

CONTRACT EXPRESS

How to

Export Documents to iManage

Overview

With Contract Express Version 8, you can export documents to iManage as part of your drafting workflow.

The guide outlines the steps to export documents, including selecting the export location and defining document properties, and how to work with documents after export.



Your Contract Express Administrator must configure the connection to your iManage Work instance before you can export documents to it.

1. Create a Document in Contract Express

To create a document, navigate to the **Documents** tab and click the **New Document** button.



Select your desired Template and answer all questions in the questionnaire.

Note: Documents may only be exported when they have a status of *Ready* or *Executed*. However, your Contract Express Administrator may have configured your site to permit this action for other statuses.



Documents will have a Ready status when the questionnaire is considered complete. This means all questions have been answered and there are no pending approvals.

Documents will have an Executed status after successful completion of the electronic signature process or after the document owner has uploaded a signed copy of the contract and manually marked it as executed.

2. Export to iManage

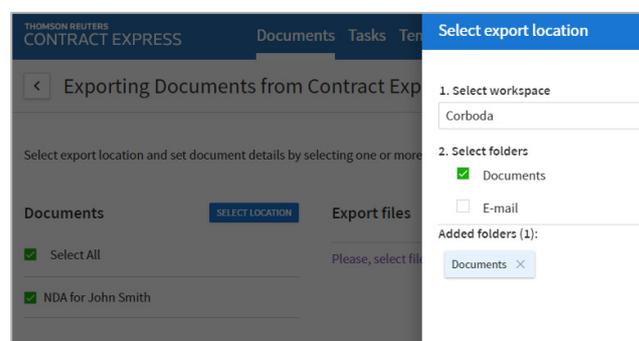
You must have Write or Full sharing permissions to export documents to iManage.

Export a single Contract Express Document

The steps below outline how to export files to the same iManage folder(s). It is also possible to export files generated from a single questionnaire to different folders.

Choose the export location

1. From the **Documents** tab, navigate to the Document you wish to export.
2. Click on **Export Documents** at bottom right of page.
3. Enter your iManage credentials, if prompted.
4. Select the files to be exported to the same iManage folder(s).
5. Click the **Select Location** button.
6. Select your iManage workspace and folder(s).
7. Click the **Save** button.
8. To export the files to additional locations, repeat steps 5 to 7.



Review the document properties

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

1. Click on **Manage properties**.
2. Review and amend the properties, if desired. Mandatory properties are marked with an asterisk (*).
3. Click the **Save** button.

Initiate export



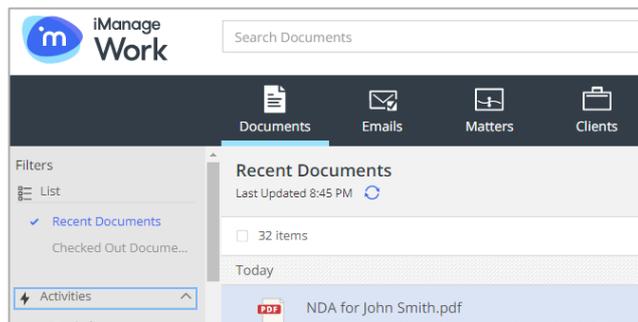
Ensure you have selected export locations for all files that you need to export. The Export action can be performed only once.

To select export locations for any remaining files, repeat the previous steps as required.

Once all the files you need to export are listed in the Export files section, click the **Export** button.



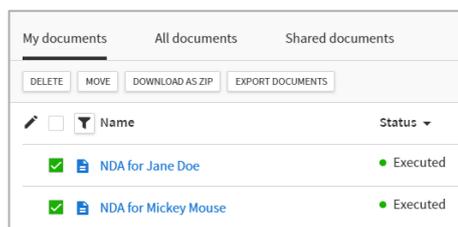
After export, the files will be available in iManage in the folder(s) selected during export.



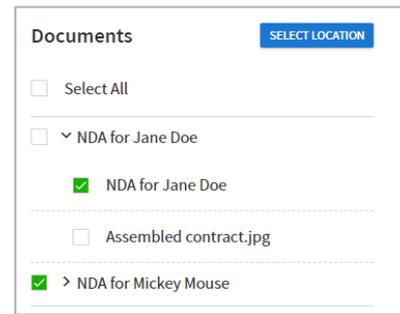
Export multiple Contract Express Documents

The steps for exporting multiple Documents are similar to exporting a single Document.

1. From the **Documents** tab, select the checkboxes for the Documents you wish to export.
2. Click the **Export Documents** button.



The files for each Document are grouped together on the export page.



Continue with the steps described for exporting a single Document to select the export locations, review document properties and initiate export.

3. Working with exported Documents in Contract Express

Once a Document has been exported to iManage, it is stored in Contract Express with a status of *Exported* and can no longer be edited.



Exported Documents can be cloned to create a new Document with the same questionnaire answers.

You can then update the questionnaire answers as needed and export the cloned Document to iManage.

Deletion of Documents after export

Your Contract Express Administrator may have configured automatic deletion of Documents after export. If this configured, you will see the following message when preparing Documents for export:

Your Document(s) will be deleted from Contract Express after export. If you want to keep your Documents after export, cancel the export process and contact your Contract Express Administrator.

View the export location of Documents

The export location is saved to the Document record in Contract Express during the export process.

To view the export location, go to the Document page and click on **View Folder(s)** at bottom right of page.

Exported documents

NDA for John Smith
exported to: TPSDK\31147\Documents 20:40:18