

CONTRACT EXPRESS

How to

Set up NetDocuments in Contract Express

Overview

If you choose to use NetDocuments as your DMS (Document Management System), this guide will help you get set up and use NetDocuments as part of your drafting and document workflow.

The guide outlines the steps to set up NetDocuments with your instance of Contract Express. This needs to be done Admins in Contract Express.

NOTE.

A specific Contract Express licence and a NetDocuments subscription are required in order to access NetDocuments.

1. Enable DMS and set up connection between Contract Express and NetDocuments

Enable DMS

As a Contract Express Admin choose NetDocuments as the DMS (Document Management System). Achieve this in the following steps:

1. Navigate to Admin Settings
2. Select License Tab
3. Find *Use DMS* setting
4. Select *NetDocuments* from the dropdown.

Define NetDocuments connecting URLs

As an Admin, define the Netdocuments URL and API URL within Contract Express by the following steps:

1. Within Admin settings, select the DMS tab
2. Give the connection a name
3. Enter the URL and API URL (these can be found in the NetDocuments API manual)
4. Save

Name *	URL *	API URL
NetDocs	https://eu.netdocuments.com/	https://api.eu.netdocuments.com/

Additional Option: Tick Include Answer File if you want to give the Business User the ability to include the Answer File when they export.

2. Set up in NetDocuments

Please refer to the NetDocuments documentation on how to add the Contract Express URL to the NetDocuments admin site.

1. Select *Define profile*

NDA for John Smith

Export Documents

Choose which documents should be exported. You can profile each document individually to separate locations. Alternatively, select "Export selected documents to the same location" to profile all selected documents. Once the profiling is complete, click Export to export the document(s).

Export selected documents to the same location

Define profile

Document	Location	Profile
<input type="checkbox"/> NDA for John Smith		
<input type="checkbox"/> Attachment		
<input type="checkbox"/> Zip file		

Export Cancel

2. Select your Cabinet and destination folder

Configure Documents Profile

Here you can define the profile for exporting the document(s). First choose the cabinet then select the destination folder. You can also choose whether to override the default profile parameters. Click Save once the profile is complete.

Select a cabinet

Documents

Select a destination folder

Documents > AMZ Solicitors

Location
<input type="checkbox"/> Agreements
<input type="checkbox"/> NDAs
<input type="checkbox"/> Others

3. Keep the default profile parameter settings or update them for the documents you will export.

4. Save

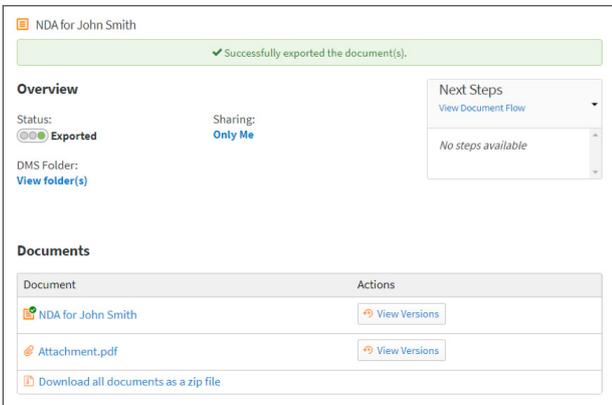
The location has now been updated for each document listed since *Export selected documents to the same location* was ticked. Deselecting this option will require you to Define profiles for each Document individually.

5. Choose the files that will be exported by ticking their box. In the image below, both the documents but not the zip file will be exported.



6. Select *Export*

7. Add a comment if desired, select OK



Success banner confirms selected documents have been exported.

User is no longer able to take any actions on this Document page except for Delete, Clone, and Download.

For confirmation of the file's location in NetDocuments, select the *View folder(s)* hyperlink. It will display the below popup:



3. Documents in NetDocuments

Documents can now be found in the NetDocuments folder selected during Export.

