DOCUSIGN CLM ADMINISTRATION PRACTICE EXAM (SAMPLE)

STUDY GUIDE

SAMPLE STUDY GUIDE WITH LIMITED QUESTIONS

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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

1. **Which statement best describes the required artifacts for configuring SSO in CLM?**
   A. OAuth 2.0 tokens are used as the primary SSO artifact.
   B. IdP metadata is not required for SSO in CLM.
   C. X.509 certificate is not needed for SSO.
   D. SAML-based SSO configuration with IdP, including entity ID, SSO URL, and X.509 certificate.

2. **How do you enable multi-language support for templates and fields?**
   A. Localize labels and content; maintain translations for fields and field options; configure locale per user.
   B. Disable translation to simplify deployment.
   C. Use a single language for all users.
   D. Convert translations only after contract approval.

3. **What practice helps ensure placeholders render correctly when a template is generated?**
   A. Rely on later post-generation validation.
   B. Disable placeholders to avoid rendering issues.
   C. Always leave placeholders blank during rendering.
   D. Use default values, require essential fields, and validate data bindings before generation.

4. **What happens when retention criteria are met in CLM?**
   A. Contracts are immediately deleted.
   B. Contracts are moved to a special vault.
   C. Contracts are flagged for review.
   D. Automatically archive or purge contracts when criteria are met.

5. **Which action would you take to fix a deployment package after transfer?**
   A. Edit at the destination site only
   B. Create a new package at the destination and install it
   C. Edit at the source site and redeploy the whole package to the destination site.
   D. Edit at the source site and save as a new separate package

6. 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.

7. How do you set default settings for new contracts?

A. Manually enter all fields for each contract.

B. Configure System Defaults or Template Defaults to prefill fields, lifecycles, routing, and metadata.

C. Defaults only control the color scheme of the UI.

D. Defaults cannot be changed once set.

8. What steps are involved to enable and orchestrate e-signature within a CLM workflow?

A. Automate the signing process with no reviewer steps.

B. Disable e-signature to avoid external dependencies.

C. Route the contract to signers in the workflow without mapping fields.

D. Enable DocuSign eSignature integration, route the contract to signers, map sign-off fields, and capture final signed document.

9. How would you search for documents based on Attributes rather than contents?

A. Use Admin and the Attributes submenu to conduct a search

B. Enter the attributes in the Search field

C. Use Advanced Search to specify one or more Attributes as Filters

D. Use the Document Content filter in the Advanced Search

10. What is Document Generation in CLM, and what data sources does it use?

A. A module to print contracts without templates.

B. A feature that requires manual typing for all clauses.

C. A tool for generating random documents unrelated to templates.

D. Auto-create documents from templates using data dictionary fields; supports dynamic content via fields.

Answers

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

Explanations

1. Which statement best describes the required artifacts for configuring SSO in CLM?

A. OAuth 2.0 tokens are used as the primary SSO artifact.

B. IdP metadata is not required for SSO in CLM.

C. X.509 certificate is not needed for SSO.

D. SAML-based SSO configuration with IdP, including entity ID, SSO URL, and X.509 certificate.

SAML-based SSO with a trusted Identity Provider is how CLM expects to handle single sign-on. To establish a trusted connection, you configure with the IdP's metadata, which includes the entity ID that identifies CLM to the IdP, the SSO URL where authentication requests are sent, and the X.509 certificate used to verify the IdP's signatures on SAML assertions. The entity ID and SSO URL tell the IdP where to send and recognize authentication requests, while the certificate ensures that the responses come from a trusted source and haven't been tampered with. OAuth 2.0 tokens are not the primary artifact for this SSO flow, and without IdP metadata or a certificate, the trust and verification necessary for SSO cannot be established.

2. How do you enable multi-language support for templates and fields?

A. Localize labels and content; maintain translations for fields and field options; configure locale per user.

B. Disable translation to simplify deployment.

C. Use a single language for all users.

D. Convert translations only after contract approval.

Enabling multi-language support relies on localizing the user interface and applying a per-user language setting. To support multiple languages for templates and fields, you must localize labels and content so each user sees the appropriate language when drafting and reviewing contracts. You also need to maintain translations for fields and field options, including any drop-downs or picklists, so every label and option appears in the correct language. Finally, configuring the locale per user ensures the UI language follows each individual's preference, providing a consistent experience across templates and fields. Disabling translation would prevent multilingual usage, using a single language defeats the purpose of multi-language support, and translating after the contract is approved misses the need for localized labeling during drafting and review.

3. What practice helps ensure placeholders render correctly when a template is generated?

A. Rely on later post-generation validation.

B. Disable placeholders to avoid rendering issues.

C. Always leave placeholders blank during rendering.

D. Use default values, require essential fields, and validate data bindings before generation.

To ensure placeholders render correctly, you should provide sensible defaults, require essential fields, and validate data bindings before generating the template. Defaults fill in when data isn't available, so a placeholder doesn't end up empty or wrong. Requiring essential fields guarantees the template has the critical information it needs before rendering, preventing incomplete or invalid documents. Validating data bindings upfront catches mapping errors, typos, or type mismatches between the template and the data source, so the rendering process can proceed smoothly. Relying on post-generation validation can let issues slip into the final document, which is risky and harder to fix after the fact. Disabling placeholders or leaving them blank during rendering defeats the purpose of the template, since the document ends up missing content or showing placeholders. This pre-check approach keeps rendering predictable and reliable.

4. What happens when retention criteria are met in CLM?

A. Contracts are immediately deleted.

B. Contracts are moved to a special vault.

C. Contracts are flagged for review.

D. Automatically archive or purge contracts when criteria are met.

Retention criteria in CLM drive automated management of contracts when they reach the end of their defined lifecycle. When these criteria are met, the system carries out the retention action specified in the policy, typically automatically archiving the contract for long-term storage or purging it from the system. Archiving preserves the record for compliance and future reference, while purging removes it according to data retention rules. This automatic handling avoids manual intervention and aligns with how organizations enforce retention schedules. The idea of immediately deleting or simply flagging for review doesn't reflect how retention policies are usually defined: archival or purge are the standard automated outcomes, and flagging is a workflow action, not the retention action.

5. Which action would you take to fix a deployment package after transfer?

A. Edit at the destination site only

B. Create a new package at the destination and install it

C. Edit at the source site and redeploy the whole package to the destination site.

D. Edit at the source site and save as a new separate package

Editing at the source and redeploying the entire package is best because deployment packages are treated as a single, versioned artifact that should be controlled from a single source of truth. When you make changes at the source, you preserve the package's integrity and dependencies, and redeploying the full package to the destination ensures the destination receives an identical, complete version. This approach keeps environments in sync, maintains clear change history, and makes rollbacks predictable. Editing only at the destination would leave the original source unchanged, creating drift between environments. Creating a new package at the destination would produce a separate artifact that doesn't reflect the source package's structure or history, complicating maintenance. Saving as a new separate package (instead of updating the existing one) similarly results in multiple divergent packages rather than a single, coherent update.

6. 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.

7. How do you set default settings for new contracts?

A. Manually enter all fields for each contract.

B. Configure System Defaults or Template Defaults to prefill fields, lifecycles, routing, and metadata.

C. Defaults only control the color scheme of the UI.

D. Defaults cannot be changed once set.

Setting default values for new contracts lets you automate the creation process so contracts come in consistent with less manual data entry. In DocuSign CLM, configuring System Defaults or Template Defaults to prefill fields, lifecycles, routing, and metadata is exactly how you establish those defaults. System Defaults apply across all contracts in the system, while Template Defaults apply to contracts created from a specific template, giving you flexibility to standardize widely or selectively. This approach speeds up contract creation, reduces errors, and enforces governance by ensuring essential fields, review steps, and metadata are consistently applied from the start. Manually entering all fields for each contract is inefficient and defeats the purpose of having defaults. Defaults are not limited to UI color or appearance, but govern the actual data and process flow. And defaults can be updated as processes evolve, so they are not a fixed, unchangeable setting.

8. What steps are involved to enable and orchestrate e-signature within a CLM workflow?

A. Automate the signing process with no reviewer steps.

B. Disable e-signature to avoid external dependencies.

C. Route the contract to signers in the workflow without mapping fields.

D. Enable DocuSign eSignature integration, route the contract to signers, map sign-off fields, and capture final signed document.

Enabling e-signature in a CLM workflow hinges on integrating an e-signature service, routing the contract to the intended signers, mapping the signature and sign-off fields so they appear in the correct places, and ensuring the completed signed document is captured back into the contract record. The best approach is to enable the DocuSign eSignature integration, route the contract to signers within the workflow, map the sign-off fields so signatures align precisely, and automatically capture and attach the final signed document. This creates the signing ceremony inside CLM, maintains an audit trail, and ensures the signed copy is readily available for governance and downstream processing. Choices that skip field mapping or attempt to bypass signing capabilities would lead to incomplete or invalid signing, while disabling e-signature defeats the purpose of this automation.

9. How would you search for documents based on Attributes rather than contents?

A. Use Admin and the Attributes submenu to conduct a search

B. Enter the attributes in the Search field

C. Use Advanced Search to specify one or more Attributes as Filters

D. Use the Document Content filter in the Advanced Search

When you want to find documents by metadata rather than by what's inside the documents, you use the search tool that exposes attribute-based filtering. Attributes are the metadata fields attached to each document, such as contract type, status, client, or effective date. In Advanced Search, you can add one or more attribute filters, select the specific attribute, choose an operator (equals, contains, etc.), and provide the value. You can combine multiple attribute filters to refine results precisely, and you're searching the metadata itself rather than the document contents. This approach is faster and more exact for attribute-based queries. The other options aren't ideal for this goal. The Admin and Attributes submenu is typically for configuring attributes, not for end-user searching. Entering attributes in the general Search field may rely on free-text or less structured matching and won't give you reliable metadata-based filtering. The Document Content filter searches inside the actual document text, which is about contents, not attributes.

10. What is Document Generation in CLM, and what data sources does it use?

A. A module to print contracts without templates.

B. A feature that requires manual typing for all clauses.

C. A tool for generating random documents unrelated to templates.

D. Auto-create documents from templates using data dictionary fields; supports dynamic content via fields.

Document Generation in CLM is about automatically producing contract documents by filling predefined templates with values drawn from the data dictionary and related data sources. The templates define the structure, clauses, and placeholders, while the data dictionary fields supply the actual values (such as party names, dates, and specific terms). This approach makes documents consistent and up-to-date because the content is driven by the current data in the system. Dynamic content is a key part: fields can drive what appears in the document, enable conditional sections, and support repeating tables or blocks based on data. So, documents aren't written from scratch; they're auto-created from templates that pull in the right data and adapt the content as the underlying data changes. This is why the best description emphasizes auto-creating documents from templates using data dictionary fields and the ability to render dynamic content via fields. The other options describe scenarios that don't reflect how CLM document generation actually works—manual typing, absence of templates, or generating random, unrelated documents.

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.

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!