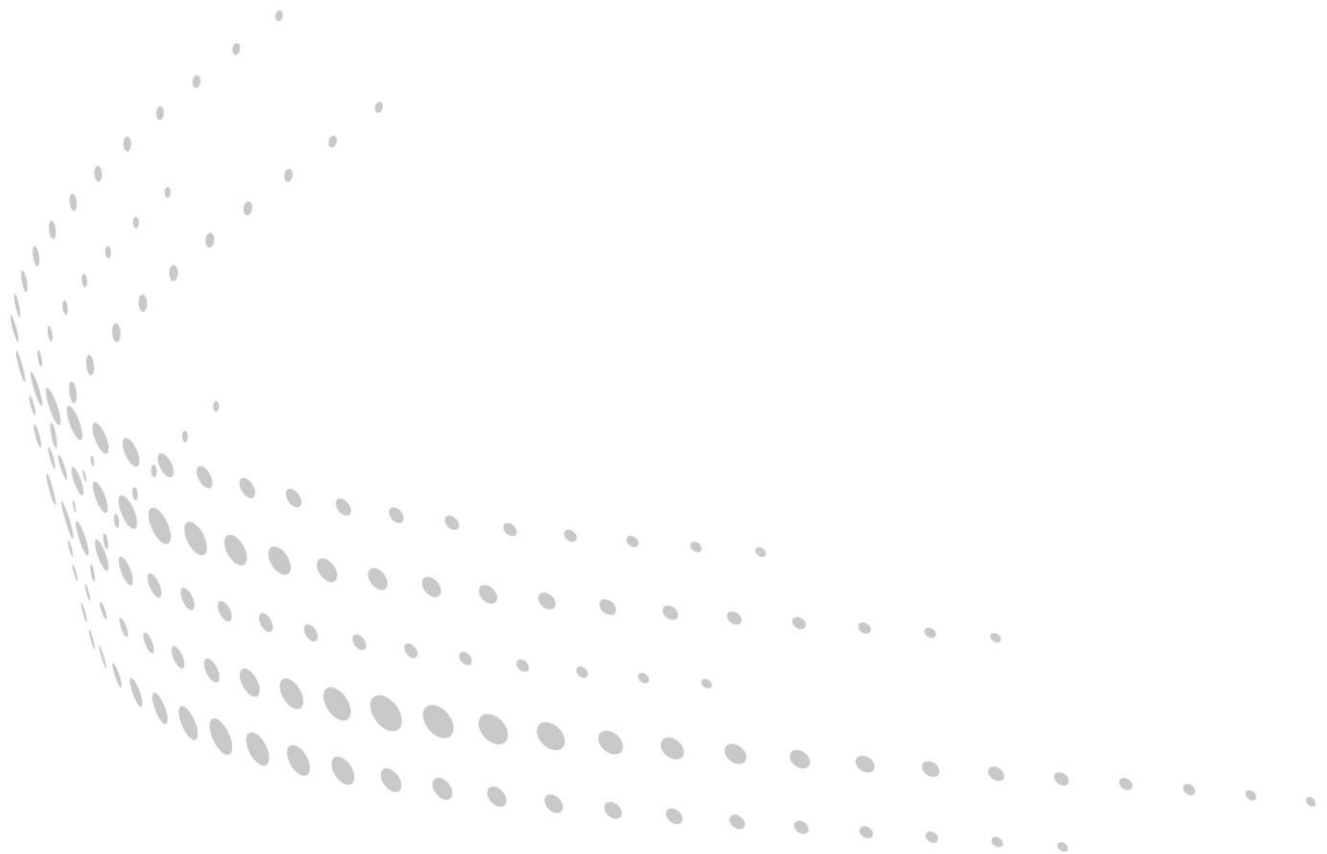


# Admin Training

Thomson Reuters Contract Express

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## 1. Introduction

This guide will give you a brief overview of the training for administrative use of Contract Express. The session will be delivered in one day and can be done as an on-site or remote session. It is recommended that all participants are given Administrator access to Contract Express in advance of the training; your trainer can provide advance guidance on doing this.

## 2. Topics covered

This section lists the main areas of functionality that can be covered during the training, with a brief description of its uses. There will also be a run through of the user interface ensuring Administrators know the tips to make their work more efficient. The coverage of the course may be limited by the version of the tool available to you.

### 2.1. Users & Roles

This section will cover adding and managing of Users within the Contract Express system. It will cover what rights Users can be assigned through use of the Roles functionality and a description of how best to utilise those roles. This will be covered here in the context of Internal Users. External Users will be covered under the section on Sites.

### 2.2. Access Control Lists

Access Control Lists (ACLs) are the main way of governing user rights in Contract Express. This section will cover where ACLs can be applied to (Categories, Documents and Templates), the various objects (Users, Groups, Roles) that can be used to define membership of the ACL, and the levels of access (None, Read, Write, Admin) that can be assigned to those objects. Finally, it will cover advanced use cases such as restricting and reordering access.

### 2.3. Template Management

Template Management is a core feature of Contract Express. Beyond use of ACLs to enable sharing, this section will consider the key areas to enable your Administrators & Authors to safely test and publish new Templates to the user base. The differences and uses of the Live & Test settings will be considered, how to test new versions of a template and share the new versions, as well as suite management to manage sub Templates effectively.

### 2.4. Groups

Groups allow for easier management of Users and their access to various objects within Contract Express. This section will expand upon previous sections to cover the creation of Groups, the adding and removing of members, and tailored guidance on how Groups will operate within your particular set up (whether using Active Directory for authentication or a username and password).

### 2.5. Profiles

Profiles control the behaviour of many aspects of Contract Express, from questionnaire behaviour and document

output, to formatting. This section will cover these options in brief detail, and detailed questions are welcome. It will focus primarily on creation and modification of new Profiles, with an overview of some of the key Profile areas that should be considered by Administrators.

### 2.6. Locales

Locales control formatting behaviour within the questionnaire and the document output based on language. This section will cover how to customise and create these, with common use cases given as examples.

### 2.7. Categories

Categories provide a new method for managing and customising Templates within Contract Express. This section will provide a brief overview before going into more detail on application. We will look at Activating categories and their creation (including sub-categories), how to assign Templates to Activating categories, and how to customise the Templates behaviour with Profiles, as well as renaming Templates which are displayed within a particular Category.

### 2.8. Themes

Themes are a way of customising the branding of your main site and any sub-sites. This section will cover the creation and application of these themes.

### 2.9. Approvals

This section will cover setting up custom approval processes, routing the template to an approver either as a matter of course or if certain conditions are met.

### 2.10. Negotiation

Negotiation allows you to keep the whole contract process within Contract Express by assigning specific negotiators to specific templates. This section will cover setting up the negotiation workflow and configuring email notifications to automatically be sent to the relevant users.

### 2.11. Matters and workflows

Matters and workflows allow for you to suggest next steps to Users after they complete a contract, align items created with key Meta data, and carry answer information through different questionnaires.

### 2.12. Contacts

How to activate and enable Users to store Contacts for use in generated documents.

### 2.13. Datasheets

Create custom views of contract data to allow for easy review and reporting on items in progress, or allow for the upload of Datasheets for mass generation of documents. At the item level these allow you to display key information on the item record screen, and quickly update it.

### 2.14. Welcome screen

This section will cover customising the Welcome Screen, adding custom text, video and image resources, and useful links.

### 2.15. Sites

Sites can be created to offer a branded experience for groups of internal or external Users. This section will cover the creation of these Sites, application of branding, controlling membership and applying site access to Templates.

### 2.16. Alerts

Alerts can be set up to send emails to users at various stages of the contract creation process. This section will cover the creation and configuration of these Alerts and applying them to templates.

### 2.17. Analytics, Reporting and Metrics

This section will cover the reporting capabilities available in Contract Express and what reporting is available to Users. It will also cover generating custom reports using Analytics.

### 2.18. Tables

This section will look at how links to external data sources can be controlled within Contract Express, and briefly look at how these are linked to Templates allowing for the data to be drawn into questionnaires.

## 3. Contacts

**Queries:** please direct to your trainer, or contact us at [contractexpress-support@thomsonreuters.com](mailto:contractexpress-support@thomsonreuters.com).

## 4. Resources

**Manuals:** the Administration Manual is available from Thomson Reuters along with more detailed manuals covering specific sections such as Themes and Tables. Please contact [contractexpress-support@thomsonreuters.com](mailto:contractexpress-support@thomsonreuters.com) if you require access to any of these.

**Videos:** for some short guides on the basics of automation and administration please see our Video page. This covers the core elements to get you started. Please note there may be some minor differences between the tool in the videos and the version you have installed, as we are continuously updating the service.

**Blog:** visit the [Contract Express Blog](#) for updates on the industry and articles on application of the tool.

**Knowledge Base:** if you are an existing Customer you will have access to the Knowledge Base, an online community forum that allows Authors and Administrators to discuss what they are working on, approaches to automation and talk generally about the product. If you do not have access please contact [contractexpress-support@thomsonreuters.com](mailto:contractexpress-support@thomsonreuters.com).