

## CONTRACT EXPRESS

### How to

# Define the export settings for a template

#### Overview

With Contract Express 8.5, you can export documents to widely-used document management systems (DMS) NetDocuments, iManage and SharePoint Online, or to client collaboration tool HighQ.

This guide outlines the steps to define the export settings for a template. Configuring a template's export settings is not necessary to export, but it allows you to control the export location, if the answer file should be included, and any metadata that should be sent along with the exported file.

Updating a template's export settings can be done by a Contract Express Author or Administrator.

#### 1. Configure connection

Please see the relevant *Quick Guide: How to set up a connection in Contract Express* to establish the connection between Contract Express and your chosen DMS or HighQ.

Once this has been set up, all users with valid credentials for that connection will be able to export documents to it.

#### 2. Configure export settings

Each Contract Express template has the option *Export settings* found in the Template's menu. Here you can define profile details and an export location that will be applied to documents when exporting to HighQ.

To change the template's default export settings, navigate to **Templates >** select the template > **Export settings**.

##### 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**.

#### Export location

By default, as a part of the export process, users will be able to choose the export location.

If you want to predefine the location, so that the documents from this template will always export to the same location, or to use that location as a starting point, set the Export location.

1. Click the **Select location** button and choose a connection from the *Select connection* dropdown.
2. Click the **Select location** button.

If you have not yet authenticated to your connection, you will be prompted to do so. Enter your valid credentials and Allow Contract Express Thomson Reuters to access your account to gain the permissions required for export.

3. Select a site or workspace from the dropdown (naming convention depends on the connection type). The dropdown will offer up to 20 suggestions; type in the name of the site or workspace to search for one not in the list.
4. Select the desired export location folder.
5. Select **Save** at the bottom right of the drawer.
6. If you would like users to be able to change the export location, tick *Allow user to change location*.
7. Select **Save** in the top right of the page.

#### Export mapping

When exporting documents, Contract Express can automatically populate metadata in the export location with answers given in the questionnaire.

Each template can be configured to map its variables to the relevant metadata value.

1. Select the **New mapping pair** button below the *Export mapping* heading. This will create a new row where you can associate a variable from the template to the relevant metadata value.



2. Under the *Variable in template* column, select the dropdown and choose the variable that has the answer you want to push to the export location when this template is exported.
3. Under the *Metadata* column, choose the metadata value that will be populated by the questionnaire answer to its left.



You must define an export location before you can map the template variables as the *Metadata* dropdown is populated by values found in the defined Export location.

If you don't want to specify an Export location for the template, but do want to specify Export mapping, we suggest you add an Export location and then select *Allow user to change location*.



The *Metadata* dropdown will only offer options that match the type of value chosen for the *Variable in template*.

For example, if the template variable is a Date value, then the Metadata column will only offer values that are also defined as Dates.

4. Once both dropdowns are populated, the mapping pair is complete and additional rows of mapping pairs can be added by selecting *New mapping pair* again.
5. Click the **Save** button at the top of the page when you have finished defining the export mapping.