

# 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 to generate documents and export documents back to HighQ as part of your drafting workflow.

This 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.




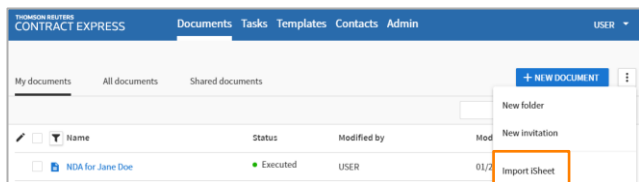
Your Contract Express Administrator must set up the connection to HighQ before you can use it.

### 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.



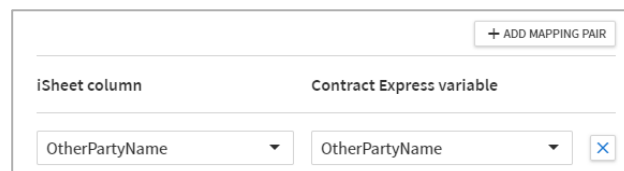
The Import button will become active (blue) once you have completed step 4. We recommend you review the data mapping before initiating import.

### 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.

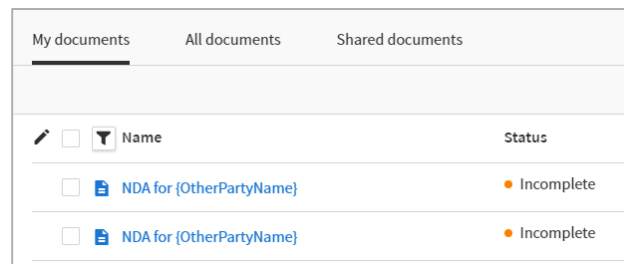


3. Click the **Import** button to generate your documents.

### 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.



## 2. Export Contract Express documents to HighQ

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

### Choose the export location

1. From within the **Document** tab, select the Document you wish to export.
2. When the document's status is an accepted state for export, an **Export Documents** button will appear within the righthand panel.
3. Click the **Export Documents** button.
4. Select the files to be exported.
5. Click the **Select Location** button.
6. Select your HighQ site and the destination folder.
7. Click the **Save** button.

### Initiate export

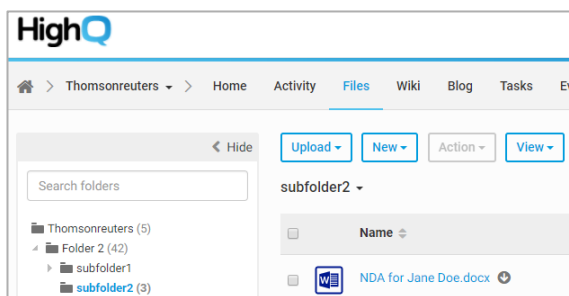


Ensure you have selected export locations for all files that you need to export. The Export action can be performed only once.

Once all the files you need to export are listed in the Export files section, click the **Export** button.

Name	Properties	Location	
NDA for Jane Doe	Default	> 1 folder	⋮

After export, the files will be available in HighQ in the folder 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.

### View the export location of Documents

The export location is saved to the Document history in Contract Express during the export process.

To view the export location, go to the Document page and click on **History** tab. An entry with the description 'Document Exported' will exist. Expand this entry to confirm the export location.