Water.org Contract Management, powered by Ironclad

User Guide

April 2025

water.org

Welcome to Contract Management, powered by Ironclad | User Guide

The Legal team is excited to announce the availability of the Ironclad Contract Management System.

Ironclad is accessible via single sign-on, and new users can expect to receive an email with initial access; we recommend bookmarking for quick future access.

Note: Not everyone at Water.org will have access to the CLM. Only those who need access for contracting will have it. There is a substantial user fee per user. If you believe you need access to the CLM and don't have it or if you believe you need access to a specific workflow, please contact the Legal team at Legal@water.org.

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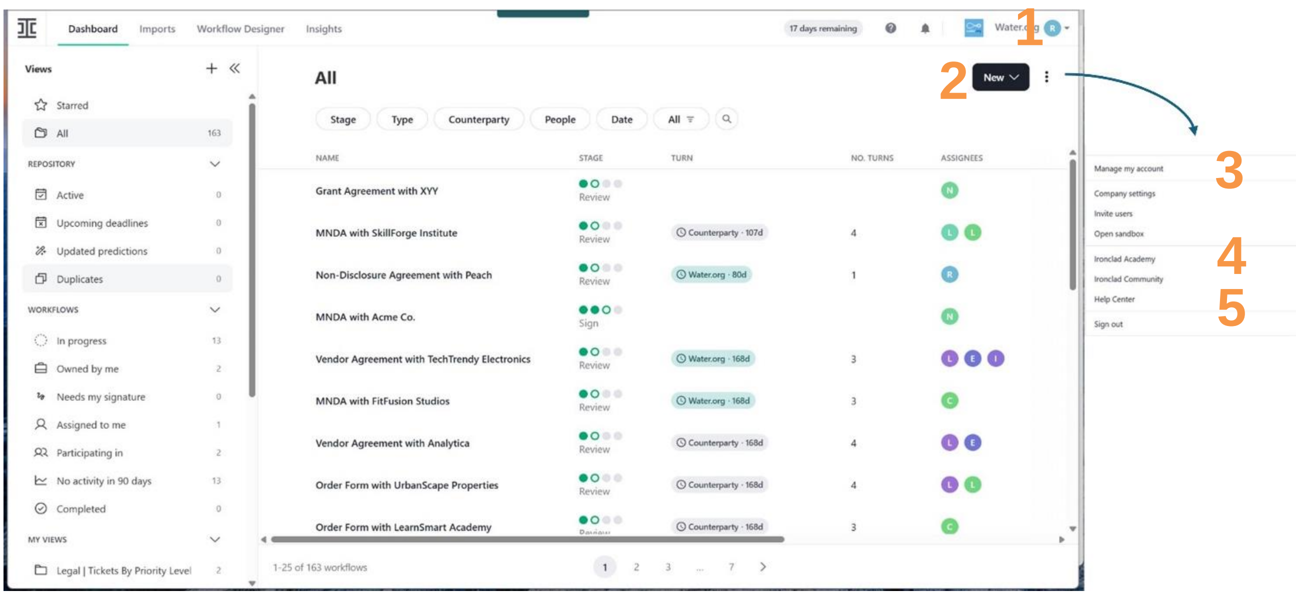
Dashboard Overview

Welcome to the CLM Dashboard, which serves as your personal picture of all the draft, active and archived contracts you are involved with in some way. The Dashboard is where you will begin to create new contracts, track the progress of draft contracts and see completed contracts (also known as records). It is where you find and manage contract-related data including navigating, managing, and prioritizing your contract workflows and records.

The Dashboard is highly customizable and allows you to search, filter, and sort your contract workflows and records (completed contracts) by using all available contract properties or metadata. You can then save the filtered and sorted reports as custom views, so you don’t have to repeatedly search for the same criteria. You can also share these reports and custom views with your peers for collaboration.

As you get to know the Dashboard, the areas highlighted below will be important to visit during your first exploration within the CLM system.



1. **User Profile**: Click here to visit your User Profile. Via the drop-down arrow on the right, you will see “Manage my account” Ironclad Academy, the Help Center and Sign out.

2. **Start a Workflow**: The New button allows you to: start a workflow, upload contracts, and upload a contract for signature.

3. **Manage my account**: Start here on your first visit to the CLM. Complete your profile including uploading a picture and be sure to save your changes. You will see on this page the user groups you have been added to.

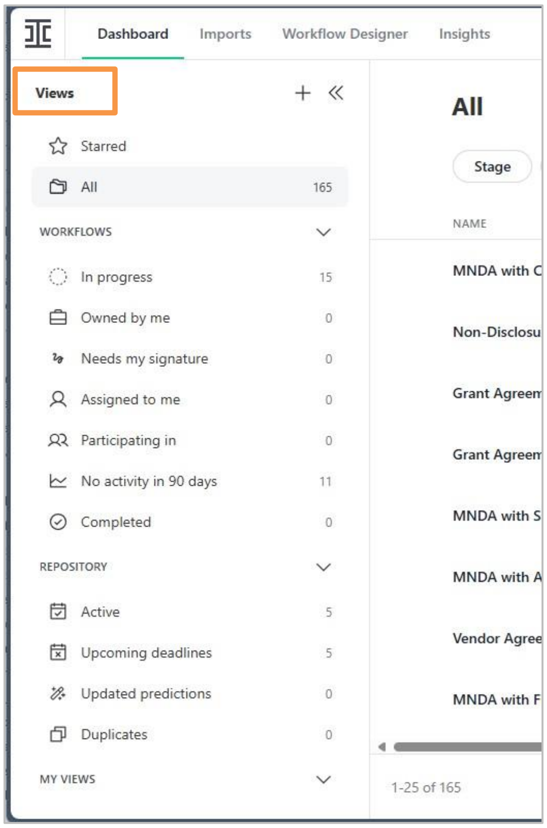
4. **Ironclad Academy**: Every Water.org CLM user will have access to the Ironclad Academy. It has live trainings and a content catalog with many articles and videos to learn all about how to use the Ironclad CLM. Filter by experience level, your role (End User), the specific area you are interested in learning more about, and the goal you are trying to accomplish.

5. **Help Center**: The Help Center has specific topics you can browse, or you can use the search function.

Dashboard Views

On the left side of the Dashboard are your specific Dashboard Views. Each View is a combination of saved filters and columns which allow you to access relevant workflows and records without manually searching each time.

Since you have access to all your contract workflows and records (both in progress and archived) from the Dashboard, you can search and filter across both workflows and records. Each View is a form of a search for the workflows and records you have access to in the CLM.



The **Views** area consists of several sections:

- Starred (or favorites) and All (all contract workflows and records applicable to you)

- Repository Views (completed contracts “records” are in the Repository),

- Workflow Views

- My Views

Your Dashboard comes with a series of “preset” views including:

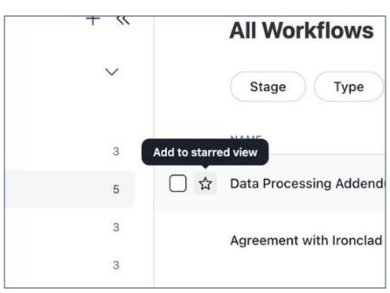
- Starred, All, and then certain ones for each section.

- In Repository Views: Active, Upcoming Deadlines, Updated Predications and Duplicates.

- In Workflow Views: In progress, Owned by me, Assigned to me, Needs my signature.

<u>**Views – Stars and Saves**</u>

- You can **star** a workflow or record to keep it in your Starred View at the top of your Views section by simply clicking on the star to the left of the contract name on the Dashboard.



- You can create searches and **save** them so you can revisit them quickly. These will save under My Views.

Dashboard Main Contract Section

The main section of the Dashboard is customizable. In this section of the course, we will review customizing columns, filtering, searching, previewing, bulk actions and creating email reminders.

While the columns start with standard topics, they can be changed in support of the meta data you wish to track. The standard columns are Name, Stage, Turn, Number of Turns, Assignees, Latest Activity and Date Created. You can add custom columns based on your contracts' data to your Dashboard. This enables you to review your information at a glance without clicking into a contract workflow or record.

To add a contract's properties to the Dashboard as a column, scroll all the way to the right, click the Add column icon indicated by a "+" sign. Begin typing and the columns autocomplete helps you find a list of matching property options. Select the one you want to add as a custom column. You can reorder columns by clicking and dragging them. To sort your workflows on your dashboard based on a column, click on the column's name on the dashboard. Columns can be sorted in ascending or descending order.

Filters

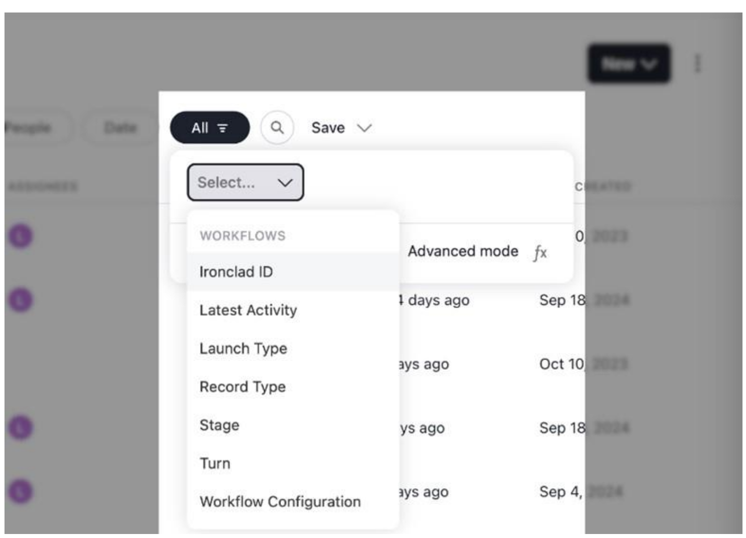
In addition to setting the columns on your Dashboard, you can also use the filters to develop a specific search of your contract workflows and records.

Basic Filtering

You can click on one or multiple of these standard or other filters to refine your filtering criteria and create a more specific search.

To start filtering, click the All button to display the filtering dropdown. Select a filter from the dropdown. You can filter by contract workflows, users, fields, and properties.

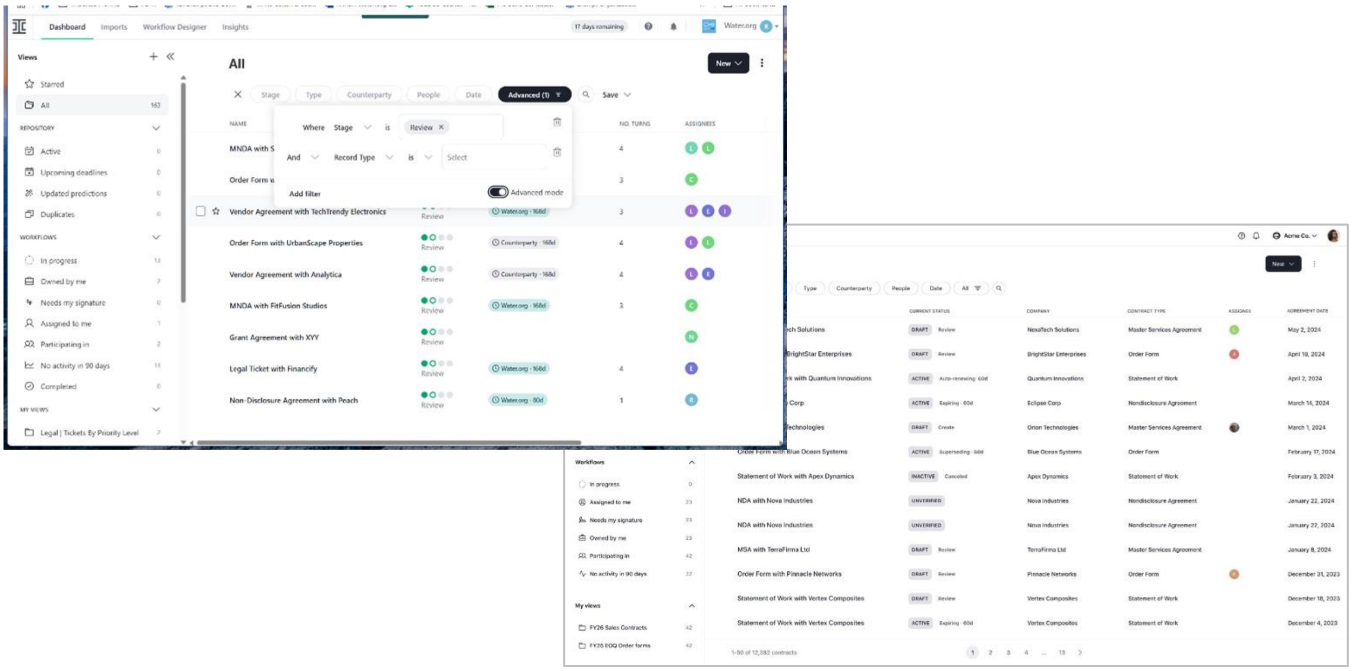
After you select a filter, you need to select a condition for that filter. Conditions are dynamic to the data type of the filter. After you set the filter condition, you can select the filter itself. Begin typing and the filters autocomplete helps you find a list of matching filter options along with the number of contracts that each option maps to.



Advanced Filtering and Conditional Statements

In addition to basic filtering where you can chain together multiple filters with AND/OR statements and use the system data, you can also filter on contract properties by clicking Advance mode.

There are many complex ways you can filter and create views. For more information on these complexities, check out [this Ironclad Academy article.](#).



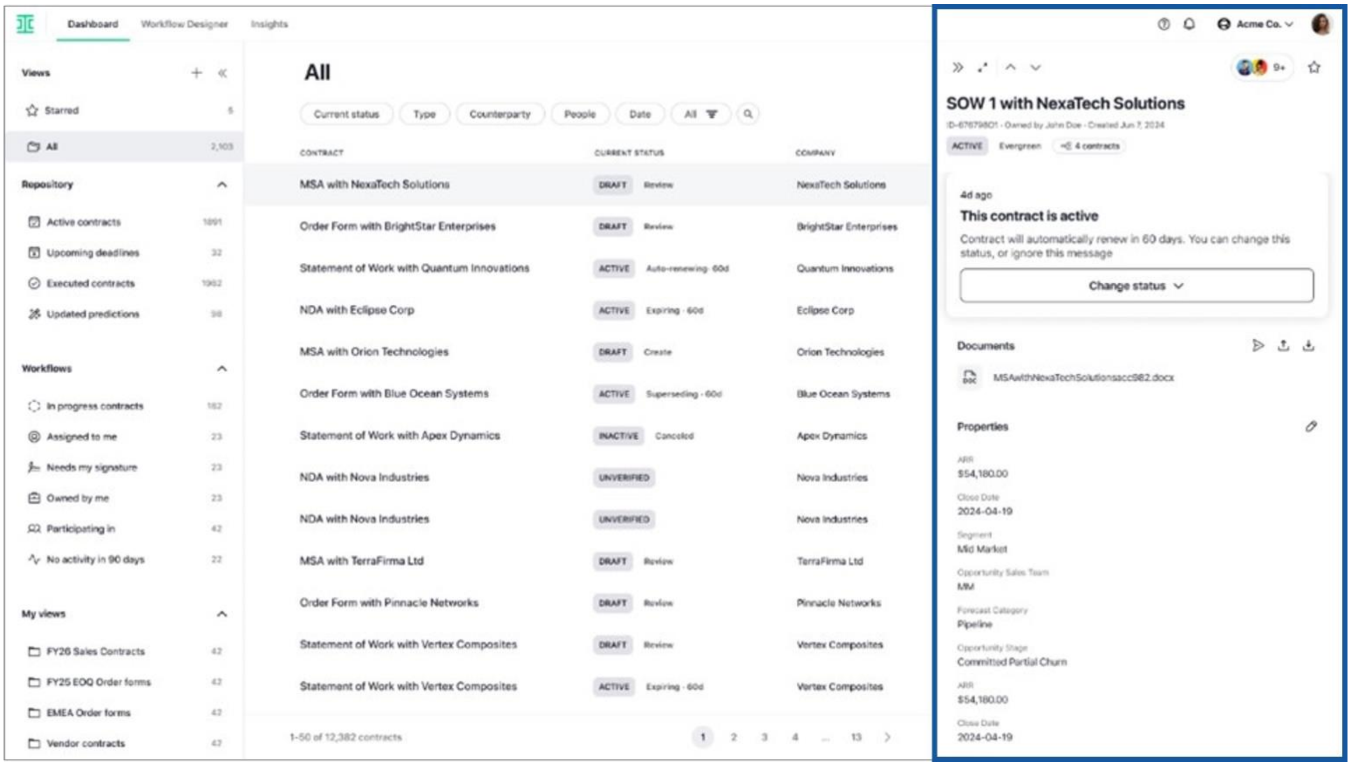
Searching in the Dashboard

The search bar enables you to search for contract workflows and records based on their title or contract properties (excluding emails). You can search for a specific contract workflow across all your contract workflows or records, or within a filtered view. The search bar supports partial matching and is not case sensitive. For example, if you type son, you will see results such as Johnson and Sonny.

To begin searching, type what you are looking for in the search bar and hit Enter. By default, this will search all contract workflows and records. If you want to perform a search within a filtered view, type what you are looking for in the search bar. In the dropdown below, select the search with the name of the filtered view you want to search within.

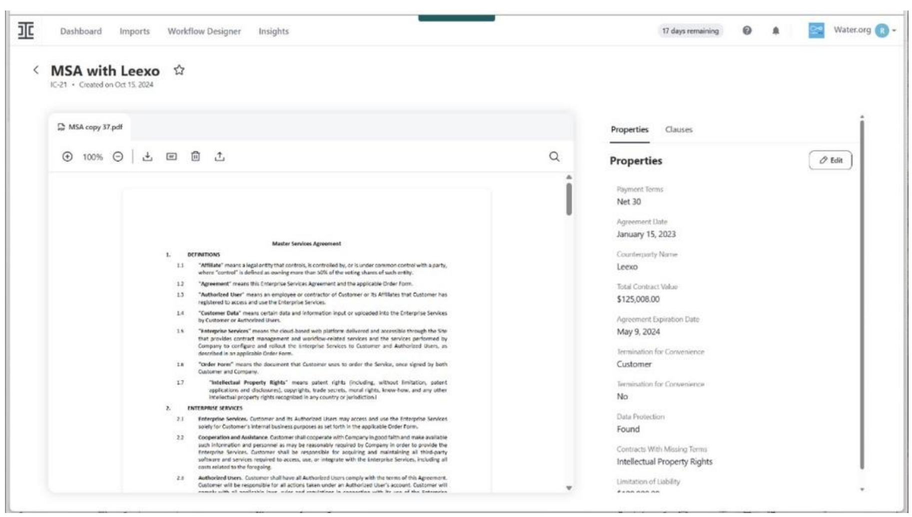
Previewing Contracts in the Dashboard

As shown in the image below, you may click on any contract (both in progress and archived record) in the Dashboard to instantly preview key details on the right side of the screen. Highlighted here in blue, details such as the title, documents, properties/metadata, and more will appear. This provides a quick summary, allowing you to dive into the documents or workflow page based on the next steps you need to take.



Open for Additional Details

To open the contract workflow or record, simply click on the contract workflow or record's name. This will take you to the Workflow Design Page or the Records Page. The Records Page shows the specific agreement and the properties/metadata on the right.



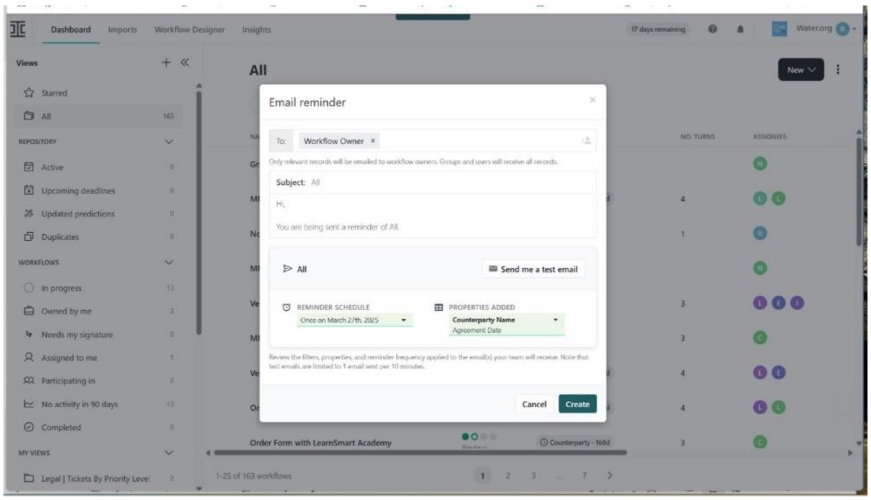
Email Reminders and Bulk Actions

Two additional key features available via the Dashboard are outlined below:

Email Reminders

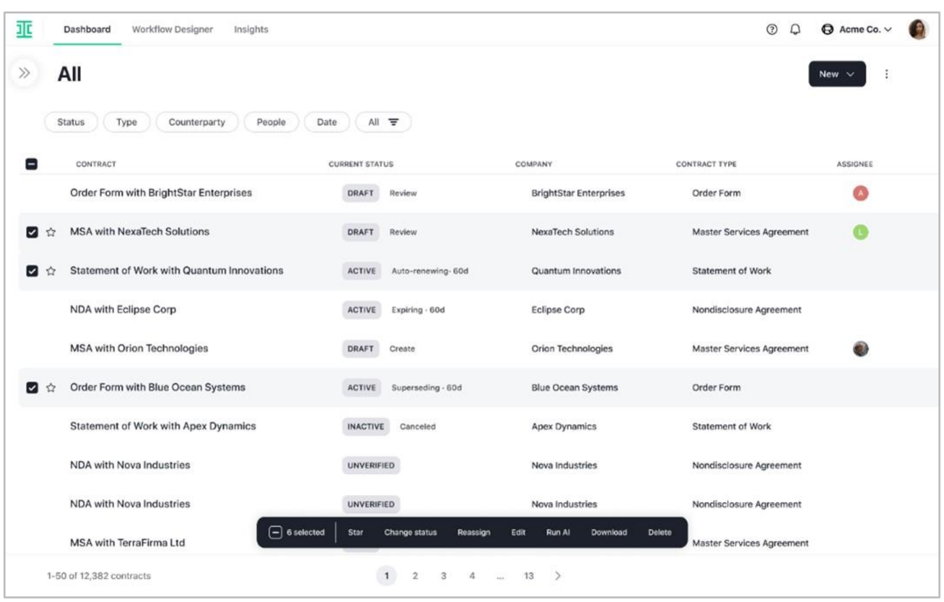
If you want to create an email reminder for yourself or someone else about a contract expiration or a milestone due date or any other meta data from a contract workflow or record, simply click on the three horizontal dots to the right of the New button on the top right-hand side of the Dashboard. Click on “email reminder”.

That will create a pop up for you to complete the email reminder. You can even send yourself a test email.



Bulk Actions

By clicking on the box to the left of a contract workflow or record’s name on the Dashboard, you can select multiple contract workflows and records for editing, reassigning, exporting data, etc.



Workflow Overview

A workflow is the creation of a contract and the business processes and approvals that need to happen for the contract to be executed.

It is a standard, repeatable process that the CLM will contain in one place including all communication regarding a contract. This streamlines the collaboration and negotiation of the contracting process.

Every Workflow in the CLM has the same four steps:

1. **Create -** The Water.org CLM Admins include the Head of Legal, the Contracts Administrator, and the IT Manager. The Legal department has created workflows that are specific to each department/country/region's needs as well as contract templates specifically for them.

   Each user that is creating a contract (or uploading counterparty paper) is a Workflow Owner, and the Create phase is the beginning of the process to develop the draft contract. It is where the Workflow Owner, by answering questions, is directed to the correct contract that is needed and where the initial basic contract template is generated by inputting the necessary metadata to populate the first draft of the contract.

2. **Review -** Once the initial draft contract is populated, the Workflow Owner will move to the review phase where they will edit and revise the draft contract so that a complete draft is created.

   During this phase, the Workflow Owner can email and collaborate with peers, supervisor, etc. to prepare the first full draft of the contract. Then, the review process begins! The Legal Department, in creating the workflows, has also identified the specific reviewers needed for all contracts.
   With the click of a button, the first reviewer will be sent an email letting them know the contract is ready for review.

   The Workflow Owner can track where the contract is in the review process from their dashboard. Also, reviewers and Workflow Owners can email and discuss the contract within the review phase in the Activity Feed located on the Workflow Design Page.

   Once the contract has gone through all its reviews, it can be sent by the Workflow Owner directly to the counterparty through the CLM. The Counterparty's response and any edits will be accessible directly in the CLM.

   The Workflow Owner will be able to work with Legal and any other necessary reviewers to finalize the contract for signature.

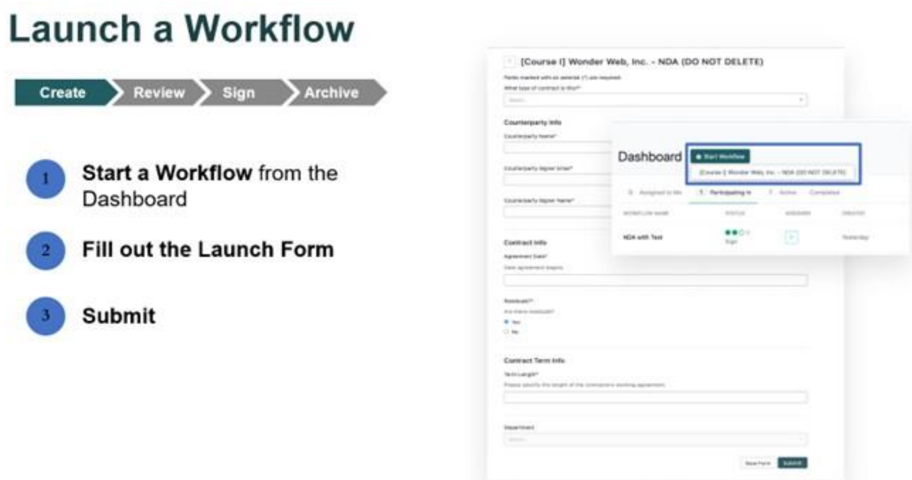
3. **Sign -** Water.org's Contracts Administrator is the Signature Coordinator. The Signature Coordinator manages obtaining the signatures for the contract using DocuSign within the CLM system. This will work much as it does today, only it will all be documented in the CLM.

4. **Archive -** Water.org's Contracts Administrator is the Archiver. Once a contract is signed, the Archiver will take the steps necessary to add the contract to the repository - making it a "record".

Launching a Workflow

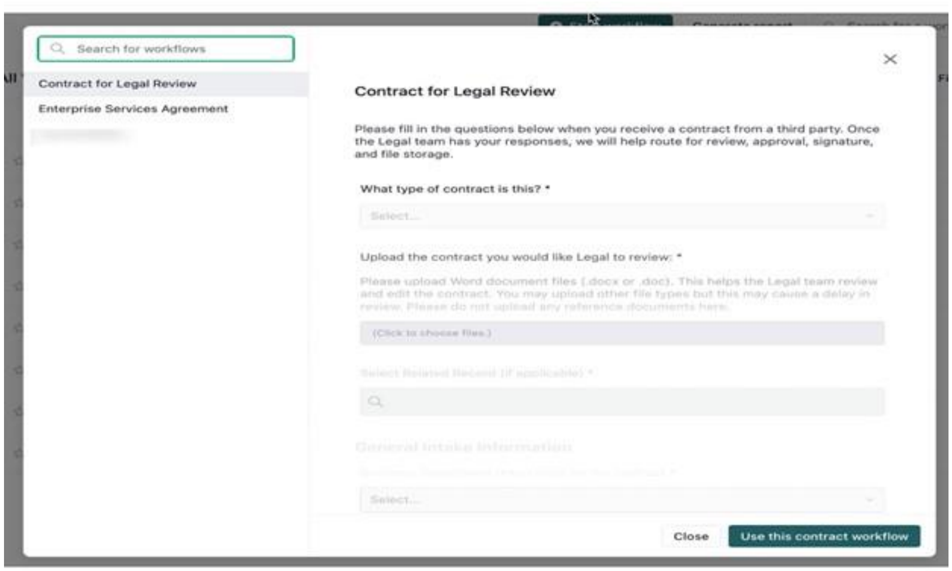
The process of launching a workflow begins in your Dashboard, as outlined in the steps below:

Step 1: From your Dashboard, at the top right-hand corner there is a black button that says “New.” Click on that button and it will take you to a page where you can pick the appropriate workflow and Launch Form. Click Start or the arrow at right to continue.



Step 2: On the left-hand side of the screen, you will see the various workflows you have access to. For instance, if you are a SPAM in Peru, you will see Peru, Brazil, and Mexico workflows. You will likely spend most of your time using the Peru Workflow for your contracts, but as a member of the LatAm region, you may have a need to draft a contract for Brazil or Mexico, so you have all three workflows to choose from.

Along the right side of the screen, you can see a preview of what is known as the Launch Form.



Step 3: Pick your workflow and click the button on the bottom on the right **“Use this contract workflow”**. You will arrive at the workflow Launch Form.

What is a Launch Form?

The **Launch Form** is an initial series of questions about the specifics of your contract. This information will be used to generate the correct contract and populate that contract with the initial correct information. The Launch Form guides you to the right contract and asks for the appropriate information to help you complete the first rough draft of the contract. The information added to the Launch Form constitutes the meta data that will be stored for the contract you are creating. It may be edited later in the Review stage if any of it changes. The more detailed your information in the Launch Form, the better the quality of the meta data the CLM will have for searching contract workflows and records on the dashboard.

The Launch Form will ask if there is a "related" contract to the one you are creating. If the answer is yes, then you will be asked to identify and "relate" that contract to this new one you are drafting. What does this mean? There are 3 common scenarios.

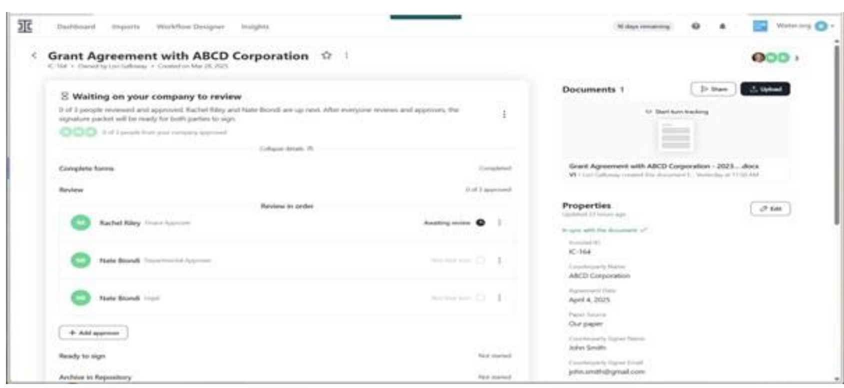
1. If we have worked with this partner/consultant/vendor previously, we should have the previous contract in the repository. If it is not there, it should be uploaded to the repository. Some of the meta data from the previous contract should automatically populate the Launch Form and this draft contract, for example the counterparty name and address.
2. If the contract being drafted is an amendment, the related party would be the original contract and as well as any other prior amendments. If these are not in the repository, they should be uploaded to it.
3. If the new contract is a project under an MSA Consultancy and is an addendum to that contract, you will want to relate it to that MSA Consultancy agreement.

Note that any question marked with an asterisk (*) on the Launch Form must be answered before a draft contract will populate in the next phase/window - called the Workflow Design Page. Also, depending on your answers, additional questions may be displayed. Further, not all the information requested on the Launch Form will be included in the contract, but the information is important for our contracting and legal processes.

Received a contract from your counterparty?

If you have received your counterparty's paper or contract, the Launch Form has a place to upload it and use it as the contract. The Launch Form will still ask many of the same questions as if it were Water.org's template contract because we want to capture that metadata!

After filling out the Launch Form, select the **"Submit"** button to create the first rough draft version of the agreement. Clicking the **Submit** button will move the agreement out of the **Create** stage and into the **Review** stage of the workflow and the Workflow Design Page will appear as shown here.



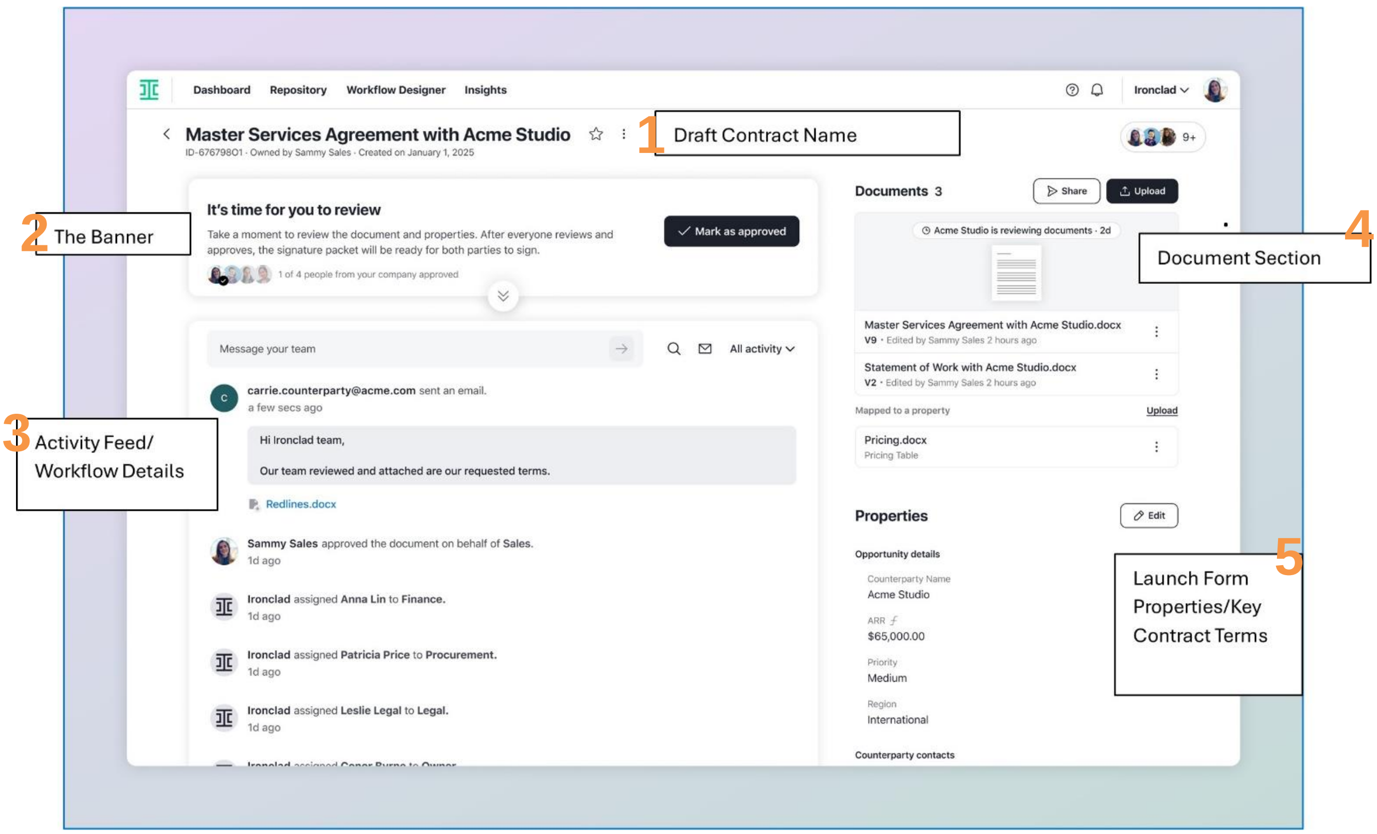
Note: the questions you will see indicated on the Launch Form are unique to your specific needs in the CLM based on the data points that are important to capture for a specific agreement type.

The Workflow Design Page

The Workflow Design Page is where you spend most of your time in the CLM. This is where you will edit your rough draft contract and prepare it for reviews. You will collaborate with your internal departments, obtain internal approvals including Legal, negotiate with the counterparty, and finalize the contract so it is ready for signature.

In general, the Workflow Design Page:

- Helps you quickly see the status of your draft contract.
- Shows you what tasks are outstanding to expedite your contracts.
- Gives you visibility into your teammates' responsibilities on a contract.
- Groups related content and actions so you can find them easily.



On the next page, we will explore additional details about these key areas of the Workflow Design Page.

1. **Draft Contract - Name**: At the top you will see the name of the draft contract you are working on. This is the name assigned by the CLM. You can edit it. Just click in the box where the name is and edit. To the right of the contract name, is a star. If you click on this star, this draft contract will be added to your "Starred View" on your dashboard. Finally, the three horizontal dots. When you click on that, you can pause, cancel, or delete the workflow (the entire draft document file).

2. **The Banner – Provides the Status of the Draft Contract**: The Banner helps you orient to the workflow. It tells you where things stand in the progress of completing the contract, who needs to do what to ensure that the contract continues to progress to completion. You'll find more information about how the banner is used below.

3. **Activity Feed**: Here is where you can follow every action that has happened since you hit submit on the launch form! You can also message co-workers to discuss the contract and move it along. It is a complete flow of all the conversations, edits, reviews, and approvals of the contract.

   You should find that you can collaborate much easier since you will be able to access and reference an individual workflow's activity. This is where you can capture all the communication and updates that have happened to this in process contract along the way. The Workflow Design Page is where all approvers must submit approvals before a workflow can move forward to share with the counterparty. All communication within a workflow is captured here so you can follow along to see the lifecycle of the contract, like a transcript.

   In the next section of this guide, you will find additional details on the Activity Feed.

4. **Document Section**: On the top right all the documents associated with this workflow are listed and available. If only the latest version is available, click on the name of the contract workflow, and you will be taken to the Document Editing page. More details on this important section of the Workflow Design Page are included next in this user guide.

5. **Properties / Launch Form Meta Data / Key Contract Terms Section**: This section lists all the key contract terms that were added when you completed the Launch Form. Sometimes during negotiations or just as you continue drafting your contract, these key terms may change. Simply click on the pencil to the right to edit them. It is important to make sure they are accurate so that the meta data that is ultimately in the repository is correct. **If you edit a contract term in the draft contract, you also need to edit the launch form properties here.**

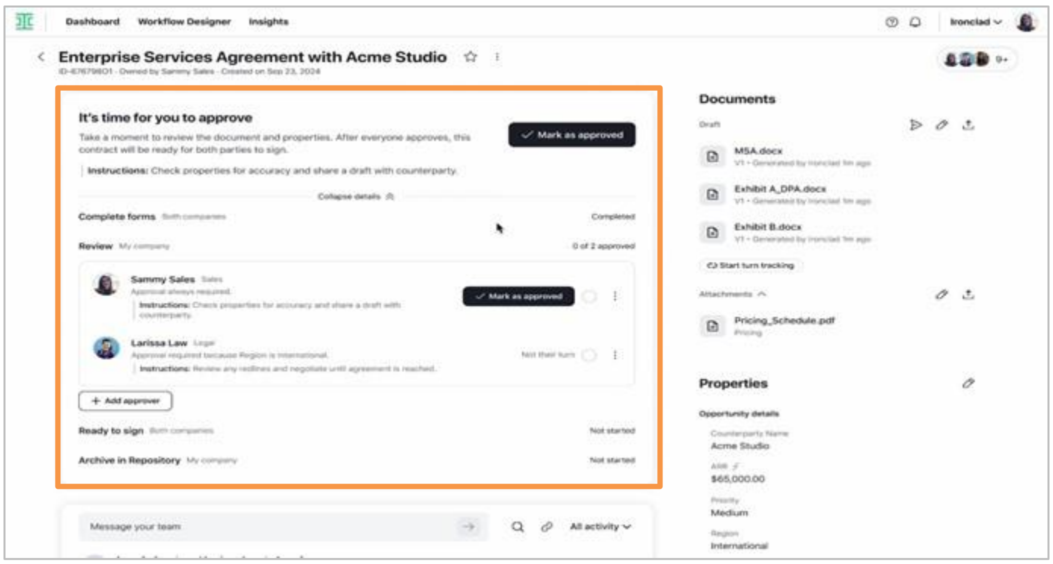
The next section in this guide will explore in more detail the Banner and Documents sections.

The Banner

As shared above, the Banner helps you orient to the workflow. It tells you where things stand in the progress of completing the contract, who needs to do what to ensure that the contract continues to progress to completion.

You can click on the double arrows at the bottom of the banner to expand the section and learn the details. Below you can see the result. You see who is scheduled to review/approve, where the contract is in that process and what the instructions are for each reviewer/approver. It also identifies when the contract signatory process starts and when the contract is added to the repository. **The three dots all the way to the right of any reviewer/approver's name allows you to send a reminder to the reviewer/approver to look at the draft contract.**

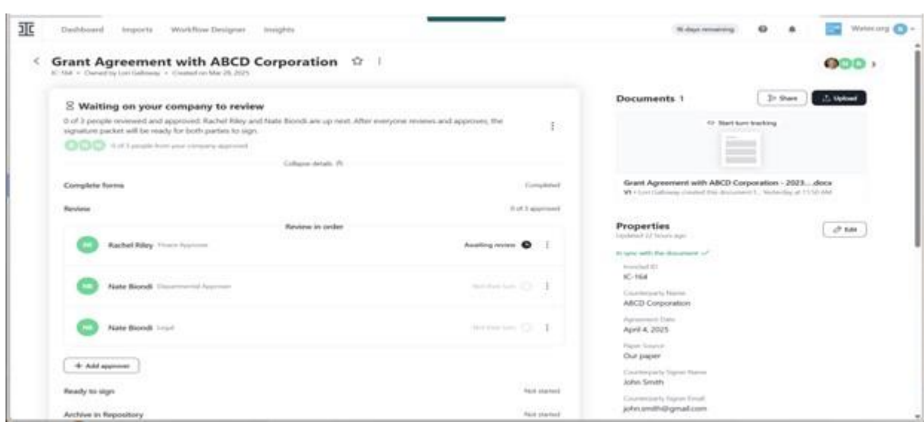
If you are the one with tasks for a particular contract, then once you complete them, you will click the black button **"Mark as approved"** and the contract will go to the next step.



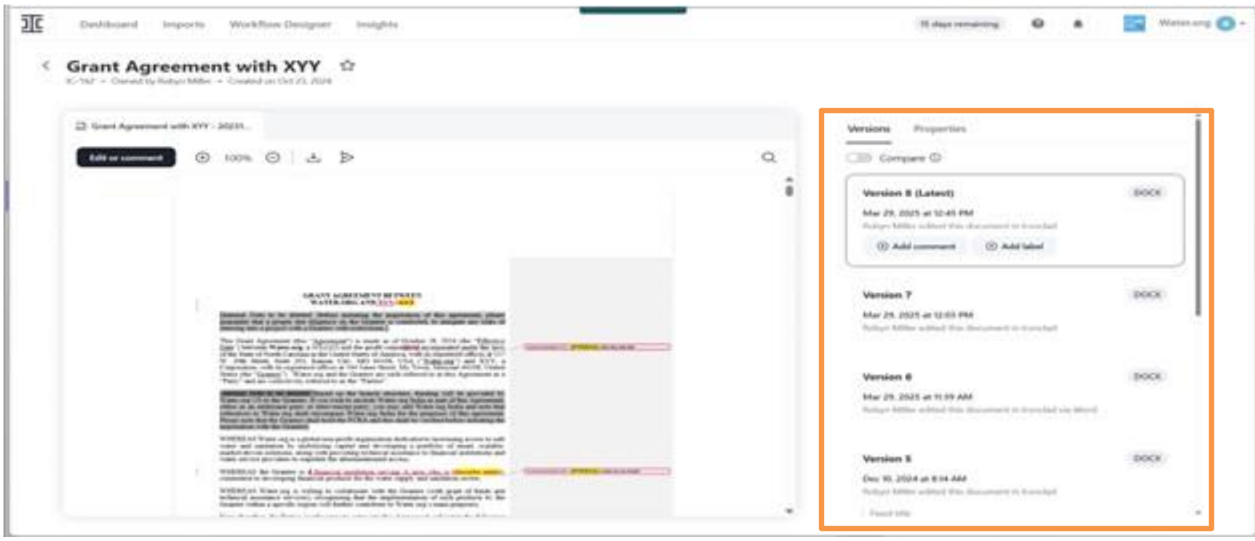
The Documents Section

All the documents associated with this workflow are listed and available on the top right side of the Workflow Design Page.

If only the latest version is available, click on the name of the contract workflow, and you will be taken to the Document Editing page.

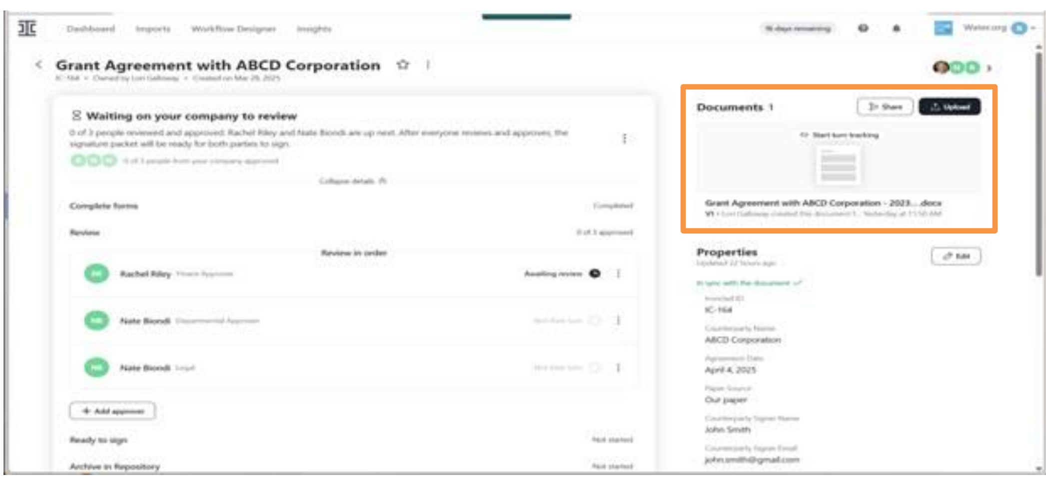


You can see what documents have been generated from a Water.org template as well as any documents that have been uploaded into the workflow. You can also see all versions of each document. As a draft contract is edited in the CLM, new versions are created. This allows you to see what versions exist, to compare the versions and go back and look at earlier versions, as shown in the image below.



Additional functionality within the Documents Section includes:

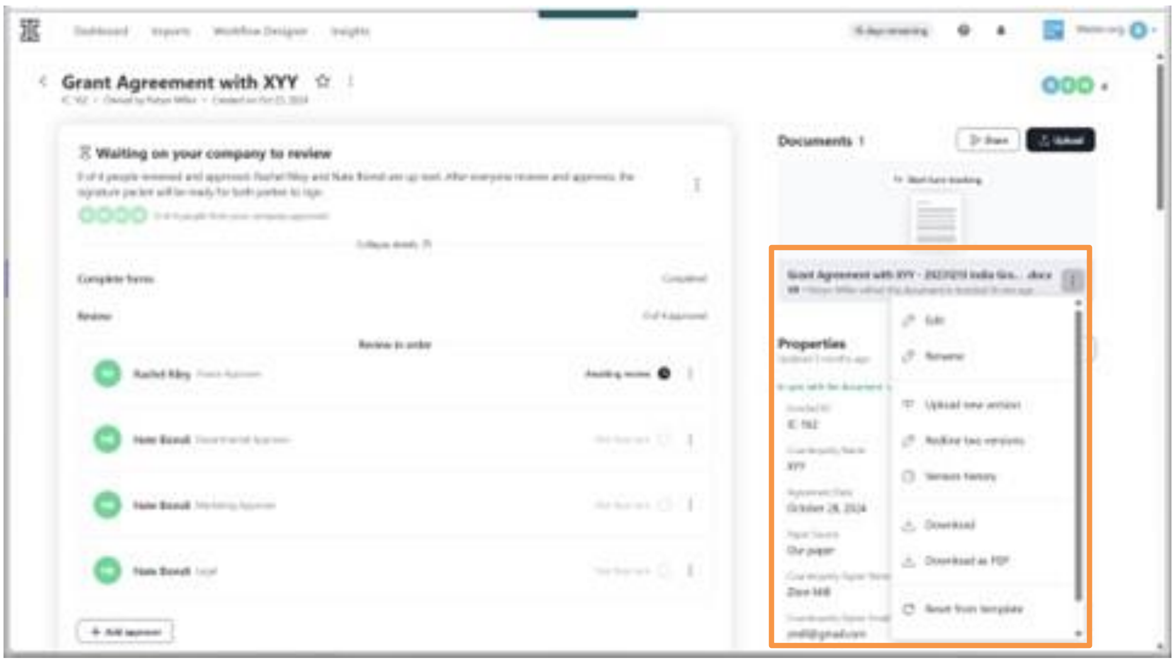
- **Upload** - click on the Upload button in the top right and upload new documents.



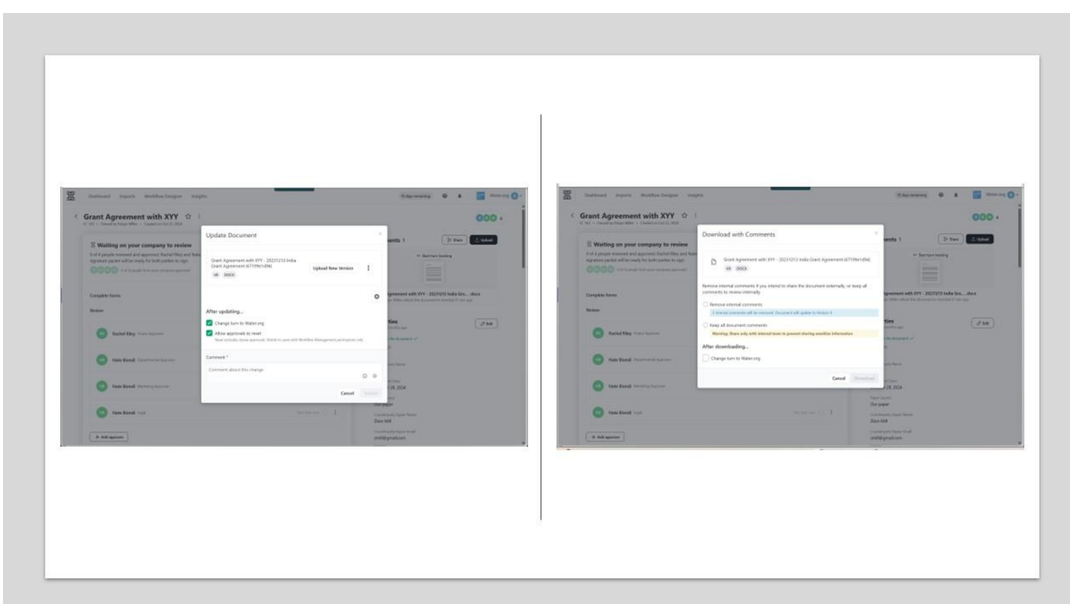
- **Edit** - click the name of the contract to go to the Document Editing page and edit the document.

- **Share** - with the right-sided arrow Share button, you can share the document with the counterparty, if your permissions allow for that.

- **…and more** - click on the three horizonal dots next to the contract name and a dropdown will appear that allows you to:
    - edit (via the Document Editing page)
    - rename
    - upload a new version
    - redline two versions
    - look at the version history
    - download the document (if permitted), and
    - reset from the template.



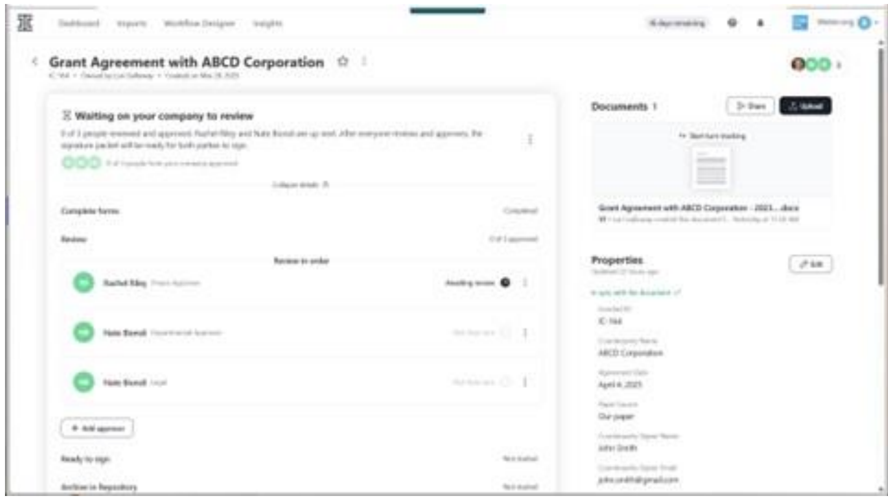
Document Section Tip: If you click on rename, upload a new version, or download, a pop-up screen will appear to assist with this process. In each case you can add a comment explaining why you are making this change or uploading this document. This information will be documented in the Activity Feed section of the Workflow Design Page.



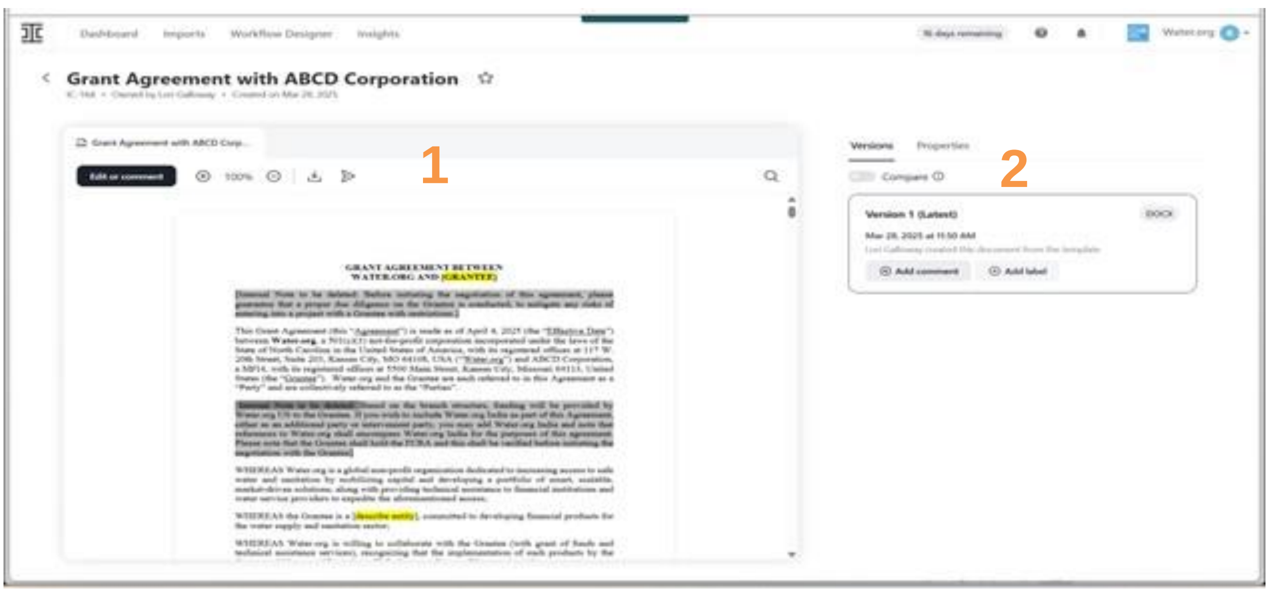
Contract Initial Draft: Editing, Comments + Versions

The Review phase of the workflow is where you will spend most of your time in the CLM. This is where you complete the initial draft of the contract, are prompted to manage your negotiations, collaborate with your internal departments and with the counterparty on contract review, and collect all the necessary approvals needed to get the contract ready for signatures.

From the Workflow Design Page, which you learned about earlier in this course, you will access the Document Section on the top right.



Within the Document Section, you will click on the contract name version 1 to view the page below. You'll find additional details about the numbered sections below the image.

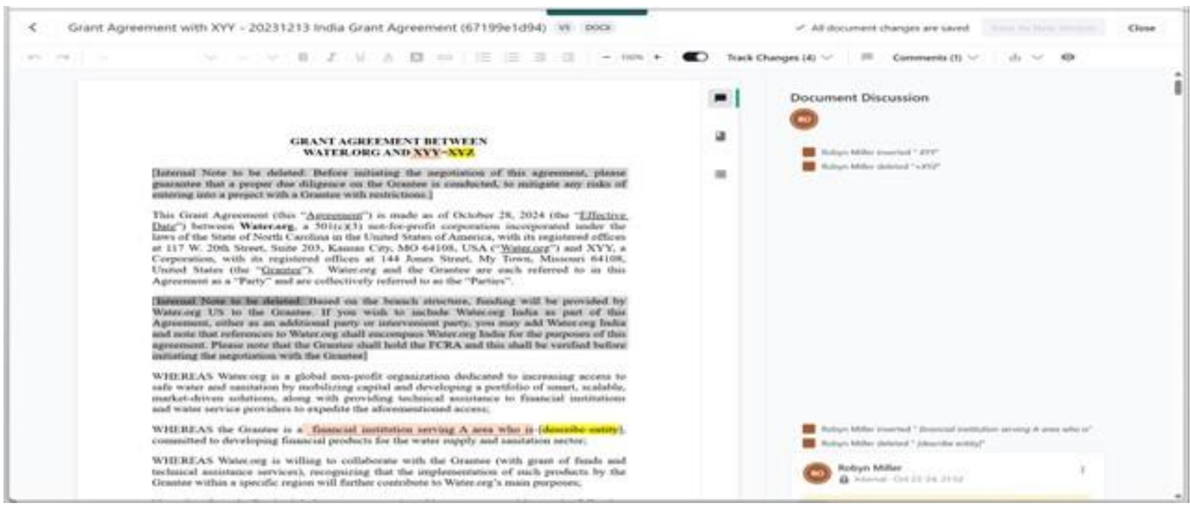


1. **Draft Agreement**: On the left is the draft agreement and from here you can edit it or review and provide comments by clicking on the **Edit or Comment** button on the top left. You can also share it or download it if the workflow permissions allow it at this stage. To maintain one source of truth, the ability to download and share is restricted to certain points during the contract workflow process.

2. **Versions + Properties Tabs**: On the right at the top are two tabs. The Versions tab shows you all the versions of the contract to date. The Properties tab is the Launch Form metadata.

When looking at the first rough draft of the contract, you will notice that based on the inputs you entered in the launch form, the information has automatically been inserted into the contract. You should be able to easily see specific information such as the effective date, the counterparty name, and as you scroll down the document, you will also see information such as the initial term length, etc.

However, there may be more information that is needed in the contract before a draft is finished. Usually that is highlighted in yellow. You will need to click on the Edit or Comment button toward the top left side of the page. This will take you to a new page (see image below), and from here you can make those edits in TRACK CHANGES and add comments.

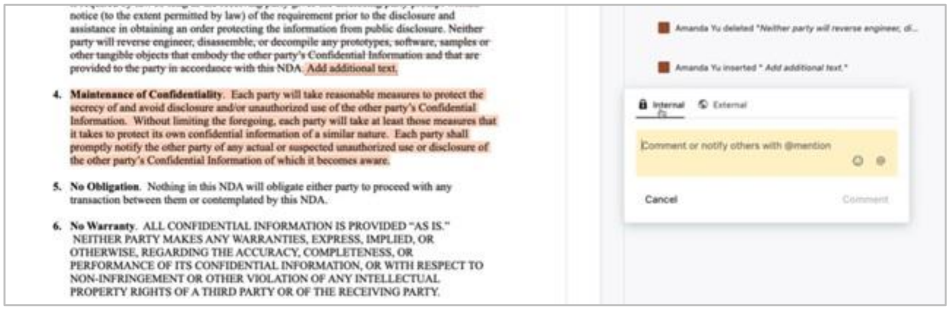


Editing the Contract

Ironclad Editor is currently the only way to edit within Ironclad being able to keep track of all changes, comments, etc. In the future, there may be a Microsoft Word add in, however Ironclad Editor acts very much like Microsoft Word. Features and reminders related to Ironclad Editor include:

- On the top ribbon, be sure the **Track Changes** button is toggled ON. Then, simply click into the document and start editing. The edits will be reflected in the contract and along the right-hand side of the screen in the **Document Discussion Section**.

- To the right of the Track Changes feature, is the **Comments** feature where you can manage all the comments. To add a comment, simply highlight the wording you wish to comment on, a dropdown will appear and offer the option to create a comment, tag a clause (something you won't use a lot), create a hyperlink or draft redlines for you through the internal AI feature.
    - When you click on comment, to the right in the Document Discussion Section, a comment area will appear. Here you can choose whether this is an **Internal** or **External** comment. In other words, who is the intended recipient of your comment. If it is for a co-worker or internal reviewer, it is an internal comment, but if it is a comment you wish to share with the counterparty or someone outside of Water.org, mark it as an external comment. Complete your comment.



- A third feature on this page is the half box with the downward arrow on the ribbon. Click on this and you can edit in Microsoft Word if you prefer (you will need to download, edit in Word, then upload again into the CLM). This feature may or may not be available.

- Another feature is the eye to the far right on the ribbon at the top. This allows you to view the contract in a print preview mode. You can see it with or without comments.

- The final feature is the Save as New Version button on the top right-hand side of the page. You must click this button to save your edits and comments.

Using Ironclad Editor is a common way in which you can collaborate with other members of your team on contract review. You can leave an internal comment asking a member of your team to review a particular section of the document. Simply put @name@water.org.

After making all the necessary changes to the agreement, in the upper right corner of your screen you will see the **"Save As New Version"** button. Save as a new version. As best practice, you should include a comment summarizing the changes you have made.

Upon pressing save as new version, colleagues that you have left comments for will receive a notification letting them know their attention is needed in the agreement.

You will also notice a new version of the document is on the Document Editing page on the right-hand side in the Documents Section.

Your Initial Edits are Done and You are Ready to Share it with Co-Workers or Your Supervisor!

> ⓘ Please note the following important rules to remember:
>
> - It is **essential that all changes are made with track changes turned on**. If track changes is not turned on, all reviews and approvals will be significantly delayed.
> - There can only be **one person editing a contract at one time**. Others can view the contract while you are editing, but if they add comments or make changes, it will result in two new versions of the contract. The CLM has a mechanism to tell the workflow owner that there are two conflicting versions so the versions can be combined, and the information not lost.
> - Approvers must approve the contract before an agreement can be sent to the counterparty.
> - Once Legal gives final internal approval, the contract is sent back to the contract owner who can then send it externally to the counterparty.
> - **Always ensure that internal comments are turned off before emailing the contract to the counterparty.**
> - Be sure to click the **SAVE AS NEW VERSION** button when you are finished with your edits!

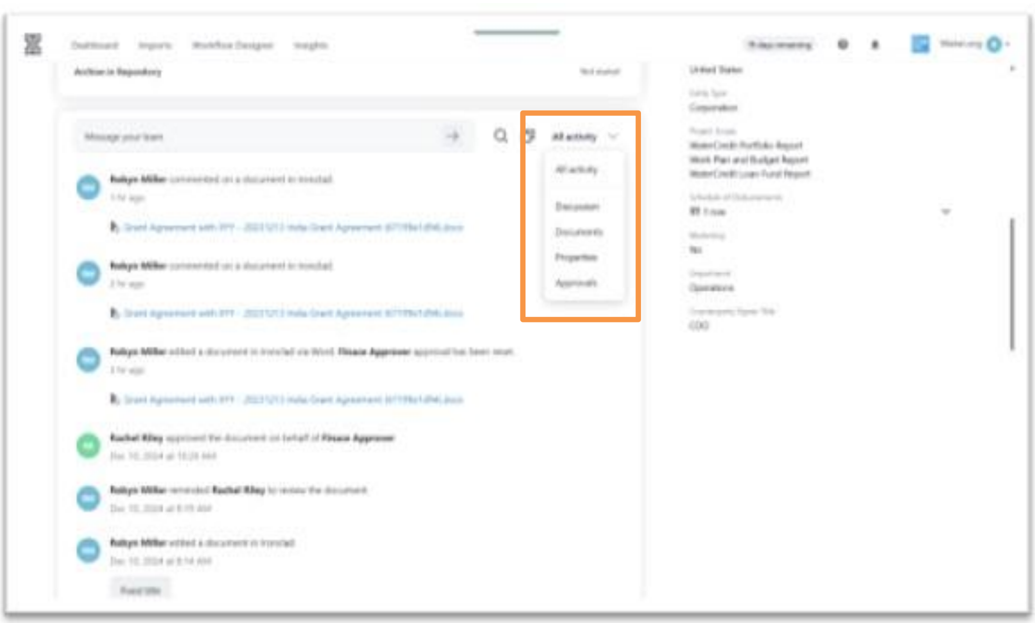
The Activity Feed?

The **Activity Feed** is a section within the **Workflow Design Page**. It serves multiple purposes. It is a complete transcript of all actions that have been performed as part of the creation and completion of a contract including who submitted the initial launch form, who and when the draft contract was edited, any discussions via email through the CLM about the draft contract, when new participants are added into the workflow to provide input (this is separate from the official reviewers/approvers), the reviews and edits or comments from reviewers/approvers, when the draft contract is sent to the counterparty and the counterparty's comments and responses, and when signatures are acquired.

The Activity Feed can be leveraged as you want to communicate or collaborate with other members of your team, and it stores all those communications. For example, within the Activity Feed, you can send emails to coworkers regarding the contract workflow or notify colleagues that a contract is currently being negotiated. Further, if you send a comment when editing a contract to a co-worker and use @name@water.org, the email will populate in the Activity Feed.

After sending a message, your colleague will receive a notification email and automatically be added as a participant in the workflow. The review stage of the contract workflow is documented and tracked within the Activity Feed. All communication regarding an agreement happens here so if you need to go back and understand an aspect of the contract, a change and why it occurred, the Activity Feed will have that information.

Within a contract workflow on the Workflow Design Page in the Activity Feed, you can specifically message or send an email to co-workers, you can search within the Activity Feed, and you can filter the information in the Activity feed to just see "discussions" "documents" "properties" or "approvals" by clicking on the down arrow next to All Activity.



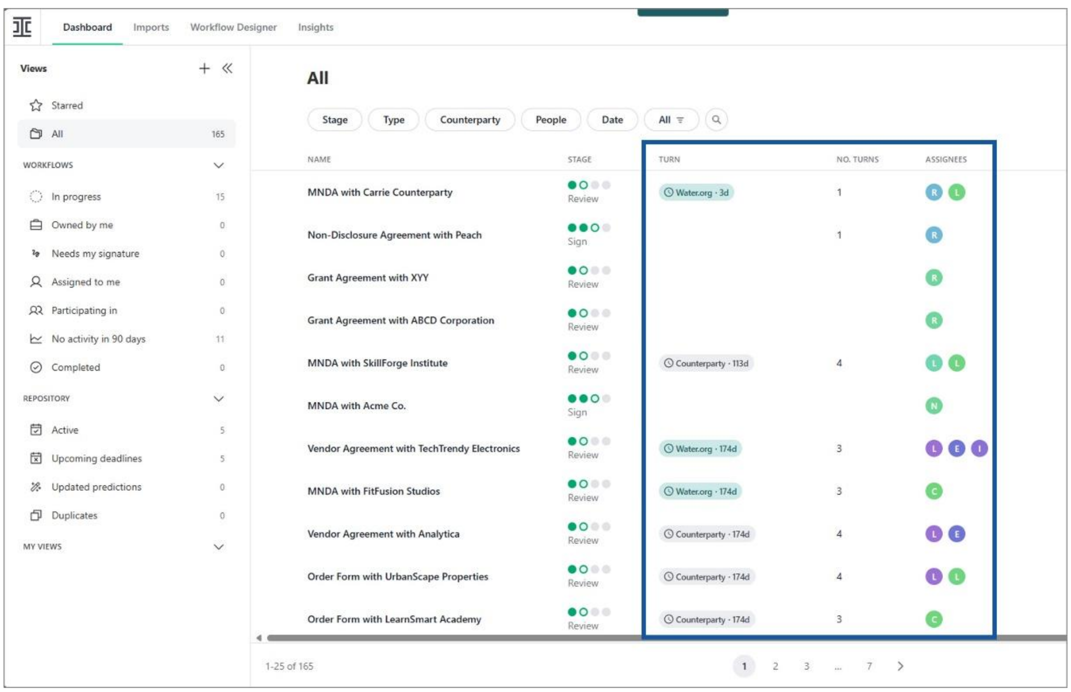
Tracking Turns and Approvals

Whose Turn Is It?

As you invite co-workers to provide input and/or start the review/approval process, you will want to keep track of who is responsible for the next step in the contract workflow process. The CLM designates this as the **"turn".** Whose **"turn"** is it with the draft contract?

The CLM keeps track of whose turn it is during the workflow process. You can also change the turn of the document. The turn of a document is who is the person responsible for the contract. If you are the initial contract workflow owner/drafter, when you send it to your supervisor for review, you need to **"change the turn"** to that person. Then when it goes to another reviewer, the supervisor should change the turn. When it goes to the counterparty for review, the turn should be changed. This is important so you can track the number of turns and who has it on your Dashboard. The CLM usually prompts the person at key actions of the contract workflow including emailing the draft contract, uploading a new version or sending it to a reviewer/approver.

On your Dashboard, you can see how many turns and can sort, and filter turn history. This tool allows users to signal to fellow participants which side currently holds the pen on the draft document. Make sure the information is available to contract administrators to see trends, identify bottlenecks, and improve our overall contracting process.

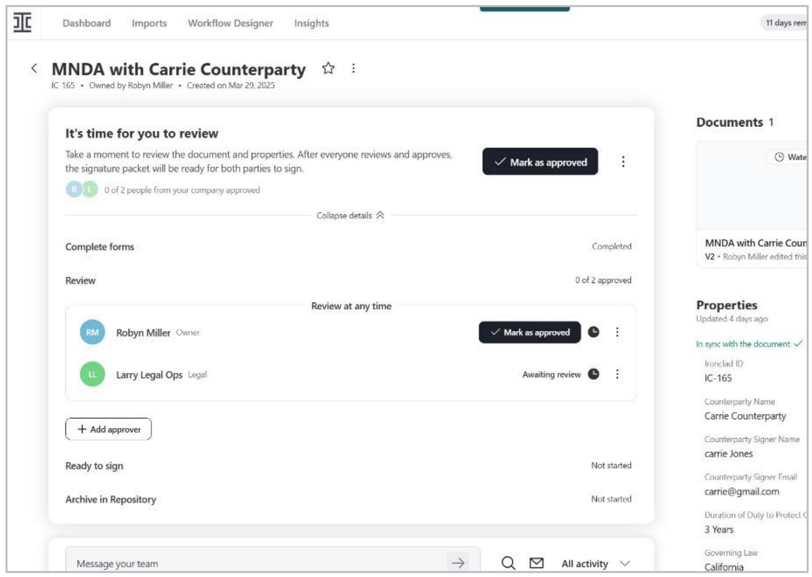


Tip: You can go into any Workflow Design Page for a specific workflow and easily send an email reminder to the person whose turn it is.

Approvals

Next, you should be ready to capture your approvals. Approvers are members of your team that have subject matter expertise and the authority to approve or deny the business parameters of the contract, the financial aspect of the contract, any sort of non-standard language contained within the document, etc. Many of the approvers in your workflows have been set as part of building out the workflow designs. However, in most cases, the Launch Form will ask for the initial reviewer, your supervisor.

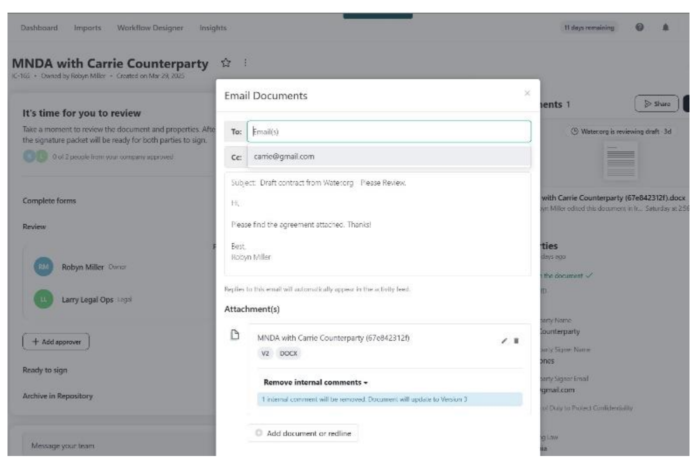
When you are finished gathering information, making edits, adding any comments needed for reviewers (internal comments) and the counterparty (external comments), and collaborating with your co-workers within the CLM, the contract is ready to start the review process.



On the Workflow Design Page for the contract, you will mark the contract as approved next to your name. This will automatically send the contract to your supervisor.

On your Dashboard you can track how long the contract sits with your supervisor, and from the Activity Page in the Approvals Section, at the three dots next to the Approver's name, you can send the approver a reminder.

Your supervisor may have edits and comments for you. Your supervisor will be able to make edits, email you in the CLM and put in internal comments for your review. This is done in the same way you did it as described in this module.



Once the first approver approves, there may be other approvers, certain approvals may be sent at the same time. When you receive the comments from these approvers and all is resolved, the approver will approve, and the contract will move down the approval process.

Once all approvals are obtained, including from Legal, you can now email the contract to the counterparty for review. On the Workflow Design page for that contract, in the Documents Section on the top right, you can click the **Share** button. Complete the email, as shown in the image here.

Important Steps in Emailing Contract to Counterparty

1. Beneath the Attachment(s), **note that all internal comments should be removed before being sent to the counterparty**. Once you remove internal comments, a 3rd version will be generated. External comments are available for the counterparty to see within the document.

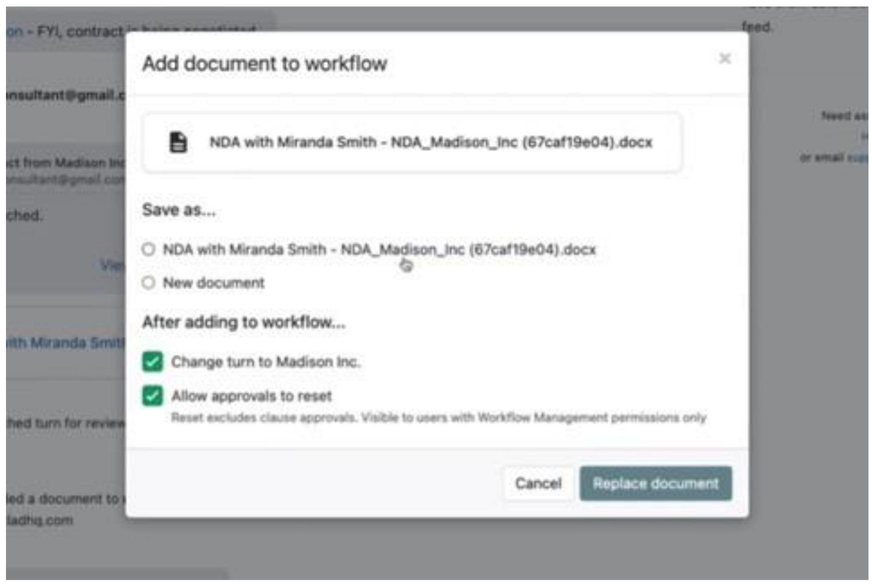
2. Be sure the change Turn button is checked.

Once shared with the counterparty, they will be able to make edits within the contract. After they review, edit, and save, they will send the contract back through the CLM to us for review. When the counterparty clicks “Reply” on their email, the unique email address that auto populates is what will tie the counterparty’s edits to the appropriate workflow in the CLM. You can see when the counterparty’s email has come back through via the Activity Feed, and as the contract workflow owner, you should also receive an email notifying you.

You can see the communication history back and forth in the workflow.

You will need to add the counterparty’s version of the contract once received back into the CLM by selecting the “Add to Workflow” button.

You will see the option to add it as a new version of the existing agreement.



Confirm that it uploaded in the Documents Section of the Workflow Design Page. If the counterparty has edits, alert Legal and other necessary approvers and continue the process until all aspects of the contract are set and approved.

Once all approvals are obtained, the contract will move from the Review phase to the Sign phase of the workflow.

The Signatory Process

The signatory process will remain similar to how it's been done historically. Here is a reminder of what you can expect:

1. The Signature Coordinator (Contracts Administrator) will ensure that the signature packet is prepared and shared with all Signers.

   The signer information should already be in the CLM as part of the contract workflow and Launch Form input. If anything is missing, the Signature Coordinator will reach out to you to gather the necessary information.

   The Signature Coordinator will send signature requests through Ironclad. The email notice to the signers will be the same as it is now, coming from DocuSign.

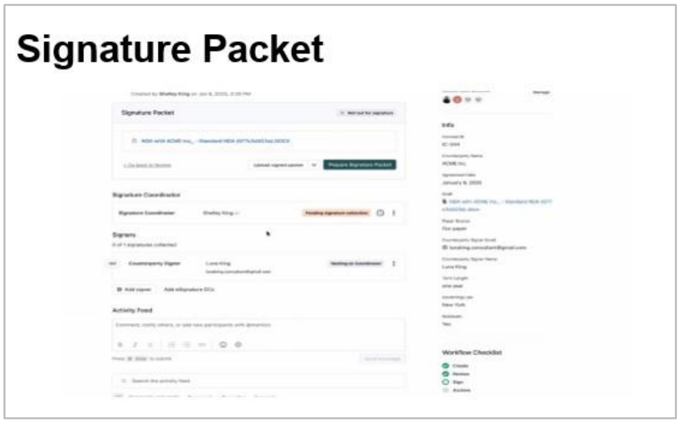
2. All signatures will be collected via **DocuSign** except for the rare case when a wet signature is required. Where a wet signature is required, you, as the contract drafter/workflow owner, will upload the wet signature contract into the workflow, and then through the Activity Feed, email the Signature Coordinator (Contracts Administrator) to let them know the contract is ready for archiving.

   The Signature Coordinator will upload the signed contract, verify it and save it in the repository section of the CLM. (More information on the Repository will be shared in the next section of this course)

3. If edits are needed to the contract during the signature phase or if there are further negotiations with the counterparty, we can revert to the Review step by selecting "Go Back to Review".

   Note: This may reset all approvals in the Review step, depending on how the workflow was set up.

   Be aware that if we revert to Review after sending the Signature packet, the eSignature packet will be voided, and all parties will receive an email noting the envelope is voided. The agreement can be sent for signatures again through DocuSign.



4. Once a contract has been signed, the Archiver will archive the executed agreement in the CLM repository.

   Click Continue to proceed to the next section in this course where we will review the Archive step and the Repository.

The Repository: Archive + Email Reminders

Archive

After the contract has been signed by all parties, the Archive step acts as a final approval to ensure the contract data information is complete before storage. This is performed by the Legal Department Archiver, who is also the Contracts Administrator.

The Archiver will verify the contract, ensure that all the metadata associated with the record is accurate, make changes if needed, and will approve the contract workflow for storage. Once approved in the Archive step, the contract workflow will be stored in the CLM repository.

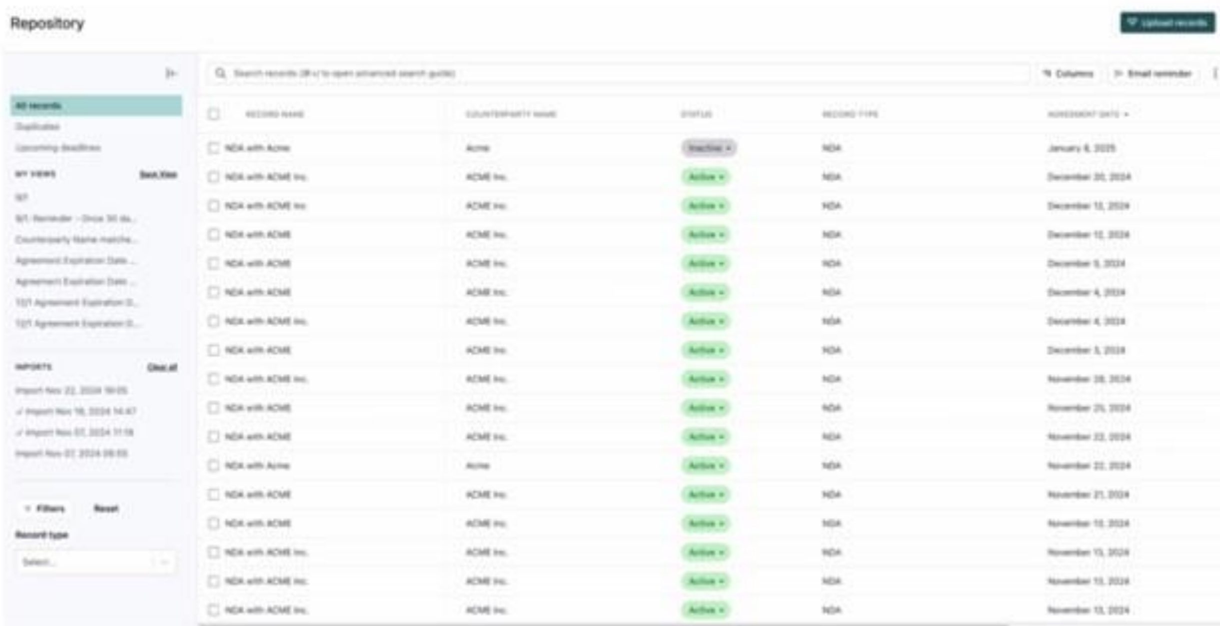
The Repository

The repository is the single source of truth for all our contracts and the history of each workflow. When you complete a contract workflow, all the information in that workflow including the Launch Form meta data information, draft documents, edits, emails, comments, approvals, etc. are captured and retained as a record. When the contract workflow is verified and then archived, all that information is saved as a record within the repository. The repository is a concept, but not a place you can click on in the CLM. All repository records that you have access to are searchable from your Dashboard.

You do have access to a repository section under your Views on the Dashboard with standard searches. As you have learned, you can create your own additional repository searches. Once a contract workflow is in the repository, it is searchable by those end users within a particular User Group. Not everyone will be able to access all contracts; you will only have access to repository records that are available to your User Groups. For confidentiality and data privacy reasons, User Groups have been assigned to different workflows, and the contracts associated with the workflows are available to those User Groups. Should you not be able to access a document that you think you should have access to in the repository, please reach out to contracts@water.org.

Contracts in the repository will have one of two statuses: “Active” means it is currently in force and “Inactive” means the contract duration has expired and is no longer active unless there has been a related Amendment.

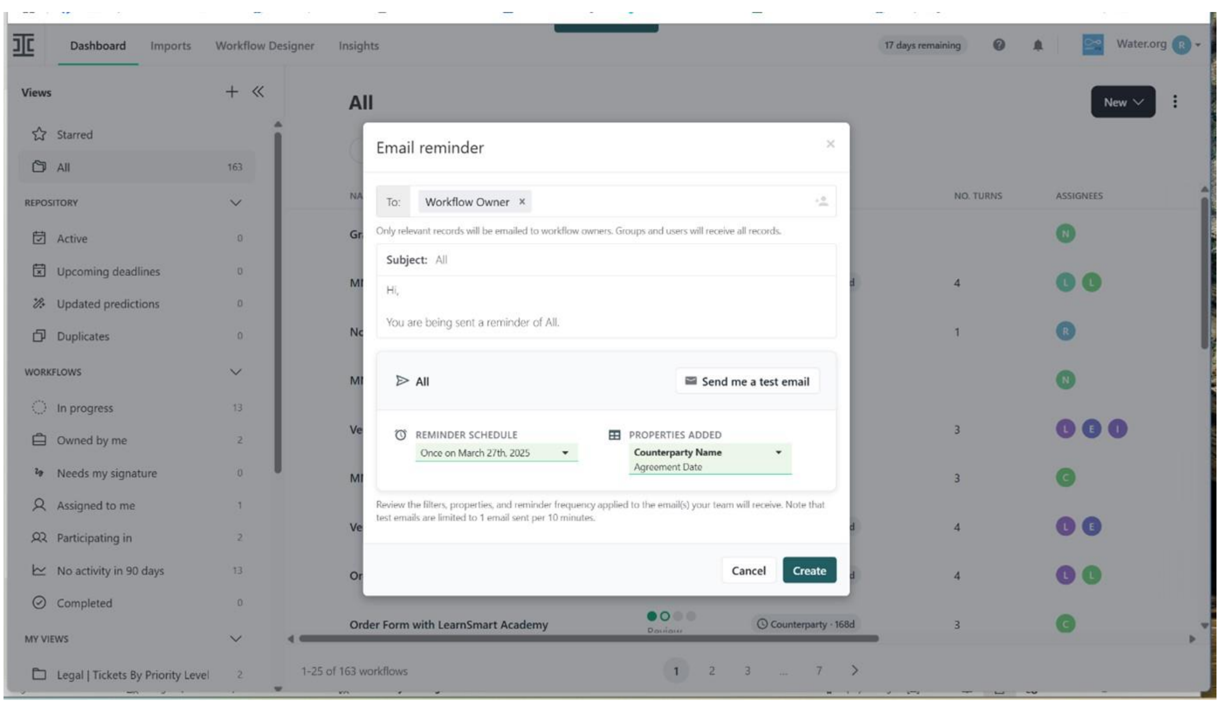
The Legal Department requested each department share their completed contracts for the past three years. We are importing those contracts into the repository. They will only have the meta data captured through an AI tool, but the contracts should be available to the appropriate User Groups.



Creating Email Reminders

Once a contract becomes an Active record in the repository, if you want to create an email reminder for yourself or someone else about a contract expiration or a milestone due date or any other meta data from a contract workflow or record, simply click on the three horizontal dots to the right of the New button on the top right-hand side of the Dashboard.

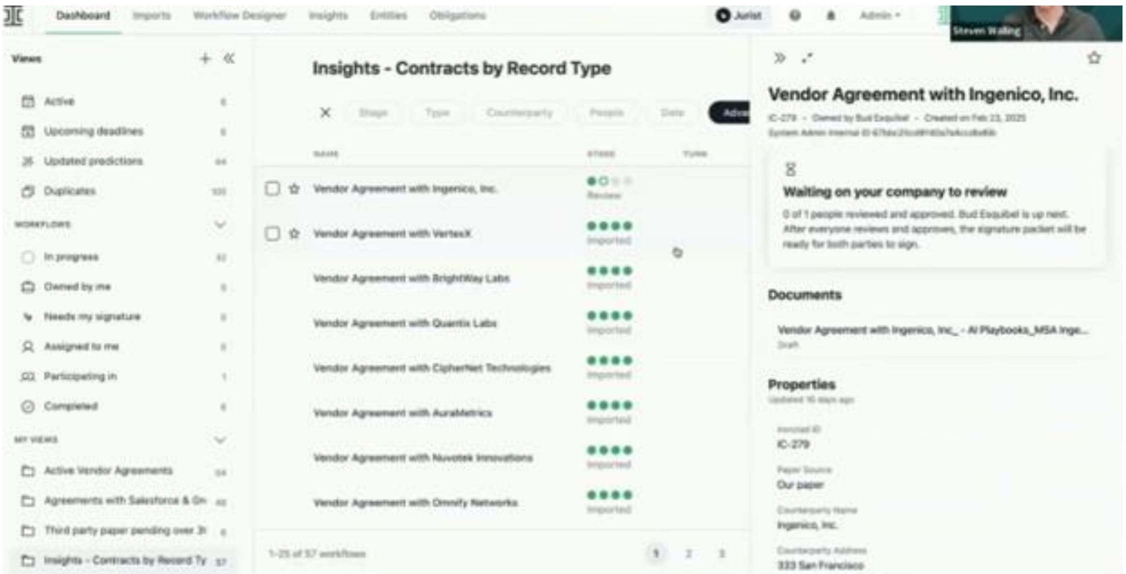
Click on “email reminder”. That will create a pop up for you to complete the email reminder. You can even send yourself a test email.



Creating + Running Reports in Insights

The reporting feature of the Ironclad CLM is called “Insights”. The Insights feature allows you to run reports, create charts and graphs and analyze meta data from our contract workflows and records.

To enter Insights, visit the Insights tab at the top of your Dashboard.



Example Chart Types

In Insights, there are templates you can use, or you can create your own reports, charts or graphs. Some of the common templates are projected spend by department, average contract value, upcoming expiration dates, etc.

You can also create your own reports using any meta data from our contract workflows and records such as milestones, project funding, effective date and expiration date, or track a country's contracts over a period of years, etc. This image shows the multiple ways that reports, graphs, and charts can be displayed within the CLM:

Follow these steps to add pre-built charts and reports:

1. In the top right, click Create from template
2. Select the Repository Report (bottom left) (this will give you a report regarding all the contracts in the Repository to which you have access
3. Click the green Continue with template button
4. Give your new Report a name and click Save
5. That's it! Your Report and Charts are found in the left panel

If you'd like to create a new chart or report, click on the new button at the top right of the Insights page. Next name your chart and save it. Then pick your filters to extract the meta data you want and create from there.

Note: The only contract workflows and records that will populate in Insights are those that you have access to due to your User Groups. For instance, if I am a PAM in Kenya, I can't run a country report on Indonesia.

Definitions and User Groups

The following definitions are utilized in the Contract Management system:

- **Workflow**: The process for drafting, editing, approving, signing and archiving the right contract for your needs. It is a standard, repeatable process that will contain in one place all information, metadata, drafts and all communication regarding a contract. This streamlines collaboration and negotiation of the contracting process.
- **Workflow Design Page**: This is where you will be working during your final creation, review and collaboration phase of any contract. Editing, internal and external messaging happens here. Within the Workflow Design Page is the Activity Feed which captures all communication regarding a contract.
- **Dashboard**: Your home page where you can navigate, manage, and prioritize your contract workflows and records.
- **Views**: On the Dashboard, you can create different searches of contract workflows and records. These are your "views".
- **Ironclad Editor**: A contract editing feature similar to Microsoft Word.
- **Records**: Completed contracts that are in the CLM.
- **Insights**: The reporting function within the CLM. It allows users to run reports and create charts on various contract metadata and visualize, understand, and analyze your contracts and contracting processes. Reporting and tracking features.
  User Groups – Water.org team members who play a role in contract management have been added to

one or more user groups in the CLM system based upon their department and contracting role within their department. Each user group is given the access necessary with the CLM to achieve their contracting role. For instance, if you are a SPAM, you are generally a contract drafter within a particular country or region. Your User Group will have access to the contract workflows and records applicable to your country or region. Only CLM Admins can manage user permissions for all users.

- **Workflow Owner / Contract Drafter**: Launches and/or manages a contracting workflow. Also known as End User. [That's you!]
- **Counterparty**: The partner, consultant, vendor, donor, etc. with whom we are entering into a contract.
- **CLM Admins**: Manage configuration of contracts, permissions, and integrations. [Legal Team, Technology Manager]

Resources

Access Ironclad's Self-Service resources to continue your learning:

- Ironclad Academy (academy.ironcladdapp.com) - Live and on-demand courses
- Help Center (support.ironcladapp.com) - Step-by-step articles