

CONTRACT EXPRESS

How to

Export Documents to SharePoint Online

Overview

With Contract Express, you can export generated documents to SharePoint Online as part of your drafting workflow.

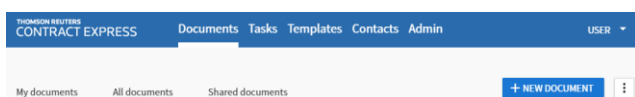
This guide outlines the steps to export documents, including selecting the export location and defining document properties, and how to work with documents after export.



Your Contract Express Administrator must configure the connection to SharePoint Online before you can export documents to it.

1. Create a Document in Contract Express

To create a document, navigate to the **Documents** tab and click the **New Document** button.



Select your desired Template and answer all questions in the questionnaire.

Note: Documents can only be exported when they have a status of *Ready* or *Executed*. However, your Contract Express Administrator may have configured your site to permit this action for other statuses.



Documents will have a Ready status when the questionnaire is considered complete. This means all questions have been answered and there are no pending approvals.

Documents will have an Executed status after successful completion of the electronic signature process or after the document owner has uploaded a signed copy of the contract and manually marked it as executed.

2. Export to SharePoint Online

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

Export a Contract Express Document

The steps below outline how to export files to the same NetDocuments folder.

Choose the export location

1. From the **Documents** tab, navigate to the Document you wish to export.
2. Click on **Export Documents** at bottom right of page.



The first time you click *Export Documents*, you will be taken to the SharePoint Online login page where you must enter valid credentials and allow the connection to Contract Express.

You will not be prompted for credentials again, unless you revoke the SharePoint Online token on your *My Account* page.

3. Select the files to be exported.
4. Click the **Select Location** button.
5. Select the SharePoint Online site and destination library.
6. 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 SharePoint Online in the library selected during export.

3. Work with exported Documents in Contract Express

Once a Document has been exported to SharePoint Online, 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 SharePoint Online.

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.