

Agenda – Part A

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Search and Reports

Icertis Contract Intelligence
Product Training



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1. Search

Performing a search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with icons for Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, and Advanced. A search bar is located at the top right with placeholder text "Enter search text here...". Below the navigation bar is a toolbar with buttons for CREATE, REFRESH, SELECT COLUMNS, EXPORT, and other options.

The main area displays a table titled "Showing 1 to 8 of 27 Agreements". The columns are ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The data in the table includes:

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	2/4/2022	● Waiting For Signature
Statement of Work	SOW_Dinesh	ICMStatementofWork_6	CLM Admin	2/8/2022	● Superseded
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Icertis Admin	2/7/2022	● Executed
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	1/6/2022	● Waiting For External Sign...
Master Services Agreement	MSA Radhika	ICMMasterServicesAgreem...	Icertis Admin	2/4/2022	● Waiting For Approval
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	● Draft

A red box highlights the "Refine View" section on the left, which contains a local search input field and a dropdown for selecting fields. A purple callout bubble over this section says: "Users can use the Local Search available on Index pages". Another purple callout bubble over the search bar at the top says: "Users can perform a search using the Advanced Search options".

At the bottom left, there is a dropdown for "Items Per Page" set to 8, and a navigation bar with page numbers 1, 2, 3, 4, >, and >>.

Performing a search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. A search bar is located at the top right. Below the navigation bar, the main content area is titled "Agreements" and shows a table of 27 agreements. The columns in the table are: ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The table lists several agreements, including "Master Services Agreement" and "Statement of Work". To the right of the table, a context menu is open for one of the rows, showing options like "Preview Document", "View Smart Links", "Copy Record", and "View Details". A callout bubble highlights this context menu with the text: "Various actions are clubbed together in the context menu (3 dots)".

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	2/4/2022	● Waiting For Signature
Master Services Agreeeme...		ICMMasterServicesAgreem...	CLM Admin	2/8/2022	● Superseded
Master Services Agreement	MSA Dinesh	ICMMasterServicesAgreem...			
Statement of Work	SOW Dinesh	ICMStatementofWork_...			
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...			
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	1/6/2022	● Waiting For External Sign..
Master Services Agreement	MSA Radhika	ICMMasterServicesAgreem...	Icertis Admin	2/4/2022	● Waiting For Approval
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	● Draft

Items Per Page: 8 < 1 2 3 4 > >>

Performing a search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. A search bar with placeholder text "Enter search text here..." is located at the top right. Below the navigation bar, the main content area is titled "Agreements" with a "More Views" dropdown. On the left, there is a sidebar titled "Refine View" containing a search bar ("Refine Search here (min 3 c...)") and a "CATEGORIES" section. The "CATEGORIES" section has a dropdown for "Vendor Name" and a list of categories: "Acme Corporation" (17), "Breve Inc." (6), and "Indus Ltd." (4). A red box highlights the "Vendor Name" dropdown and the "Acme Corporation" category. In the center, a table displays "Showing 1 to 8 of 17 Agreements". The table columns are: ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The data in the table includes:

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	2/4/2022	● Waiting For Signature
Master Services Agreement	MSA_Supriya_2	ICMMasterServicesAgreem...	CLM Admin	2/8/2022	● Superseded
Master Services Agreement	MSA_Supriya_3	ICMMasterServicesAgreem...	CLM Admin	2/7/2022	● Executed
Master Services Agreement	MSA_Supriya_4	ICMMasterServicesAgreem...	CLM Admin	2/8/2022	● Draft
Master Services Agreement	MSA_Supriya_5	ICMMasterServicesAgreem...	Icertis Admin	2/8/2022	● Draft
Master Services Agreement	MSA_Supriya_6	ICMMasterServicesAgreem...	Supriya Ashtikar	1/6/2022	● Waiting For External Sign...
Statement of Work	MSA_Supriya_7	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	● Draft
Master Services Agreement	MSA_Supriya_8	ICMMasterServicesAgreem...	Supriya Ashtikar	1/7/2022	● Executed

A purple callout box with white text is overlaid on the table, stating: "Users can use the attribute names found in each contract to perform a search". At the bottom of the table, there is a "Items Per Page" dropdown set to 8, and a pagination bar with buttons for 1, 2, 3, >, and >>.

Performing a search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. A search bar with placeholder text "Enter search text here..." is located above the main content area. To the right of the search bar is an "Advanced" search button. Below the navigation bar, the main content area is titled "Agreements" and shows a search result for "supriya". A callout box highlights the search input field with the text: "Users can type simple keywords to perform a search using Exactly or Contains option". The search results table has columns: ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The results show eight entries, all of which contain the keyword "supriya" in their entity name. The status column indicates the current state of each agreement, such as "Waiting For Signature", "Draft", "Waiting For External Sign...", "Executed", etc. At the bottom of the table, there are pagination controls showing page 1 of 2.

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	2/4/2022	● Waiting For Signature
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Icertis Admin	2/8/2022	● Draft
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	1/6/2022	● Waiting For External Sign...
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	● Draft
Statement of Work	SOW Supriya	ICMStatementofWork_4	Supriya Ashtikar	2/4/2022	● Draft
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	1/7/2022	● Executed
Master Services Agreement	MSA_Training	ICMMasterServicesAgreem...	Supriya Ashtikar	2/2/2022	● Waiting For External Sign...
Master Services Agreement	MSA_Supriya_Acme	ICMMasterServicesAgreem...	Supriya Ashtikar	1/10/2022	● Executed

Performing a search

Here is a search performed to display “Master Services Agreement” which are in “Draft” status created with vendor name “Breve Inc.”

The screenshot shows the Icertis platform interface for managing agreements. A search query has been applied to find agreements for vendor 'Breve Inc.' and contract type 'ICMMasterServicesAgreement' that are in 'Draft' status. The search results table displays four such agreements, each with details like Entity Name, Contract Name, Agreement Code, Created By, Created Date, and Status.

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agreement	MSA Dinesh Request	ICMMasterServicesAgreem...	CLM Admin	2/2/2022	• Draft
Master Services Agreement	MSA Sheetal	ICMMasterServicesAgreem...	Sheetal Sankpal	1/11/2022	• Draft
Master Services Agreement	MSA Dinesh Request	ICMMasterServicesAgreem...	CLM Admin	1/7/2022	• Draft
Master Services Agreement	MSA Dinesh Request	ICMMasterServicesAgreem...	CLM Admin	1/4/2022	• Draft

The left sidebar shows a 'Refine View' section with a 'Status' dropdown set to 'Draft' (highlighted with a red box), and a 'Categories' section with a list of categories: 'Draft' (4 items), 'Draft - In Editing' (1 item), and 'Waiting For External...' (1 item).

Performing a search

The screenshot shows the Icertis platform interface for performing a search. The search criteria are:

- Contract Type Name: Contains "ICMStatementofWork"
- Contract Value: >= 5000

The results show 6 agreements, all of which are "Statement of Work" type. The search results can be exported to Excel or CSV.

Search Criteria (Left Panel):

- CATEGORIES: Contract Value
- SELECT OPERATOR AND ENTER VALUE:
 - OPERATOR: >=
 - VALUE: 5000
- APPLY button

Search Results (Main Panel):

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Statement of Work	SOW Dinesh	ICMStatementofWork_6	CLM Admin	2/8/2022	Draft
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	Draft
Statement of Work					
Statement of Work					
Statement of Work					
Statement of Work					

Search Summary (Bottom Left):

Showing 1 to 6 of 6 Agreements

SAVE VIEW REFRESH SELECT COLUMNS EXPORT (Excel, CSV)

Annotation (Purple Callout):

Here is a search performed to display high valued (above 5000K) "Statement of Work".
This search result can be exported to Excel or CSV format.

Performing a search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. A search bar is located at the top center with the placeholder "Enter search text here...". To the right of the search bar are "Advanced" search options and user profile icons.

The main area is titled "Agreements" and displays a table of search results. The table has columns for ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. One row is visible, showing "Master Services Agreement" as the ENTITY NAME, "MSA_Supriya" as the CONTRACT NAME, "ICMMasterServicesAgreem..." as the AGREEMENT CODE, "Supriya Ashtikar" as the CREATED BY, "1/6/2022" as the CREATED DATE, and "Review Pending" as the STATUS.

On the left side, there is a "Refine View" section with a "CATEGORIES" dropdown menu. This menu is highlighted with a red border and lists several categories: "Team Member: User Name", "Reviewer Group", "Finance Manager", "Reviewer Group" (which is selected and highlighted in green), "Sheetal Sankpal", and "Supriya Ashtikar". Below this, there is a search bar with the placeholder "Search Team Member: User Name".

At the top of the search results table, there is a filter box containing "TEAM MEMBER : USER NAME" and "Reviewer Group".

Below the table, there is a "Items Per Page" dropdown set to "8" and a navigation bar with page numbers "1" and "2".

A callout bubble in the bottom right corner contains the text: "Applying nested filters based on any user roles using the following categories" followed by two examples: "Team Member: Role Name, Team Member: Is Group," and "Team Member: Role Display Name, Team Member: User Name".

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	1/6/2022	Review Pending

Performing a search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. A search bar at the top right contains the placeholder "Enter search text here...". Below the search bar is an "Advanced" link and a row of small icons.

The main area is titled "Agreements" and shows a search result for "Showing 1 to 7 of 7 Agreements". The search criteria are displayed in a red-bordered box:

- Contains: DOCUMENT CLAUSES : IS DEViated
- true

Below the search criteria, there is a "Refine View" section with a dropdown set to "Contains" and a search input field. To the right of the search results are buttons for "SAVE VIEW", "REFRESH", "SELECT COLUMNS", and "EXPORT".

A large callout bubble highlights the search criteria and provides a detailed description of the search parameters:

Searching for clauses using various clause categories such as Clause Group, Clause Language, Clause Name, Is Alternate Clause, Is Dependent Clause, Is Deviated, Is Editable, Is Mandatory, Perform Deviation Analysis, Primary Clause, and Clause Code

The search results table has columns: ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The results show several agreements, with the first one being "Master Services Agreement" (MSA Dinesh) created by "CLM Admin" on "1/3/2022" in status "Executed".

On the left side, there is a "CATEGORIES" section with a dropdown menu showing "Document Clauses : Is Devia..." with options "false" and "true". The "true" option is highlighted with a green background and a red border.

At the bottom, there is a "Items Per Page" dropdown set to "8" and a page navigation bar with a green "1" button.

Performing a search

The screenshot shows the Lcertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. A search bar at the top right says "Enter search text here..." and an "Advanced" button is also present.

The main area is titled "Clauses" and shows a table of 8 clauses. The columns include Entity Name, Clause Name, Created By, Created On, and Status. The status column shows all entries as "Approved".

On the left, there is a "Refine View" sidebar with several filters:

- A dropdown for "Contains" with a search input "Refine Search here (min 3 c...)".
- A "CATEGORIES" section with a dropdown for "Clause Group" and a search input "Search Clause Group". This section is highlighted with a red box.
- A dropdown for "Finance" with items: Legal (selected, highlighted in green), None, and Other (with a count of 1).
- A dropdown for "Legal" with items: Legal (selected, highlighted in green), None, and Other (with a count of 9).
- A "More Options" link.

At the top of the clause table, there are two filters applied: "IS CURRENT VERSION: true" and "CLAUSE GROUP: Legal". These filters are also highlighted with a red box.

A large callout bubble is overlaid on the table, containing the text: "Searching for clauses using various clause categories".

Entity Name	Clause Name	Created By	Created On	Status
Clause	Entire Agreement	CLM Admin	1/3/2022	Approved
Clause			1/3/2022	Approved
Clause			1/3/2022	Approved
Clause			1/3/2022	Approved
Clause	Governing Law	CLM Admin	1/3/2022	Approved
Clause	Termination	CLM Admin	1/3/2022	Approved
Clause	Term	CLM Admin	1/3/2022	Approved
Clause	Signature Block	CLM Admin	1/3/2022	Approved



- * This feature is discussed in detail in a separate LMS course
- Details are provided in Learn More Resources Section at the end of the module

Instant Search Results

The screenshot shows the Icertis interface with a search result overlay for 'ACME'. The search results are listed under the heading 'Agreement' and include:

- MSA_Supriya | ICMMasterServicesAgreement_17** 1 appearance in Document Text
... "Effective Date"). BETWEEN: Icertis , Pune (the "Company") AND Acme Corporation , 14711 NE 29th Pl #100 ,USA (the "S...
- ICMMasterServicesAgreementA... | ICMMasterServicesAgreementA...** 1 appearance in Document Text
... 2022 (the "Effective Date"). BETWEEN: Icertis , Seattle (the "Company") AND Acme Corporation , 14711 NE 29th Pl #100 ,...
- MSA Dinesh | ICMMasterServicesAgreement_19** 1 appearance in Document Text
... 2022 (the "Effective Date"). BETWEEN: Icertis , Seattle (the "Company") AND Acme Corporation , 14711 NE 29th Pl #100 ,...
- SOW Dinesh | ICMStatementofWork_6** 1 appearance in Document Text
...ll reference the Accounts Payable above purchase order number and Acme Corporation shall be sent to: 14711 NE 29th P...

A purple callout box highlights the first result with the text: "Instant search results shows the context of the specific result".

Date	Status	Actions
2/7/2022	Executed	...
2/8/2022	Draft	...
2/8/2022	Draft	...
1/6/2022	Waiting For External Sign...	...
2/4/2022	Waiting For Approval	...
2/4/2022	Draft	...

Navigation controls at the bottom right include page numbers 1, 2, 3, 4, >, and >>.

Advanced Search

The screenshot shows the Icertis platform's search interface. At the top, there is a navigation bar with links: Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, and More. Below the navigation bar is a search bar labeled "Search" with a dropdown menu "More Views". The main search area has a field "Agreement, Associated Document" with a dropdown "Type to filter" containing options like All Agreements, All Associated Documents, All Contract Requests, All Masterdata, Agreement (selected), and Associated Document. To the right of this is a search criteria section with fields "with" (set to "Any Data"), "Contains" (set to "Exactly"), and a search input "Refine Search here (min 3 char)". There are also "SEARCH" and "CLEAR" buttons.

Search for entities using:

- Any Data (Both attribute and document)
- Attribute Value
- Document Text

Advanced Search

Agreements Requests Associations Compliances Templates Clauses Configure Reports More

Search More Views

Agreement, Associated Document with Attribute Value Contains acme

SEARCH CLEAR

Refine View Showing 1 to 8 of 17 records

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS	KEYWORD FOUND IN
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Icertis Admin	2/1/2022	Waiting For External ...	Attribute Value
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Icertis Admin	2/8/2022	Draft	Attribute Value
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Supriya Ashtikar	1/6/2022	Waiting For External ...	Attribute Value
Statement of Work	SOW_Dinesh	ICMStatementofWork_6	CLM Admin	2/8/2022	Draft	Attribute Value
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Icertis Admin	2/8/2022	Draft	Attribute Value
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Supriya Ashtikar	1/6/2022	Waiting For External ...	Attribute Value
Statement of Work	MSA_Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	Draft	Attribute Value
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Supriya Ashtikar	1/7/2022	Executed	Attribute Value

Items Per Page 8 1 to 8 of 17 items 1 2 3 > >>

Search for agreements, Associated Document where attribute value contains “acme”

Advanced Search

The screenshot shows the Icertis platform interface with the following elements:

- Header:** Icertis logo, navigation menu (Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, More), and user icons.
- Search Bar:** A search bar with the term "Agreement", dropdown filters "with Any Data" and "Contains", a search input "Refine Search here (min 3 char)", and "SEARCH" and "CLEAR" buttons.
- Refine View:** A sidebar with a "Refine View" button and a "CATEGORIES" section. The "Status" dropdown is set to "Search Status". The "Status" filter is expanded, showing categories: Draft (9), Draft - In Editing (1), Executed (3), Review Pending (1), and Superseded (1). The "Executed" category is highlighted with a green background.
- Search Results:** A table showing search results for "ICMMasterServicesAgreement" filtered by "Executed". The table columns are: ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The results are:

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agreement	MSA_Dinesh	ICMMasterServicesAgreem...	CLM Admin	2/7/2022	Executed
Master Services Agreement	MSA_Supriya	ICMMasterServicesAgreem...	Supriya Ashtikar	1/7/2022	Executed
Master Services Agreement	MSA_Supriya_Acme	ICMMasterServicesAgreem...	Supriya Ashtikar	1/10/2022	Executed
- Annotations:**
 - A purple callout box states: "The search can be Saved for further use using Save View action." with a red box around the "SAVE VIEW" button.
 - A purple callout box at the bottom states: "Here is a search to find all MSA Agreements. The MSAs are then filtered to display signed agreement documents."

Favorite Search

The screenshot shows the Icertis search interface. On the left, there's a search bar with filters for 'Agreement' and 'Any Data' set to 'Contains'. Below it, a 'Refine View' section includes 'CONTRACT TYPE NAME: ICMMasterServicesAgreement' and 'STATUS: Executed'. To the right, a 'Save View' dialog is open, titled 'Save View'. It contains a 'VIEW NAME' field with the value 'MSA with Status Executed'. A red box highlights the 'GLOBAL ACCESS TO VIEW' section, which has a radio button set to 'No'. Below this are sections for 'Advanced Criteria', 'SMART LINK' (radio button 'No'), and 'DASHBOARD TILE VIEW' (radio button 'No'). A purple callout box in the center-right area states: 'The Saved Search can be saved as Global Search or a local Search. Only Administrator can set it as Global Search.'

Agreements Requests Associations Compliances Templates

Search More Views

Agreement with Any Data Contains Refine Search

Refine View

CONTRACT TYPE NAME: ICMMasterServicesAgreement STATUS: Executed

CATEGORIES

Status

Search Status

Draft (9)

Draft - In Editing (1)

Executed (3) Selected

Review Pending (1)

Superseded (1)

More Options

CUSTOM KEYWORD

TEXT Contains

CLEAR ALL About

Save View

* VIEW NAME MSA with Status Executed

GLOBAL ACCESS TO VIEW No

Advanced Criteria

SMART LINK No

Create link for easy reference of related records.

DASHBOARD TILE VIEW No

This search will be available on the Dashboard in a Grid widget. Select to display it in a Tile widget.

The Saved Search can be saved as Global Search or a local Search.
Only Administrator can set it as Global Search.

SAVE

Saved Search – More Views

The screenshot shows the Icertis software interface with a red box highlighting the 'More Views' dropdown menu. The menu lists several global saved searches: 'Saved Searches', '3 or more Months Contract Term', 'Signed MSAs', 'AgreementsByContractType', 'All Clauses', 'All Contract Types', and 'All Masterdata'. A callout bubble points to the 'Manage Global Favorites' link at the bottom of the list. To the right of the menu is a search bar with a 'Contains' dropdown and a 'Refine Search here (min 3 char)' input field, along with 'SEARCH' and 'CLEAR' buttons.

More Views option shows the local and global Saved searches

These are global saved searches

Search View	Description
Saved Searches	Global saved search for saved searches
3 or more Months Contract Term	Global saved search for contracts with a term of 3 or more months
Signed MSAs	Global saved search for signed Memoranda of Agreement (MOAs)
AgreementsByContractType	Global saved search for agreements categorized by contract type
All Clauses	Global saved search for all clauses in the system
All Contract Types	Global saved search for all contract types defined in the system
All Masterdata	Global saved search for all master data records

Advanced Search

The screenshot shows the Lcertis platform interface. At the top, there is a navigation bar with links: Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, and More. Below the navigation bar is a search bar with the placeholder "Search Signed M...". A dropdown menu is open next to it, showing "Agreement, Clause" selected. To the right of the dropdown are buttons for "with Any Data", "Contains", a search input field containing "confidentiality", a magnifying glass icon, a "SEARCH" button, and a "CLEAR" button. The main content area displays a table titled "Showing 1 to 3 of 3 records". The table has columns: ENTITY NAME, CLAUSE NAME, CREATED BY, CREATED DATE, STATUS, and KEYWORD FOUND IN. The data in the table is as follows:

ENTITY NAME	CLAUSE NAME	CREATED BY	CREATED DATE	STATUS	KEYWORD FOUND IN
Master Services Agreement	MSA Dinesh Request	CLM Admin	2/2/2022	• Draft	Document Text
Master Services Agreement	MSA Dinesh Request	CLM Admin	1/4/2022	• Draft	Document Text
Clause	Confidential Information	CLM Admin	1/3/2022	• Approved	Document Text

At the bottom left of the table, there is a "Items Per Page" dropdown set to "8". At the bottom right, there are navigation buttons for "1 to 3 of 3 items", page numbers (1, 2, 3), and arrows. A callout bubble with a purple background and white text points to the search input field, stating: "The Any Data search performs a keyword or sentence search in the agreement document and displays the results."

Advanced Search

Showing 1 to 3 of 3 records

ENTITY NAME	CLAUSE NAME	CREATED BY	CREATED DATE	STATUS	KEYWORD FOUND IN	Actions
Master Services Agreement	MSA Dinesh Request	CLM Admin	2/2/2022	• Draft	Document Text	
Master Services Agreement	MSA Dinesh Request	CLM Admin	1/4/2022	• Draft	Document Text	
Clause	Confidential Information	CLM Admin	1/3/2022	• Approved	Document Text	

Items Per Page: 8

1 to 3 of 3 items

Preview Document
View Smart Links
View Details

Various actions can be performed using the Context menu (3 dots). Preview Document allows user to view the document in a split preview mode

Advanced Search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with links for Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, and More. Below the navigation bar is a search bar with the placeholder "Search Signed M...". The main area displays a search result for "Agreement, Clause" containing the word "confidentiality". The results table has columns for CLAUSE NAME, CREATED BY, CREATED DATE, and STATUS. There are three records listed:

	CLAUSE NAME	CREATED BY	CREATED DATE	STATUS
Agreement	MSA Dinesh Request	CLM Admin	2/2/2022	Draft
Agreement	MSA Dinesh Request	CLM Admin	1/4/2022	Draft
	Confidential Information	CLM Admin	1/3/2022	Approved

Below the table, there is a "Per Page" dropdown set to "1" and a "Preview" modal window on the right side. The preview window shows the content of the "Confidential Information" clause, which is titled "MASTER SERVICES AGREEMENT". The text states that the agreement is made effective as of January 4, 2022, and describes the parties involved: Icertis, India (the "Company") and Breve Inc., 54 Walnut Street, USA (the "Supplier"). It also includes a section titled "1. Services and Deliverables" with a detailed description of the services provided by the Supplier.

Split preview enables dynamic preview of each search result without requiring a download or opening a separate window.

Working with Dashboard KPIs

The screenshot shows the Lcertis dashboard interface. At the top, there is a navigation bar with various menu items: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar, the main content area displays several KPI tiles. One tile is highlighted with a red border and contains the number '21' and the text 'Contract Term more than 3 Months'. Another tile shows 'MSA with ACME | 19 records'. A callout bubble with a purple background and white text points to these tiles with the text: 'Contract metrics or Key Performance Indicators (KPIs) tiles provide real time insights'. To the right of the main content area, there is a modal window titled 'Add Widgets' with a search bar and a list of available widgets. The list includes: Agreement Deviation, Agreements Pending Approval, Agreements Pending Execution, AgreementsByContractType, All Clauses, All Contract Types, All Masterdata, All Org Groups, and All Security Groups. An 'ADD' button is located at the bottom right of the modal.

21
Contract Term more than 3 Months

MSA with ACME | 19 records

Entity Name AI Model Name

Master Services Agreement	MSA_Supriya
Master Services Agreement A...	
Master Services Agreement	MSA Dinesh
Statement of Work	SOW Dinesh
Master Services Agreement	MSA_Supriya

View More

My Tasks | 4 records

Task	Record Name	Entity Type	Received On

View More

Agreements Pending Approval

Configure

Reports

AI Studio

Bulk Actions

Admin

Enter search text here...

Advanced

Add Widgets

WIDGETS SELECTED 0 / 12

SELECT TO ADD FROM AVAILABLE WIDGETS.

Search Widget

- Agreement Deviation
- Agreement Deviation
- Agreements Pending Approval
- Agreements Pending Execution
- AgreementsByContractType
- All Clauses
- All Contract Types
- All Masterdata
- All Org Groups
- All Security Groups

ADD

Favorite Search

Lcertis

Agreements Requests Associations Compliances Templates

Search Signed M...

with Any Data Contains

Refine View

CATEGORIES

Select Field

Showing 1 to 3 of 3 records

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE
Master Services Agree...	MSA_Dinesh	ICMMasterService
Master Services Agree...	MSA_Supriya	ICMMasterService
Master Services Agree...	MSA_Supriya_Acme	ICMMasterService

8 Items Per Page

CLEAR ALL About

Save View As

* VIEW NAME

GLOBAL ACCESS TO VIEW No

Advanced Criteria

DASHBOARD TILE VIEW Yes
This search will be available on the Dashboard in a Grid widget. Select Yes to display it in a Tile widget.

* DASHBOARD WIDGET NAME

* KPI CALCULATION ON WIDGET

Criteria for calculating the number on dashboard tile

SAVE

Users can create their own Dashboard KPIs. In the Advanced Search, they need to enable the saved search as a Dashboard Tile.

Creating Dashboard KPIs

The screenshot shows the lcertis platform interface. On the left, there's a dashboard section with various tiles. One tile displays '21 Contract Term more than 3 Months'. Another tile shows 'MSA with ACME | 19 records' with a table of agreements. A third tile is titled 'Agreements Pending Approval' and contains a chart and a table.

A modal window titled 'Edit Dashboard allows user to add a new Widget in the form of a KPI tile using Saved Search.' is overlaid on the dashboard. This modal has three numbered steps:

- Step 1: A button labeled 'ADD WIDGETS' is highlighted with a red box and a circled '1'.
- Step 2: A list of available widgets is shown, with one item, 'Signed MSAs', checked and highlighted with a red box. A circled '2' is next to this item.
- Step 3: A green 'ADD' button at the bottom right of the modal is highlighted with a circled '3'.

The top navigation bar includes a search bar, an 'Advanced' dropdown, and several menu items: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin.

Creating Dashboard KPIs

The screenshot shows the Icertis platform interface for creating dashboard KPIs. At the top, there's a navigation bar with various menu items like Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar, the main area is titled 'Home'. It features several dashboard tiles and lists. One tile on the left is highlighted with a red border and contains the number '3' and the text 'Signed MSAs'. A callout bubble from this tile points to a text box containing the following description:

The newly created Dashboard Tile added to the Dashboard page. System allows user to customize the look and feel of the tile by selecting the text color.

Other visible tiles include 'My Tasks' (4 records) and 'My Recent Activities' (36 records). The 'My Tasks' tile shows a list of tasks with columns for Task, Record Name, Entity Type, and Received On. The 'My Recent Activities' tile shows a list of recent activities with columns for Record Name and Record Action.

Creating Global Favorite Search

The Saved Search can be saved as Global Search and as Global Favorite

The Favorite can be added to Index page

The screenshot shows the Lcertis interface. On the left, a search results page displays a table with three rows of data: 'Master Services Agreement' (MSA_Supriya), 'Master Services Agreement' (MSA_Supriya), and 'Statement of Work' (MSA Supriya). Below the table are buttons for 'CLEAR ALL' and 'About'. On the right, a modal window titled 'Save View As' is open. It contains fields for 'VIEW NAME' (set to 'MSA with ACME'), 'GLOBAL ACCESS TO VIEW' (set to 'Yes'), 'AVAILABLE AS GLOBAL DEFAULT VIEW' (set to 'Yes'), and a note about marking it as a favorite. It also has sections for 'ADD FAVORITES TO', 'SECURITY GROUPS WITH ACCESS' (set to 'Default'), and 'ORGANIZATION UNITS WITH ACCESS UPTO' and 'ORGANIZATION UNITS WITH ACCESS FROM' (both empty). A 'SAVE' button is at the bottom of the modal.

Agreements Requests Associations Compliances Templates

Search MSA with...

Agreement, Associated Document, Clause, Contract... with Any Data Contains Refine Search

Refine View VENDOR NAME Acme Corporation

CATEGORIES Select Field

Master Services Agreement MSA_Supriya

Master Services Agreement MSA_Supriya

Statement of Work MSA Supriya

8 Items Per Page

CLEAR ALL About

Save View As

* VIEW NAME MSA with ACME

GLOBAL ACCESS TO VIEW Yes

AVAILABLE AS GLOBAL DEFAULT VIEW Yes

Select Yes to mark the global search as favorites, else select No to make it appear in the list of saved searches.

ADD FAVORITES TO Index Page

SECURITY GROUPS WITH ACCESS Default

ORGANIZATION UNITS WITH ACCESS UPTO

ORGANIZATION UNITS WITH ACCESS FROM

Advanced Criteria

SAVE

Creating Global Favorite Search

The screenshot shows the Icertis platform interface. On the left, there is a search bar with the query "SOWs with Acme". Below it is a table displaying three records of agreements. On the right, a modal window titled "Manage Global Favorites" is open. The modal contains a dropdown menu set to "Agreement", a descriptive text about creating a saved view, and a list of "AVAILABLE GLOBAL FAVORITES" with one item selected: "SOWs with Acme". There are movement arrows for reordering items and buttons for "SAVE" and "CANCEL". A purple callout box highlights the text "Manage Global Favorites to add to a required view".

Manage Global Favorites

Agreement

To add a View to 'Available Global Favorites' list, create a Saved View with 'Global Access To View' and 'Available As Global Default View' options turned on.

AVAILABLE GLOBAL FAVORITES

SOWs with Acme

Use the movement buttons to reorder items in this list

SAVE CANCEL

Manage Global Favorites to add to a required view

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE
Statement of Work	SOW Dinesh	ICMStatementofWork_6	CLM Admin	2/8/2022
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022
Statement of Work	MSA Dipshi	ICMStatementofWork_2	Icertis Admin	1/28/2022

Items Per Page

CLEAR ALL About

Viewing Global Favorite Search

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and Bulk Actions. Below the navigation bar, the main content area is titled "Agreements". A search bar at the top of this section contains the text "SOWs with Acme". A red box highlights this search term. To the right of the search bar are buttons for "CREATE" and "More Views". Below the search bar, there is a "Refine View" button and a "Showing 1 to 3 of 3 Agreements" message. On the far right of the header, there are several small icons for notifications and user management.

The main content area displays a table of agreements. The table has columns for "Statement of Work", "Last Modified By", "Last Modified Date", and "Status". There are three rows of data:

Statement of Work	Last Modified By	Last Modified Date	Status
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar
Statement of Work	MSA Dipshi	ICMStatementofWork_2	Icertis Admin

A large purple callout box is overlaid on the table, containing the following text:

The global favorite is available to any non admin user.
The user can Unpin favorite and it will be available in the Saved Searches.

At the bottom left of the table, there is a dropdown menu for "Items Per Page" set to 8, and a page navigation bar with a page number "1".

Allow Bulk Actions on List View

The screenshot shows the lcertis platform interface. On the left, there's a search bar with 'SOWs with Acme' and a 'Refine View' section. The main area displays a table with three records: Statement of Work (SOW) Dinesh, MSA Supriya, and MSA Dipshi. A purple callout box highlights the text: "Allow bulk actions for the given Saved Search can be enabled". On the right, a modal window titled 'Update View' is open. It contains fields for 'VIEW NAME' (set to 'SOWs with Acme'), 'GLOBAL ACCESS TO VIEW' (set to 'Yes'), 'AVAILABLE AS GLOBAL DEFAULT VIEW' (set to 'Yes'), and a note about marking it as a favorite. Below these are sections for 'ADD FAVORITES TO' (set to 'Index Page'), 'SECURITY GROUPS WITH ACCESS' (set to 'Default'), 'ORGANIZATION UNITS WITH ACCESS UPTO' (empty), 'ORGANIZATION UNITS WITH ACCESS FROM' (empty), and 'Advanced Criteria'. Under 'Advanced Criteria', there's a 'DASHBOARD TILE VIEW' setting (set to 'No') with a note about displaying it in a Tile widget. At the bottom, there's a section titled 'ALLOW BULK ACTIONS ON LIST VIEW' with a 'Yes' toggle switch. Underneath are checkboxes for 'Approve' (checked), 'Reject' (checked), 'Delete' (unchecked), and 'Send For Approval' (unchecked). A red border surrounds this section. A green 'SAVE' button is at the bottom right.

Allow bulk actions for the given Saved Search can be enabled

Agreements Requests Associations Compliances Templates Clauses

Search SOWs with...

Agreement with Contains

Refine View VENDOR NAME: Acme Corporation CONTRACT TYPE NAME: ICMStatementofWork

CATEGORIES: Select Field

Showing 1 to 3 of 3 records

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE
Statement of Work	SOW Dinesh	ICMStatementofWork_6
Statement of Work	MSA Supriya	ICMStatementofWork_5
Statement of Work	MSA Dipshi	ICMStatementofWork_2

8 Items Per Page

CLEAR ALL About

Update View

* VIEW NAME

GLOBAL ACCESS TO VIEW Yes No

AVAILABLE AS GLOBAL DEFAULT VIEW Yes No

Select Yes to mark the global search as favorites, else select No to make it appear in the list of saved searches.

ADD FAVORITES TO

SECURITY GROUPS WITH ACCESS

ORGANIZATION UNITS WITH ACCESS UPTO

ORGANIZATION UNITS WITH ACCESS FROM

Advanced Criteria

DASHBOARD TILE VIEW Yes No

This search will be available on the Dashboard in a Grid widget. Select Yes to display it in a Tile widget.

ALLOW BULK ACTIONS ON LIST VIEW Yes No

Approve
 Reject
 Delete
 Send For Approval

1 1 End End External Connection

SAVE

Allow Bulk Actions on List View

The screenshot shows the Icertis platform interface for managing agreements. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and Bulk Actions. A search bar is also present. Below the navigation bar, the main content area displays a list of agreements under the heading 'Agreements'.

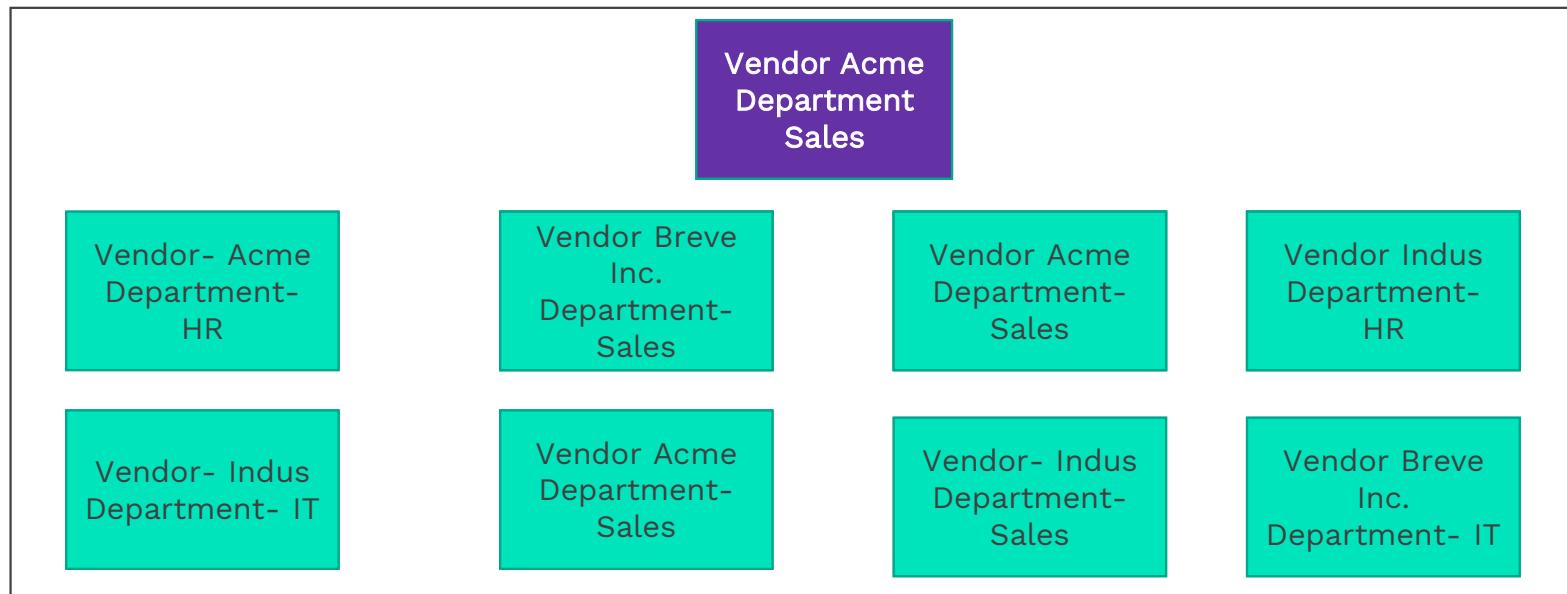
A purple callout box with the text 'Allow bulk actions for the selected records' points to the 'Bulk Actions' section of the interface. This section includes three buttons: APPROVE, REJECT, and DOWNLOAD, which are highlighted with a red border. To the left of the list, a column of checkboxes is highlighted with a red border, indicating selected items for bulk action. The list itself contains four entries:

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Statement of Work	SOW Dinesh	ICMStatementofWork_6	CLM Admin	2/8/2022	Draft
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	Draft
Statement of Work	MSA Dipshi	ICMStatementofWork_2	Icertis Admin	1/28/2022	Draft

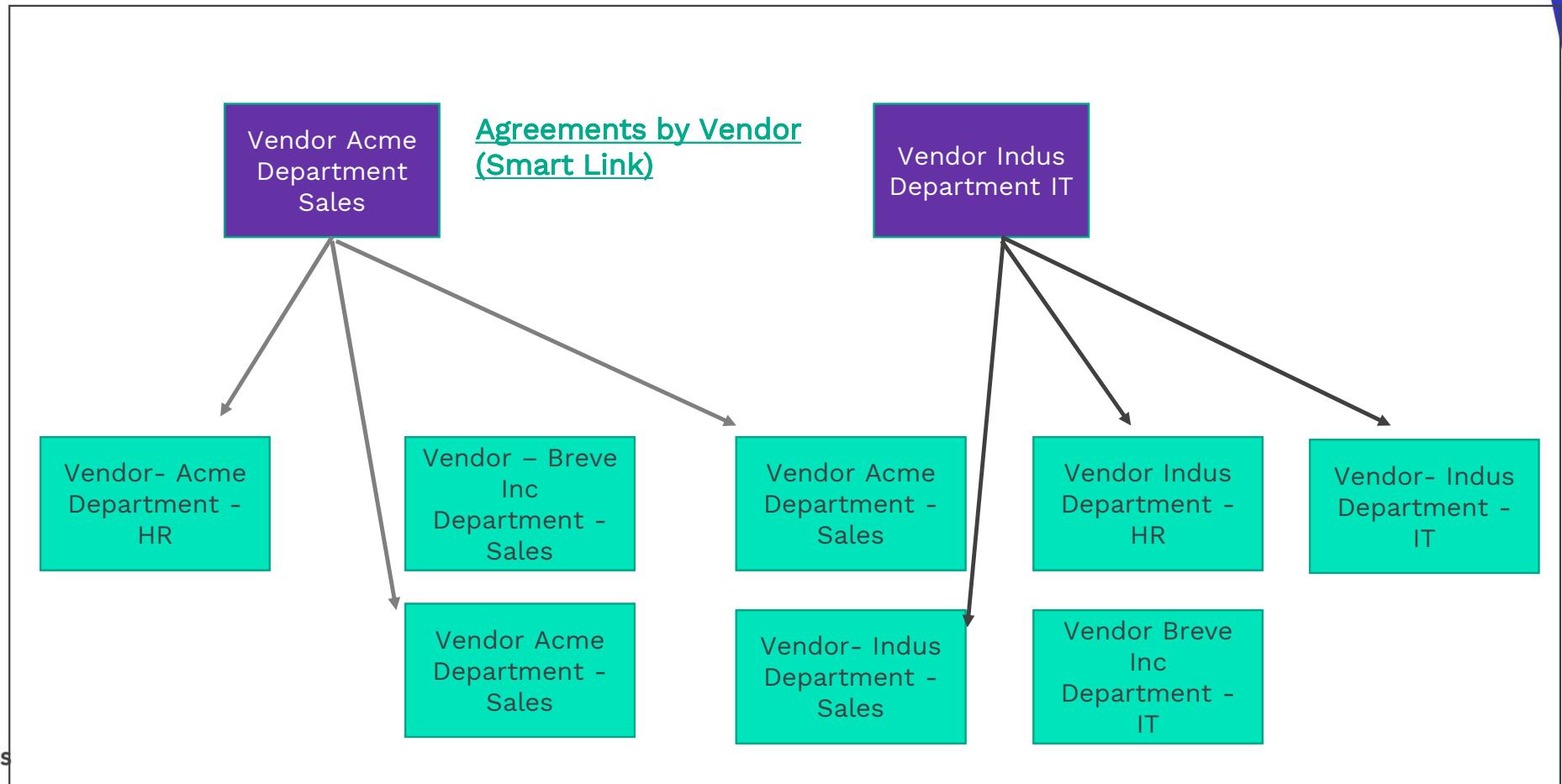
At the bottom of the list, there are buttons for 'Items Per Page' (set to 8) and page navigation (page 1).

Smart Links Overview

- Smart Links enables the system to display search results based on a desired value of an attribute in an agreement
- Example: Here is an agreement with a Vendor “Acme” and this agreement is initiated by department Sales.
- Smart links enable you to find all other agreements in the system with Vendor Acme OR find all agreements in the system with Division Sales



Smart Link- Search Results by Vendor



Creating Smart Links

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with links for Agreements, Requests, Associations, Compliances, Templates, and More. On the far right of the header are icons for creating a new item, notifications, help, and user profile.

Below the header is a search bar. The search term "Statement of Work" is highlighted with a red box. To the right of the search term are dropdown menus for "with" (set to "Any Data"), "Contains" (set to "Contains"), and a search input field labeled "Refine Search here". There are also "SEARCH" and "CLEAR" buttons.

To the left of the main content area, there is a sidebar titled "Refine View" with a "CATEGORIES" section containing a "Select Field" button. A large purple callout bubble points from this sidebar towards the search bar, containing the text: "Search all ‘Statement Of Work’ entity for which we want to set up the Smart Link."

The main content area displays a table of search results. The columns are: AGREEMENT CODE, CREATED BY, CREATED DATE, STATUS, and three additional columns represented by icons. The data in the table is as follows:

AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS	Actions
CMStatementofWork_6	CLM Admin	2/8/2022	● Draft	
ICMStatementofWork_4	Supriya Ashtikar	2/4/2022	● Draft	
ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	● Draft	
ICMStatementofWork_4	Supriya Ashtikar	2/4/2022	● Draft	
ICMStatementofWork_3	Icertis Admin	2/1/2022	● Waiting For Approval	
ICMStatementofWork_1	CLM Admin	1/4/2022	● Draft	
ICMStatementofWork_2	Icertis Admin	1/28/2022	● Draft	
MSA Dipshi				

Creating Smart Links

The screenshot shows the Icertis platform interface for creating smart links. The top navigation bar includes links for Agreements, Requests, Associations, Compliances, Templates, and More, along with user profile icons.

The main search bar contains the query "Statement of Work" with the "Contains" operator selected. A "Refine Search here" button is available for further filtering.

A "Refine View" section displays a "VENDOR NAME" filter set to "Acme Corporation".

The left sidebar features a "CATEGORIES" section with a dropdown menu set to "Vendor Name". Under this dropdown, "Search Vendor Name" is shown, followed by a list of vendors: "Acme Corporation" (selected and highlighted in green), and "Indus Ltd." (highlighted in red).

The main search results table shows three records:

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
CLM Admin			CLM Admin	2/8/2022	Draft
Supriya Ashtikar			Supriya Ashtikar	2/4/2022	Draft
Icertis Admin			Icertis Admin	1/28/2022	Draft

Below the table are buttons for "UPDATE VIEW", "SAVE VIEW AS" (highlighted in red), "REFRESH", "SELECT COLUMNS", and other grid management options. The page shows "1 to 3 of 3 items" and a page number "1".

Annotations provide instructions:

- A callout points to the "SAVE VIEW AS" button with the text: "Save View As lets you save this search and create the Smart Link".
- A callout points to the "Vendor Name" dropdown in the categories section with the text: "Search for the specific vendor. Example: Here we are searching SOWs with Acme vendor".

Before Editing the Query

The screenshot shows the iCertis platform interface. On the left, there's a search bar with filters for 'Statement of Work' and 'Vendor Name' set to 'Acme Corporation'. The results show 1 to 3 records for 'Acme Corporation'. A purple callout bubble points from the bottom left towards the 'Smart Link' section of a 'Save View As' dialog box on the right.

This query needs to be modified to search all SOWs with the Vendor Name as that in the Agreement.

Save View As

VIEW NAME: SOWs with Same Vendor

GLOBAL ACCESS TO VIEW: No

Advanced Criteria

SMART LINK: Yes (highlighted with a red box)

Create link for easy reference of related records.

```
{"freetext": "", "must": [{"ICMVendorName": {"field": "iCMVendorName", "type": "String", "isLocalized": false, "query": ["Acme Corporation"], "data": []}, "customquery": null, "isNot": false, "op": "", "textQueryOperator": ""}], "must_not": [], "should": []}
```

SMART LINK FOR LINKED ENTITIES: Yes

Toggle Yes to enable Smart Link for any linked entity

TREAT STATEMENT OF WORK AS CHILD: No

CONTRACT: No

LINKED ENTITY: Statement of Work

SAVE



Note: Smart link feature is available only with Advanced Search.

After Editing the Query

The screenshot shows the iCertis platform interface. On the left, a search view is displayed with the following criteria:

- Statement of Work
- with Any Data Contains
- VENDOR NAME: Acme Corporation

The results show 1 to 3 records. A callout bubble points from the vendor name field to a note: "The value ‘Acme Corporation’ is replaced with ‘?’ . This is done to match the vendor name to the one that is in the select Agreement."

On the right, a "Save View As" dialog is open:

- VIEW NAME:** SOWs with Same Vendor
- GLOBAL ACCESS TO VIEW:** No
- Advanced Criteria:** SMART LINK (Yes) - A code snippet is shown:

```
{"freetext": "", "must": [{"ICMVendorName": {"field": "iCMVendorName", "type": "String", "isLocalized": false, "query": ["?"]}], "data": [{"customquery": null, "isNot": false, "op": "", "textQueryOperator": ""}], "must_not": {}, "should": {}}}
```
- FOR LINKED ENTITIES:** TREAT STATEMENT OF WORK AS CHILD CONTRACT
- LINKED ENTITY:** Statement of Work
- SAVE** button

View Saved Searches

The screenshot shows the lcertis web interface. At the top, there is a navigation bar with links: Agreements, Requests, Associations, Compliances, Templates, and More. Below the navigation bar is a search bar with a placeholder 'Refine Search here'. To the left of the search bar is a 'More Views' dropdown menu, which is circled in red. A red box highlights the 'Saved Searches' section. This section contains three saved search filters: '3 or more Months Contract Term', 'SOW for Same vendor', and 'SOWs with Acme Vendor'. Each filter has a delete icon. Below these filters is a link 'Manage Global Favorites' with a star icon. On the far left, there is a vertical sidebar with a filter icon.

More Views

Saved Searches

3 or more Months Contract Term

SOW for Same vendor

SOWs with Acme Vendor

Manage Global Favorites

View all the Saved Searches that you have created in **More Views**

Viewing other SOWs of the same vendor

The screenshot shows the Icertis platform interface. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and More. Below this is a search bar with placeholder text "Enter search text here..." and an "Advanced" link. On the right side of the header are icons for creating a new record, notifications, help, and user profile.

The main area is titled "Agreements" and displays a list of 27 agreements. The columns include ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The first few rows show entries such as "Master Services Agree...", "MSA_Supriya", "ICMMasterServicesAgr...", "Supriya Ashtikar", "2/4/2022", and "Waiting for Signature".

A purple callout box with the text "Click to open the pop up." points to a context menu that appears over the second row. This menu is enclosed in a red box and contains the following options: "Preview Document", "View Smart Links" (which is circled in red), "Copy Record", and "View Details".

At the bottom left, there is a "Items Per Page" dropdown set to 8, and at the bottom right, there are page navigation buttons (1, 2, 3, 4, etc.).

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Supriya Ashtikar	2/4/2022	Waiting for Signature
Master Services Agree...		ICMMasterServicesAgr...	CLM Admin	2/8/2022	Superseded
Master Services Agree...	MSA Dinesh	ICMMasterServicesAgr...	CLM Admin	2/7/2022	Executed
Statement of Work	SOW Dinesh	ICMStatementofWork_6	CLM Admin	2/8/2022	Draft
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Icertis Admin	2/8/2022	...
Master Services Agree...	MSA_Supriya	ICMMasterServicesAgr...	Supriya Ashtikar	1/6/2022	...
Master Services Agree...	MSA Radhika	ICMMasterServicesAgr...	Icertis Admin	2/4/2022	Waiting For Approval
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	Draft

Viewing other SOWs with same vendor

The screenshot shows the Icertis platform interface. On the left, there's a sidebar with 'Home', 'Agreements', and 'Requests' buttons. Below that, it says 'Agreements' and has 'Refine View' and search/filter options ('Contains' and 'Refine Search here (min 3 char)'). At the bottom, there's a 'CATEGORIES' section. The main area is titled 'Smart Links' and contains a search bar with the query 'SOW for Same vendor'. A red box highlights this search term. Below the search bar is a table with columns: ENTITY NAME, CONTRACT NAME, AGREEMENT CODE, CREATED BY, CREATED DATE, and STATUS. The table lists three rows of data:

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS
Statement of Work	SOW Dinesh	ICMStatementofWork_6	CLM Admin	2/8/2022	Draft
Statement of Work	MSA Supriya	ICMStatementofWork_5	Supriya Ashtikar	2/4/2022	Draft
Statement of Work	MSA Dipshi	ICMStatementofWork_2	Icertis Admin	1/28/2022	Draft

A green arrow points from the search bar to the 'CONTRACT NAME' column.

All the SOWs created with Acme Corporation are listed here.

Viewing other SOWs with same vendor

The screenshot shows the iCertis platform interface for viewing an agreement. At the top, there's a navigation bar with icons for Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and More. A search bar says "Enter search text here..." and an "Advanced" button is available. On the right, there's a context menu with options like Edit, Send For Approval, Cancel, and Smart Links (which is highlighted with a red box). Below the menu, the page title is "Agreements / MSA Supriya (ICMStatementofWork_5)" and it shows the status as "Draft". A purple callout bubble points to the "Smart Links" option in the menu, stating "Smart Links are also available on the agreement screen". The main content area displays the "Summary" of the agreement, including fields for Created By (Supriya Ashtikar), Created On (2/4/2022), Organization UI (/icertis), and various sections like General Information, Vendor Information, and Terms and Services. To the right of the summary, there's a vertical list of other actions: Download All, Confidential, Compare Documents, Collaborate, Broadcast, Agreement Deviation Report, Compare Clause Changes, Assemble Contract, Request Review, On Hold, and Delete.

Smart Links are also available on the agreement screen

Smart Links

Lock

Download All

Confidential

Compare Documents

Collaborate

Broadcast

Agreement Deviation Report

Compare Clause Changes

Assemble Contract

Request Review

On Hold

Delete

2. Reports

Reports in ICI

- Reports are graphical representation of consolidated data.

The screenshot shows the Icertis software interface with a navigation bar at the top containing icons for Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. A search bar and an Advanced button are also present. Below the navigation bar, there are tabs for Default Reports, Custom Reports, and My Reports, with a Refresh button. A purple callout box labeled "Report categories" points to a dropdown menu under the "SHOW REPORTS" heading. The dropdown menu is set to "All" and lists categories: All, Legal & Compliance, Workflow, and Admin. The "All" option is highlighted with a red border. To the right of the dropdown, there are several report cards. The first card, "Agreement Deviation", is under the "Legal & Compliance" category and has a "Power BI Report" button. The second card, "Agreements Pending Approval", is under "Workflow" and has a "Power BI Report" button. The third card, "Agreements Pending Execution", is under "Workflow" and has a "Power BI Report" button. The fourth card, "Approved Requests Waiting For Contract Creation", is under "Workflow" and has a "Power BI Report" button. The fifth card, "Approved Requests Waiting For Contract Creation", is under "Workflow" and has a "Power BI Report" button.

Reports in ICI

The screenshot shows the Icertis software interface with a navigation bar at the top. The navigation bar includes the Icertis logo, a search bar with placeholder text "Enter search text here...", and several menu items: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar, there are three tabs: Default Reports (selected), Custom Reports, and My Reports. A green "REFRESH" button is located on the right side of this row. Under the "Default Reports" tab, there is a dropdown menu labeled "SHOW REPORTS" with "Admin" selected. A red box highlights this dropdown. Below it, there are four report cards:

- Average Agreement Turn Around Time**: Admin, Power BI Report
- Clause Profiling Report**: Admin, Power BI Report
- CLM Activity Report**: Admin, Power BI Report
- Cycle Time Report**: Admin, Power BI Report
- Cycle Time Report**: Admin, Power BI Report

A purple callout box is overlaid on the screen, containing the following text:

Reports are graphical representation of consolidated data
Agreements Pending Approval / Execution – Business pipeline
Agreements Expiring in The Next 30 Days – Agreements needing immediate attention

Reports in ICI

The screenshot shows a web-based reporting interface for Icertis. At the top left is the Icertis logo. The top navigation bar includes 'Reports' and 'Average Agreement Turn Around Time'. On the right, it says 'Welcome Supriya Ashtikar'. Below the header is a toolbar with search, filter, and navigation buttons. The main title 'Average Agreement Turn Around Time' is displayed above a chart and a table.

Report Options: A dropdown menu in the toolbar allows exporting to 'Excel', 'PDF', or 'CSV (comma delimited)'. This menu is highlighted with a red box.

Contract Type Selection: A dropdown menu labeled 'Contract Type (Select Contract Type to view agreements)' shows 'Master Services Agreement' selected.

Chart: A horizontal bar chart titled 'Average Turn Around Time (days)' shows a single data point for 'Master Services Agreement' at 18 days.

Table: A table lists three agreements with their contract type and turn-around time.

Text Overlay: A purple callout box contains the text: 'Report can be exported to Excel, pdf, csv format'.

Sr No.	Agreement Code	Contract Type	Turn Around Time (Days)
1	ICMMasterServicesAgreement_10	Master Services Agreement	24
2	ICMMasterServicesAgreement_19	Master Services Agreement	1
3	ICMMasterServicesAgreement_8	Master Services Agreement	28

Reports in ICI

The screenshot shows the Icertis platform interface with the 'Reports' section selected. On the left, there's a navigation bar with various icons for Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar, the path 'Reports / Expiring Agreements' is shown. The main area displays two tables: 'Count of Agreements by Contract Type' and 'Count of Agreements by Organization Unit'. A large purple callout box highlights the report configuration area on the right, which includes sections for 'Visualizations', 'Fields', 'Filters', and 'Axis'. The 'Fields' section is expanded, showing a search bar and a list of fields under 'AgreementPendingApp...', such as 'Duration' and 'Order'. Other sections like 'Filters' and 'Axis' are also visible.

Expiring Agreements reports is designed using PowerBI. User can select the required fields and Visualizations to customize the report.

Contract Type	Duration	Order
Last 30 Days	1	
31-60 Days	2	
61-90 Days	3	
>91 Days	4	

Count of Agreements by Contract Type

Count of Agreements by Organization Unit

Visualizations >

Fields >

Filters

Axis

Organization Unit

Legend

Add data fields here

Values

Count of Agreements

A photograph of a man with dark hair, a beard, and glasses, wearing a light-colored polo shirt. He is seated at a desk in an office environment, looking down at a computer monitor. The background shows office equipment and shelving.

Thank You