

CONTRACT EXPRESS

How to

Set up NetDocuments connections 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 tool HighQ.

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

1. Set up connection in NetDocuments



This step is only necessary if your Contract Express license space is locally or individually hosted.

You can skip to section 3 if your license space is hosted on eu1, na1, ca1, or au1.contractexpress.com.

To configure a connection to Contract Express in NetDocuments:

1. Sign into NetDocuments with Admin credentials.
2. Navigate to the NetDocuments Partner Portal.
3. Within *Accounts*, create a new Application and complete the following parameters:
 - Application Type: *REST*
 - Client type: *Confidential*
 - Redirect URI: `{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 to add them to the Contract Express API web.config.

2. Update the Contract Express web.config

1. Open your Contract Express API web.config file.

2. Find *NetDocumentsClientId* and add your *Client Id* from the NetDocuments Partner as the value.
3. Find *NetDocumentsClientSecret* and add your *Client Secret* from the NetDocuments Partner Portal as the value.

3. Set up connection in Contract Express

To configure a connection to NetDocuments in Contract Express:

1. Go to **Admin > Connection settings**.
2. Click the **+Add connection** button.
3. Choose *NetDocuments* 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 NetDocuments *OAUTH API URL*. This will be the same URL you use to navigate to NetDocuments.
6. Enter your NetDocuments *API URL*. This will be the same URL as above, with *api.* at the beginning. For example: `https://api.eu.netdocuments.com/`
7. 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*.

