Configuring the Agiloft Contract Assistant for Word

Consult this page when configuring the Agiloft Contract Assistant for Word.

This process tells Agiloft which tables and fields in your KB should link to the fields on the app interface. This step must be completed before installing.

Prerequisites

Check to ensure your KB aligns with the recommendations in this section before continuing on to the configuration section.

Tables

Before you configure the app, you should have multiple fields and tables in your KB. If you've used the standard CLM Template or CLM AI Template, these tables are all available by default.

You should have the following tables in your KB.

- **Contracts**: This table holds Contract records. The app can add new Microsoft Word documents to the Contracts Table as new records.
- **Attachments**: This table holds Attachment records, which are the file version of the contract document being analyzed in Word. The app adds Microsoft Word document files to the Attachments table as new records. If you have AI enabled, the Attachments table is the ideal table for holding machine learning action buttons, which exist by default in the CLM AI Template.
- **Clause Library**: This table holds Clause records, which represent existing, vetted clauses that you can compare against the clauses found in the contract document in Microsoft Word. You can also insert these clauses directly into the contract document using the Insert Library Clause function, or add clauses to the Clause Library table from a trusted contract document.

  > ⚠ If your KB was created prior to November 13, 2020, reach out to your Agiloft representative for assistance in configuring your Clause Library to work with the app. There are a few global variables that may need to be added to make this possible.

- **Contract Clauses**: This table holds Contract Clause records, which are new clauses identified in the Word document. The app can add tagged clauses as new records to the Contract Clauses table. You can distinguish which Contract Clause records relate to which Contract record by the ID field.

- **Clause Types:** This table holds Clause Type records, which represent the types of clauses that your organization wants to identify in contract documents, such as Termination or Insurance. The records in this table are used by AI to identify clauses in the contract document, but can also be manually assigned by a user if AI is not enabled in their system.
- **AI Clause Types**: You only need this table if your system uses AI. This table holds AI Clause Type records, which represent the clause types that are used to train AI models to identify clauses in contract documents. These records are associated with Clause Type records in the Clause Types table. Holding these records in separate tables allows for more system flexibility. This table is only necessary if you have AI enabled in your system. Simply adding a record to this table will not train AI to recognize them, as this requires custom model training.
- **Contract Types**: This table holds Contract Type records, which represent the types of contract documents that are used in your system, such as Master Services Agreement or Non-Disclosure Agreement. You can integrate this table to manually identify the type of document you've uploaded with Word. If you have AI enabled, you can use this information to train the AI model what kind of clauses and key terms to look for in the contract document. Your Contract Types should also each include a list of required Clause Types, so the Word app can let the user know when a contract doesn't include all the required clauses.
- **Key Terms:** This table holds Key Term records, which represent the types of key terms that are identified in contract documents, such as Contract Title or Contract Start Date. The records in this table are used by the AI to identify key terms in the contract document, but can also be manually assigned by a user if AI is not enabled in their system. There is no key term library table because key terms are stored in the fields of the Contract record, unlike clauses and the Clause Library and Contract Clause tables. Adding new Key Term records to this table, and then associating them with a corresponding field in the Contracts table, allows the app to use those key terms as labels. However, these must always be tagged manually; adding a new Key Term record to this table doesn't allow the AI model to recognize or extract that key term, as this requires custom model training. For more information on the Key Terms table, view the Key Terms Table section below.

Permissions

To use the app, users must have the following permissions set:

- Users must be granted access to REST services. Click the **Setup** gear icon and go to **System > Manage Web Services**. In Groups Allowed for REST, select all the groups that need to work with the app. To select multiple groups, hold the Ctrl key while making selections.
- Users must have Create permissions, at the least, for all of the tables included in the configuration wizard in order to use the app properly. For example, you need permission to create Clause Library records in Agiloft if you want to be able to insert clauses from the Clause Library into a document.

Configuring the Agiloft Contract Assistant

To configure the app:

1. In your KB, navigate to the **Setup** gear in the top-right corner and go to **Integrations.**
2. Under Agiloft Contract Concept Mapping, click **Configure**. Doing this for the first time in a KB automatically adds the Key Terms table, if it doesn't already exist. This brings you to the General tab.

   > You may also see an option to Upgrade. For information about upgrading, visit Upgrading the Agiloft Contract Assistant for Word.

General

Follow these steps to fill out the fields in the General tab.

1. Under the **Attachment Table** section, choose the table that holds records for attached files like .docx or PDF . This is likely the Attachments table.
2. Under **Attached File Field**, choose the field that holds the actual Word document file uploaded from the app. This drop-down list allows you to choose from all the File with Versioning fields from the table you selected in the Attachment Table section.
3. Under the **Companies Table** section, choose the table that holds company information in your KB.
4. Under **Company Name**, choose the field that holds the name of the company that you are doing business with, also called the the counterparty. This should not be the name of your company.
5. Under the **People Table** section, choose the table that holds records on individuals, such as employees or external users.
6. Under **Person's Full Name**, choose the field that holds the individual's name.
7. Under **Requester's Profile Picture**, choose the field that holds the user's photo. This is an optional field, and there are no issues that will arise if the field is left empty.
8. Under the **Contract Types Table** section, choose the table that holds records for different types of contracts. This field's value determines the drop-down list choices for the Contract Type fields.
9. Under **Contract Type**, choose the field that holds the name of the contract type.
10. Under **Contract Type Status**, choose the field that holds the status of the contract type.
11. Under the **Contract Clause Table** section, choose the table that holds clauses after they have been extracted.
12. Under the **Table Configurations** section, you will see an entry for Contract table, which you can edit to complete the configuration. Some of the fields in Contract may be mapped already.

The Table Configurations section is also where you can add support for multiple Contract tables. To configure an additional Contract table, click New and then continue to follow the steps below. Some of the fields may be mapped already. Note that the Word app is only recommended for tables that contain the fields requested by the setup wizard; if you configure the Word app for a table that does not have these fields, it might not function properly. Additionally, every table you configure must point to the same Attachment, Contract Type, and Contract Clause tables when you configure those relationships in steps 1, 8, and 11 above.

Contracts Window

1. Under **Contract Tables**, select where you'd like the app to create new contracts.
2. Under **Contract Type**, choose the field that you'd like to use to designate Contract Types. If this field doesn't show any options in the drop-down list, ensure that the Contract Type Table section in step 22 has a value.
3. Under **Contract Title**, choose the field that holds the title of the contract.
4. Under **Contract Description**, choose the field that holds a description of the contract.
5. Under **Contract Status**, choose the field that holds the contract status.
6. Under **Company Name**, choose the field that holds the name of the company that you are doing business with, also called the the counterparty. This should not be the field that holds the name of your company.
7. Under **Parent Contract ID**, choose the field that holds the ID of the parent Contract record.
8. Under **Record Type**, choose the field that holds the record type.
9. Under **Contract Start Date**, choose the field that holds the start date of the contract.
10. Under **Contract End Date**, choose the field that holds the end date of the contract.
11. Under **Contract Requester**, choose the field that indicates who requested the contract.
12. Under **Date Updated**, choose the field that indicates when the record was last updated. This coincides with the Name of Latest Updater field.
13. Under **Name of Latest Updater**, choose the field that indicates who the last user to edit the record was. This coincides with the Date Updated field.
14. Under **Contract Comments**, choose the field that indicates the field that holds comments about contracts. This field is used by the Comment feature in the Word app, and is often omitted from the actual Contract table layout.
15. Under **Missing Clause Types**, choose the field you'd like missing clause types to show up in. For this to work, you need to link Clause Types in the Required Clause Type field of a Contract Type record. If you don't have this field, visit the Missing Clause Types section below.
16. Under **Link URL Field**, choose the field that holds the hotlink to the Contract record. If you don't have a Link URL field, you can continue to use the app as usual, you just won't be able to open Contract records in a flyout directly from the Word app.
17. Under **Contract ID**, select the ID field that links the contract to an attachment.
18. Under **Contract ID linking contract clause table to chosen contracts table**, choose the ID field that links the contract to the contract clause table. This is usually the same as the selection in Contract ID.

19. Under **Contract Clause Contract Type Field**, select the field that holds the contract type for Contract Clause records.
20. Under **Contract Clause Start Date Field**, select the field that holds the start date associated with a contract clause.
21. Under **Contract Clause Title Field**, select the field that holds the title of Contract Clauses records.
22. Under **Contract Clause Company Name Field**, select the field that holds the company name associated with a contract clause.
23. Click Save.
24. If you plan on using AI, expand the tab in the AI Fields section. Otherwise, continue on to the Clause Fields section.

AI Fields

If you have enabled AI in your KB, follow these steps to fill out the fields in the AI Fields tab.

1. Set Enable AI Functionality to Yes. This adds many new options to the page, which are used to configure the app with Agiloft's AI capabilities.
2. Under **Table that holds the Document Classification action button**, choose the table that holds the AI action button that allows you to predict Document Type. This is likely the Attachments table.
3. Under **Action Button field to use when requesting Document Classification**, choose the action button that allows you to predict Document Type. This drop-down list contains action buttons from the table selected under "Table where the Action Button field to use when requesting Document Classification can be found."
4. Under **AI Document Classification Input field**, choose the File with Versioning field that holds the document you'd like to load into the app. This drop-down list contains File with Versioning fields from the table selected under "Table where the Action Button field to use when requesting Document Classification can be found." The file, or value, contained in the chosen File with Versioning field should be the same for every "Input" field in the Enable AI Functionality section. You have the option to select an input more than once, just in case your machine learning action buttons are found in different tables.
5. Under **AI Document Classification Output field**, choose the Text field that you'd like the AI model to output information to. This drop-down list contains Text and Short Text fields from the table selected under "Table where the Action Button field to use when requesting Document Classification can be found."
6. Under **Table that holds the Clause extraction action button,** choose the table that holds the AI action button that allows you to extract clauses. This is likely the Attachments table.
7. Under **Action Button field to use when requesting clause extraction**, choose the action button that allows you to extract clauses. This drop-down list contains action buttons from the table selected under "Table where the Action Button field to use when requesting Clause Extraction can be found."

8. Under **AI Clause Extraction Input field**, choose the File with Versioning field that holds the document you'd like to load into the app. This drop-down list contains File with Versioning fields from the table selected under "Table where the Action Button field to use when requesting Clause Extraction can be found."
9. Under **AI Clause Extraction Output field**, choose the Text field that you'd like the AI model to output extracted clauses to. This drop-down list contains Text and Short Text fields from the table selected under "Table where the Action Button field to use when requesting Clause Extraction can be found."
10. Under **Table that holds the Key Terms extraction action button**, choose the table that holds the AI action button that allows you to extract key terms. This is likely the Attachments table.
11. Under **Action Button field to use when requesting Key Terms Extraction**, choose the action button that allows you to extract key terms. This drop-down list contains action buttons from the table selected under "Table where the Action Button field to use when requesting Key Term Extraction can be found."
12. Under, **AI Key Terms Extraction Input field** choose the Attached File field that holds the document you'd like to load into the app. This drop-down list contains Attached File fields from the table selected under "Table where the Action Button field to use when requesting Key Terms Extraction can be found."
13. Under **AI Key Terms Extraction Output field**, choose the Text field that you'd like the AI model to output extracted key terms to. This drop-down list contains Text and Short Text fields from the table selected under "Table where the Action Button field to use when requesting Key Terms Extraction can be found."
14. Document Risk is not used at this time. Skip over this section and navigate to the Clause Fields tab.

Clause Fields

Follow these steps to fill out the fields in the Clause Fields tab.

1. Under **Clause Library Table**, choose the table designed to hold vetted, pre-approved Clause records that are readily available to be used in company contracts. This table is commonly called the Clause Library table.
2. Under **Clause Library Table Clause Title,** choose the Text field that holds the title of the clause. This drop-down list contains Text and Short Text fields from the table selected under "Clause Library Table."
3. Under **Clause Library Table Clause Description**, choose the Text field that holds the clause itself. This drop-down list contains Text and Short Text fields from the table selected under "Clause Library Table."
4. Under **Clause Library Table Clause Risk**, choose the Number field that holds the risk value associated with using this clause. This drop-down list contains Number fields from the table selected under "Clause Library Table."
5. Under **Clause Library Table Clause Type ID**, choose the field that holds the ID of the clause type. This drop-down list contains all Integer and Auto-Increment fields from the table selected under "Clause Library Table."
6. Under **Library Clause Status**, choose the field that holds the library clause's status, which is generally either Active or Inactive.
7. Under **Display Risk on Library Clauses**, select an option.
8. Under **Date Library Clause Updated**, choose the field that indicates when the clause was last updated.
9. Under **Associated Print Templates**, choose the field that holds the document templates associated with the clause.

10. Under **Clause it's a Fallback For,** choose the field that holds the clause's fallback clause.
11. Under **Available for Contract Types**, choose the field that indicates which contract types this clause can be added to.
12. Under **Clause Fallback Status**, choose the field that indicates whether the clause is Standard or Fallback.
13. Under **Boilerplate Status**, choose the field that indicates if the clause is a boilerplate clause or not.
14. Under **Clause Guidance Field**, choose the field that holds usage information about the clause.
15. Under **Contract Clause Text,** choose the Text field where the modified clause text should be stored. This drop-down list contains Text and Short Text fields from the table selected under "Contract Clause Table."
16. Under **Contract Clause Type**, choose the Text field that holds the clause type. This drop-down list contains Text and Short Text fields from the table selected under "Contract Clause Table."
17. Under **Contract Clause Library Clause ID**, choose the field that holds the ID of the clause. This drop-down list contains all Integer and Auto-Increment fields from the table selected under "Contract Clause Table."
18. Under **Contract Clause Risk**, choose the Number field that holds the risk value associated with using this clause. This is typically the Clause Type Default Risk field. This drop-down list contains Number fields from the table selected under "Contract Clause Table."
19. Under **Contract Clause table has "Deleted" state**, select whether or not the Contract Clause record's list of Status choices includes Deleted. If Yes, when the user deletes a clause from the Word app, it won't be deleted outright in the KB, the Contract Clause record will just be set to a state of Deleted. This is recommended. If No, deleting the Contract Clause in the Word app deletes the Contract Clause record in the KB.
20. Under **Most Similar Clause ID**, choose the field that indicates clause ID.
21. Under **Date Contract Clause Updated**, choose the field that holds the date that the contract clause record was last updated.
22. Under **the Clause Type Table** section, choose the table designed to hold records for the clause types in your system. This table is commonly named the Clause Type table.
23. Under **Clause Type Table Title**, choose the Text field that holds the name of the clause type. The clause types found here should match the clause types available from the choice in "Clause Library Table Clause Type." The drop-down list contains Text and Short Text fields from the table selected under "Clause Type Table."
24. Under **Clause Type Status**, choose the field that holds the status of clause types.
25. Click Next.

Document Template Fields

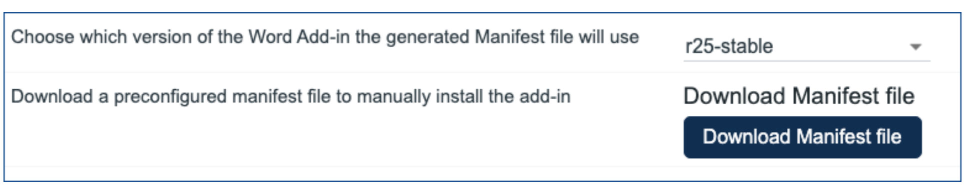
This tab allows you to configure which tables are used to build or edit document templates, formerly known as print templates, in the app. For additional information about Document Templates, visit Creating Document Templates with the Word App.

1. Under **Document Template Table**, choose the table that holds document templates. This is likely either the Document Templates table or Print Templates table.
2. Under **Document File**, choose the field where the file of the document template should be uploaded after it is created.
3. Under **Title**, choose the field that holds the title of the document template.
4. Under **Template Description**, choose the field that holds a description for the document template.
5. Under **Template Status**, choose the field that holds the status of the document template.
6. Under **Publication Level**, choose the field indicating the publication level of the document template. This would be the field that determines if a document should be public, internal, etc.
7. Under **Related to**, choose the field that holds the types of records the document template is related to.
8. Under **Available for Contract Type IDs**, choose the field that holds the IDs of contract types that this document template can be used with.
9. Under **Linked Contract Types**, choose the field that indicates the contract types that this document template can be used with.
10. If you plan to install the Word app from the Office add-in store, click **Finish** and continue on to Installing the Agiloft Contract Assistant. Otherwise, navigate to the Download Manifest tab.

Download Manifest

If you are using a manifest file for installation, follow these steps to download a manifest file from the Download Manifest tab. Otherwise, continue on to Installing the Agiloft Contract Assistant.

1. Select the "appsource" option.
2. Click the Download Manifest file button. Be sure to save this file somewhere safe.



3. Click **Finish**.

Continue to Installing the Agiloft Contract Assistant.

Key Terms Table

The Key terms table is automatically added to your KB when you click Deploy under Word add-in in **Setup > Integrations**. The default records in the Key Terms table map to fields in the Contract table. These Contract table fields all share the same logical name as key terms, and Agiloft maps them to each other using REST API calls. You can create a new Key Term in your system by following these steps:

1. Create a new field in the Contract table. Ensure that you add the new field to the Contract record layout.
2. Create a new record in the Key Terms table. The Field Name field of the Key Terms record should contain the same value as the Field Name field of the Contract field you'd like the Key Terms annotation to map to.
3. Open the app, and the new Key Terms label is available in the drop-down list after tagging a key term.
4. Label using the new key term.
5. Navigate to the Upload to Agiloft section, and click the Sync to Agiloft button.
6. Refresh the Contract record. The new key term field should now include the same value you labeled back in step 4.

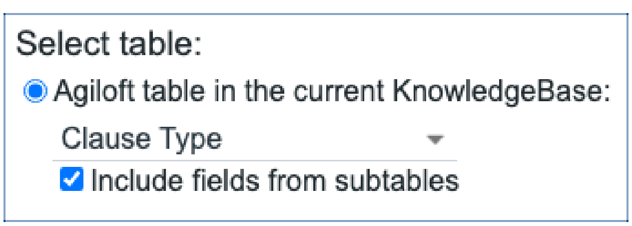
> The AI extraction models are only designed to work with the default Key Term records. Extracting additional Key Term records requires a custom AI model.

Missing Clause Types

To use this feature, you need to define required clause types for each Contract Type, so the system can recognize when one is missing. For example, this feature can warn you when a Non-Disclosure Agreement contract doesn't contain a Termination clause, if you configure that contract type to require such a clause. Then, you need to create a linked field where that missing Termination clause is listed, so that the system can display all the clause types that are missing.

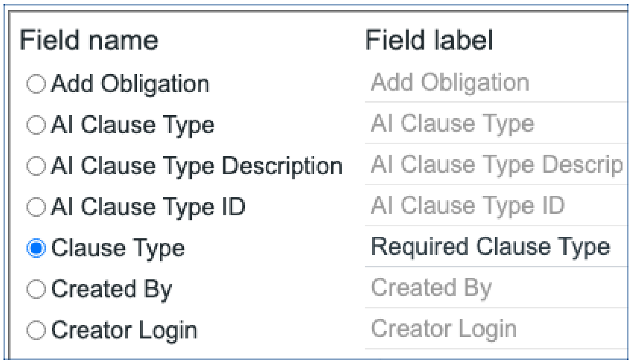
To set up the fields for required clause types and missing clause types:

1. Go to the Contract Types table and click the Fields tab.
2. Click New and select Link to single field from other table.
3. Under Select table, choose the Clause Type table from the drop-down list. Select the Include fields from subtables checkbox.



4. Go to the Mapping tab and select Yes, fast search.

5. Go to the Field tab and select the Clause Type field. Under the Field label column, rename the field to Required Clause Types or something similar.



6. Go to Setup [Contract Type] and click the Layout tab. Add the Required Clause Types field to the layout and click Finish.
7. Go to Setup [Contracts] and click the Fields tab.
8. Using Ctrl+F, search for the term "Link to:selected fields from other table Contract Type" without including the quotation marks. Edit this field.
9. Go to the Fields tab and select the checkbox next to the Required Clause Types field you created earlier.
10. Go to the Display tab and click Finish. Back in the table wizard, the new field is now be visible in the list of fields.
11. At the top of the page, click New and select Link to single field from another table.
12. Under Select table, choose Contract Clause from the drop-down list.
13. Navigate to the Mapping tab and select Yes, fast search.
14. Navigate to the Field tab and select the Contract Clause Type field. Under the Field label column, rename the field to Included Clause Types or something similar.
15. Click Next until you are on the Options tab.
16. Select the "The values from the record(s) in which the" checkbox. Choose Deletable from the drop-down list.
17. In the "field matches the value in" field, choose Deletable again from the drop-down list.
18. Scroll down until you see "Restrict the Contract Clauses from which values may be imported?" and select the checkbox next to a saved search.
19. Click Create New Linked Field Search.
    a. Add the Simple filter.
    b. In the first drop-down, do not select anything.
    c. In the second TEXT drop-down, choose Contract ID.
    d. In the third "contains, ~=" drop-down, choose "equals, =".
    e. In the fourth Value drop-down, choose Variable.
    f. In the fifth blank drop-down, choose $contract.id.
    g. Click Finish.
20. Go to the Display tab and click Finish.
21. At the top of the page, click New and select Link to single field from another table.
22. Under Select table, choose Clause Type from the drop-down list.

23. Navigate to the Mapping tab and select Yes, fast search.
24. Navigate to the Field tab and select the Clause Type field. Under the Field label column, rename the field to Missing Clause Types or something similar.
25. Click Next until you are on the Options tab.
26. Select the "The values from the record(s) in which the" checkbox. Choose Deletable from the drop-down list.
27. In the "field matches the value in" field, choose Deletable again from the drop-down list.
28. Scroll down until you see "Restrict the Contract Clauses from which values may be imported?" and select the checkbox next to a saved search.
29. Click Create New Linked Field Search.
    a. Add the Simple filter.
    b. In the first drop-down, do not select anything.
    c. In the second TEXT drop-down, choose Clause Type.
    d. In the third "contains, ~=" drop-down, choose "is contained in, <<".
    e. In the fourth Value drop-down, choose Variable.
    f. In the fifth blank drop-down, choose $contract.required_clause.
    g. Make sure the now checkbox is selected.
    h. Add the Simple filter again.
    i. On the new line, do not select anything from the first drop-down.
    j. In the second TEXT drop-down, choose Clause Type.
    k. In the third "contains, ~=" drop down, choose "is not contained in, !<<".
    l. In the fourth Value drop-down, choose Variable.
    m. In the fifth drop-down, choose $contract.included_clause.
    n. Make sure the now checkbox is selected.
    o. Click Finish.
30. Navigate to the Display tab and click Finish.
31. Navigate to the Layout tab and add the Missing Clause Types field to the layout.
32. Click Finish.

Now, you the Missing Clause Types field should be available in the Missing Clause Types drop-down list of the configuration wizard.