

## CONTRACT EXPRESS

### How to

# Set up an iManage connection in Contract Express

## Overview

With Contract Express Version 8.5, you can export documents to widely-used document management system iManage.

This guide outlines the steps to configure the connection to iManage from Contract Express. This must be done by an Administrator in Contract Express.

In order to connect successfully, you must have an iManage Work 10.2 (or higher) that uses v1 Rest API.

## 1. Set up connection in iManage

To configure a connection to Contract Express in iManage:

1. Sign into iManage using System Admin credentials.
2. Go to the iManage *Control Center*.
3. In *System Setup*, add a new application and complete the following parameters:
  - This application requires authentication: *Yes*
  - Application Type: *Web*,
  - Client Type: *Public*
  - Redirect URL: `{ContractExpressURL}/dms/callback`



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`

4. Make a note of the *Client ID* and *Client Secret*. You'll need this when you set up the iManage connection in Contract Express.

## 2. Set up connection in Contract Express

To configure a connection to iManage in Contract Express:

1. Go to **Admin > Connection settings**.
2. Click the **+Add connection** button.
3. Choose *iManage* from the *Integration type* dropdown.
4. Give the connection a name name to differentiate it from any other connections that have been set up.
5. Enter your iManage *OAUTH API URL*. This will likely be the same URL you use to navigate to iManage.
6. Enter your iManage *API URL*: This will likely be the same URL used above, with `/api` at the end. For example: `{iManageURL}/api`
7. Enter your *Client ID* and *Client Secret* copied from your iManage Control Center.
8. Click the **Save** button at the top of the page.



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*.

