

CONTRACT EXPRESS

How to

Work with HighQ in Contract Express

Overview

If you use HighQ for client collaboration, you can import iSheet data into Contract Express Version 8 to generate documents and export documents back to HighQ as part of your drafting workflow.

The guide outlines the steps to import HighQ data to generate Contract Express Documents, how to export documents back to HighQ and how to work with documents after export.




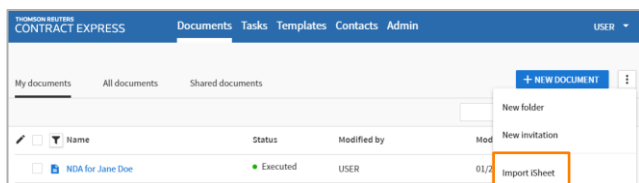
Your Contract Express Administrator must set up the connection to HighQ before you can use it.

1. Import HighQ data to create documents

You can import data from HighQ iSheets to bulk generate multiple documents. Each row of data in the iSheet will generate a separate Contract Express Document based on the Template selected.

Choose your HighQ data source

1. Go to the **Documents** tab.
2. Click the More button () at the right of the page and select **Import iSheet** from the dropdown.



3. Choose the appropriate Contract Express Template for the document(s) you wish to generate.
4. Select your HighQ site, the iSheet that contains your source data, and the iSheet View.



The Import button will become active (blue) once you have completed step 4. We recommend you review the data mapping before initiating import.

Check the data mapping

When you select your HighQ data source, Contract Express will map the iSheet column headings to the variable in the selected Contract Express Template with the exact same name.

Reviewing the data mapping will ensure that the HighQ data is used in the correct place when generating your documents.

1. Click the **Check Mapping** button.
2. Review the data pairings and amend if needed.

iSheet column	Contract Express variable
OtherPartyName	OtherPartyName

+ ADD MAPPING PAIR

3. Click the **Import** button to generate your documents.

Review the generated documents

After import, documents generated from imported data will be listed in your **My Documents** tab.

Click on the document name to finalise the document, completing any outstanding questionnaire answers.

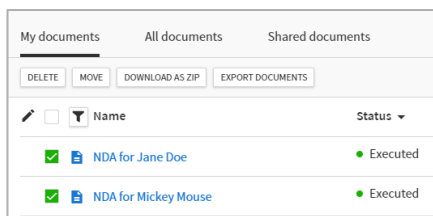
My documents		All documents	Shared documents
			Name
			Status
			NDA for {OtherPartyName}
			Incomplete
			NDA for {OtherPartyName}
			Incomplete

2. Export Contract Express documents to HighQ

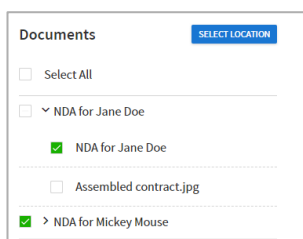
You must have Write or Full sharing permissions to export documents to HighQ.

Choose the export location

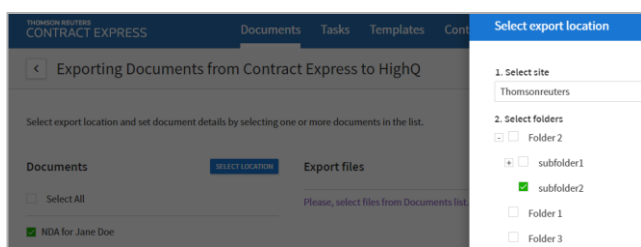
1. From the **Documents** tab, select the checkboxes for the Documents you wish to export.
2. Click the **Export Documents** button.



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



3. Select the files to be exported to the same HighQ folder(s).
4. Click the **Select Location** button.
5. Select your HighQ site and folder(s).
6. Click the **Save** button.
7. To export the files to additional locations, repeat steps 3-6.



Manage document export properties

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

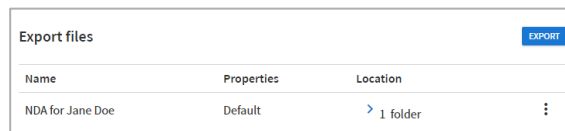
1. Click on **Manage properties**.
2. Ensure all properties are populated with the correct data. Properties with an asterix (*) are mandatory.
3. Click the **Save** button.

Initiate export

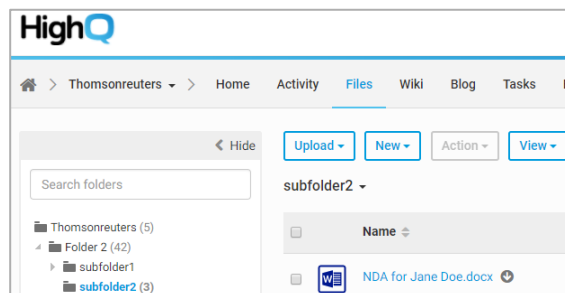


Ensure you have selected export locations for all files that you need to export. The **Export** action can be performed only once.

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 HighQ in the folder(s) selected during export.



3. Working with exported documents in Contract Express

Once a Document has been exported to HighQ, 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 HighQ.

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.