

CONTRACT EXPRESS

How to

Set up a DMS connection in Contract Express

Overview

With Contract Express Version 8, you can export documents to widely-used document management systems NetDocuments and iManage or to client collaboration tool HighQ.

The guide outlines the steps to configure the connection to your DMS from Contract Express and how to customize the export settings. This must be done by an Administrator in Contract Express.

1. Enable DMS

To enable export of documents:

1. Go to **Admin > Features**.
2. Check **Document Management System**.
3. Choose from *NetDocuments*, *iManage* or *HighQ*. Contract Express does not allow for connection to more than one DMS at a time.
4. Click the **Save** button at the top of the page.

2. Configure your DMS connection

Connect to NetDocuments

To configure a connection to Contract Express in NetDocuments:

1. Go to NetDocuments Partner Portal.
2. Create a new account application.
3. Enter all details; Application Type is REST, Client Type is Confidential.
4. Copy Client ID from NetDocuments Partner Portal and add it to the *NetDocumentsClientId* value in the Contract Express web.config file.
5. Copy Client Secret from NetDocuments Partner Portal and add it to the *NetDocumentsClientSecret* value in the Contract Express web.config file.

To configure a connection to NetDocuments in Contract Express:

1. Go to **Admin > Document Management System**.
2. Click the **Add Connection** button to the right of the Connection Settings heading.
3. Give the connection a name and enter the *URL* and *API URL* for your NetDocuments instance.
4. Click the **Save** button at the top of the page.

Connect to iManage

Contract Express can export to iManage Work 10 (backend) or higher. To configure a connection to Contract Express in iManage:

1. Go to iManage Admin Portal.
2. In Systems, add a new application
3. Enter all details; This application requires authentication is Yes, Application Type is Web, Client Type is Public, and Redirect URL is {contractexpressurl}/dms/callback
4. Copy Client ID and Client Secret

To configure a connection to iManage in Contract Express:

1. Go to **Admin > Document Management System**.
2. Click the **Add Connection** button to the right of the Connection Settings heading.
3. Give the connection a name and enter the iManage *URL*, the *API URL: {imanagerurl}/api*, *Client ID* and *Client Secret* copied from your iManage Work instance.
4. Click the **Save** button at the top of the page.

Connect to HighQ

To configure a connection to Contract Express in HighQ:

1. As a System Admin, sign into HighQ.
2. Find the API application registration section and create a new application.

3. Application
4. Enter all mandatory details; redirect URL is {contractexpressurl}/dms/highq/callback.
5. After saving, Copy Client ID from API Application registration grid.
6. Copy Client Secret from API Application registration grid.

To configure a connection to HighQ in Contract Express:

1. Go to **Admin > Document Management System**.
2. Click the **Add Connection** button to the right of the Connection Settings heading.
3. Give the connection a name and enter the *URL {HighQurl}*, *API URL {HighQurl/api}*, *Client ID* and *Client Secret* copied from your HighQ instance.
4. Click the **Save** button at the top of the page.
5. Click the **Add HighQ System Admin Access** button and enter your HighQ system admin credentials.

This step is required to connect Contract Express to all sites in your HighQ instance. Entering system admin credentials here *will not* enhance access levels for regular users when exporting documents.

Configure in HighQ

For a successful export the HighQ site needs to have a File Metadata iSheet set up. As a system admin in HighQ, complete the following for all sites that do not already have a File Metadata iSheet set up.

1. Go to **Admin** and select **iSheets**
2. Select **Add > iSheet**
3. Name this iSheet
4. Tick **File metadata template**
5. Save



It is possible to configure more than one connection to your chosen DMS, but only the first connection listed in your Connection Settings table is active.

To activate another connection, drag the corresponding row to the top of the Connection Settings table.

3. Configure export profiles

Export profiles are used to define the settings that will be applied to documents when exporting to your DMS.

You can create custom export profiles to define the export values for document properties and assign to one or more Templates.

Contract Express also provides a default export profile that will be applied to all Templates that have not been associated with a custom export profile.



Export profiles are only used when exporting to iManage or HighQ. The NetDocuments integration does not support export profiles.

Create a custom export profile

To add an export profile:

1. Go to **Admin > Document Management System**.
2. Click the **Add Export Profile** button to the right of the Export Profiles heading.
3. Enter your DMS login and password, if prompted.
4. Enter a name and description for the export profile.

Allow export of answer files

By default, users can export all documents associated with the selected Contract Express Document. It is also possible to export the answer file in .xml format, if needed. To enable this, check **Allow Export of the Answer File**.

Delete exported Documents automatically from Contract Express

By default, exported Documents are stored in Contract Express with an *Exported* status. You can define in an export profile whether the Document Record should be automatically deleted from Contract Express after export.

To enable document deletion after export, check **Delete the Document in Contract Express after Export**.

Apply the export profile to specific Templates

Click the **Add Template** button and select the Templates to which this export profile should be applied.

This will apply all the export settings defined in the profile when users export documents generated from those Templates.

HighQ users: select a HighQ site

When creating an export profile for HighQ, you must associate it with a specific HighQ site. To do this, select a site from the dropdown.

It is not possible to use an export profile across multiple HighQ sites as each site has its own configured metadata.

Define values for document properties

Document properties are the metadata parameters of documents stored in iManage or HighQ.

Export profiles can be configured to populate these properties with pre-set values, including Contract Express variables.

To define a property value:

1. Click the **Add Properties** button to the right of the Document Properties heading. This will retrieve a list of the document properties available in your DMS.
2. Select a property to add to the export profile.
3. Enter a value for that property into the textbox. To insert a Contract Express variable:
 - i. Click the **Select CE Variable** button.
 - ii. Select the template and variable.
 - iii. Click the **Add** button.

Note: you can only use an arbitrary value if your DMS does not restrict the values for that property. If a list of valid values has been defined, you can select only one of these values to prefill the corresponding property.

4. To make the property value editable by users, check **Editable by Users**. You also may make the property mandatory by checking **Compulsory**.
5. Click the **Save** button at the top of the page when you have finished defining the export profile settings.



To configure which statuses permit export, go to **Admin > Features** and click the **Manage Statuses and Actions** link, which can be found in the Documents section of the Features page.

The default setting is to allow export when a Document has a status of *Ready* or *Executed*.