

## CONTRACT EXPRESS

### How to

# Set up a HighQ connection in Contract Express

#### Overview

With Contract Express Version 8.5, you can export documents to widely-used document management systems NetDocuments, iManage, SharePoint Online or to client collaboration platform HighQ.

This guide outlines the steps to configure a connection to HighQ from Contract Express. This must be done by an Administrator in Contract Express using System Admin credentials in HighQ.

#### 1. Set up the connection in HighQ

To configure a connection to Contract Express in HighQ:

1. Sign into HighQ using System Admin credentials.
2. Navigate to the *System admin* area.
3. Choose *API application registration* from the menu.
4. Select *Add application* and complete the following parameters:
  - Application Name
  - Display Name
  - Redirect URL: `{ContractExpressURL}/dms/callback`
  - Token expires in: *select at least 3 months*



Don't forget to add the bit after the trailing slash in your Contract Express URL. For example:  
`https://eu1.contractexpress.com/app/dms/callback`

5. Save
6. Make a note of the *Client ID* and *Secret key*. You'll need this when you set up the HighQ connection in Contract Express.

#### 2. Set up connection in Contract Express

To configure a connection to HighQ in Contract Express:

1. Go to **Admin > Connection settings**.
2. Click the **+Add connection** button.

3. Choose *HighQ* from the *Integration type* dropdown.
4. Give the connection a name to differentiate it from any other connections that have been set up.
5. Enter your HighQ *OAUTH API URL*. This will likely be the same URL you use to navigate to HighQ, including the contents after the trailing slash. For example: `https://test.highq.com/test/`
6. Enter your HighQ *API URL*. This will likely be the same URL used above, with `/api` at the end. For example: `https://test.highq.com/test/api/`
7. Enter your *Client ID* and *Secret key* copied from your HighQ *API application registration* page.
8. Click the **Save** button at the top of the page. Once the connection has saved, a new button will appear at the bottom of the *Edit connection* page.
9. Select the **Add HighQ System Admin Access** button and enter your HighQ System Admin credentials to authorise the connection.

This step is required to connect Contract Express to all sites in your HighQ instance. Entering system admin credentials here *will not* enhance access levels for regular users when exporting or importing documents.



You can create multiple connections to one or more applications. Adding a connection will enable it for the entire license space.

When exporting, all users will be offered the ability to connect to each enabled connection, however they can only successfully connect to the connections they have valid credentials for.



To configure which statuses permit export, go to **Admin > Features** and click the **Manage Statuses and Actions** link, which can be found in the Documents section of the Features page.

The default setting is to allow export when a Document has a status of *Ready* or *Executed*.

