Using the Agiloft Contract Assistant for Word

The Agiloft Contract Assistant for Word is a powerful tool that helps you work with contracts. With the app, you can easily:

- Create or edit Contract records directly in Word
- Add, remove, or replace clauses and key terms in a contract, and send those changes to the respective records in your KB
- Manually tag clauses and key terms in a contract, or tag them automatically with AI, and send them to your KB
- Build out a Clause Library in your KB table using clauses, where you can compare clauses and assign clause preferences
- Review third-party contracts

Before you can use the app, you need to configure it in your KB and install it in Word.

This article focuses on using the app with Contract records. For more information on this using the app with document templates, visit Creating Document Templates with the Word App.

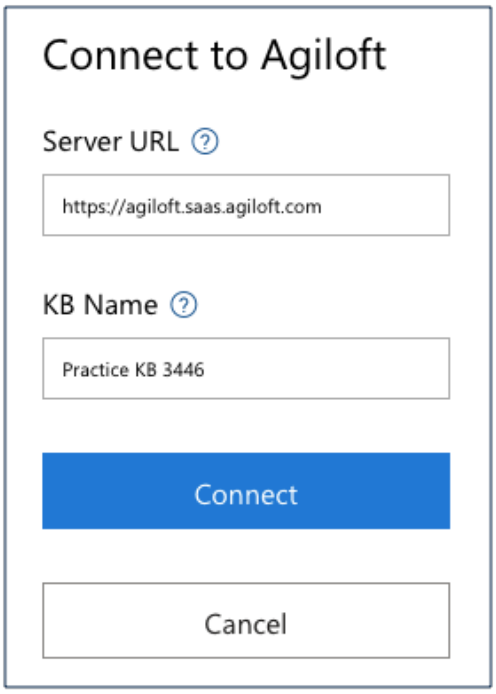
Logging In

To log in, follow the steps below.

1. Open Microsoft Word.
2. Click the app from the right-hand side of the Word ribbon.

3. Click Sign In.
4. If you're asked to log in, complete the log in process by inputting your Agiloft credentials and clicking Submit. You can also click one of the additional login options if they are configured. If you're asked to enter your KB information, continue to step 5.
5. Open your KB in your web browser.
6. Copy the URL from `https//` to `.com` only. Additional URL string will result in an error in step 10.
7. Paste the shortened URL in the Server URL field of the app. See the example in step 9. Beware of hidden spaces trailing your Server URL, as this will cause a Network Error message to appear.
8. Copy the KB Name from the top right-hand side of Agiloft, just to the left of the Help icon.

9. In the app, paste the KB Name in the KB Name field. Like in step 7, beware of hidden spaces.



10. Click Connect. If you get an error, check to make sure you entered the URL and KB Name correctly.
11. Enter your login information for the KB you opened in step 5, then click Submit. Alternatively, click one of the additional login options if they are configured:

    a. **Login via SAML**: Click this option if your organization uses single sign-on credentials for multiple platforms. Clicking this option redirects you to the proper sign-on location.
    b. **Login via OAuth**: Click this option to access the app without needing to input credentials. If this hasn't been enabled, you are redirected and receive an error message.

Connecting to a different KB

You can connect the app to a different KB, as long as it is on the same server as the initial KB you configured. To change your KB:

1. Open Microsoft Word.
2. Click the app from the right-hand side of the Word ribbon.

3. Click Sign In.
4. Click Connect to a different KB.

5. Open the KB in your web browser.
6. Copy the KB Name from the top right-hand side of Agiloft, just to the left of the Help icon, and paste it in the KB Name field of the app.
7. Click Connect.

Getting Started

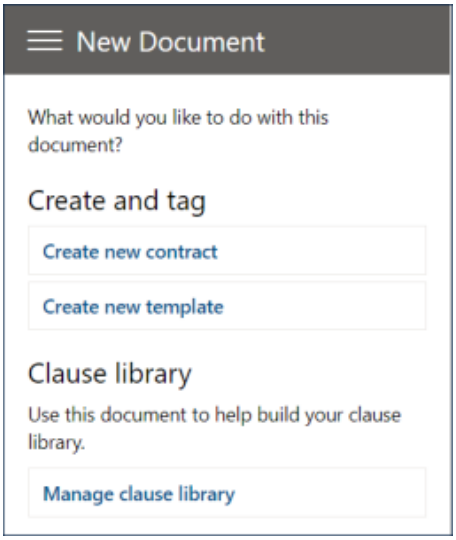
When you've logged in to the app, users generally have two different kinds of documents open in Word. These are either brand new contract documents, or contract documents from existing records in Agiloft.

Starting from a New Contract

You can use the app to commit a new contract to Agiloft as a Contract record. Once the contract has a Contract record in Agiloft, you can use the app to import information about the contract into Agiloft.

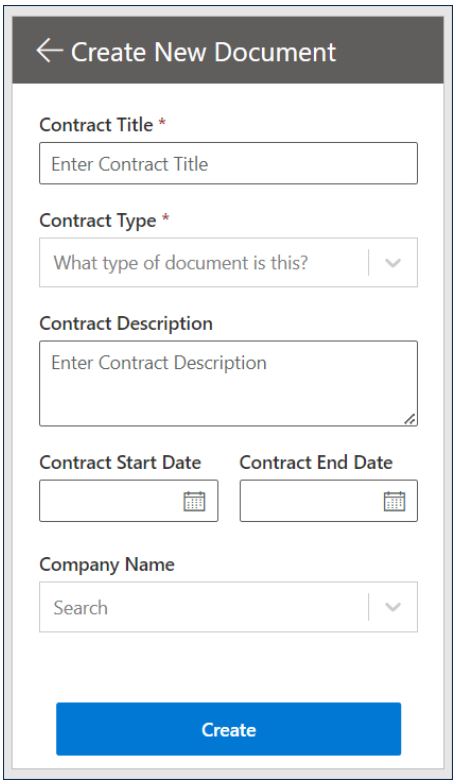
To add new contract information to Agiloft, complete the following steps:

1. Open the contract document in Word. If the file isn't saved to your local machine already, save it now.
2. Click the Agiloft icon on the top right-hand side of the Word ribbon and log in.
3. In the app, click Create new contract to create a new Contract record. Create new template is covered in Creating a Document Template, and Manage clause library is covered in Clause Library.



4. Next, enter the contract details:
    a. Contract Title and Contract Type are required.

b. Contract Description, Start and End Date, and a Company Name are optional. Company Name should reflect the counterparty your organization is doing business with.



5. Click Create. This creates a new Contract record in your KB that contains the information you added in step 4.

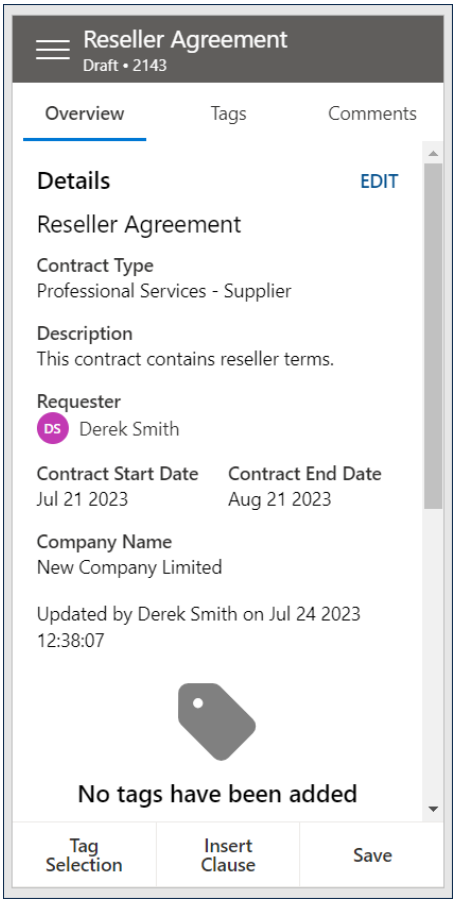
Now that your contract has a record in Agiloft, continue on to Working in the App.

Starting from a Contract Record

To pull contract data into Agiloft, or simply make edits to an existing contract, follow the steps below.

1. Open Word.
2. Open the contract using either of these methods:
    a. Open your KB in your web browser, navigate to the Attachments table, and open a contract in Word.
    b. Open a contract directly from Word as long as it is saved on your local machine and already has a record in your KB.
3. Click the Agiloft icon on the top right-hand side of the Word ribbon and log in.

4. The Contract record details will load in the app. Now that you have the app open, you can tag clauses and key terms and send them to Agiloft, insert clauses from the Clause Library, or simply make edits to the contract.



For information about tagging and then working with contract data, and then sending it to Agiloft, continue on to Working in the App.

Working in the App

Whenever you work with a contract in the Word app, you typically want to tag the contents to make it easy to review, track, and edit. This is especially important when reviewing a third-party.

You usually want to tag contract data like clauses and key terms:

- Clauses are text sections found in the document that address a specific aspect of the agreement, like a Termination clause.
- Key terms are instances of metadata found in the document, like a Contract Title.

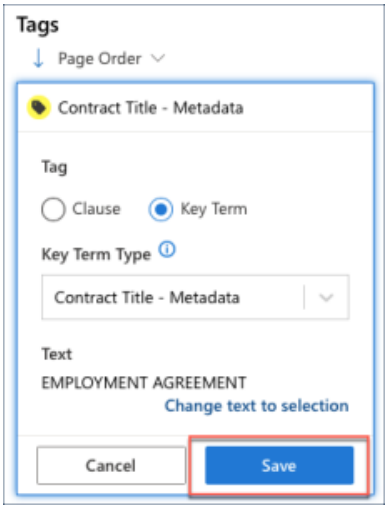
You can edit, remove, compare, and even replace tagged information, and then send the changes to your KB along with an updated version of the contract.

You can also build a database of clauses, which can be used in your own contracts or compared against similar clauses in contracts from other organizations.

Tagging Contract Data

Follow the steps below to tag clauses and key terms and then upload them to Agiloft.

1. Open the contract in Word.
2. Click the Agiloft icon on the top right-hand side of the Word ribbon and log in.
3. In either the Overview or Tags tab, highlight a clause or a key term with your cursor. If you have AI enabled, simply click Generate Tags and proceed to step 8.
4. Click Tag Selection. You can only click this option if something is highlighted in the document.
5. Under Tag, choose whether the highlighted content is a clause or a key term.
6. If you chose Clause in step 5, select the Clause Type. If you chose Key Term in step 5, select the Key Term Type.
7. You can change the highlighted text by clicking Change text to selection and making the edit within the document. Otherwise, click Save to save the tag.



8. Review the tags for accuracy, and ensure every necessary clause and key term has been tagged. To upload this information to Agiloft, click Save at the bottom of the app, as well as save the document in Word.

Clauses now appear as records in the Contract Clauses table, and key terms now appear as field values in the Contract record. The tags remain available in the app whenever the contract is open.

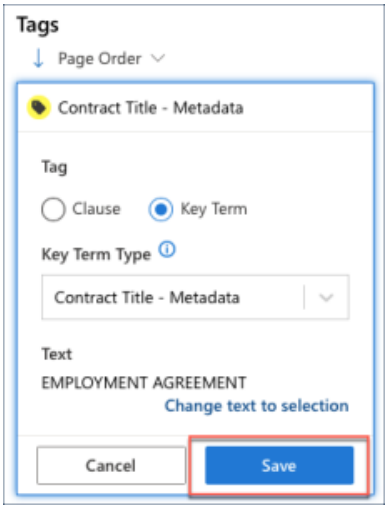
Working with Tagged Contract Data

Follow the steps below to edit, compare, remove, or lock your tags in the app.

1. Open the contract in Word.
2. Click the Agiloft icon on the top right-hand side of the Word ribbon and log in.
3. In the Overview tab, click EDIT to edit basic contract details like Contract Title and Contract Type.
4. To edit clause or key term data, click the tag from the list in the app.
5. Click the three-dot menu on the top right-hand side of the tag. The options are explained below.
    a. Click Edit to edit basic information like whether or not the tag is a clause or key term, the type, or the text.
    b. For clause tags only, click Compare to see a list of clauses from the Clause Library with the same clause type. You can also access this by clicking Compare clauses from the tag. Compare is useful when reviewing third-party contracts.
        i. To select a Clause Library clause to compare to the tagged clause, click the icon that appears on the top right-hand side of each Clause Library clauses in the app.

        ii. To see differences in the text of the clauses, toggle between the Side by side view or a Compared view by clicking the respective buttons on the top left-hand side of the window.
        iii. If you want to replace the tagged clause with the Clause Library clause, click Use Compared Clause. You can also replace a tagged clause by clicking Use library clause directly from the app pane in Word. Otherwise, click Keep Original Clause or close the window to return to Word without making any changes.
    c. Click Remove to remove a tag from the list. This does not actually remove the contract body text associated with the term or clause.
    d. Click Lock to notify other employees of a finalized clause, or to prevent users from changing the content by mistake. Locking a clause doesn't prevent users from unlocking a tag and deliberately changing it; a locked clause generally indicates a finalized clause that has been protected against accidental editing.

6. Once you've made an edit, click Save in the tag.



7. When you're done editing, make sure you've saved every individual tag you've made a change to. Then, click Save at the bottom of the app to send the changes to Agiloft. Also, be sure to save the document in Word as well.

Leaving Comments

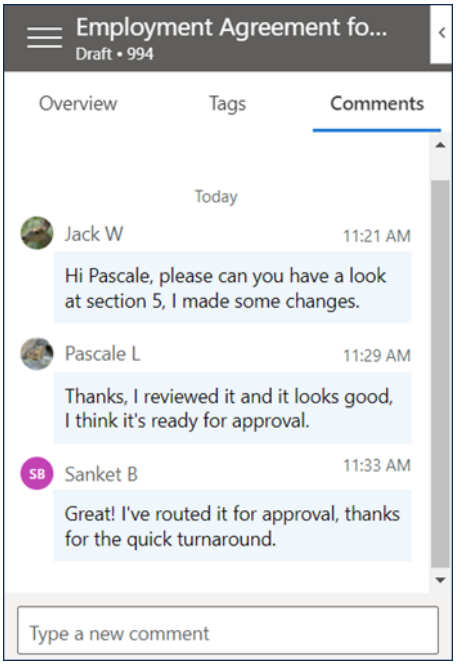
In the Comments tab of the pane, you can add comments about an individual contract.

Comments are stored in the KB in the Contract Comments field, instead of in the Word document itself. This allows you to share the Word file with third parties without including your comments.

To make comments, follow the steps below:

1. Open a contract in Word.
2. Click the Agiloft icon on the top right-hand side of the Word ribbon and log in.
3. Navigate to the Comments tab.

4. Type your comment in the text field. Click Enter on your keyboard to send.



Managing a Clause Library

Follow the steps below to fill out a Clause Library table or similar using the app.

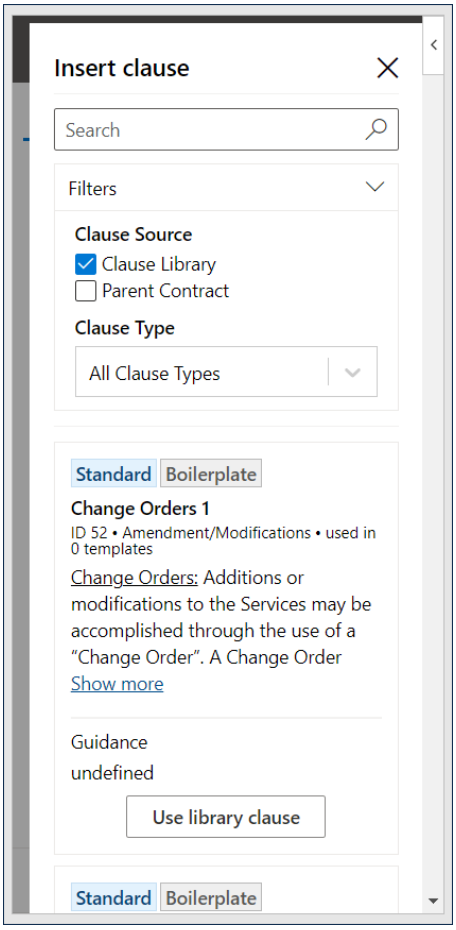
1. Choose a vetted contract that contains useful clauses, generally ones commonly used by your organization.
2. Open the contract in Word.
3. Click the Agiloft icon on the top right-hand side of the Word ribbon and log in.
4. Open the Manage Clause Library feature.
    a. In a contract that doesn't have an Agiloft record yet, click Manage clause library.
    b. In a contract that does have an Agiloft record, click the menu icon on the top left-hand side of the app and select Manage Clause Library.
5. Highlight a clause with your cursor.
6. Click Tag Selection.
7. Add the Clause Type and a Clause Title.
8. Use Playbook to make preferential determinations about clauses. Here, you can give preferred clauses a Standard distinction, and give similar clauses the Fallback distinction. Check Boilerplate for clauses that are standard in all contracts of the type you select next in step 9.
9. Click +Link Contract Types to associate this clause with a Contract Type. You can only add a Clause Library clause to a Contract record if the Contract record's type matches up with any of your selections here. You can link a clause to multiple different Contract Types.

10. In the Guidance field, you can add some tips about how the clause should be used, or other miscellaneous notes.
11. Click Add. Repeat the process starting at step 5 until you've highlighted all your clauses.
12. Click Save to create the new Clause Library records.

Working with Stored Clauses

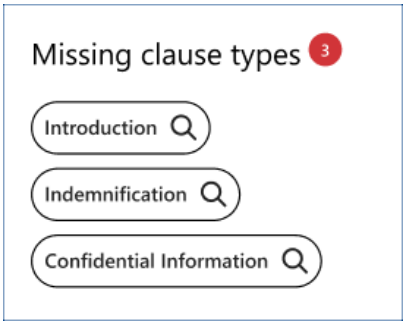
Follow the steps below to add clauses from the Clause Library directly into a contract document.

1. Open a contract in Word.
2. Click the Agiloft icon on the top right-hand side of the Word ribbon and log in.
3. Click the Insert Clause button.
4. Search the Clause Library for the clause you want to add. You can do a text search, filter by clause source or type, or simply scroll through the list. When you find the clause you'd like to add, click the Use library clause button. Once you add a clause, it behaves like any other clause or key term that you tag in the document.



You can also add clauses from your Clause Library using the Missing clause types feature. To add one of these missing clauses:

1. In the app, click the icon containing the Clause Type to get to the Clause Library.



2. The Clause Library loads with only the relevant Clause Types showing, as long as your Clause Library has some.
3. Select the best Clause for your contract and scenario. It's possible that not all examples of this clause in your Clause Library are viable for your given situation.