

# DocuSign CLM Administration Practice Exam (Sample)

## Study Guide



**Everything you need from our exam experts!**

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# Table of Contents

<b>Copyright</b> .....	<b>1</b>
<b>Table of Contents</b> .....	<b>2</b>
<b>Introduction</b> .....	<b>3</b>
<b>How to Use This Guide</b> .....	<b>4</b>
<b>Questions</b> .....	<b>5</b>
<b>Answers</b> .....	<b>8</b>
<b>Explanations</b> .....	<b>10</b>
<b>Next Steps</b> .....	<b>16</b>

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# Introduction

Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.

This guide was designed to help you do exactly that.

Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.

The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:

- Practice answering questions under realistic conditions,
- Improve accuracy and speed,
- Review explanations to strengthen weak areas, and
- Approach the exam with greater confidence.

We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.

**Remember:** successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.

Let's begin.

# How to Use This Guide

**This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here's how to get the most out of your Examzify study guide:**

## **1. Start with a Diagnostic Review**

**Skim through the questions to get a sense of what you know and what you need to focus on. Your goal is to identify knowledge gaps early.**

## **2. Study in Short, Focused Sessions**

**Break your study time into manageable blocks (e.g. 30 - 45 minutes). Review a handful of questions, reflect on the explanations.**

## **3. Learn from the Explanations**

**After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.**

## **4. Track Your Progress**

**Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.**

## **5. Simulate the Real Exam**

**Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.**

## **6. Repeat and Review**

**Don't just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning. Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.**

**There's no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly, adapt the tips above to fit your pace and learning style. You've got this!**

## Questions

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- 1. How are lifecycle states used in reporting and governance?**
  - A. State values are used to measure cycle time, bottlenecks, and compliance by filtering on states.**
  - B. States determine the user permissions only.**
  - C. States automatically generate contracts.**
  - D. States are ignored in reporting.**
  
- 2. What is a Document Rule in CLM, and can you provide an example?**
  - A. A rule that governs document behavior; example: require a metadata field before routing.**
  - B. A rule that sets user permissions on documents.**
  - C. A rule that automatically signs documents.**
  - D. A rule that replaces clauses in a document.**
  
- 3. Where is the Help option in the CLM interface?**
  - A. Menu**
  - B. Toolbar**
  - C. File**
  - D. User Navigation Header**
  
- 4. Which reporting approach uses lifecycle states to assess process performance?**
  - A. Filtering reports by all lifecycle states to hide bottlenecks.**
  - B. Always reporting only the final state.**
  - C. Filtering reports by specific lifecycle states to analyze cycle time and bottlenecks.**
  - D. Using states to automatically approve contracts.**
  
- 5. Which account settings does a CLM Administrator have control over?**
  - A. Localization, region settings, storage, document permissions, integrations, search, reports, notifications**
  - B. Localization, company emails, company calendar, integrations, notifications, document sharing**
  - C. Localization, company emails, user passwords, user archived files, integrations, notifications**
  - D. Localization, region settings, storage, document permissions, integrations, search, reports, notifications**

- 6. Which component defines the action that occurs when a Smart Rule fires?**
- A. Response**
  - B. Event**
  - C. Filter**
  - D. Action**
- 7. Regarding editing a document, what is the relationship between CLM and Office 365 Online?**
- A. The use of Office 365 Online from within CLM is limited to view only: Documents cannot be edited.**
  - B. If users have access to CLM, they also have access to Office 365 Online.**
  - C. Only users with a Office 365 Online license can use this feature from within CLM.**
  - D. Users must invoke a separate login to open Office 365 Online while they are in CLM.**
- 8. Which navigation customization option is valid for CLM administrators?**
- A. Dashboards, Action, User Navigation Header tabs**
  - B. Navigation Header, Search**
  - C. Menus, Dashboards, Start folders**
  - D. Admin folders, Action, Dashboards**
- 9. What are the branding elements that can be set for a CLM site?**
- A. Search, Reports, and Folder Names**
  - B. Logo, Color Scheme, and Email Preview**
  - C. Email Addresses, Page Headers, and Help**
  - D. Menu, Navigation, and Actions**
- 10. Which statement about CLM package deployment is correct?**
- A. It can be deployed to any CLM account other than the creator's**
  - B. It can only be deployed to the creator's original account**
  - C. It can be deployed only to production accounts**
  - D. It can be deployed to any CLM account except the creator's**

## Answers

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1. A
2. A
3. D
4. C
5. A
6. D
7. C
8. C
9. B
10. A

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## **Explanations**

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## 1. How are lifecycle states used in reporting and governance?

- A. State values are used to measure cycle time, bottlenecks, and compliance by filtering on states.**
- B. States determine the user permissions only.**
- C. States automatically generate contracts.**
- D. States are ignored in reporting.**

Lifecycle states are the markers that show where a contract sits in its process, such as Draft, In Review, Approved, Executed, or Archived. In reporting and governance, those states become key data points you can filter on to measure how work moves through the lifecycle. By looking at how long items spend in each state, you can compute cycle time and pinpoint bottlenecks where work stalls. Filtering reports by states also helps verify compliance with governance rules—for example, whether a contract passed through all required states and approvals within defined SLAs. Because state transitions reflect the actual flow of work and policy adherence, they are central to both performance insights and governance oversight. States are not primarily about user permissions, they don't automatically generate contracts, and they are not ignored in reporting, so those statements don't fit with how lifecycle states are used.

## 2. What is a Document Rule in CLM, and can you provide an example?

- A. A rule that governs document behavior; example: require a metadata field before routing.**
- B. A rule that sets user permissions on documents.**
- C. A rule that automatically signs documents.**
- D. A rule that replaces clauses in a document.**

Document Rules control how a document behaves within a CLM workflow. They define gating, validation, and automated actions tied to a document's metadata and state, so the document can't advance or trigger steps until certain conditions are met. For example, a Document Rule can require that a critical metadata field be filled before routing. If that field is missing, routing is blocked and a validation message appears; when the field is populated, routing is allowed to proceed and downstream actions like assigning reviewers or updating fields can be automatically triggered. This helps ensure data integrity and consistent process outcomes, and it's distinct from rules that set user permissions or automatically sign documents.

### 3. Where is the Help option in the CLM interface?

- A. Menu
- B. Toolbar
- C. File
- D. User Navigation Header**

Understanding where to find help in DocuSign CLM comes down to recognizing the global area of the interface that stays the same across screens. The Help option sits in the User Navigation Header—the top-right region that includes your profile, settings, and other account-related items. Keeping help there ensures you can access assistance from any page without hunting through page-specific controls. The menu is where you go to navigate to different sections of the app, not for global assistance. The toolbar contains quick-action buttons for the current task, so it's tied to what you're doing right now. The File menu, if present, is a traditional, file-oriented set of commands and isn't where help resources are typically placed. So, for universal access to help, the User Navigation Header is the right spot.

### 4. Which reporting approach uses lifecycle states to assess process performance?

- A. Filtering reports by all lifecycle states to hide bottlenecks.
- B. Always reporting only the final state.
- C. Filtering reports by specific lifecycle states to analyze cycle time and bottlenecks.**
- D. Using states to automatically approve contracts.

Lifecycle-based reporting centers on how long items spend in each stage of a process. When you filter reports by specific lifecycle states, you can measure cycle time for those stages and spot where work piles up. This makes bottlenecks visible and allows targeted process improvements, plus it supports trend analysis by comparing how long items stay in different states over time. For example, filtering to the middle states can reveal if approvals are the hold-up, or how long transitions take. Filtering by all lifecycle states hides bottlenecks because delays in one stage get averaged with others, masking where the problem is. Reporting only the final state provides end-to-end results but loses visibility into intermediate steps that reveal cycle time and bottlenecks. Automatic approvals based on states isn't a reporting approach and doesn't illuminate performance. So, filtering by specific lifecycle states to analyze cycle time and bottlenecks is the best fit.

5. Which account settings does a CLM Administrator have control over?

- A. Localization, region settings, storage, document permissions, integrations, search, reports, notifications**
- B. Localization, company emails, company calendar, integrations, notifications, document sharing**
- C. Localization, company emails, user passwords, user archived files, integrations, notifications**
- D. Localization, region settings, storage, document permissions, integrations, search, reports, notifications**

A CLM Administrator is responsible for the global, system-wide settings that govern how the workspace behaves and how data is managed. This includes things that shape the user experience across the entire environment and how information flows. Localization and region settings determine the language, date/time formats, and locale-specific behavior, while storage controls where data resides and how data is retained. Document permissions are about who can access, view, or modify documents, setting the security model for content. Integrations are the connections to external systems and how data moves between CLM and other apps. Search configuration decides what gets indexed and how users can find information. Reports and notifications control what reporting options are available and how alerts and updates are delivered. Items like company emails, company calendar, or user passwords are managed outside CLM administrator settings—typically through identity management or other enterprise tools—and aren't global account settings within CLM. Similarly, user-level features such as personal archives or document sharing permissions often map to user or workflow permissions rather than core admin-configured account settings.

6. Which component defines the action that occurs when a Smart Rule fires?

- A. Response**
- B. Event**
- C. Filter**
- D. Action**

In Smart Rules, you separate what starts the rule, what conditions must be met, and what happens as a result. The Action is the part that defines the actual outcome when the rule fires. Once the Event occurs and the Filter criteria are satisfied, the Action executes to produce the change or result you want—such as updating a field, routing the document, sending a notification, or applying a tag. The Event is simply the trigger, the Filter sets the criteria, and the Action is the operation carried out.

7. Regarding editing a document, what is the relationship between CLM and Office 365 Online?
- A. The use of Office 365 Online from within CLM is limited to view only: Documents cannot be edited.
  - B. If users have access to CLM, they also have access to Office 365 Online.
  - C. Only users with a Office 365 Online license can use this feature from within CLM.**
  - D. Users must invoke a separate login to open Office 365 Online while they are in CLM.

Editing a document through Office 365 Online from within CLM depends on licensing. You must have a valid Office 365 Online license to use the in-CLM editing feature; simply having access to CLM doesn't grant Office Online edit rights. So the correct understanding is that only users with an Office 365 Online license can use this capability inside CLM. The idea that CLM access alone provides Office Online, or that you always need a separate login for Office 365 Online from CLM, isn't accurate—license status matters, and the integration often supports single sign-on rather than a separate login.

8. Which navigation customization option is valid for CLM administrators?
- A. Dashboards, Action, User Navigation Header tabs
  - B. Navigation Header, Search
  - C. Menus, Dashboards, Start folders**
  - D. Admin folders, Action, Dashboards

In CLM, what you can customize to shape how users navigate the workspace centers on three elements: menus, dashboards, and start folders. Menus let you group related tasks and pages under a single navigational item, making it easier for users to access what they need. Dashboards provide quick, role-relevant views and links to important lists or reports, guiding what users see first. Start folders determine the initial set of folders users are shown when they log in, effectively steering their starting point and flow through the system. Other options mix elements that aren't part of the standard navigation customization for CLM admins—things like header tabs, the search bar, or admin-only areas. Those aren't configured as the navigation surface admins customize for end users, so they aren't considered valid navigation customization options.

**9. What are the branding elements that can be set for a CLM site?**

- A. Search, Reports, and Folder Names**
- B. Logo, Color Scheme, and Email Preview**
- C. Email Addresses, Page Headers, and Help**
- D. Menu, Navigation, and Actions**

In CLM site customization, what you're primarily adjusting is how the platform presents your brand to users and recipients. The three elements you configure to achieve a branded experience are the site logo, the color scheme, and the email preview. The logo sets the visual identity in the header and other branded areas, making the site immediately recognizable to your team and external parties. The color scheme opportunities let you apply your corporate colors across the interface, ensuring consistency in buttons, banners, and backgrounds. The email preview controls how outgoing messages look, so emails sent from the CLM environment reflect your branding in headers, footers, and overall styling. Other items listed are more about how the site functions and is navigated rather than its branding. Search, reports, and folder names relate to organization and access; menu, navigation, and actions describe how users move through the system. While some header-related elements can appear in branding, the core branding settings typically focus on logo, color scheme, and email preview for a cohesive brand presence.

**10. Which statement about CLM package deployment is correct?**

- A. It can be deployed to any CLM account other than the creator's**
- B. It can only be deployed to the creator's original account**
- C. It can be deployed only to production accounts**
- D. It can be deployed to any CLM account except the creator's**

Cross-account distribution is what this concept is about. A CLM package is created in one account and is intended to be deployed into other CLM accounts that you have access to, enabling sharing of templates, configurations, and workflows across tenants. That's why the correct statement says it can be deployed to any CLM account other than the creator's—deployment is not limited to the creator's own account, and it isn't restricted to production environments. The other options imply restrictions that don't reflect how package deployment is designed to work.

## Next Steps

**Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.**

**As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.**

**If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at [hello@examzify.com](mailto:hello@examzify.com).**

**Or visit your dedicated course page for more study tools and resources:**

**<https://docusignclmadmin.examzify.com>**

**We wish you the very best on your exam journey. You've got this!**

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