruptions.
- **Automatic data recovery**: The Salesforce Connector now automatically identifies and resolves missed synchronization attempts caused by network timeouts or system limits.
- **Proactive maintenance**: Enhanced backend monitoring allows for faster diagnostics and improved connection health.

Changes

We have upgraded the underlying service architecture for the Salesforce Integration to provide a more stable and reliable experience.

What Do I Need to Do?

Nothing, this change is automatically available.

May

Friday, 01st May

- Friday, 01st May
- Friday, 01st May

Full Document Review Skill for Contract Negotiation Agent

With this release, we continue to enhance the Contract Negotiation agent by transforming the contract review from a manual, reviewer-dependent task into an automated process that's clear and predictable.

The Full Document Review skill uses AI to automatically flag risks, identify missing terms, and suggest redlines based on your organization's specific legal and business requirements.

For detailed step-by-step instructions, see Set Up AI Playbooks and Review Documents with AI Playbooks .

Business Benefits

- **Consistency**: Ensures negotiation standards are applied the same way every time across the organization.
- **Risk Prioritization**: Focuses reviewer attention on the most critical changes by providing a perspective on risk and severity levels.
- **Transparency**: Provides a clear rationale for every AI-suggested change, allowing reviewers to understand the why behind a finding.
- **Efficiency**: Reduces the time spent on boilerplate review so legal teams can focus on high-level judgment.

Changes

With the new Full Document Review skill we introduce:

- Playbook configuration
- Reusable AI instructions that you can use across multiple playbook configurations
- AI Review for contracts
- AI Editing capabilities that you can use to directly apply suggestions to the document

Admin experience: We add 2 sub-tabs under the **Libraries** tab where administrators can configure **Playbooks** and **Negotiation Requirements** to define company-specific negotiation logic.

Reviewer workflow: We add a new **AI Review** panel in the document editor within workflow tickets, allowing users to run analysis and receive AI-suggested redlines based on published Playbooks.

Security:

- We replace the existing *Clause Library: View* permission with a new *Libraries: View* that provides read-only access to Playbooks, Negotiation Requirements, and Clause Library.
- We replace the existing *Clause Library: Manage* permission with a new *Libraries: Manage* that provides full create and edit access to Playbooks, Negotiation Requirements, and Clause Library.
- We replace the existing *AI Drafting Tools: Edit* permission with a new *AI Review & Editing: Access* that enables users to run AI Review in workflow tickets using any published Playbook.

Considerations:

- **Editing sequence**: You must run AI Review before making manual edits in the in-app editor.
- **File compatibility**: AI Review is only available for DOCX files. You must convert PDF documents to DOCX before analysis.
- **Naming requirements**: Playbooks and Requirements each require a unique name, and you can't reuse names from deleted items.
- **Tabulated Data & Placeholders**: AI Review flags instances where changes are required for tables or placeholder values (Example: [$AMOUNT]); however, you must manually update this content.
- **Version memory**: AI Review doesn't currently retain memory of previously accepted suggestions across versions. Rerunning a review on a new version may surface repeat recommendations.

What Do I Need to Do?

1. **Configure roles**: Assign the *Libraries: Manage* and *AI Review & Editing: Access* permissions to the appropriate user roles.

2. **Create playbooks**: You can choose to **Start from an Example** (for NDAs, SLAs, or MSAs) or use **Manual Configuration**. Note: Examples are only available in Sandbox accounts by request.
3. **Define Requirements**: Add instructions to your playbook to tell the AI what to evaluate, such as checking for required clauses or flagging specific risks.
4. **Publish the playbook**: Once the configuration is validated, change the state from Draft to Published to make it available for reviewers in workflow tickets.

For detailed step-by-step instructions, see Set Up AI Playbooks and Review Documents with AI Playbooks.

What Happens if I Do Nothing?

If you don't configure this skill, contract reviews will remain a manual process within the document editor.

Microsoft Word Connector for Workday Contract Lifecycle Management

The Microsoft Word Connector enables users to launch contract documents from Workday Contract Lifecycle Management (CLM) directly into their local Microsoft Word desktop application for editing, and synchronize updates back to the CLM platform.

Business Benefits

- **Time savings**: Eliminates the manual steps of downloading, saving, and re-uploading documents, leading to faster contract cycles and increased efficiency.
- **Collaboration**: Enables multiple users to launch and edit documents simultaneously, supporting threaded comments and discussions between the desktop and the platform.

Changes

On the document viewer, we rename the **Edit Online** button to **Edit with Microsoft** and include a new **Microsoft Word for Desktop** option that enables users to open documents in the desktop version of Microsoft Word.

With the new connector, we enable **synchronization capabilities** such as:

- Automatic sync for document content, including icons, tables, and images.
- Support for native text highlighting applied in the desktop application.
- Track Changes and Activity Log within CLM that capture modifications made during desktop sessions.

During Microsoft Word desktop editing sessions, we also deliver **version locking and force unlock capabilities**:

- When a document is open in Microsoft Word using the Microsoft Word connector, Workday CLM enforces a lock that prevents users from uploading new versions, creating new versions from within the platform, deleting the current document version, or progressing to the next workflow stage. This prevents conflicting edits or version overwrites while a Word desktop session is in progress.
- We also deliver a new unlock control on the document's workflow page. Users with edit rights for the current workflow stage can initiate a force unlock to terminate a session. Workday records every force unlock action in the document's activity log.

Security and Permissions:

- The integration inherits Workflow Visibility and Permissions from the CLM platform.
- Users must have Edit permissions on the workflow to be able to access the **Edit with Microsoft** functionality.
- To enable the integration, the connector requests these permissions:

Type	Permission / scope	Purpose / note
Delegated	User.Read	Sign-in and user identity

Type	Permission / scope	Purpose / note
Delegated	FileStorageContainer.Selected	User-selected SharePoint container
Application	FileStorageContainer.Selected	App-level access to selected container

Considerations:

- **File formats**: The integration supports .doc and .docx formats. While PDF documents are not directly supported for editing, you can convert them within Contract Management and Document Intelligence before being opened in the Word desktop application.
- **Sync timing from the editor to CLM**: Document changes may experience a delay of 0 to 5 minutes.
- Documents edited in the desktop application don't appear in the **Recently Edited** list within **Microsoft Word**. Users must return to Workday CLM to re-open the file.

What Do I Need to Do?

Administrators must set up Microsoft Word Connector. Follow the steps outlined in Set Up Microsoft Word Connector for Contract Lifecycle Management

What Happens if I Do Nothing?

If you don't configure the integration, users can continue to use the native in-app editor or **Microsoft Word for the Web**. Alternatively, they can manually download documents from Workday CLM, edit them locally, and manually upload the revised versions to the platform.

Related Information

Concepts

Concept: AI Playbooks and Review

Friday, 15th May

Microsoft Word Connector for Workday Contract Lifecycle Management - AI Tool

Workday introduces AI-driven capabilities delivered via an Add-in for the Microsoft Word Connector, allowing you to leverage Workday CLM intelligence directly within Microsoft Word desktop.

Business Benefits

This update helps unify your drafting process by bringing conversational AI and automated insights into your local editing environment.

Changes

We expand the functionality of the Microsoft Word Connector with an Add-in to include high-speed drafting support and conversational AI.

- **Ask AI**: We add a new panel in Word desktop that allows you to ask natural language questions about the information contained in the currently open document. Examples: summarize terms or ask questions about specific clauses. Note: Queries are run against the version of the document first opened.
- **Source citations**: To ensure accuracy, Ask AI provides interactive, numbered citations that link directly to specific sections within the Word document.
- **Copy to Clipboard**: We include a Copy to Clipboard option that enables you to quickly move AI-generated summaries into the Word document.
- **Edit detection**: The Add-in notifies you if the document state has changed since the last AI analysis, ensuring your queries are always based on the most recent text.

Considerations:

- To prevent version conflicts and maintain a single source of truth, the Add-in blocks subsequent sessions if you attempt to edit documents across different platform instances (such as Production and Sandbox) simultaneously.
- The CLM AI tool continues to inherit and enforce the Workflow visibility and permissions established in Workday CLM, ensuring that only users with Edit permissions for the current workflow stage can access these AI features.
- These options are only available on the Workday CLM editor:
    - Saved questions
    - Batch processing
    - Automate with Custom AI

What Do I Need to Do?

Prerequisites

The Microsoft Word Connector integration must be enabled and configured first. See Set Up Microsoft Word Connector for Contract Lifecycle Management .

Steps

A Microsoft 365 administrator must perform these steps to deploy the Add-in to your organization:

1. In the **Microsoft 365 admin center**, navigate to **Settings** > **Integrated apps** and select the **Deployed apps** tab.
2. Select **Upload custom apps**.
3. Choose **Office Add-in** and select **Provide link to manifest file**.
4. nclude the link corresponding to your region:
    a. Non-EU: https://scribyl.evisort.com/addin/manifest.production.xml
    b. EU: https://scribyl.eu1.evisort.com/addin/manifest.eu1.xml
5. Assign the Add in to the appropriate audience:
    a. Entire Organization
    b. Specific users/groups (e.g., your Legal Team)
    c. Just me
6. Review and accept the app permissions to finalize the deployment.
    a. To complete the connection, a user in your organization must open the Workday CLM Add-in within Microsoft 365 (Word, Excel, or PowerPoint). It may take up to 24 hours for the Add-in to appear in the Word ribbon for designated users.

Next Steps

1. Open **Word Desktop** and select **Add-ins**.
2. Workday CLM AI Tool should be visible under **My Add-ins**. If it is not visible, select **More Add-ins** and navigate to **Manage my apps**.

What Happens if I Do Nothing?

Users will still be able to sync documents using the Word connector, but they won’t have access to Workday CLM AI identifications within the Word desktop application.

Friday, 29th May

- Friday, 29th May
- Friday, 29th May

Grouped Tickets and Signed Documents

Workday enhances the Groups functionality in Contract Management and Document Intelligence to consolidate pre-signature workflow tickets and post-signature repository documents into a single, cohesive view.

Business Benefits

By enabling hierarchical relationships and centralized access, this enhancement eliminates the need to navigate to multiple folders or ticket queues, reducing legal risk and increasing contract execution velocity.

Changes

- Apart from the existing **Groups** view under the **Documents** tab, we also add a **Groups** view under the **Workflow** tab.
- We provide a new **Groups contextual side panel** accessible anywhere where a ticket or document is displayed, allowing users to view all group affiliations and group member lists without navigating away.
- We introduce dynamic versioning, which automatically displays the latest document version by pulling from the active **Ticket** or the completed **Repository**.
- We add visual differentiation using distinct icons to help users instantly identify whether an item is a pre-signature ticket or a post-signature document.
- We introduce isolated unlinking and smart removal logic:
    - Unlinking an item from one group doesn't affect its status in other groups.
    - Removing an item from a group doesn't affect its related items, which stay in the group to maintain context.
- We replace the **Related Documents** tab on the **Document Details** page with the **Groups** side panel.
- Search: We add **Groups** as a search filter and a column within the main global search results.
- **Ask AI**: We add **Groups** as a new scope option in Ask AI, enabling users to ask questions about documents in the repository or the document file associated with each ticket, within a specific group.
- **Admin permissions**: We add a new **Groups** section to the New Role > permissions page, consolidating the *Groups: Edit and Groups: View* settings for easier management.
    - The Workflow-only role now includes *Groups: Edit* access by default, allowing users to seamlessly create, edit, and view groups.

What Do I Need to Do?

See Manage Document and Ticket Groups .

Enhanced Optical Character Recognition (OCR) and Table Processing

Workday is enhancing document processing and OCR capabilities to provide more accurate data extraction from table-heavy documents.

Business Benefits

Users obtain better AI results when uploaded documents contain important values inside tables. Workday is better able to return the value from the right table cell and show the source highlight when one is available.

Changes

The document processing engine better detects and preserves table structure during OCR, including text inside table cells. This helps AI use the right row and column context when answering questions about table-heavy documents.

What Do I Need to Do?

This enhancement is automatically available for all new document uploads.

Existing documents aren't updated automatically. If an existing document needs the improved table-processing behavior, contact Workday Support so the team can evaluate whether reprocessing is available.

June

Friday, 26th June

Full Search Result Visibility and Counts

Workday Contract Management and Document Intelligence now displays the total document count returned by a search query and allows you to view the full result set.

Business Benefits

By displaying the exact number of matching records, Workday ensures you know whether a query returns a complete or highly populated dataset.

Changes

We update the user interface to eliminate the previous in-app visibility limit that capped displayed search results at 10,000 documents. The search interface now displays the full count of matching documents and enables pagination controls to navigate results in blocks of 10 pages at a time.

What Do I Need to Do?

This change is automatically available. You don't need to perform any security or configuration steps to view full search results or total counts.

July

Friday, 10th July

- Friday, 10th July
- Friday, 10th July
- Friday, 10th July

Bundle E-Signatures

With this release, Workday introduces the ability to bundle document files from multiple tickets into a single signing package.

Business Benefits

These enhancements maximize negotiation productivity and accelerate contract review cycles by keeping reviewers fully contextualized within their preferred drafting tool.

Changes

- You can now choose multiple tickets within the **Sign** stage to bundle for signature.
- You can re-order the sequence of documents before they are sent for signature.

Considerations:

- If you manually upload a signed document to a ticket that is part of an active bundle, the full envelope is voided, and you must manually upload the signed document to all tickets in that bundle.
- Bundling is only available for tickets where signers sign at the same time. Staggered signing times still require individual tags in the e-signature platform.
- Bundling is only available when the signers and the signing order matches for all of the tickets.

What Do I Need to Do?

You can bundle documents for signature from the Groups and Tickets Details pages:

From the Groups page:

1. In **Workflow** > **Groups**, click on a group that contains several tickets in the Sign stage.
2. Select 2 or more tickets you want to bundle. Workday validates the signers match for you.
3. Click **Actions** > **Send to DocuSign / Adobe**.
4. Drag and drop the files to re-order the document sequence as needed.
5. Click **Submit**.

From the Ticket Details Page:

1. Open a ticket you want to add to a bundle.
2. Click on **Groups** from the details panel.
3. Click on the group and select 2 or more tickets you want to bundle. Workday validates the signers match for you.
4. Click **Actions** > **Send to DocuSign / Adobe.**
5. Drag and drop the files to re-order the document sequence as needed.
6. Click **Submit**.

What Happens if I do Nothing?

If you don't use the bundling feature, you can continue to send e-signature requests for each ticket individually.

Microsoft Word Connector for Workday Contract Lifecycle Management - AI Tool (Ticket Comments and Standard AI Clauses)

Workday keeps enhancing the Microsoft Word Connector by introducing new AI-driven extraction and real-time collaboration tools, delivered via the Microsoft Word desktop Add-in.

Business Benefits

These enhancements maximize negotiation productivity and accelerate contract review cycles by keeping reviewers fully contextualized within their preferred drafting tool.

Changes

We expand the functionality of the Microsoft Word desktop Add-in to surface Workday CLM workflow ticket comments and automated clause mapping:

Standard AI Clauses

- The Add-in runs an automated AI scan of the document opened in Microsoft Word desktop and performs an initial extraction within minutes.
- The task pane displays a structured map that automatically groups detected clauses by legal type and displays a total item count for each category.
- Selecting an extracted clause card inside the task pane automatically scrolls the cursor to that specific location in the document and visually highlights the matching text.
- Reviewers can search and refine clause extractions by typing specific keywords or filtering by standardized clause types.
- The contract map remains dynamically scoped to the currently open document. To align clause identifications with any new text added during an editing session, reviewers need to close the document and reopen it from CLM once the editing session has ended.

Ticket Comments

- We deliver a live-syncing comment panel that surfaces ticket-level comments and document-level comments with short excerpts of the referenced contract text.
- The Add-in supports advanced threaded workflows, allowing users to reply directly in threads, resolve closed issues, and copy deep links to specific comments.
- We add a type-ahead suggestion menu inside the comment panel to quickly tag and route questions to internal users or groups.

- We also enable rich-text options in comments.
- Reviewers can filter comments by status, source, or ownership, and sort them chronologically or by position in the document.
- Comments are synchronized with the Workday CLM web interface in real time.

Considerations:

- To prevent version conflicts and maintain a single source of truth, the Add-in blocks subsequent sessions if you attempt to edit documents across different platform instances (such as Production and Sandbox) simultaneously.
- The CLM AI tool continues to inherit and enforce the Workflow visibility and permissions established in Workday CLM, ensuring that only users with Edit permissions for the current workflow stage can access these AI features.
- These options are only available on the Workday CLM editor:
  - Saved questions
  - Batch processing
  - Automate with Custom AI
  - Document level comment highlighting & redirect: Clicking a document-level comment in the Add-In doesn't highlight or jump to the corresponding text in the document.
- Comments sync:
  - Document-level comments made during a Word editing session don't appear in the Add-In until the document has synced back to CLM. Once synced, users must also click the refresh icon in the Add-In to find them.
  - Comments made during an editing session don't appear in the web platform in real time. Users with the page open need to refresh to see updates.

What Do I Need to Do?

Prerequisites

The Microsoft Word Connector integration must be enabled and configured first. See [Set Up Microsoft Word Connector for Contract Lifecycle Management]

Steps

A Microsoft 365 administrator must perform these steps to deploy the Add-in to your organization:

1. In the **Microsoft 365 admin center**, navigate to **Settings** > **Integrated apps** and select the **Deployed apps** tab.
2. Select **Upload custom apps**.
3. Choose **Office Add-in** and select **Provide link to manifest file**.
4. Include the link corresponding to your region:
   a. Non-EU: *https://scribyl.evisort.com/addin/manifest.production.xml*
   b. EU: *https://scribyl.eu1.evisort.com/addin/manifest.eu1.xml*
5. Assign the Add in to the appropriate audience:
   a. Entire Organization
   b. Specific users/groups (e.g., your Legal Team)
   c. Just me
6. Review and accept the app permissions to finalize the deployment. Note: To complete the connection, a user in your organization must open the Workday CLM Add-in within Microsoft 365 (Word, Excel, or PowerPoint). It may take up to 24 hours for the Add-in to appear in the Word ribbon for designated users.

Next Steps

1. Open **Word Desktop** and select **Add-ins**.

2. Workday CLM AI Tool should be visible under **My Add-ins**. If it is not visible, select **More Add-ins** and navigate to **Manage my apps**.

What Happens if I do Nothing?

Users will still be able to sync documents using the Word connector, but they won't have access to Workday CLM AI identifications within the Word desktop application.

EviSync Authentication Error Notifications

Workday sends automatic email notifications to administrators when a document synchronization pair fails authentication with a third-party platform.

Business Benefits

This enhancement helps admins catch and fix disconnected integrations immediately, reducing downtime and preventing delays in contract/document syncing.

Changes

Workday automatically sends email notifications to administrators when a document synchronization pair is taken offline due to certain types of errors with a third-party provider. The notification includes:

- The affected provider name
- The explicit error type
- The explicit error type

After resolving the issue with the external provider, administrators can go to the **Admin Console** and manually restart the synchronization.

Error types that generate notifications:

- Authentication errors
- Out of space errors
- Data access errors

These types of errors take the synchronization offline and are user-recoverable.

Who receives the notifications

For this initial phase, Workday sends notifications to:

- Built-in Administrators
- Owners
- Legacy Admins

Users with custom roles, even if those roles have admin-like permissions, aren't included.

What Do I Need to Do?

You don't need to work on any additional setup to turn on the notifications.

We recommended these actions:

- Confirm that the correct users are set up as Administrators, Owners, or Legacy Admins.
- Establish an internal process for administrators to:
    - Review the notification details.
    - Resolve the issue with the external provider (auth, storage, or access).
    - Use the **Admin Console** to manually restart the affected sync pair.

Related Information
Tasks
Set Up Microsoft Word Connector for Contract Lifecycle Management
Edit Documents Using Microsoft Word