

Agenda – Part A

- | | |
|----|---|
| 01 | Icertis Contract Intelligence Platform- An Overview |
| 02 | Authoring Agreements |
| 03 | Agreement Workflow |
| 04 | Linking Agreements |
| 05 | Agreement Constituents |
| 06 | Post Execution Workflow |
| 07 | Search and Reports |



An Overview of the platform

Icertis Contract Intelligence
Product Training



Contents

- 01 Highlights
- 02 Platform Navigation
- 03 Contracting Basics in ICI



1. Highlights

Platform Overview- Core Functionality

Contract Management



- Icertis application is a cloud-based contract management system that is easy to use
- Manages all contract types in a single repository
- Flexible configuration and management of contract lifecycle
 - Reviews, Approvals, Redlining
 - Renewal, Amendments, Commitments

Document & Data Management



- Maintains agreement versions
- Manages supporting documents such as invoice, purchase orders, addendums
- Configure Metadata and master data

Effective Governance



- Edit and manage clauses as per regulations
- Manage notifications and task assignments
- Configure metadata and full text search
- Multiple OOTB reports such as contract turn around time (TAT) are available

Platform Overview- Add-Ons

Artificial Intelligence & Machine Learning



- Helps solve previously intractable enterprise contract management challenges that are uniquely suited to an AI-powered solution
- Helps the system automatically identify different entities and take actions related to them

Business Applications



- Applications designed to work with ICI targeted to specific business/domain requirements
- Sourcing, Obligation Management, Collaboration Portal to name a few
- Gives the user the flexibility and ease of usage for specific requirements

Integrations



- Configures electronic signatures such as DocuSign and Adobe Sign
- Connects to identity providers for authentication such as Active Directory and Azure B2C
- Integrates with Salesforce, Oracle ERP, Dynamic CRM

Motivations for ACE



Adaptable

The experience adapts to the Contract Intelligence paradigm and surfaces information and insights to help customers derive the maximum value from ICI.



Customer Focused

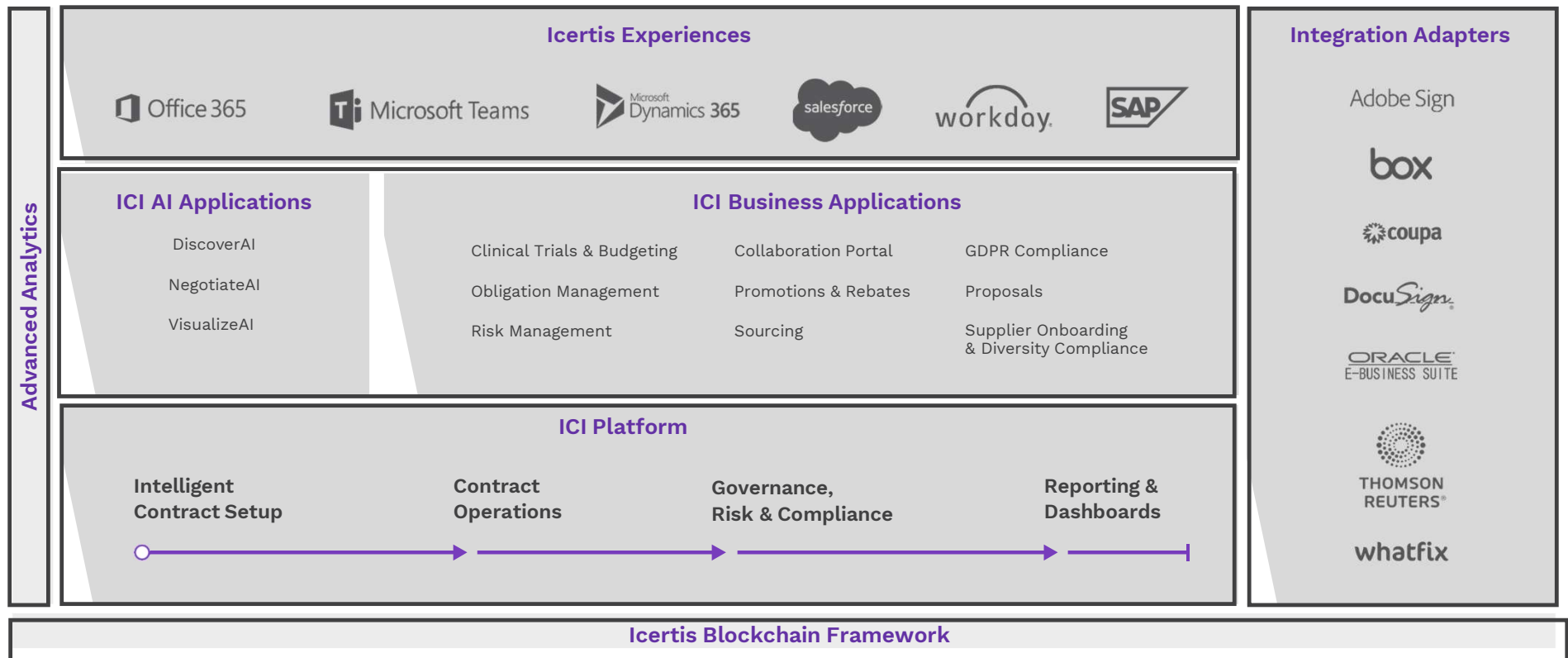
The changes will significantly increase user adoption while maintaining the general ICI contract lifecycle actions which current users have invested time in.



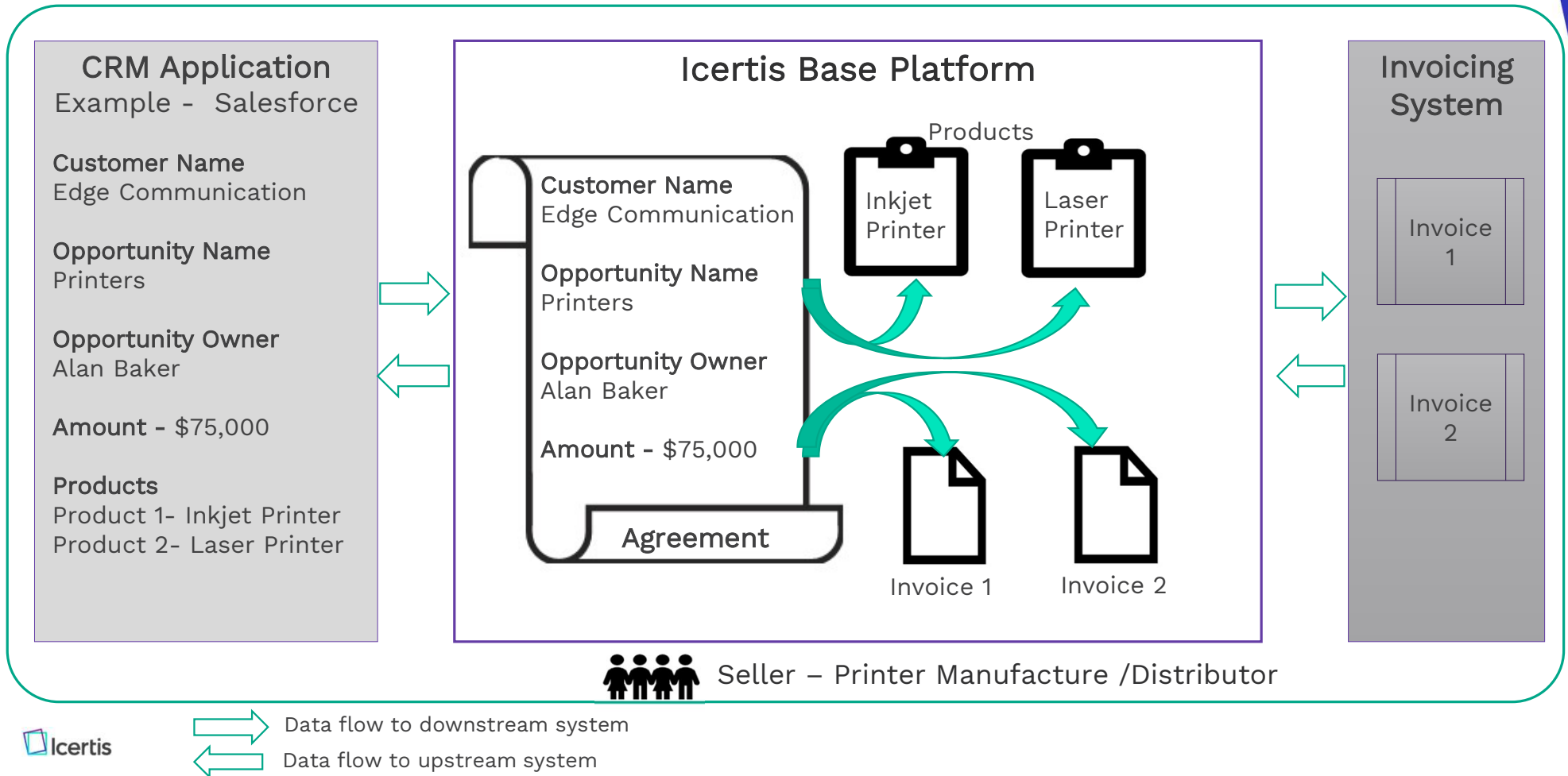
Efficient

Users will be able to navigate the platform more intuitively and effectively through fewer clicks and better organization of actions.

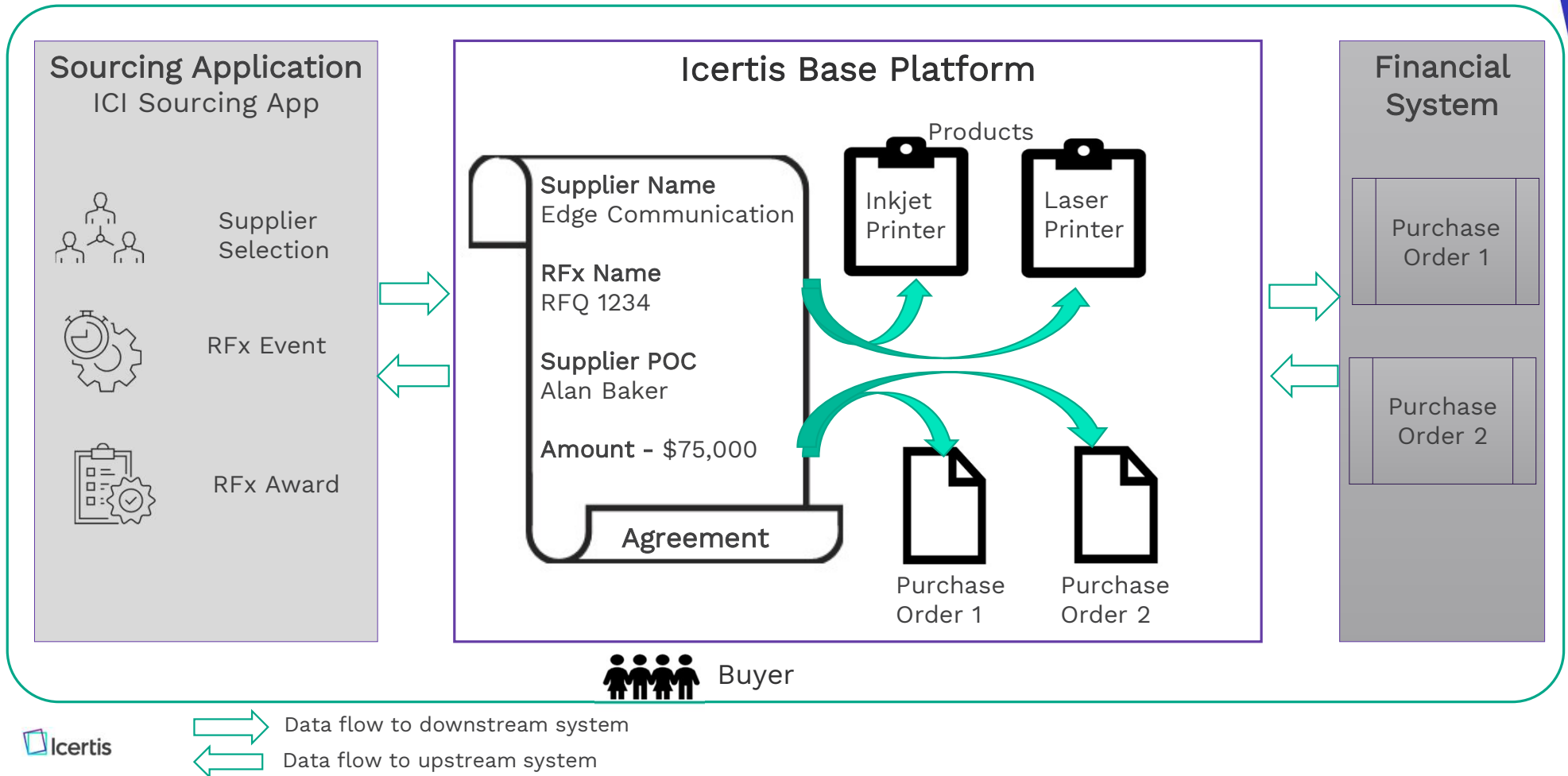
ICI Portfolio: Apps, Experiences & Integrations



Sell-Side Contracting Overview



Buy-Side Contracting Overview



2. Platform Navigation

Requirements

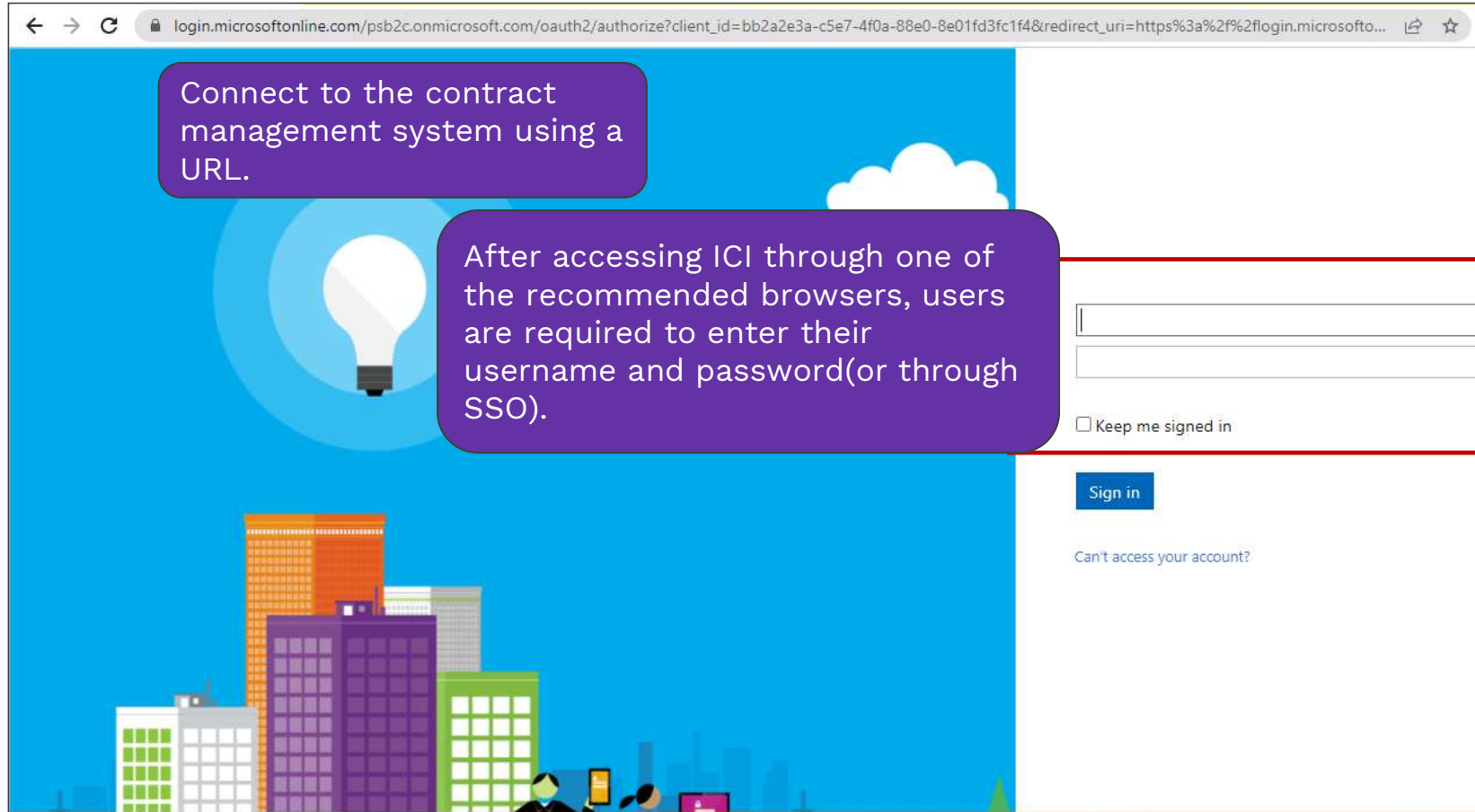
- ICI recommends the following browsers for compatibility

Compatible Browsers	Compatible Versions
Internet Explorer	IE 11 and above
Mozilla Firefox	81 and above
Google Chrome	85 and above
Microsoft Edge	85 and above
Safari	14 and above



- ICI can be configured for Single Sign On (SSO)
 - This allows users to connect to the contract management system using their enterprise username and password.

Log in to the ICI platform



The screenshot shows a web browser window with the URL `login.microsoftonline.com/psb2c.onmicrosoft.com/oauth2/authorize?client_id=bb2a2e3a-c5e7-4f0a-88e0-8e01fd3fc1f4&redirect_uri=https%3a%2f%2flogin.microsoft...`. The page features a blue background with a lightbulb icon and a city skyline at the bottom. Two purple text boxes provide instructions: 'Connect to the contract management system using a URL.' and 'After accessing ICI through one of the recommended browsers, users are required to enter their username and password(or through SSO)'. The login form on the right includes a red border around the username and password fields, a 'Keep me signed in' checkbox, a 'Sign in' button, and a link for 'Can't access your account?'.

Connect to the contract management system using a URL.

After accessing ICI through one of the recommended browsers, users are required to enter their username and password(or through SSO).

☐ Keep me signed in

[Sign in](#)

[Can't access your account?](#)

Home and Dashboard

ICI ACE UX provides a **single highly configurable dashboard** type which can host KPIs, Graphic Reports, Searches and links to bring the right data to the user's fingertips.

Single dashboard layout can include **Quick Links, KPI tiles, Interactive Reports and Widgets**

Dashboard is **drag and drop configurable** with resizing, auto arrange, and coloring

Saved Search **widgets auto convert to KPI tiles** when resized down

Context menu enables actions on contracts directly from the dashboard

Complete Configuration control for Admins to **define default dashboard** based on the Security Group

Home and Dashboard

After successful login, the Home screen is displayed.

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

AI Studio

More

Home

ADD WIDGETS

AUTO ARRANGE

SAVE

CANCEL

12

Contract Term more than 3 Months

Notifications | 0 record

SUBJECT

RECEIVED ON

Nothing to show here, yet.

My Tasks | 1 record

RECEIVED ON

1/9/2022 6:14:20...

View More

Agreements Pending Approval

View More

My Recent Activities | 17 ...

RECORD NAME	RECORD ACTION	
MSA_Supriya_Ac...	Agreement Modified	
MSA_Supriya_Ac...	Agreement Modified	
ICMVendorMaster	Masterdata Modified	
MSA_Supriya_Ac...	Agreement Created	
MSA_Supriya	Agreement Modified	
MSA_Supriya	Agreement Modified	
MSA_Supriya	Agreement Modified	

View More

The Tasks tile cannot be

The dashboard can be edited by adding / removing and rearranging the KPI tiles, widgets.

Dashboard

^

Icertis

Enter search text here...

Advanced

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

AI Studio

Bulk Action

Home

What would you like to do?

Nothing to show here, yet.

TASK

RECORD ...

ENTITY TY...

RECEIVED...

PRIMARY...

Review

MSA_Supriya

ICMMasterS...

1/9/2022 6:1...

Supriya Ash...

View More

Notifications | 0 record

SUBJECT

RECEIVED ON

ADD WIDGETS

AUTO

ADD WIDGETS

WIDGETS SELECTED 0 / 17

SELECT TO ADD FROM AVAILABLE WIDGETS.

Search Widget

☐

Agreement Deviation

☐

Agreement Deviation

☐

Agreements Pending Approval☐☐☐☐☐

ADD


The dashboard can be edited by adding / removing various widgets using the ADD WIDGETS action button.

Dashboard with Widgets

- The widget-based dashboard offers the following widgets:
 - **Performance Metric:** displays all the KPIs to which the user has access.
 - **My Tasks:** displays a list of tasks assigned to the user.
 - **Notification:** displays the notifications in the descending order of the date and time in which they have been received
 - **My Recent Activities:** displays a list of the latest activities performed by the user on agreements, contract requests and clauses.
 - **Saved Search :** displays the searches saved on the Search page

Dashboard with Widgets

^





Q


Enter search text here...

Advanced

+







Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

AI Studio

More

Home

EDIT DASHBOARD


REFRESH

What would you like to do?

Nothing to show here, yet.

My Tasks








1 record

TASK	RECORD ...	ENTITY TY...	RECEIVED...	PRIMARY ...	
Review	MSA_Supriya	ICMMasterS...	1/9/2022 6...	Supriya Ash...	

View More

My Recent Activities

17 ...

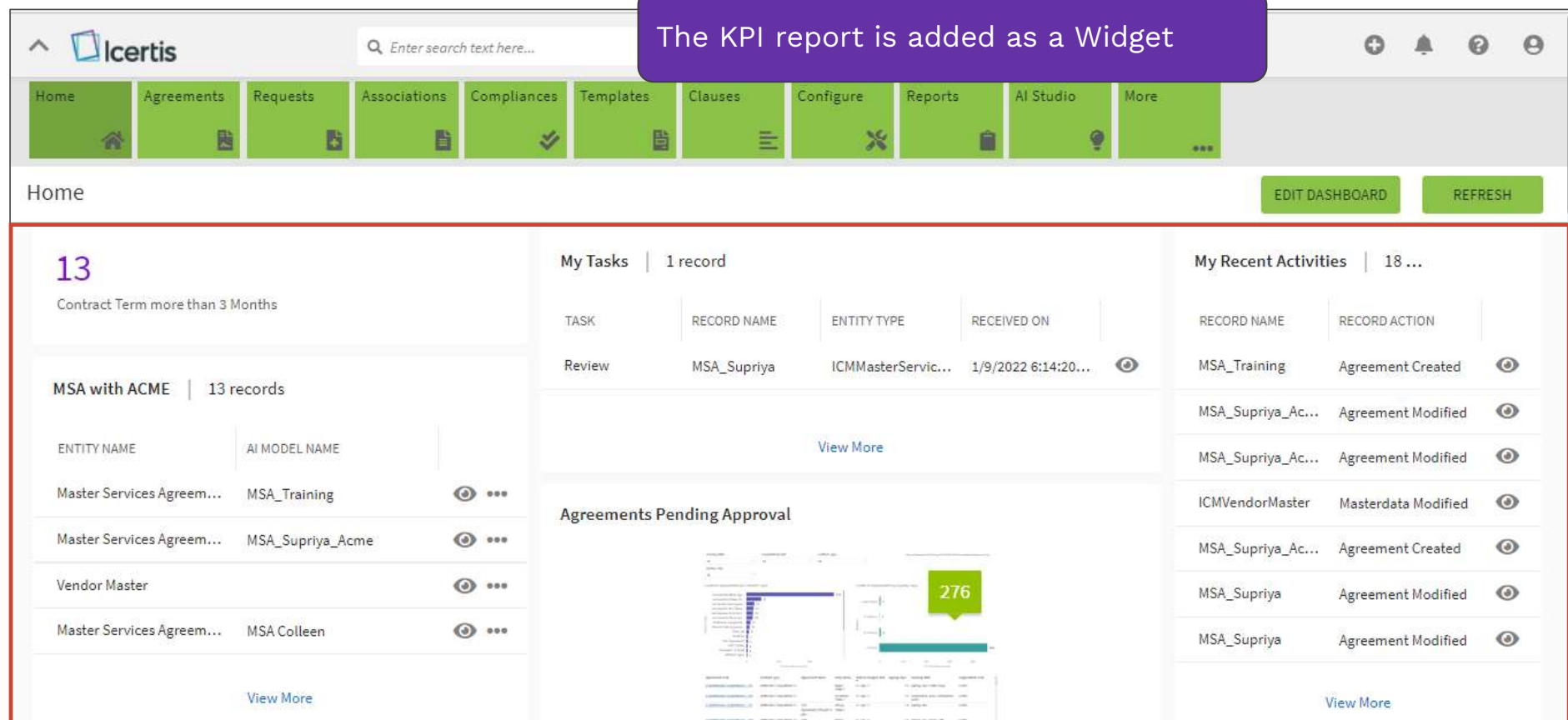
RECORD NAME	RECORD ACTION	
MSA_Supriya_Ac...	Agreement Modified	
MSA_Supriya_Ac...	Agreement Modified	
ICMVendorMaster	Masterdata Modified	
MSA_Supriya_Ac...	Agreement Created	
MSA_Supriya	Agreement Modified	
MSA_Supriya	Agreement Modified	
MSA_Supriya	Agreement Modified	

The four default widgets are My Tasks(s), Performance Metrics, My Recent Activities and Notifications

The widgets can be added/ removed or resized by using Add/Edit Dashboard

Sample Dashboard with added KPI widgets

- The Dashboard can be edited, and more widgets can be added to it



Preferences – My Settings

1

2

3

My Preferences

My Settings | Locale Settings | Auto Delegation

- * RECORDS PER PAGE OPTIONS (USER DEFINED) 8
- * DEFAULT CHOICE ON GRID 8
- * RECORDS LAYOUT Grid View
- * SEARCH PANEL VISIBILITY Yes
- OPEN EVERY RECORD IN SAME BROWSER TAB No
- HIGH CONTRAST MODE No

THEME COLOR

SAVE

Supriya Ashtikar

Preferences

Login As

Log Off

Preferences allows the logged in user to configure few UI settings as per choice

My Settings allow the user specific settings such as theme color and dashboard layout

Preferences - Local Settings

- Locale settings such as setting the time zone, language and currency as per user's choice

My Preferences

My Settings **Locale Settings** Auto Delegation

* LANGUAGE	English (United States) ▼
* TIME ZONE	(UTC) Coordinated Universal Time ▼
* DATE FORMAT	M/d/yyyy ▼
* TIME FORMAT	h:mm:ss tt ▼
PREFERRED CURRENCY	Select Currency ▼

Preferences - Auto Delegation

- Auto Delegation allows to set the Delegation of Task in case of user unavailability
- Conditional delegations will selectively delegate a user's tasks to another user based on saved searches. The delegation will take effect only if the set conditions are met.
- While setting multiple delegations, users can reorder the evaluation sequence to suit their needs

My Preferences

My Settings

Locale Settings

Auto Delegation

* TIME PERIOD

FROM

2/4/2022

TO

End Date

DELEGATION CONDITION ?

None

* DELEGATE TO USER

Select User

DELEGATE

Active Delegations

Expired Delegations

START DATE	END DATE	DELEGATED TO	CONDITION
------------	----------	--------------	-----------

Tiles

- The Home and Reports tile is visible/available to all users by default
- Other Tiles are available to the user based on the Privileges *

Agreements tile displays the Agreement Index page to list down all the existing agreements. Create button enables users to create a new agreement record.

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agree...		ICMMasterServicesAgree...	Supriya Ashtikar	2/9/2022	Executed
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgree...	Supriya Ashtikar	2/4/2022	Waiting For
				2/10/2022	Draft
				2/8/2022	Supersede
				2/7/2022	Executed
Statement of Work	SOW Dinesh	ICMStatementofWork_6	CEM Admin	2/8/2022	Draft
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgree...	Icertis Admin	2/8/2022	Draft

* Privileges is covered later in the other course

Searching within the entities

- The search is possible based on the entity such as Agreements, Clauses.
- User needs to navigate to the entity and can filter the search
- Example – The user can search the Agreements based on the Contract Type Name

The screenshot displays the Icertis 'Agreements' entity page. The top navigation bar includes links for Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. The 'Agreements' section is active, showing a 'More Views' dropdown and a 'CREATE' button.

On the left, the 'Refine View' sidebar is visible, featuring a 'Contains' dropdown, a search bar, and a 'CATEGORIES' section. Under 'CATEGORIES', the 'Contract Type Name' filter is selected, showing two results: 'ICMMasterServices...' (16 items) and 'ICMStatementofWork' (3 items).

The main content area shows 'Showing 1 to 8 of 16 Agreements'. A search filter 'CONTRACT TYPE NAME' is applied with the value 'ICMMasterServicesAgreement'. The table below lists the results:

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS	
Master Services Agreement	MSA Dinesh Request	ICMMasterServicesAgreement...	CLM Admin	2/2/2022	● Draft	👁️ ...
Master Services Agreement	MSA_Training	ICMMasterServicesAgreement...	Supriya Ashtikar	2/2/2022	● Draft	👁️ ...
				2022	● Draft	👁️ ...
				2022	● Draft	👁️ ...
				2022	● Draft	👁️ ...
				2022	● Draft	👁️ ...
				2022	● Draft	👁️ ...
				2022	● Review Pending	👁️ ...

A purple callout box states: 'Users can use the search functionality to find agreements based on the agreement contract type. Use the search keyword “Contract Type Name”'.

The bottom of the page shows a pagination bar with '8 Items Per Page' and a page number '1'.

Searching Agreements

- The search is possible based on the entity
- Example – The user can search the Agreements based on the clause name

The screenshot shows the Icertis 'Agreements' search interface. On the left, a 'Refine View' sidebar is highlighted with a red box, containing filters for 'Confidential Information', 'Consequences of T...', 'Entire Agreement', 'Fees', and 'Governing Law'. Below this is a 'CUSTOM KEYWORD' section with a 'TEXT' input field containing 'Contains' and an 'APPLY' button. The main area displays 'Showing 1 to 8 of 12 Agreements' with filters for 'DOCUMENT CLAUSES : CLAUSE NAME' (Confidential Information, Governing Law). A table lists agreements with columns: ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The table contains 8 rows of data. A purple callout box on the right states: 'Users can use the search functionality to find agreements based on many other criteria such as Nested Filters such as “Document Clause : Clause Name”, or simple filters such as “Created By” or “Status” and many more.'

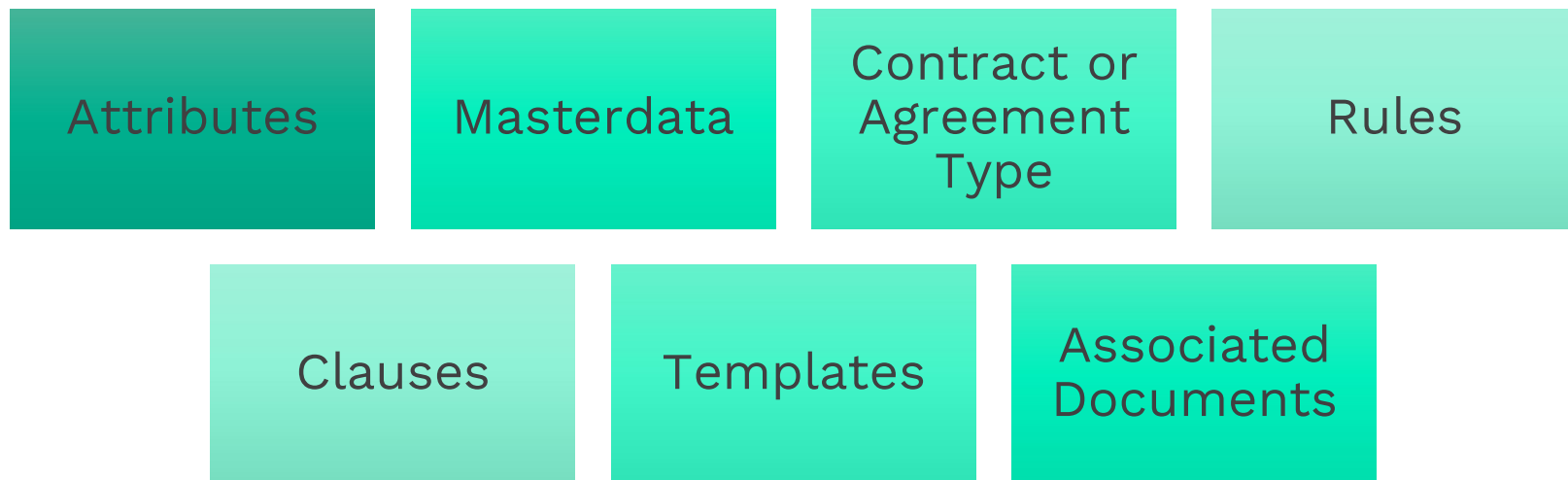
Users can use the search functionality to find agreements based on many other criteria such as Nested Filters such as “Document Clause : Clause Name”, or simple filters such as “Created By” or “Status” and many more.

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agre...	MSA Dinesh Request	ICMMasterServicesAgr...	CLM Admin	2/2/2022	● Draft
Master Services Agre...	MSA_Training	ICMMasterServicesAgr...	Supriya Ashtikar	2/2/2022	● Draft
Master Services Agre...	MSA_Supriya_Acme	ICMMasterServicesAgr...	Supriya Ashtikar	1/10/2022	● Draft
Master Services Agre...	MSA Colleen	ICMMasterServicesAgr...	Icertis Admin	1/28/2022	● Draft
Master Services Agre...	MSA Dipshi	ICMMasterServicesAgr...	Icertis Admin	1/27/2022	● Draft
Master Services Agre...	MSA_Supriya	ICMMasterServicesAgr...	Supriya Ashtikar	1/6/2022	● Review Pending
Master Services Agre...	MSA Sheetal	ICMMasterServicesAgr...	Sheetal Sankpal	1/11/2022	● Draft

3. Contracting Basics

Main Entities

- There are various entities that are available in ICI
- These entities help the user in the contract authoring process
- The entities are interconnected and work together



Attributes

- **Attributes-** In any contract, you find metadata or variables that keep changing
- Some attributes are tagged into the contract

Examples:

- Contract Effective Date
 - Entity Name
 - Vendor (Supplier) Name
-
- Some attributes are used merely for searching contracts, analysis or reporting purposes, for example:
 - Finance Director Name
 - Business Unit or Department Name

GENERAL SERVICES AGREEMENT

This General Services Agreement (this "Agreement") is made effective as of **09-Mar-18** (the "Effective Date").

BETWEEN:

Icertis, S B Road, Pune "Company")

AND:

Breve Inc., 54 Walnut Street, Austin, Texas, USA , 73301 (the "Supplier")

1. Services and Deliverables

1.1 Company hereby retains the Supplier to provide to Company services (the "Services") and to supply the work product (the "Deliverables") described in the Statement of Work. If Statement of Work provides that the Services shall be performed by a specific individual (the "Representative"), Company engages the Supplier to provide the Services on the express and essential condition that the Services shall be performed by the Representative and by no other person. In the event that the Representative is no longer (i) able or willing to perform the Services, or (ii) active with or employed by the Supplier, for any reason whatsoever, Company shall have the right to terminate this Agreement immediately upon written notice, without prejudice to Company's rights hereunder. Notwithstanding the foregoing, the Supplier may replace the Representative with another individual reasonably satisfactory to Company with the prior written consent of Company.

2. Term

2.1 This Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to Section 4 hereof, shall continue until the termination **28-Nov-18** (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number.

3. Fees

3.1 For and in consideration of the Services and Deliverables furnished by the Supplier to Company under this Agreement, the Supplier shall receive fees set out in the Statement of Work. Although the fees set out in the Statement of Work may not set out the relevant sales, goods and services, excise, value added or similar taxes, whether of federal or other jurisdictional level, taxes should be charged to Company in the normal course, and suppliers may be subject to withholding tax under US law. All taxes shall be shown separately on each invoice. Invoices shall be submitted to the attention of Accounts Payable as set out in the Statement of Work.

Attributes

To create a contract in ICI, users need to provide values for attributes. These values are used to prepare the final contract

1. General Information

AGREEMENT CODE ⓘ

ICMMASTERSERVICESAGREEMENT_15

CONTRACT NAME ⓘ

MSA_Training

★ LEGAL ENTITY NAME ⓘ

Icertis

★ LEGAL ENTITY ADDRESS ⓘ

Pune

DEPARTMENT ⓘ

Engineering

DEPARTMENT HEAD ⓘ

Sheetal Sankpal;

2. Vendor Information

VENDOR RATING

Excellent

VENDOR NAME ⓘ

Acme Corporation

VENDOR ADDRESS ⓘ

14711 NE 29th Pl #100

VENDOR COUNTRY ⓘ

US

VENDOR STATE ⓘ

WA

VENDOR CITY ⓘ

Bellevue

Template- format and legal language of a contract

- To create an agreement, users need to use a template
- A template contains attributes and clauses
- Attributes are tagged into the template and act as placeholders
- One agreement can be created using one template
- Template also contains clauses required for a contract

GENERAL SERVICES AGREEMENT

This General Services Agreement (this "Agreement") is made effective as of **ICMEffectiveDate** (the "Effective Date").

BETWEEN:

ICMLegalEntity, ICMLegalEntityAddress("Company")

AND:

ICMVendorName, ICMVendorAddress, ICMVendorCity, ICMVendorState, ICMVendorCountry, ICMVendorPostalCode(the "Supplier")

1. Services and Deliverables

1.1 Company hereby retains the Supplier to provide to Company services (the "Services") and to supply the work product (the "Deliverables") described in the Statement of Work. If Statement of Work provides that the Services shall be performed by a specific individual (the "Representative"), Company engages the Supplier to provide the Services on the express and essential condition that the Services shall be performed by the Representative and by no other person. In the event that the Representative is no longer (i) able or willing to perform the Services, or (ii) active with or employed by the Supplier, for any reason whatsoever, Company shall have the right to terminate this Agreement immediately upon written notice, without prejudice to Company's rights hereunder. Notwithstanding the foregoing, the Supplier may replace the Representative with another individual reasonably satisfactory to Company with the prior written consent of Company.

2. Term

2.1 This Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to Section 4 hereof, shall continue until the termination **ICMExpiryDate** (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number.

3. Fees

3.1 For and in consideration of the Services and Deliverables furnished by the Supplier to Company

Attributes

Clauses

Let' review

Template

Attribute's values

Effective Date- 1 Jan 2022
Legal Entity Name- Icertis, Inc.
Vendor Name- ABC Ltd.



GENERAL SERVICES AGREEMENT

This General Services Agreement (this "Agreement") is made effective as of **ICMEffectiveDate** (the "Effective Date").

BETWEEN:

ICMLegalEntity, ICMLegalEntityAddress("Company")

AND:

ICMVendorName,ICMVendorAddress,ICMVendorCity,ICMVendorState,ICMVendorCountry, ICMVendorPostalCode(the "Supplier")

1. Services and Deliverables

1.1 Company hereby retains the Supplier to provide to Company services (the "Services") and to supply the work product (the "Deliverables") described in the Statement of Work. If Statement of Work provides that the Services shall be performed by a specific individual (the "Representative"), Company engages the Supplier to provide the Services on the express and essential condition that the Services shall be performed by the Representative and by no other person. In the event that the Representative is no longer (i) able or willing to perform the Services, or (ii) active with or employed by the Supplier, for any reason whatsoever, Company shall have the right to terminate this Agreement immediately upon written notice, without prejudice to Company's rights hereunder. Notwithstanding the foregoing, the Supplier may replace the Representative with another individual reasonably satisfactory to Company with the prior written consent of Company.



**Agreement
Record**

Own versus Third Party paper

- The first step of creating an agreement is to select the Contract Type Name and the Type of Paper
- Many agreement contract types are configured in ICI. Each contract type contains attributes and templates for authoring a contract.

Create Agreement
Master Services Agreement

Contract Type Details (Step 1 of 4)

CATEGORY: Procurement Contracts

CONTRACT TYPE NAME: Master Services Agreement

This form lets you create a Master Service Agreement

TYPE OF PAPER: Own (highlighted), Third Party

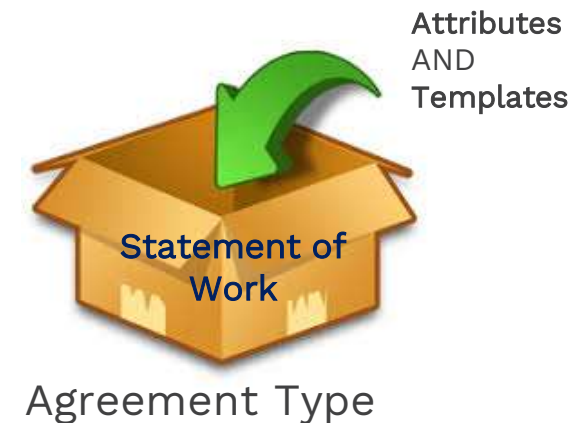
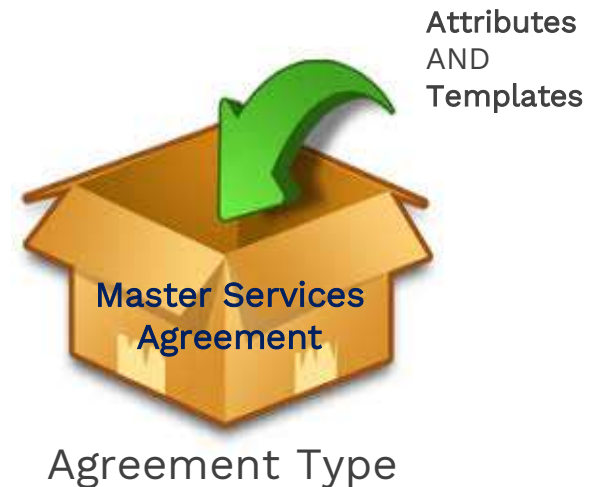
PREVIOUS NEXT SAVE DISCARD

- **Type of Paper**

- **Own**- Select this option when you want to use one of the pre-configured templates to create the contract.
- **Third party**- Upload a file (not included in ICI system) to create the agreement.
 - Upload a file that contains the legal language provided by the vendor / customer / supplier for creating an agreement
 - Upload an already executed agreement document

Agreement/ Contract Types

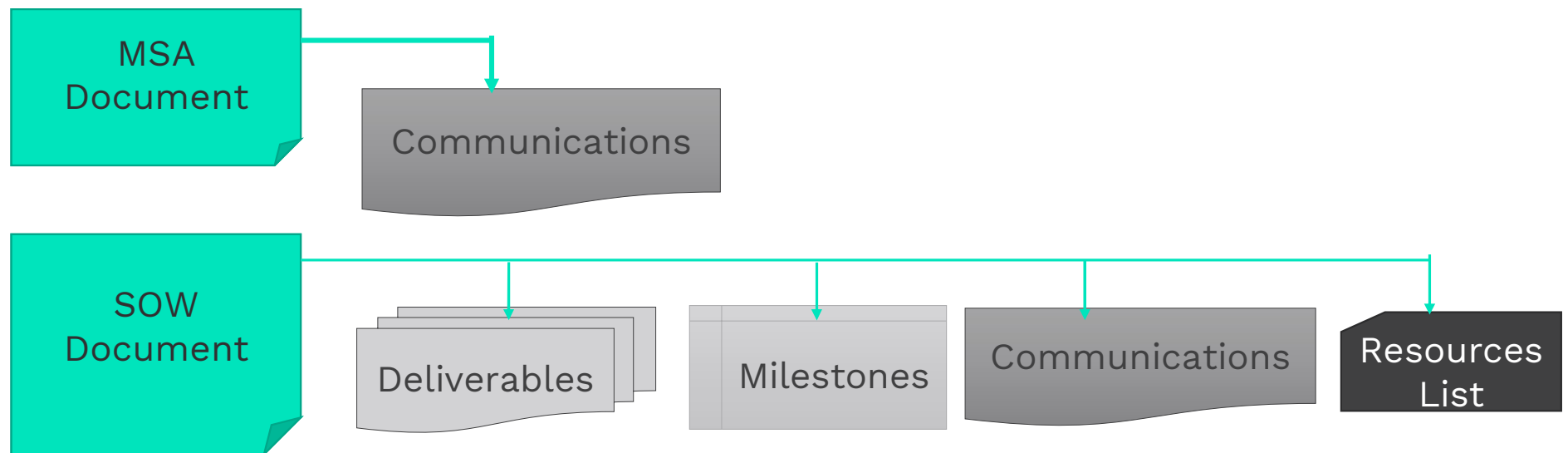
- Attributes and Templates are packaged together in a container called as the **Contract/Agreement Type**
- Agreement instances are created using a contract type. The composition of the contract type decides what the agreement instances contain, for example:
 - Certain attributes need to be present in the agreement
 - Clauses are tagged to a contract type during time of creation
 - Templates are created for specific contract types



Associated Documents

- For many agreements, some additional legal documents or supplement materials need to be associated
- These additional documents are called Associated Documents

Examples- Scanned copies of Purchase order, invoices, Brochures, Rate Charts



Associated Documents

Agreements / MSA_Supriya (ICMMasterServicesAgreement_17)

Waiting For Signature from Supriya Ashtikar (Internal Signatory)

DOWNLOADRECALLCOPY RECORD

Menu

All Associations

Communications1+

Statement of Work1+

Document List

Associations / Communications

Refine ViewAllMore Views

SAVE VIEWREFRESH

ENTITY NAME	NAME	AGREEMENT CO...	CREATED BY	CREATED DATE	STATUS	
	communications	ICMCommunicatio...	Supriya Ashtikar	2/10/2022	Draft	...

8Items Per Page

Showing 1 to 1 of 1 Communications

Associations for MSA

Agreements / MSA Supriya (ICMStatementofWork_5)

Draft

OPEN IN OFFICE FOR THE WEBDOWNLOADUPLOAD DOCUMENTEDIT...

Menu

Associations

All Associations

Master Services Agree...1

Communications0+

Deliverable1+

Milestones1+

Product List0+

Summary

CREATED BYCREATED ONORGANIZATION UNIT

2/4/2022/icertis

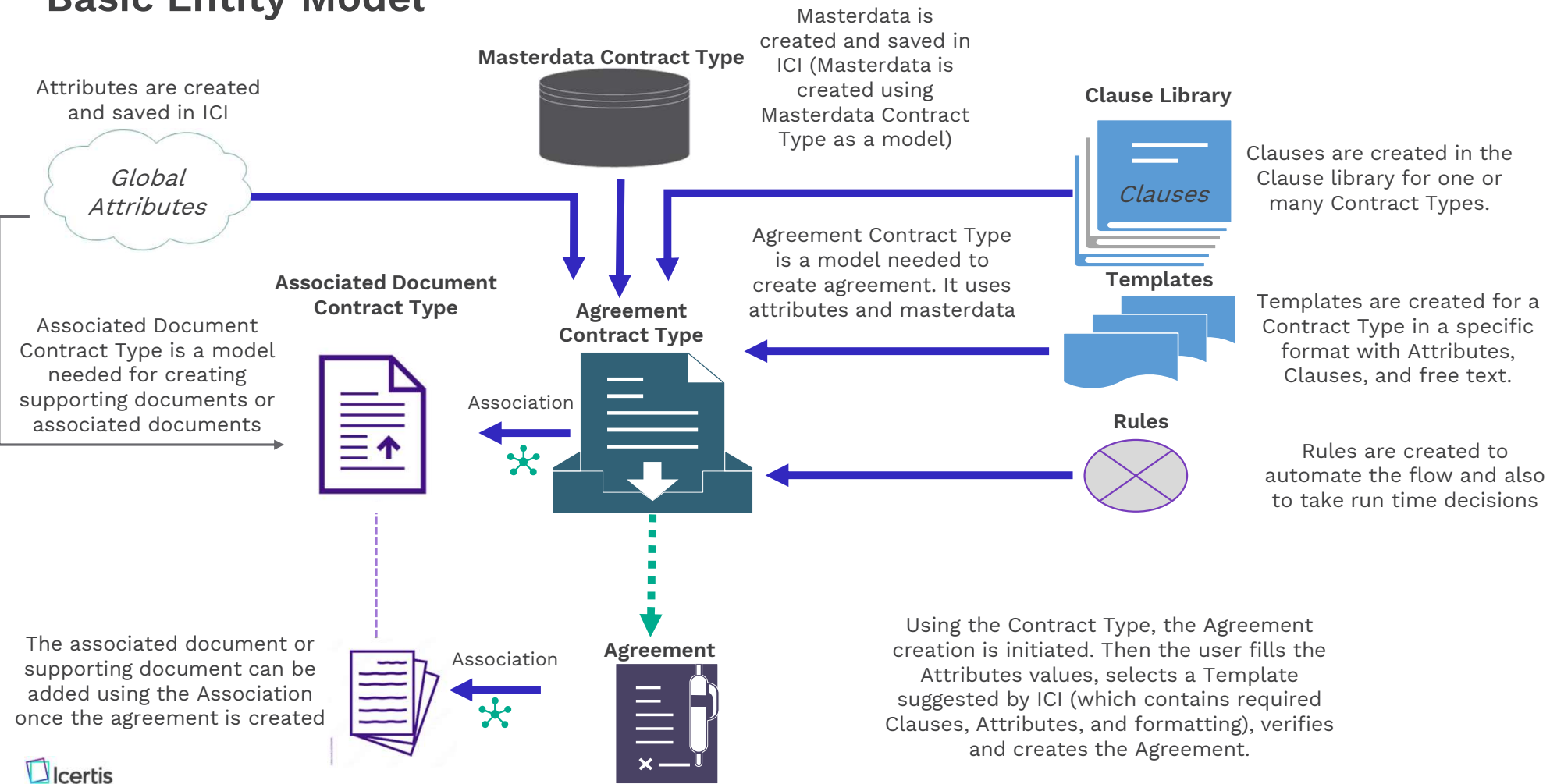
AGREEMENT CODECONTRACT NAMEDEPARTMENT

ICMStatementofWork_5MSA SupriyaEngineering

2. Vendor Information

Associations for SOW

Basic Entity Model



Summary

ICI Highlights

- Flexible configuration, with the ability to model any type of agreement relationship
- Offers Widget based or Standard Dashboard based on user preferences
- User preference can be set as per user choice including locale, currency preference , color theme
- Enhanced UI/UX – ACE UX

Contracting Entities in ICI

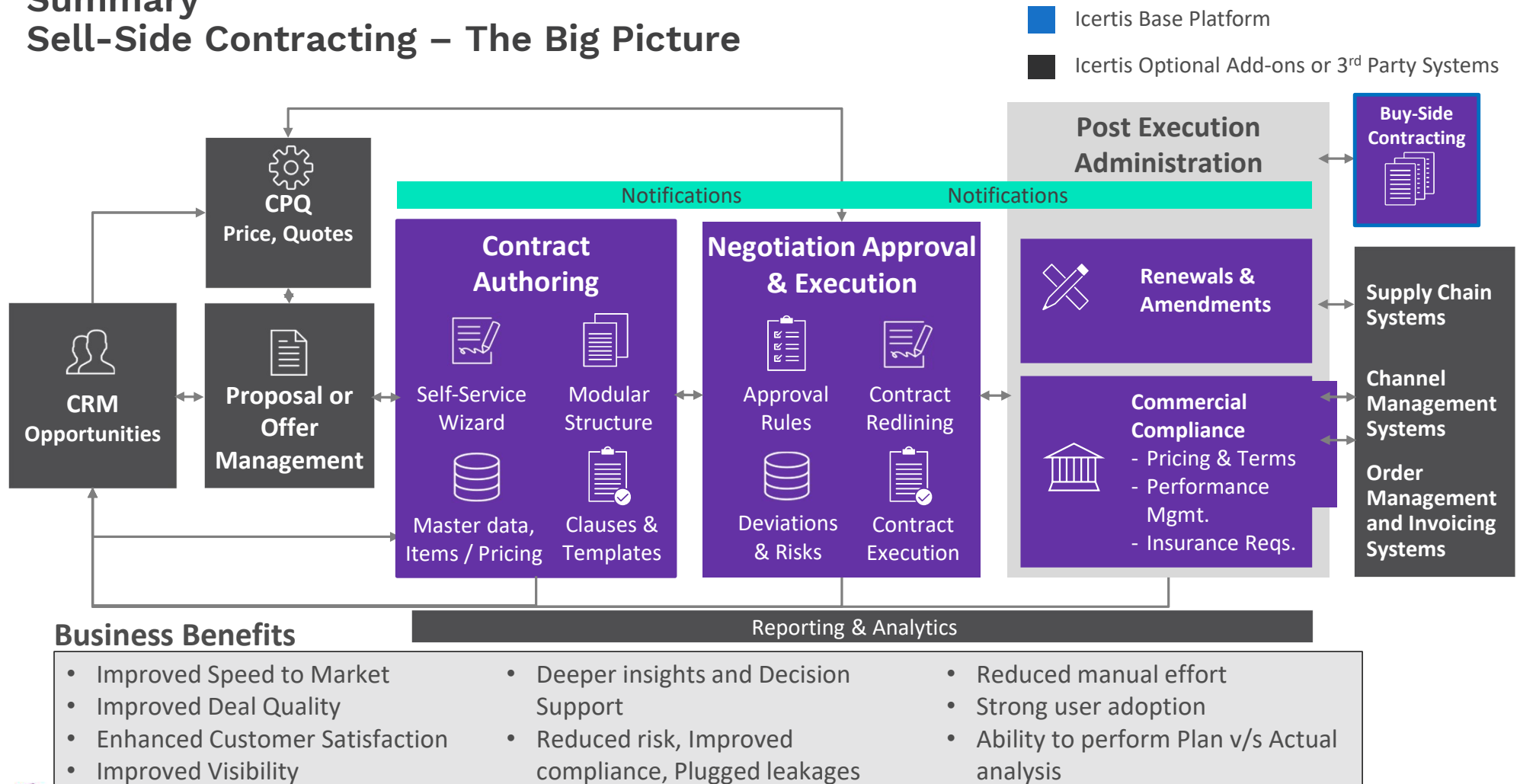
- Global Attributes
- Master Data
- Clauses
- Templates and
- Rules
- Associated Documents



Thank You

Summary

Sell-Side Contracting – The Big Picture



Summary

Buy-Side Contracting – The Big Picture

■ Icertis Base Platform
 ■ Icertis Optional Add-ons or 3rd Party Systems



Business Benefits

- Reduced cost of goods and services
- Improved compliance
- Improved supplier relationship
- Reduced risk
- Plugged spend leakages
- Visibility, Deeper insights and Decision Support