Admin Manual

Thomson Reuters Contract Express

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1. Key concepts in Contract Express

1.1. What is Contract Express?

Contract Express® is a family of products that enable law firms and corporations to create standardized legal documents from templates. There are three main products:

- **Contract Express**: The flagship web-based document assembly solution that provides law firms with a single platform to allow users within the firm to create documents from automated Contract Express templates, and to enable law firms to share Contract Express templates with clients via client microsites or publicly available templates. Small corporate legal departments can also use Contract Express for self-service contract creation, approvals and e-signatures. Contract Express is available as an on-premises solution or via Software as a Service (SaaS).

- **Contract Express for SharePoint**: This application for the Microsoft SharePoint platform integrates the core document assembly and contract creation capabilities of Contract Express with SharePoint lists and document libraries. Contract Express for SharePoint provides a contract automation solution for corporate legal departments to provide self-service contract creation capabilities to end users, together with matrix-based approvals, document versioning, e-signature, search and reporting. Law firms who use SharePoint as an extranet based platform can also use Contract Express for SharePoint to provide self-service document automation to their clients.

- **Contract Express for Salesforce**: This app is available in the Salesforce AppExchange and directly integrates the Contract Express contract automation product into an organizations Salesforce Org. Contracts can be initiated from any Salesforce record or object and all of the contract documents and data are stored within the customers Salesforce Org. This solution can be used by corporations for revenue generating contracts as well as NDAs, Employment Agreements and Sourcing Agreements.

Common to all three products is the unique and patented Contract Express document generation engine. The same engine is used in all three products, meaning that templates created for one product can be used by the other products too. Indeed, both Contract Express for SharePoint and Contract Express for Salesforce have the main Contract Express product embedded inside the solution.

1.2. Contract Express Author

Contract Express Author is the tool that template owners use to create templates for these three Contract Express products. Contract Express Author is an add-in for Microsoft Word 2007 and above and provides template authors with all of the capabilities for converting a regular Microsoft Word document into a Contract Express template through the addition of mark-up and the creation of dictionary items. Once a template is created in Microsoft Word with Contract Express Author, it is uploaded to one of the Contract Express products above where end-users can start to create documents from that template. Contract Express contains a unique and patented questionnaire generation engine which automatically creates the questionnaire forms directly from the information contained within the template. This is one of the major advantages of Contract Express over other document assembly systems.

For more details on Contract Express Author, see the Contract Express Author Getting Started Manual.

2. Changing License Space settings

2.1. License Details

Your license details are available in the License tab, under the Admin Settings page (the cogwheel).

2.1.1. Uploading a License

Where your license needs renewing you must upload the .xml file into your account. You can do this by clicking on the Upload License button, and browsing to the .xml file. Contact contractexpress-support@thomsonreuters.com for a license file if you have not received this file.

⬆ Upload License

Once you have pressed the Upload button, a message to indicate success will appear at the top of the screen.

Upload a License	✕
Choose File No file chosen	
Upload	Cancel

2.1.2. Closing a License Space

IMPORTANT: If for any reason you need to close a license space, note that closing the license space will prevent access to all data and sites contained within and you will <u>not</u> be able to access it for future operations.

To close a license space, all users within the license space must be deleted with only one user remaining (this should be an Admin). Clicking on the Close License button within the License tab will initiate the closure of the license space. A confirmation dialog will ask if you wish to continue and once confirmed, an email will be sent to the User with a link to complete the closure. When you follow the link a final confirmation will be displayed asking if you wish to continue. Click continue to finalise the process.

✕ Close License

2.1.3. Enabling custom Datasheets

The "Use Custom Datasheets" setting controls whether users on the site will have the ability to create customized Datasheets in addition to the built-in Datasheets. See section 0 for more details on Datasheets.

Use Custom Datasheets: Yes ▼

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.4. Changing the default Theme

The various Themes you have created will be available from the drop-down menu here. This will only apply to the main site, not the sub-sites you have created. See section 0 for information on creating Themes.

Default Theme: Built-In ▼

Press the Save button at the bottom of the License Page screen to save your selection.

Save

2.1.5. Changing the default Profile

The various Profiles you have created will be available from the drop-down menu here. This will only apply to the main site, not the sub-sites you have created which can be configured independently.

Default Profile: Built-In ▼

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.6. Enabling Categories

Activates the use of Categories for the organisation of Templates when users are creating Documents. See section 20 for more information about setting these up.

Use Categories:	Yes ▾

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.7. Changing the default language

A selection of languages is available from the drop-down menu. This will only apply to the main site, sub-sites you have created can be configured independently.

Default Language:	English (UK) ▾

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.8. Embedding

You can allow embedding of questionnaires on one separate domain. Enter the domain name in the text box for the permission to be made.

Allow Embedding:	*.contractexpress.com

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.9. Changing the Default tab for New Documents

This allows you to select whether users, upon starting the creation of a new document, will be taken to either All templates, Recent templates, or template Categories *(if Categories are enabled)*.

Default tab for New Document:	All ▾

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.10. Document deletion

The Contract Deletion setting enables the deletion of all Document data and generated documents on log-out. This can be done on-demand, or automatically. Select Automatic to enable Document deletion automatically on log out.

Contract Deletion:	On Demand ▾

In a Forms Based Authentication environment, this deletion will occur when the session ends – whether the session times out or the user signs out. In a Windows Authenticated environment, this will happen only once the user signs out.

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.11. Enabling DocuSign

This setting controls whether DocuSign is available for users to complete workflows and applies to the entire license space. Configuring DocuSign per template is explained further in section 18.5 and using DocuSign as part of a Document workflow within Contract Express is explained in further detail in section 25.

Use DocuSign:	No ▾

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.12. Template Access

This setting allows you to set the default template access to be used when a new template is uploaded. By default, this is Owner Only. The associated rights are as follows: the Owner will get Full rights, the Authors will get Write rights, and Users Read rights. This setting will **not** apply to templates that have been uploaded prior to the change. See section 6.5 for more details on these rights.

Template Access: Owner Only   ▼

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.13. Enabling Negotiation

This setting controls whether it is possible for users to trigger Negotiation tasks for a Document and applies to the entire license space. You need to enable Negotiation here in order to customize the Negotiation process per template. Configuring the Negotiation setting per template is explained further in section 18.14.

Enable Negotiation: No   ▼

Note that if Negotiation has been disabled and then enabled again, the system will restore all previous negotiation settings for each template.

Voiding Active Negotiation tasks when Disabling Negotiation

When turning off Negotiation, Contract Express will ask you whether you want to:

(a) Allow all active negotiations to be completed or
(b) Void all active negotiation tasks

If you wish to void all active negotiation tasks, select the 'Void active negotiations' checkbox. As a result, all active negotiation tasks will be voided and corresponding Documents will return to their previous statuses from which negotiation had been requested. If you do not choose to void the active negotiations, users will no longer be able to request negotiations for any Documents but all pending negotiations will continue until they are either completed or revoked.

Disabling Negotiation   ✕

You are going to disable negotiation for the template(s) that could have active negotiation tasks. If you want to void these tasks check "Void active negotiations" checkbox.

Otherwise, these tasks will remain active and negotiators will be able to complete them.

☑ Void active negotiations

OK	Cancel

Changes to Contract Express User when Negotiation is Disabled

Not that when Negotiations are turned off for the entire license space, the following changes will occur in the Contract Express:

1. The Negotiation KPI is not calculated and not displayed in the KPI widget of the Dashboard (see section 3.1.1 for details about the KPI widget)
2. The Negotiation tab in the Overdue Items widget is not displayed (see section 3.1.2 for details about the Overdue Items widget)
3. The Negotiation tab in Template details is not displayed (see section 18.14 for details about the negotiation settings for a template)
4. The Negotiation tab of the Tasks tab is not displayed, if there are no active negotiation tasks or they have been voided (see the section above)
5. The Negotiation Turnaround Time metric is not available on the Template details tab for a Template (see section 18.12 for details about metrics)
6. Reports for Negotiations are not available (Total Negotiations by Status – see section 3.2.7, Average Negotiation Cycle Time – see section 3.2.8).

All data and settings are re-instated when Negotiations are turned back on.

2.1.14. Enabling Matters

You can choose whether Matters are enabled for the license space. Disabling the Matter feature will disable the Matter page. The Matter feature can be re-enabled at any time and all existing Matters will become visible. See section 21 for more details on Matters.

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.15. Enabling Contacts

You can choose whether Contacts are enabled for the license space. Disabling the Contacts feature will disable the Contacts page and will not allow users the opportunity to save contacts from the questionnaire into their master list of contacts. The Contacts feature can be re-enabled at any time and all existing contacts will be available. See section 21 for more details on Contacts.

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.16. Customizing the Terms of Service

This option is only available for on premise or privately hosted deployments.

By ticking 'Add Custom Terms', you are now able to add a link to your custom terms of service. Please note the link must be HTTP Secure (meaning it begins with https), and must not point to a file.

Ticking the 'Show Terms for users who have not yet accepted it' will mean users who have not yet accepted the terms of service will be required to accept them before being able to start using Contract Express.
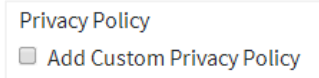
Pressing the 'Require all users to re-accept Terms of Service' means that upon next login, all users will be presented with the new terms and will be required to accept them before being able to continue with their use of Contract Express.

Press the Save button at the bottom of the License Page screen to save your selection.

2.1.17. Customizing the Privacy Policy

This option is only available for on premise or privately hosted deployments.

As with the Terms of Service, the link for your custom privacy policy must be HTTP Secure (meaning it begins with https), and must not point to a file.

Privacy Policy
☐ Add Custom Privacy Policy

Press the Save button at the bottom of the License Page screen to save your selection.

3. Analytics and Reporting

The Analytics tab allows Administrators to view user activity within the site and build various process reports.

3.1. Dashboard

The Dashboard contains information about the system-wide KPIs, overdue Documents and contains a set of prebuilt process reports. Note the Dashboard contains a predefined set of widgets and is not configurable.

3.1.1.KPIs widget

KPIs are calculated for the last 30 days. The default KPIs displayed on the Admin dashboard are the following:

1. **Self-serviced documents** — how many documents have been executed without legal assistance (i.e. the negotiation sub-process and/or approvals were not invoked, current status of documents is Executed)
2. **Approvals** on time — how many documents have not breached the Approval turnaround time metric
3. **Negotiations** on time — how many documents have not breached the Negotiation turnaround time metric Note that this KPI is not displayed if the Negotiation setting is turned off in Admin Settings (see section 2.1.13)
4. **eSignatures** on time — how many documents have not breached the Signature turnaround time metric

For more information about the time metrics see section 18.11.

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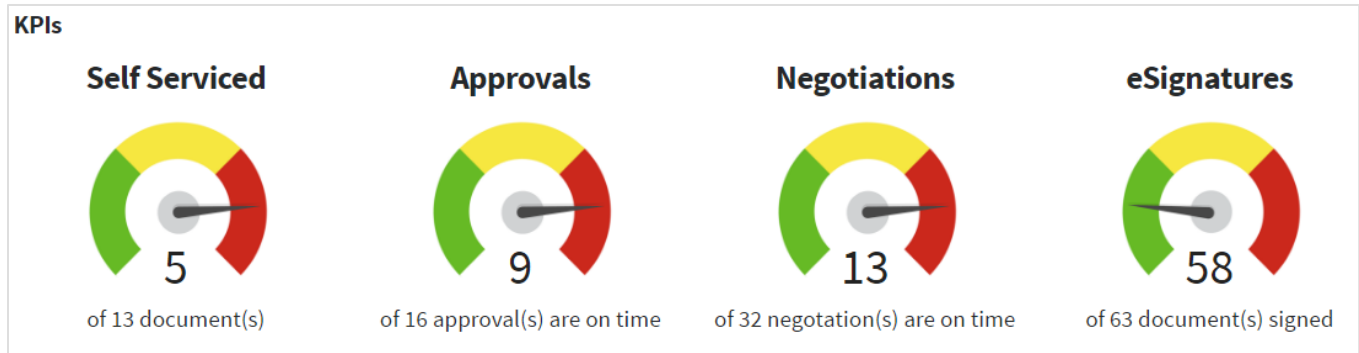
The gauge charts indicate the system's state regarding the associated KPI.

- Green — more than 90% of documents are self-serviced/ on time, or there are no documents for which SLA metrics are tracked.
- Amber — 61-89% of documents are self-serviced/ on time
- Red — 0-60% of documents are self-serviced/ on time

3.1.2.Overdue Items widget

Documents that have breached SLA metrics are displayed in the Overdue Items widget. Depending on the metric type, a document is displayed on one of the following tabs:

- Approvals — contains the list of overdue Documents, for which the Approval Turnaround Time metric has been breached
- Negotiation — contains the list of overdue Documents, for which the Negotiation Turnaround Time metric has been breached
  Note that this tab is not displayed if the Negotiation setting is turned off in Admin Settings (see section 2.1.13)
- eSignature — contains the list of overdue Documents, for which the Signature Turnaround Time metric has been breached

For more information about the configuration of the time metrics see section 18.11.

Each tab contains the five oldest overdue Documents for each SLA metric. To view the full list of overdue Documents, click on the 'See all in Tasks' link (for Approvals and Negotiation) or the 'See all in Documents' link (for eSignature). The list of the overdue Documents will be presented in a new browser tab.

3.1.3. Fast Actions widget

71 Documents
Last Updated:
NDA for the other party

9 Templates
Last Updated:
Share Purchase Agreement

1 Team Members
Last Added:
ekaterina_slisenko@epam.com
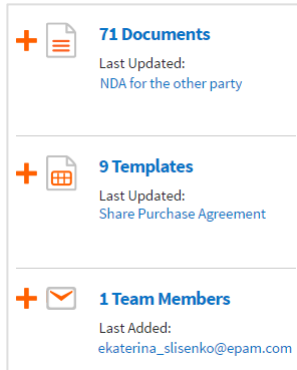
The Fast Actions widget contains statistics about the documents, templates and users that have been created, uploaded or added during the last 30 days.

The widget also allows you to add a new Document, upload a new template or invite a new user.

Click ✚ 📄 to add a new Document.

Click ✚ ⊞ to upload a new template.

Click ✚ ✉ to invite a new user.

3.1.4. Reporting widgets

The dashboard contains four reporting widgets that allow you to view the corresponding prebuilt process report. All reports on the dashboard are built for the last 7 day period.

1. **Distribution of Documents by Status** — this widget shows the status changes of documents created within the last 7 days (see section 3.2.6 for more information about the Distribution of Documents by Status report)
2. **Documents Created by User** — this widget shows the top 7 users who have created the highest number of documents during the last 7 days (see section 3.2.1 for more information about the Total Documents Created by User report)
3. **Current Status of All Documents** — this widget shows the number of documents in each Contract Express status for the current date (see section 3.2.5 for more information about the Total Documents by Status report)
4. **Template Popularity** — this widget shows the most popular templates that have been used within the last 7 days along with how many documents have been created for each template within the last 7 days (see section 3.2.3 for more information about the Total Documents Created by Template report)

You can view each complete report by clicking on the 'Go to Report' link. As a result, the Reports tab will be displayed, where you can view the report and change its input parameters if required. To get back to the dashboard, click on the Dashboard tab at the top of the page.

3.2. Process Reports

Administrators can access process reports by selecting the Reports tab on the Analytics page.

Contract Express provides users with two report categories – Point in Time reports and Distribution reports. Point in Time reports allows you to view snapshots of user and Document activity for the chosen period. Distribution reports allow to review trends in activity during the chosen period.

3.2.1. Total Documents Created by User

This report reports on the total number of document sets that have been created by selected users broken down by these users. The report can be built for users, groups or subsites.

To build the report:

1. Set the input parameters for the report
   a. **Report Category**: Point in Time
   b. **Report Type**: Total Documents Created by User
   c. **Scope**: by Users/ Groups/ Subsites. Depending on the chosen value, you will be able to specify either the list of users, of groups, or of subsites, for which the report should be built
   d. **Users/ Groups/ Subsites**. Select the required users/ groups/ subsites by clicking ✚ Add Users / Groups / Subsites
   You can select up to 20 users/ groups/ subsites
   e. **Templates**. Select the required templates by clicking ✚ Add Templates . It is possible to select all templates
   f. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify the Start Date and the End Date
   g. **Exclude Suspended Documents**. Select this checkbox if you want to exclude Documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a Document)
   h. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted Documents from the report
2. Click "Run Report"

The report will contain a graph and a table with the data.

The graph demonstrates, how many documents have been created by users during the chosen period, broken down by template. You can toggle the graph view using Grouped/ Stacked control.

The table contains filterable representation of the same data. Click on the filter icon to enable filtering. You can collapse or expand the sections of the table by clicking on a user's name or to collapse/ expand the whole table use the **Expand** and **Collapse** buttons.

By clicking on the number in the Total row you can view the corresponding distribution report "Distribution of Documents Created by User" (see section 3.2.2) pre-filtered with the input parameters of the initial report and by the chosen user/ group/ subsite.

3.2.2. Distribution of Documents Created by User

The Distribution of Documents Created by User report is a distribution report that illustrates the trends in Document creation over the chosen time period by the specified users. The report can be built for users, groups or subsites.

To build the report:

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1. Set the input parameters for the report
   a. **Report Category**: Distribution report
   b. **Report Type**: Distribution of Documents Created by User
   c. **Scope**: by Users/ Groups/ Subsites. Depending on the chosen value, you will be able to specify either the list of users, of groups, or of subsites, for which the report should be built
   d. **Users/ Groups/ Subsites**. Select the needed users/ groups/ subsites by clicking ✚ Add Users / Groups / Subsites
      You can specify up to 20 users/ groups/ subsites
   e. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
   f. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
   g. **Exclude Suspended Documents**. Select this checkbox if you want to exclude Documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
   h. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted Documents from the report
2. Click Run Report

Reports

Report Category
[Distribution report ▾]

Report Type
[Distribution of Documer ▾]

Parameters

Scope
[By Users ▾]

✚ Add Users / Groups / Subsites

2 account(s) added

Templates
✚ Add Templates

4 template(s) added

Period
[Last 6 months ▾]

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

Run Report

The report will contain a graph and a table with the data.

The graph demonstrates, how many documents have been created by *all* selected users during the increments within the chosen period, broken down by template. You can toggle the graph view using Grouped/ Stacked control.
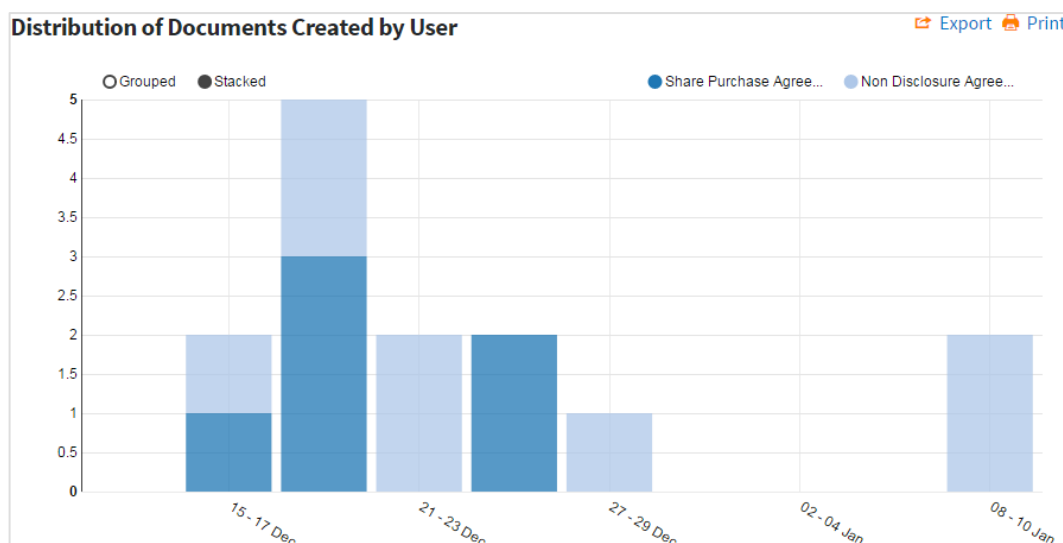
The table contains filterable representation of the same data. Click on the filter icon to enable filtering. You can collapse or expand the sections of the table by clicking on a period or to collapse/ expand the whole table use the
▸ Expand and ▾ Collapse buttons.

▼ Template	Number of Documents
12 - 14 Dec ▸	
15 - 17 Dec ▸	
18 - 20 Dec ▾	
Share Purchase Agreement	3
Non Disclosure Agreement	2
Total:	**5**
21 - 23 Dec ▸	

3.2.3.Total Documents Created by Template

This report shows the total number of document sets that have been created from the selected templates.

To build the report, Administrator should:

1.   Set input parameters for the report
     a.   **Report Category**: Point in Time
     b.   **Report Type**: Total Documents by Template
     c.   **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
     d.   **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
     e.   **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
     f.   **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2.   Click Run Report

Reports

Report Category

Point in Time ▾

Report Type

Total Documents by Ten ▾

Parameters

Templates

✚ Add Templates

4 template(s) added

Period

Last 30 days ▾

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

Run Report

The report will contain a graph and a table with the data.

The graph demonstrates how many documents have been created from the selected templates during the chosen period.

Total Documents by Template   Export   Print

Non Disclosure Agree...   Share Purchase Agree...

Share Purchase Agreement 6
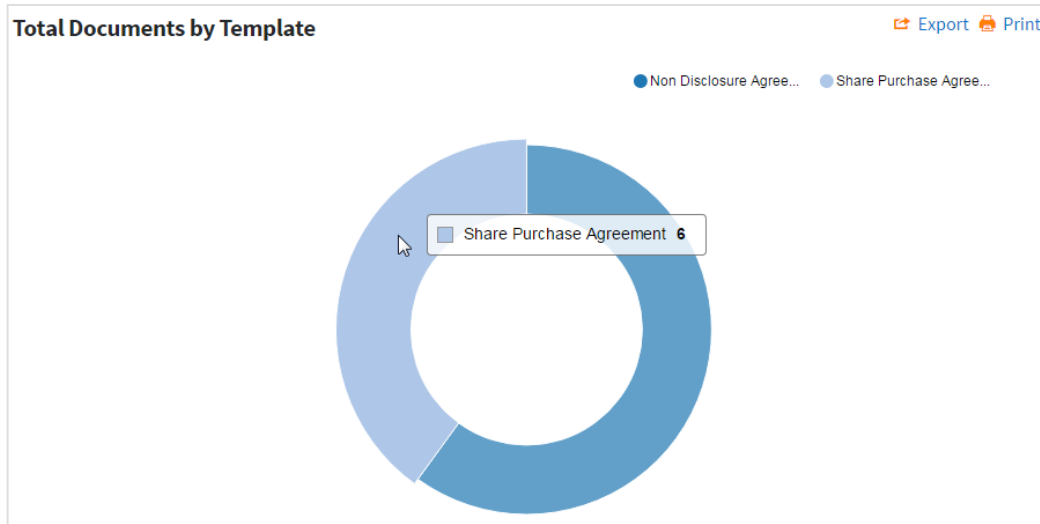
The table contains filterable representation of the same data.

Template	Total Number of Generated Documents
Non Disclosure Agreement	9
Share Purchase Agreement	6

By clicking on the number in the Total Number of Generated Documents column you can view the corresponding distribution report "Distribution of Documents Created by Template" (see section 3.2.4) pre-filtered with the input parameters of the initial report and by the chosen template.

3.2.4.Distribution of Documents Created by Template

The Distribution of Documents Created by Template is a distribution report that illustrates the trend in document creation over the chosen time period by the specified templates.

To build the report, Administrator should:

1. Set input parameters for the report
   a. **Report Category**: Distribution report
   b. **Report Type**: Distribution of Documents Created by Template
   c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
   d. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
   e. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
   f. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category

| Distribution report ▾ |

Report Type

| Distribution of Documer ▾ |

Parameters

Templates

✚ Add Templates

4 template(s) added
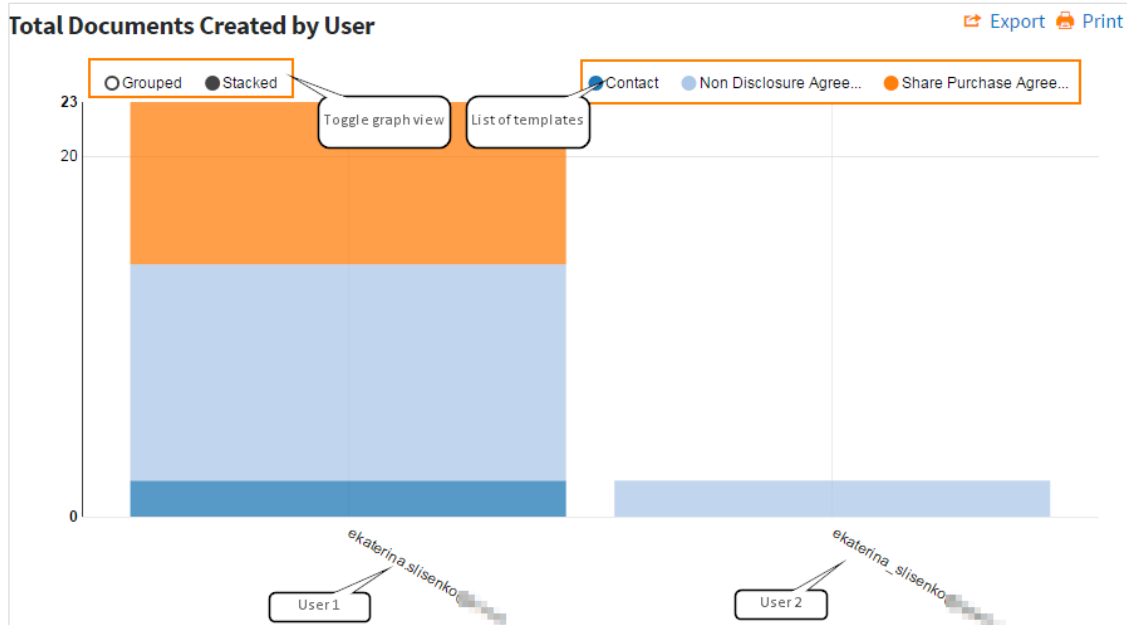
Period

| Last 30 days ▾ |

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

Run Report

The report will contain a graph and a table with the data.

The graph demonstrates how many documents have been created from the selected templates during each increments within the chosen period, broken down by template. You can toggle the graph view using Grouped/ Stacked control.

Distribution of Documents Created by Template   ⬈ Export 🖨 Print

○ Grouped ● Stacked   ● Share Purchase Agree... ● Non Disclosure Agree...

(bar chart with y-axis 0 to 6 and x-axis periods: 15 - 17 Dec, 21 - 23 Dec, 27 - 29 Dec, 02 - 04 Jan, 08 - 10 Jan)

The table contains filterable representation of the same data. You can collapse or expand the sections of the table by clicking a template's name. To collapse/ expand the whole table use ▸ Expand and ▾ Collapse buttons.

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▼ Time period	Number of Documents
Non Disclosure Agreement ▸	
Share Purchase Agreement ▾	
12 - 14 Dec	0
15 - 17 Dec	1
18 - 20 Dec	3
21 - 23 Dec	0

3.2.5. Total Documents by Status

The Total Documents by Status report represents the snapshot of the number of documents in different statuses by a particular date.

To build the report:

1. Set input parameters for the report
    a. **Report Category**: Point in Time
    b. **Report Type**: Total Documents by Status
    c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
    d. **Statuses**. Select document statuses you are interested in, or choose all of them by clicking ✚ Add Statuses
    e. **By date**. Select the date, by which the number of documents in chosen statuses should be calculated. Choose current date, if you want to see the current number of documents in chosen statuses
    f. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
    g. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category
[Point in Time ▾]

Report Type
[Total Documents by Stat ▾]

Parameters

Templates
✚ Add Templates
4 template(s) added

Statuses
✚ Add Statuses
8 status(es) added

By Date
[1/12/2017]

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

[**Run Report**]

The report will contain a graph and a table with the data.

The graph demonstrates how many documents have been in particular statuses by the selected date, broken down by template. You can toggle the graph view using Grouped/ Stacked control.

The table contains filterable representation of the same data. You can collapse or expand the sections of the table by clicking on a status name. To collapse/ expand the whole table use ▸ Expand and ▾ Collapse buttons.

Template	Number of Documents
Executed ▾	
Non Disclosure Agreement	3
Share Purchase Agreement	2
Total:	5
Incomplete ▸	
Negotiating ▸	
Ready ▸	
Requires Approval ▸	

By clicking the value in the Total rows, you can view the corresponding lists of Documents.

3.2.6. Distribution of Documents by Status

The Distribution of Documents by Status report is a distribution report that illustrates the trend in changing the statuses of the documents created during the given time increment.

To build the report:

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1. Set input parameters for the report
   a. **Report Category**: Distribution report
   b. **Report Type**: Distribution of Documents by Status
   c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
   d. **Scope**. Choose 'By single statuses' to see the report broken down by all document statuses.
      If you want an aggregated view, select 'By grouped statuses'. In this case, only 3 aggregated statuses will be used: New (incorporates the following statuses: Incomplete, Requires Approval, Awaiting Approval, Rejected, In Negotiation), Drafted (incorporates Ready, Sent for Signature statuses), Executed (only Executed)
   e. **Statuses**. Select the document statuses you are interested in. Depending on the value of the Scope parameter, you can choose either from the complete list of statuses or from the list of aggregated statuses.
   f. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
   g. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
   h. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

The report will contain a graph and a table with the data.

The graph demonstrates, how many documents have been in particular statuses during the given time increment, broken down by status. You can toggle the graph view using Grouped/ Stacked control.

The table contains filterable representation of the same data. You can collapse or expand the sections of the table by clicking on a status name. To collapse/ expand the whole table use ▸ Expand and ▾ Collapse buttons.

Time period	Number of Documents
Awaiting Approval ▸	
Executed ▸	
Incomplete ▸	
Negotiating ▸	
Ready ▾	
17 - 19 Dec	2
20 - 22 Dec	1
26 - 28 Dec	1
07 - 09 Jan	2
Requires Approval ▸	

3.2.7. Total Negotiations by Status

This report is a snapshot of the number of negotiation tasks in different statuses by a particular date.

To build the report:

1. Set input parameters for the report
   a. **Report Category**: Point in Time
   b. **Report Type**: Total Negotiations by Status
   c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
   d. **Negotiation Status**. Select negotiation statuses you are interested in, or choose all of them by clicking ✚ Add Statuses
   e. **By date**. Select the date, by which the number of negotiation tasks in chosen statuses should be calculated. Choose current date, if you want to see the current number of negotiation tasks in chosen statuses
   f. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
   g. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category
[Point in Time ▼]

Report Type
[Total Negotiations by St ▼]

Parameters

Templates
✚ Add Templates
4 template(s) added

Negotiation Status
✚ Add Statuses
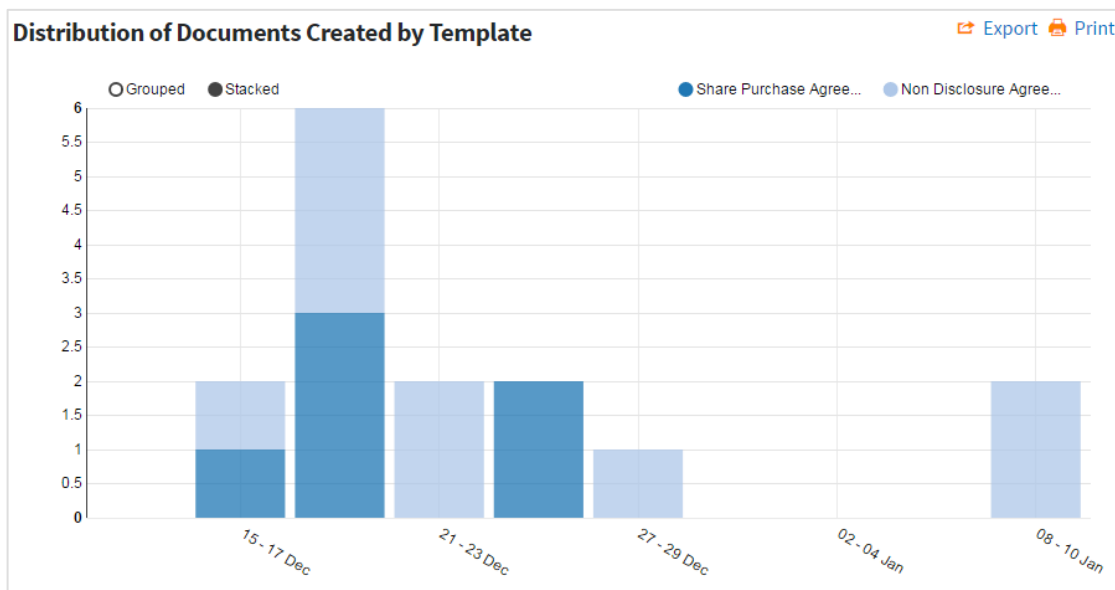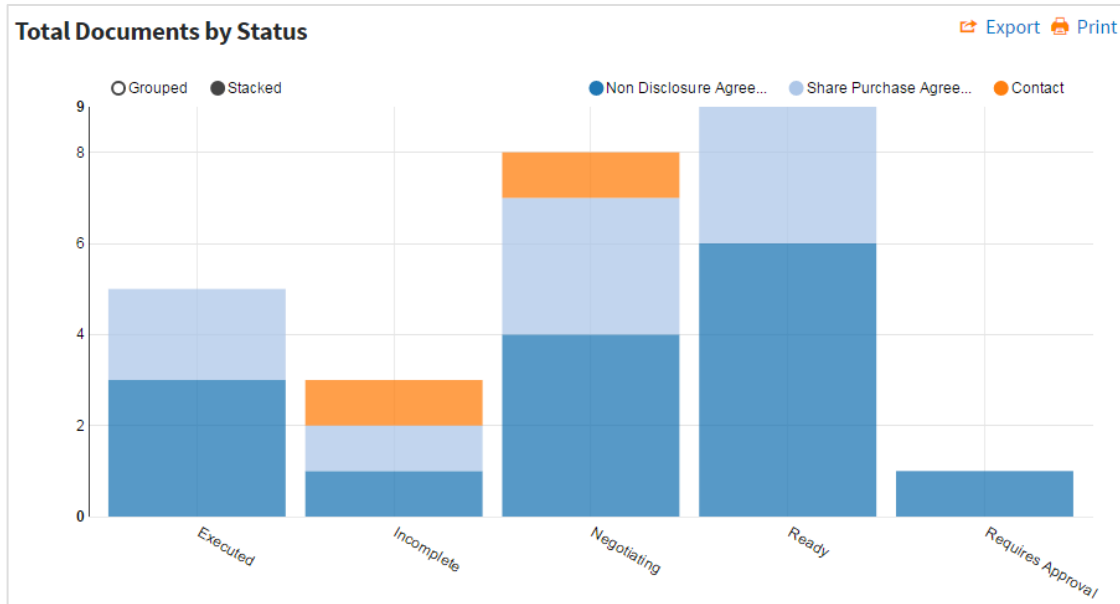**4 status(es) added**

By Date
[1/13/2017]

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

[**Run Report**]

The report will contain a graph and a table with the data.

The graph demonstrates how many negotiation tasks have been in particular statuses by the selected date, broken down by template. You can toggle the graph view using Grouped/ Stacked control.
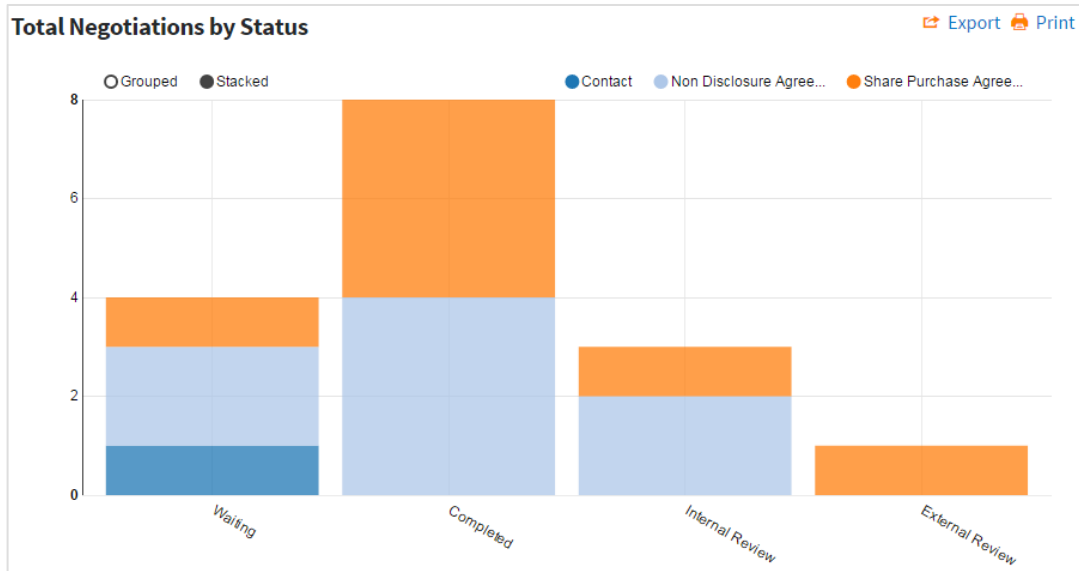
The table contains filterable representation of the same data. You can collapse or expand the sections of the table by clicking on a status name. To collapse/ expand the whole table use ▸ Expand and ▾ Collapse buttons.

Template	Number of Documents
Completed ▾	
Non Disclosure Agreement	4
Share Purchase Agreement	4
Total:	**8**
External Review ▸	
Internal Review ▸	
Waiting ▸	

3.2.8. Average Negotiation Cycle Time

The Average Negotiation Cycle Time report represents the average duration of the negotiation tasks for documents, created from the selected templates, broken down by time increments.

To build the report:

1. Set input parameters for the report
    a. **Report Category**: Distribution report
    b. **Report Type**: Average Negotiation Cycle Time
    c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
    d. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
    e. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
    f. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category

| Distribution report ▾ |

Report Type

| Average Negotiation C ▾ |

Parameters

Templates

✚ Add Templates

23 template(s) added
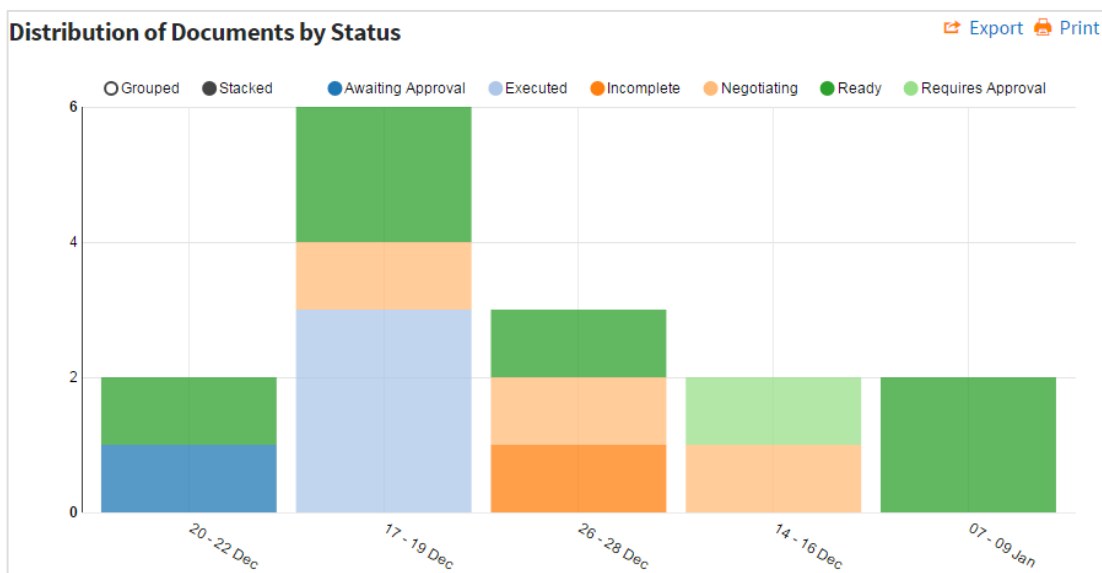
Period

| Last 30 days ▾ |

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

| **Run Report** |

The report will contain a graph and a table with the data.

The graph demonstrates the longest, shortest and average duration of the negotiation per template basis for a specific time increment. Hover over the average value to see the name of the template.

The report table contains average durations of the negotiation (rounded up, in days) for the time increments, broken down by template name. You can collapse or expand the sections of the table by clicking on a time period.

3.2.9. Time at Current Status

The Time at Current Status report illustrates, how many documents are now in the selected statuses and for how long.

To build the report:

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1. Set input parameters for the report
   a. **Report Category**: Distribution report
   b. **Report Type**: Average Negotiation Cycle Time
   c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
   d. **Statuses**. Select the document statuses you are interested in or choose all of them by clicking ✚ Add Statuses
   e. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
   f. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category

[Point in Time ▼]

Report Type

[Time at Current Status ▼]

Parameters

Templates
✚ Add Templates

4 template(s) added

Statuses
✚ Add Statuses

8 status(es) added

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

Run Report

The report will contain a graph and a table with the data. Each value in the report illustrates, how many documents are currently in a particular status for the indicated time period (1 day, 2 days … >4 weeks).

Status	1 Day	2 Days	> 2 Days	> 1 Week	> 2 Weeks	> 3 Weeks	> 4 Weeks	Grand Total
INCOMPLETE	-	-	-	-	1	-	2	**3**
NEGOTIATING	-	-	-	-	2	1	5	**8**
EXECUTED	-	-	-	-	-	3	2	**5**
READY	-	-	2	-	2	3	2	**9**
REQUIRES APPROVAL	-	-	-	-	-	-	1	**1**
Grand Total	**0**	**0**	**2**	**0**	**5**	**7**	**12**	**26**

Time at Current Status   ↗ Export   🖨 Print

By clicking the value in the report table, you can view the corresponding list of Documents.

3.2.10. Total Age of Documents by Status

This report shows the age of the documents and how many of them are now in the selected statuses.

To build the report:

1. Set input parameters for the report
   a. **Report Category**: Distribution report
   b. **Report Type**: Total Age of Documents by Status
   c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
   d. **Statuses**. Select the document statuses you are interested in or choose all of them by clicking ✚ Add Statuses
   e. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
   f. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category

| Point in Time ▾ |

Report Type

| Total Age of Documen ▾ |

Parameters

Templates

✚ Add Templates

4 template(s) added

Statuses

✚ Add Statuses

8 status(es) added

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

Run Report

The report will contain a graph and a table with the data. Each value in the report illustrates, how many documents are currently in a particular status, and how long ago they have been created (1 day, 2 days … >4 weeks).

Total Age of Documents by Status   ↗ Export   🖶 Print

Status	1 Day	2 Days	> 2 Days	> 1 Week	> 2 Weeks	> 3 Weeks	> 4 Weeks	Grand Total
INCOMPLETE	-	-	-	-	1	-	2	**3**
NEGOTIATING	-	-	-	-	1	2	5	**8**
EXECUTED	-	-	-	-	-	1	4	**5**
READY	-	-	2	-	1	2	4	**9**
REQUIRES APPROVAL	-	-	-	-	-	-	1	**1**
Grand Total	**0**	**0**	**2**	**0**	**3**	**5**	**16**	**26**

By clicking the value in the report table, you can view the corresponding list of Documents.

3.2.11. Total Approver Activity

This report shows the list of a chosen approver's tasks, both completed and waiting.

The report can be built for any period, which ends at the current date.

To build the report:

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1. Set input parameters for the report
   a. **Report Category**: Point in Time
   b. **Report Type**: Total Approver Activity
   c. **Approvers Scope**: by Users/ Groups. Depending on the chosen value, you will be able to specify either an individual approver or an approvers' group, for which the report should be built
   d. **Approver**. Add individual approver or an approvers' group by clicking
      ✚ Add Approvers
   e. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify the Start Date. The End Date is always a current date.
   f. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
   g. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category

| Point in Time ▾ |

Report Type

| Total Approver Activity ▾ |

Parameters

Approvers Scope

| By Users ▾ |

✚ Add Approvers

1 approver added

Period

| Last 30 days ▾ |

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

Run Report

The report will contain a graph and a table with the data.

The graph demonstrates, how many approvals are associated with the chosen approver/ approver's group, broken down by their status (Waiting, Approved, Rejected).

Total Approver Activity   ⤴ Export 🖶 Print

● Waiting ● Approved

Waiting

6
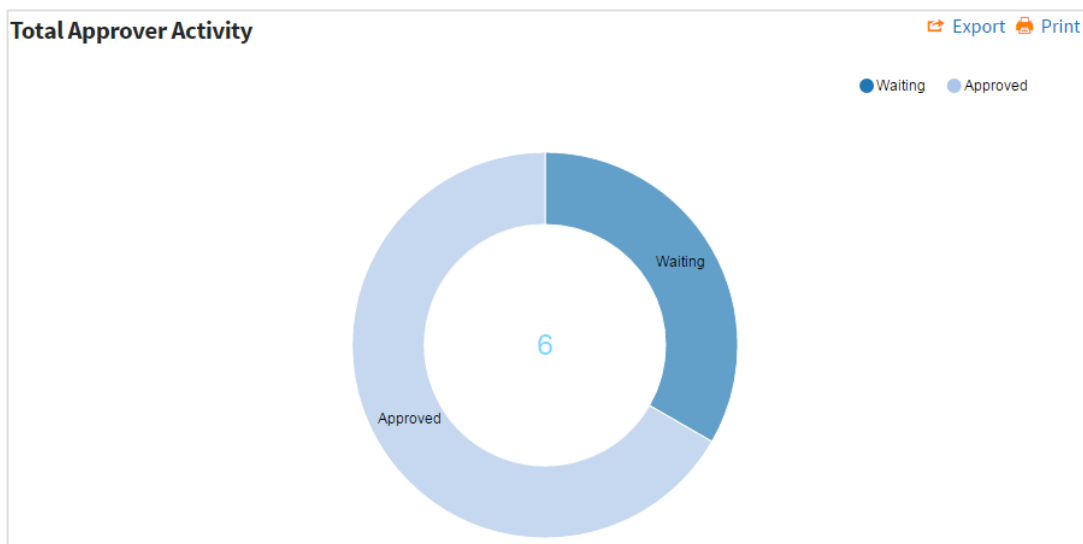
Approved

The report table contains the same data. Chosen approver/ approvers' group is set as a primary approver for approvals in the 'Waiting' status.

	Document	Approval Step	Approver	Approval Result	Date
	NDA for Corboda	Legal		Waiting	12/23/2016
	NDA for Corboda	Finance		Waiting	12/23/2016
	NDA for Corboda	Legal	ekaterina.slisenko@tr.com	Approved	12/23/2016
	NDA for f	Approval	ekaterina.slisenko@tr.com	Approved	12/20/2016
	NDA for r	Approval	ekaterina.slisenko@tr.com	Approved	12/20/2016
	NDA for test	Approval	ekaterina.slisenko@tr.com	Approved	12/20/2016

You can view the Documents under approvals by clicking on the Document names.

3.2.12. Average Approval Cycle Time by Template

This report represents the average duration of the approvals for documents, created from the selected template, broken down by time increments.

To build the report:

1. Set input parameters for the report
    a. **Report Category**: Distribution report
    b. **Report Type**: Average Approval Cycle Time
    c. **Template**. Select the template you are interested in from the dropdown list.
       This report can be built for a single template only, as the set of approval steps may differ for different templates.
    d. **Approval steps**. Select the approval steps you are interested in, or select all of them by clicking ✚ Add Approval steps
    e. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
    f. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
    g. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

The report will contain a graph and a table with the data.

The graph demonstrates the longest, shortest and average duration of the approval per approval step basis for a specific time increment. Hover over the average value to see the name of the approval step.

Reports

Report Category

[Distribution report ▾]

Report Type

[Average Approval Cycl ▾]

Parameters

Template

[Non Disclosure Agreer ▾]

Approval steps
✚ Add Approval steps
9 approval step(s) added

Period

[Last 6 months ▾]

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

[**Run Report**]
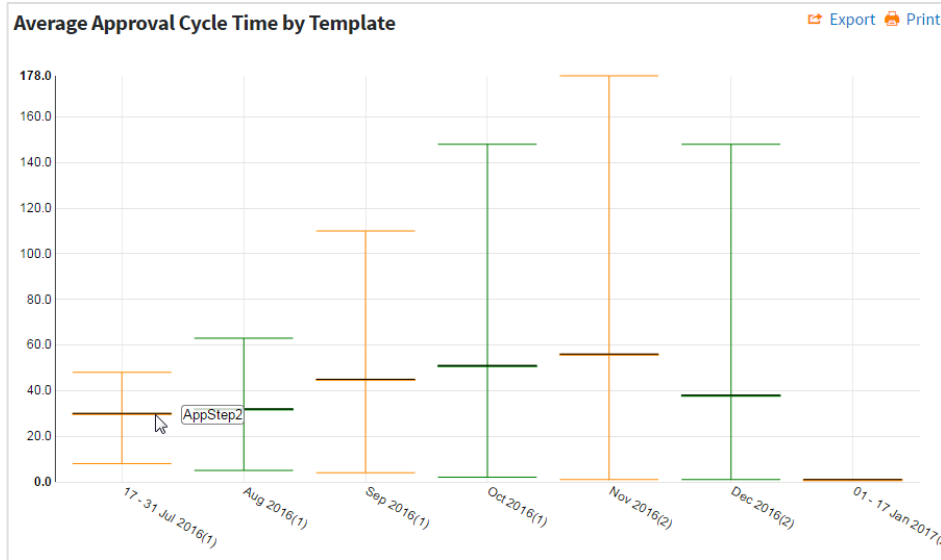
The report table contains average durations of the approval steps (rounded up, in days) for the time increments, broken down by approval steps. You can collapse or expand the sections of the table by clicking on a time period.

3.2.13. Average Signature Cycle Time

This report demonstrates how long it takes to get the signature for documents, created from the selected templates, broken down by time increments.

To build the report:

1. Set input parameters for the report
    a. **Report Category**: Distribution report
    b. **Report Type**: Average Signature Cycle Time
    c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
    d. **Signature**. Select the type of the signature you are interested in.
        If 'DocuSign Signature' is chosen, the average signature cycle time will be calculated only for the documents, e-signed with DocuSign.
        If 'Both Manual and DocuSign Signature' the average signature cycle time will be calculated for all documents regardless the signature type.
    e. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
    f. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
    g. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

The report will contain a graph and a table with the data.

The graph demonstrates the longest, shortest and average duration of the signature cycle per template basis for a specific time increment. Hover over the average value to see the name of the template.

The report table contains average durations of the signature cycle (rounded up, in days) for the time increments, broken down by templates. You can collapse or expand the sections of the table by clicking an increment's name.

3.2.14. Average Status Cycle

This report demonstrates the average duration of the transition between two chosen contract statuses for the selected templates.

To build the report:

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1. Set input parameters for the report
    a. **Report Category**: Distribution report
    b. **Report Type**: Average Status Cycle
    c. **Templates**. Select the templates you are interested in, or choose all of them by clicking ✚ Add Templates
    d. **From Status.** Choose the first contract status of the transition you are interested in.
    e. **To Status.** Choose the second contract status of the transition you are interested in.
       Example on the right will calculate the average duration of the transition between the 'Requires Approval' and the 'Ready' status.
    f. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
    g. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
    h. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category

[Distribution report ▼]

Report Type

[Average Status Cycle ▼]

Parameters

Templates

✚ Add Templates

1 template(s) added

From Status

[Requires Approval ▼]

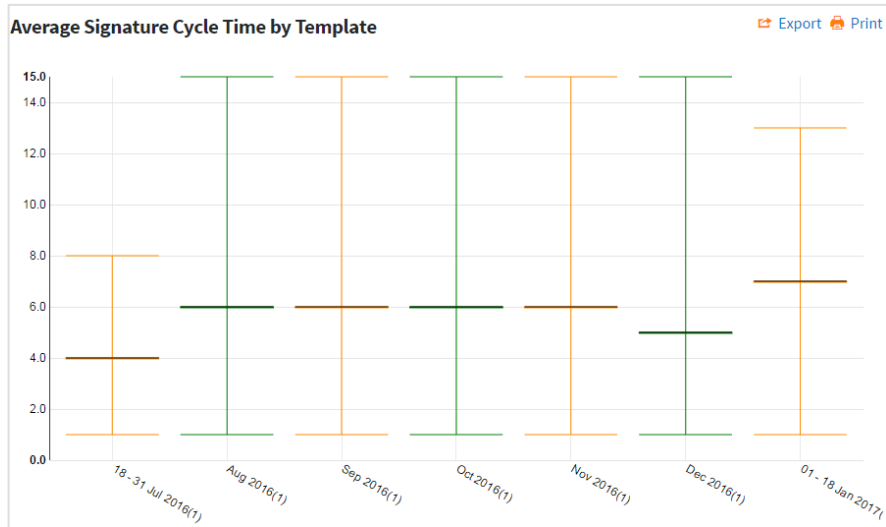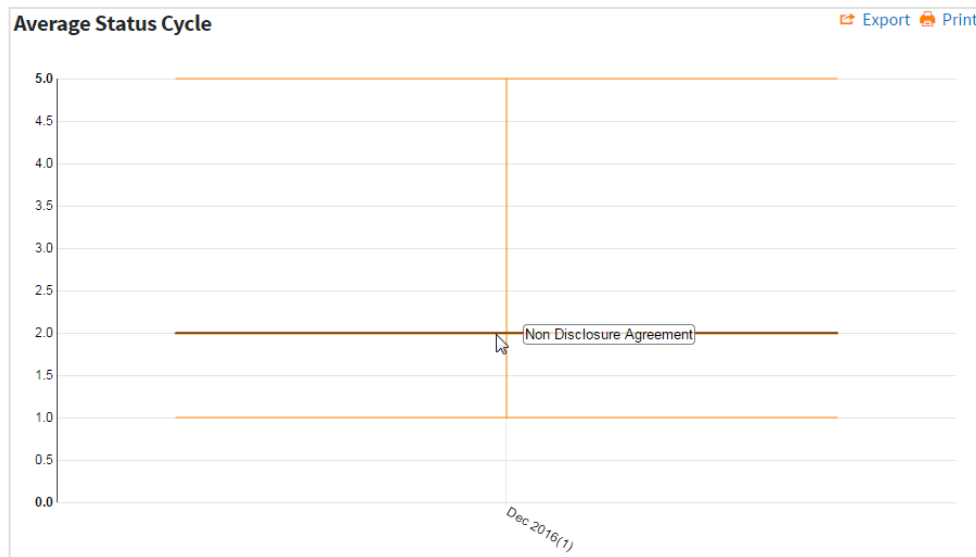To Status

[Ready ▼]

Period

[Last 6 months ▼]

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

[**Run Report**]

The report will contain a graph and a table with the data.

The graph demonstrates the longest, shortest and average duration of the transition between two chosen statuses per template basis for a specific time increment. Hover over the average value to see the name of the template.

Average Status Cycle   ⤴ Export 🖶 Print

Non Disclosure Agreement

Dec 2016(1)

The report table contains average durations of the transition between two chosen statuses (rounded up, in days) for the time increments, broken down by templates. You can collapse or expand the sections of the table by clicking on a time period.

3.2.15. Distribution of Documents by Template Version

The Distribution of Documents by Template Version report illustrates the usage of the different versions of the chosen template.

To build the report:

1. Set input parameters for the report
    a. **Report Category**: Distribution report
    b. **Report Type**: Distribution of Documents by Template Version
    a. **Template**. Select the template you are interested in from the dropdown list.
        This report can be built for a single template only.
    c. **Period**. Select the period from the list of pre-set periods available from the dropdown list. If you need to choose a specific period, select 'Custom period' value and specify Start Date and End Date
    d. **Exclude Suspended Documents**. Select this checkbox if you want to exclude the documents marked as 'Suspended' from the report (see section 24.4 for more information about suspending a document)
    e. **Exclude Deleted Documents**. Select this checkbox if you want to exclude deleted documents from the report
2. Click Run Report

Reports

Report Category

[Distribution report   ▾]

Report Type

[Distribution of Docum ▾]

Parameters

Template

[Non Disclosure Agreer ▾]

Period

[Last 6 months   ▾]

☐ Exclude Suspended Documents

☐ Exclude Deleted Documents

[**Run Report**]

The report will contain a graph and a table with the data.

The graph demonstrates how many documents have been created from the particular version of the chosen template during the time increment, broken down by the template version. You can toggle the graph view using Grouped/ Stacked control.
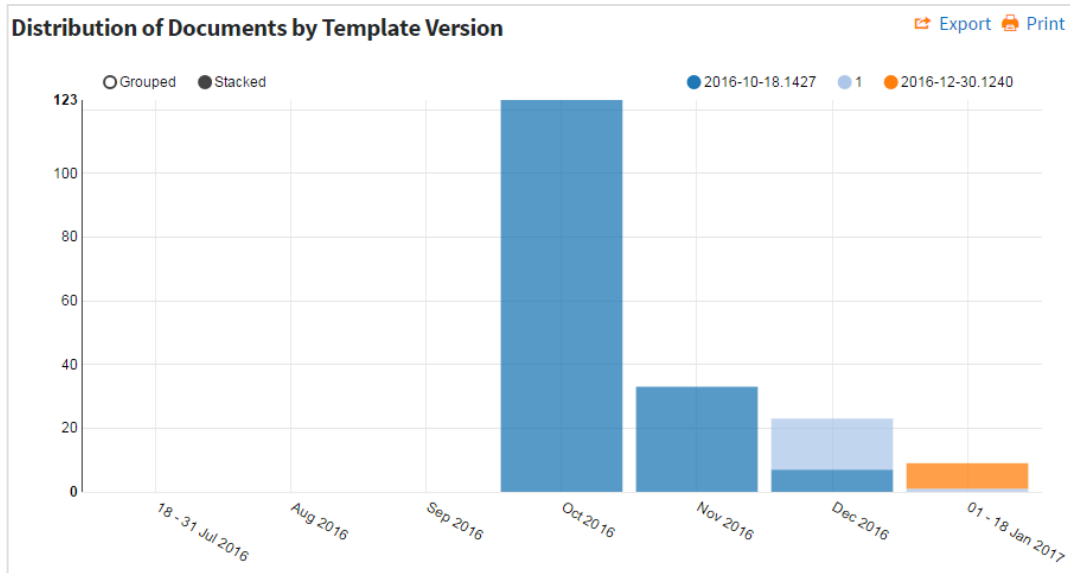
The report table contains the same data. You can collapse or expand the sections of the table by clicking on a time period.

By clicking the value in the "Number of Documents" column you can view the corresponding list of Documents created from a particular template version during the defined time period.

3.3. Saving Process Reports

It is possible to save a report with a unique name which will save the set of input parameters quick access to them at a later time. To save a set of input parameters for a report:

1. Once a report has been run, click 📌 Save Report
2. Enter a unique name for the set of input parameters. The default name is "Report Type (Period)". This can be changed if required.
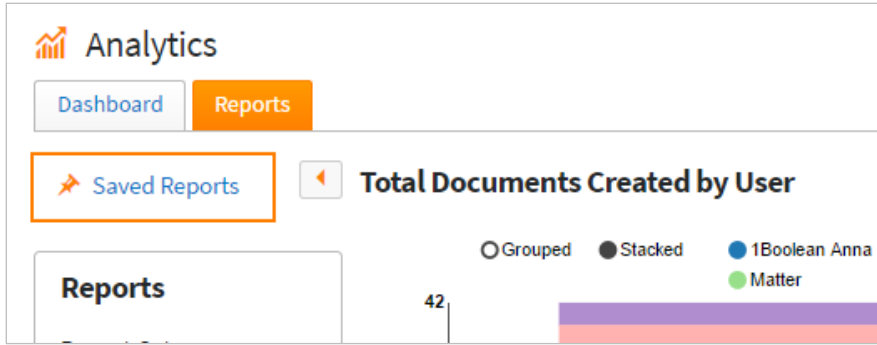

To access the saved reports, click "Saved Reports" option on the Reports tab to see a list of saved reports – your own saved reports and/or reports saved by other Administrators

Click on the name of a report to run the report.

3.4. Viewing Recent Reports

Administrators can view a list of the last 10 reports that have been run by all Administrators. To view the recent reports:

1. Click "Saved Reports" option on the Reports tab
2. Choose "Recent Reports"

To run a recent report, click on the name of the report.

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3.5. Downloading Process Reports

Administrators can download MS Excel or PDF versions of each report.

To get the MS Excel version of the report click on the ↪ Export button on the page of the report.

To get the PDF version of the report click on the 🖶 Print button on the page of the report.

3.6. Reports in Admin Settings

Admin Settings in Contract Express also contains two simple usage reports under the 'Reports' tab.

Year:

2014 ▼

Month:

August ▼

Report	
Templates by popularity	📋 View
Generated document sets	📋 View

3.6.1. Templates by popularity

Select a month and year to show the total number of generations for each document set in that timeframe.

3.6.2. Generated document sets

Select a month and year to display, for each user who has generated documents, the number of generated for each kind in that timeframe.

3.6.3. Generate Chargeable Data Report

'Download Charges' generates an xml file list of the documents created for the selected timeframe. The primary function for this is to assist administrators operating on a 'pay-per-generation' basis.

📄 Download Charges

3.6.4. Downloading Reports

'Downloading Data' permits Administrators to download (in Excel format) the data generated for the selected timeframe. This will show the generated document sets (displaying for each user who has generated documents the number they've generated).

📄 Download Data

4. Welcome Screen

The Welcome Screen can be enabled or disabled for viewing by the user; by default it is enabled. Where enabled by the individual user (under My Account), it appears to the user after logging in. It can contain a video, images, text and links.

4.1. Accessing the Welcome Screen

The Welcome Screen is accessible either after logging in (where this is enabled), or by clicking on the interrogation mark at the top of the screen.

❓

4.2. Customizing the Welcome Screen

This is done through the Welcome tab in the Admin Settings. It is possible to add text, up to 10 custom links, upload locally-saved images, and reference a video that is hosted on a video sharing website.
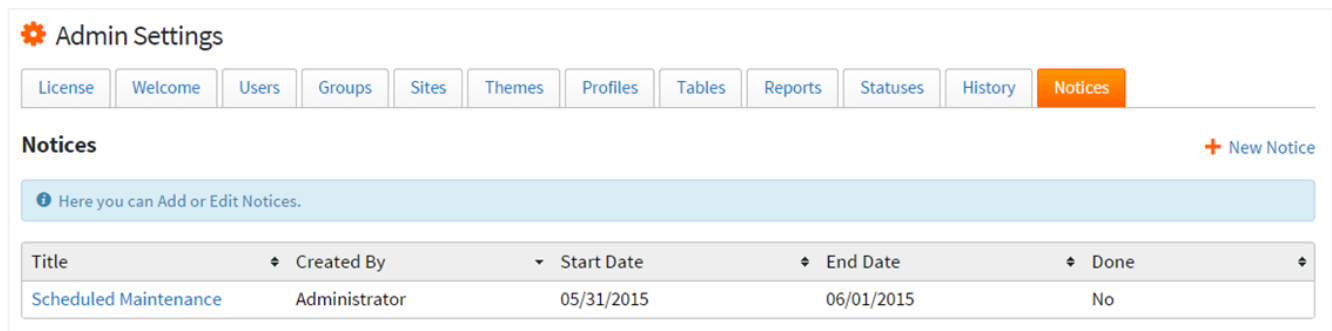
To add a video, ensure you use the link provided by the host website for embedding (this begins with: \\www.).

5. Notices

Notices enable license space administrators to set up, for example, notice of downtime. The use of notices has to first be set up in your Contract Express deployment configuration, see the Enterprise Installation Manual for more details.

Once Notices have been enabled, the Administrator has access to them through the Notices tab.

5.1. Creating a Notice

Click 'New Notice' to start the creation of a Notice. Note that a notice is active as soon as it is created and does not depend on the Start Date.

Notice Title: this will be used as the notice header.

Description: use this for the main body of the notice.

Estimated Start/End Dates: use these to tell the users when the e.g. maintenance will be taking place.

5.2. Display of Notices

Notices are displayed to users on screen before the Welcome Page. Clicking 'Remind me Later' will mean the notice re-appears the next time the user logs in. If the user does not click this, the notice will not be displayed again. Users cannot continue to the site without acknowledging the notice by clicking 'Continue'.

A user can also go to their account page, and click View Current Notices to see all current notices.

Once a Notice no longer needs to be displayed, an Administrator can remove it by going to that particular Notice, and clicking 'Mark as Done'. The administrator will be asked for a Closure Reason (for administrative purposes), and the Notice will be logged as done. Note that Notices cannot be permanently deleted.

6. Managing Users

Each user in Contract Express is assigned one of four roles. These are described below:

6.1. User Role

Users are able to complete questionnaires and generate documents.

Accessible tabs: Matters *(if configured)*; Documents; Tasks; Contacts *(if configured)*; Admin Settings (cog wheel) - Reports tab only.

6.2. Author Role

Authors are able to upload, test and control permissions on templates. They can share live templates with users, who can then generate documents using them. They can also perform all the actions available to Users.

Accessible tabs: Matters *(if configured)*; Documents; Tasks; Templates; Contacts *(if configured)*; Admin Settings (cog wheel) – Reports, Profiles, Tables and Locales tabs only.

6.3. Admin Role

Admins are able to add and manage users, groups and sites. They can also edit profiles and view monthly reports on generated document sets. They can also perform all the actions available to Authors and Users. In addition, they have administrative permissions over all templates and documents and can view all the documents within the license space within.

Accessible tabs: Matters *(if configured)*; Documents; Tasks; Templates; Contacts *(if configured)*; Admin Settings (cog wheel).

6.4. Guest Role

Guests are invited to complete individual questionnaires, either through an invite or a public URL. They are unable to see the dashboard. This is only available in sites that have been set up with Forms Based Authentication and where the License space allows Guests.

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6.5. Template permissions

These are applied to templates and affect how they can be used. Permissions can be applied to users, groups or roles. Users, being unable to access the templates tab, will never be able to make use of Write or Full permissions on a template, and Admins will always have access to all functions. The Author who uploaded the template is automatically granted Full rights over that template as they are considered to be the 'Owner' of the template. The template permissions automatically applied rely upon the setting of Template Access in Admin Settings. See section 2.1.12 for more details.

The None option is used to expressly remove permissions from a user or group. For example, by placing a user with an Access Level of None, above a group or role that contains that user, any access granted by virtue of that group or role will not be applied to that user.

Where multiple entries give a user more than one Access Level, the occurrence highest in the access list will take precedence.

	Read	Write	Full
View properties	Yes	Yes	Yes

Launch Questionnaire/Generate Documents (including testing)	Yes	Yes	Yes
Download Template	No	Yes	Yes
Delete Template	No	Yes	Yes
Edit Template Properties	No	Yes	Yes
Upload Template	No	Yes	Yes
Change Template visibility	No	Yes	Yes (all templates)
Share Templates	No	No	Yes (all templates)

6.6. Document permissions

These are applied to Documents which have been generated. For these permissions to apply, the user in question must have at least Read permissions on the template. As with Template permissions, the Admin role always has Full permissions.

The None option is used to expressly remove permissions from a user or group. Where multiple entries give a user more than one Access Level, the occurrence highest in the access list will take precedence.

	Read	Write	Full
View properties	Yes	Yes	Yes
Download Document as PDF	Yes	No	No
Download Document as Locked docx	Yes	No	No
Download Document as .docx	No	Yes	Yes
View Questionnaire	Yes (read-only)	Yes	Yes
Edit Questionnaire	No	Yes	Yes
Delete Document	No	Yes	Yes
Edit permissions	No	No	Yes

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Request/Revoke Negotiations	Yes	Yes	Yes
Clone Document	Yes	Yes	Yes

6.7. Adding a User to Contract Express

Should you have unallocated users remaining in your license space, you may invite further users into the system. How this is done will vary depending on your authentication method.

6.7.1.Inviting a User where using Forms Based Authentication

Open the Internal Users tab in Admin Settings and click the New Internal User button.

You will be prompted to enter the user's name, e-mail address and assign a Role. Optionally you can add the user to an existing group from here.

Once you have completed these, choose whether an email invitation should be sent to the new users by selecting the "Send invitation email to new users" checkbox. If this is selected then you will have the option to add any additional information to the email. Once you are happy click OK to add the user. If the user is supposed to receive an invitation email they will receive a link to join, with 48 hours to follow through on the invitation before the link expires.

6.7.2.Inviting a User where using Active Directory

In Windows Authenticated mode, the Admin can begin to share contracts and templates with users before they have even signed in for the first time. So long as the users are in the Active Directory or part of a group in the Active Directory, they are automatically a part of the site. They will not appear in the User list until they sign in for the first time, however the Admin may share contracts and templates with them through the usual methods.

When sharing something with a user/group who has not yet signed in for the first time, the Admin will need to type the first three letters of that user's username/group name in order for the system to find and recognise it.

The user(s) will then have access to everything that has been shared with them automatically upon first login.

If you wish to configure a user's permissions in advance then this can either be done by assigning Role based permissions (see section 18.9) or by typing the User ID into a group and assigning the group template permissions.

Note that where using Mixed Mode Authentication, it is possible to invite users through the New User button. For more information please refer to the Contract Express Enterprise Installation Manual.

6.8. Adding multiple Users to Contract Express

It is possible to upload multiple users into Contract Express at a time using a CSV file. The CSV file must contain certain columns which Contract Express will use to add each user

6.8.1.CSV file for importing multiple users into Contract Express

Contract Express provides a sample file that can be used for importing multiple users. To access this file, navigate to Admin Settings **->** Internal Users **->** Import Users. This will display a modal with the option ⬇ Download sample file Clicking on this will download a CSV file that can be filled out and used when importing users.
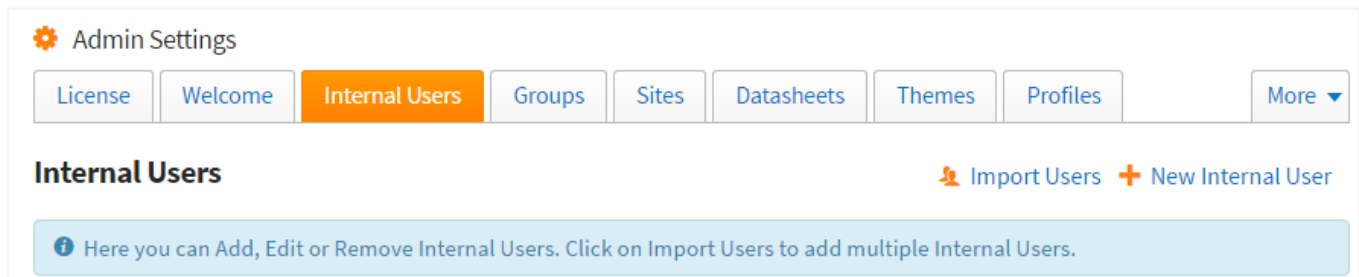
The file contains 3 columns:

- Full name: This is optional. This is the name that will be used if an invitation email will be sent out
- Email: **Compulsory**. This will be used to create a new user. The email address must have the correct email address format
- Role: This is optional. This is the role that will be assigned to the user when created. If this does not have a value the user will be created as a User by default

Although it is only the email column that requires an entry, all 3 columns must exist in the CSV file when importing users otherwise Contract Express will throw an error.

It is possible to import users using a CSV file which is not based on the sample file but the file must contain the columns Full name, Email and Role.

6.8.2.Importing multiple users into Contract Express

Once you have a CSV file which contains the relevant information (see 6.8.1 for details about the CSV file for importing), multiple users can be created by clicking on the "Import Users" option on the Internal Users tab in Admin Settings.

This will open a modal where you can select the CSV file to use for importing users by clicking on "Choose File".

You can also choose whether to send an invitation email to all users by selecting the "Send invitation email to users" checkbox. If this is selected then you will have the option to add any additional information to the email. Once you are happy click Import to create the users. If the users are supposed to receive an invitation email they will receive a link to join, with 48 hours to follow through on the invitation before the link expires.

6.9. Editing a User's role

A user's Role can be changed at any time by clicking on their current role in the Internal Users tab.

A pop-up will open, with the various Roles available from a drop-down menu.

6.10.   Deleting a User

Deleting a user is done by ticking the box next to their name and then clicking on the Delete button which will appear at the top of the Users tab.
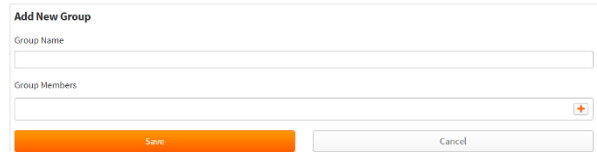

7. Managing Groups

Groups can be used in Contract Express to easily assign permissions over templates and easily control access to Sites.

7.1. Creating a Group

To create a new Group, open the Groups tab and press the New Group button.

This will open a page enabling you to name the Group and add users to it. Note that the Group name cannot be the same as the name of any Sites (see section 8 below). The users need to have already been added via the Internal Users tab or if using a Windows Authenticated site, should be a part of the Active Directory. For Active Directory users, typing the first three letters of their username will initiate the search.

It is also possible to add users from an already established Group by using the drop-down menu, selecting Group and entering the name of the group; this includes groups that were created as part of a Site. If using a Windows Authenticated site, typing the first three letters of the Active Directory group will initiate the search.

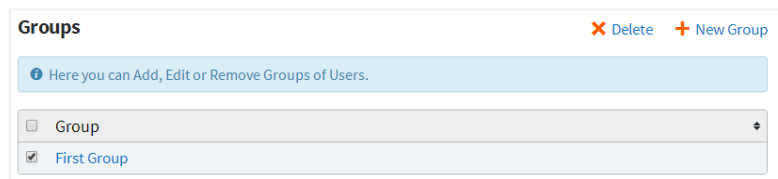Press the Save button to confirm creation of the Group.

7.2. Editing a Group

Editing a Group is done by clicking on the Group name in the list of Groups. It is not possible to edit the Group Name, however it is possible to amend the Group Members.

To edit the Group associated with a Site, you will have to do so by going to the Sites tab, and editing the members within the appropriate Site.

7.3. Deleting a Group

1) Click the tick box next to the sub-site's name. Press the newly-appeared 'Delete' button, and confirm the deletion.

2) Or, open the desired Group by clicking on its name. Then use the 'Delete Group' button in order to delete the selected Group.

8. Sites

Sites can be set up even if you do not have a client license to activate it but you will not be able to use the site and add users until the site has been activated by assigning a client license to it. Contact contractexpress-support@thomsonreuters.com if you are unable to assign licenses to your sites but feel like you should. Below are the steps required in order to set up and start using Sites:

1. Obtain a license file that allows you to use sites and upload it to Contract Express via the License tab in Admin Settings if you have not done so already.
2. Create a new site (see section 8.1)
3. Activate the site by assign a license (see section 8.2)
4. Add users and/groups to the site (see sections 8.6, 8.7 and 8.8)

8.1. Creating a site

To create a new Site, open the Sites tab and press the New Site button; you will then be asked for a Site Name. Note that the Site name cannot be the same as the name of any existing Groups (see section 7 above) and cannot be changed once you continue. Click Create.

✚ New Site

The site will have been created and you will be directed to an editing page for the site. On this page you can add a Description to the Site (which will be visible only by Administrators) and customize the Welcome Screen (for that sub-site only).

Edit Site   📌 Assign License ✖ Delete Site

Site Name

tr

Site Description

Theme

Built-In ▾

Document Deletion

On Demand ▾

Site Members

☐	Username	Display Name	Date Added	Role
No users				

Add New Users

Email Address	Full Name	Role	
			✚

Site Groups

✚ New Group

☐	Group
No groups	

8.2. Activating a site

Once a site has been created, it can be activated by selecting 📌 Assign License on the edit page for the site. A modal will be displayed which displays a list of the licenses that are available that can be associated to the site. For each license you can see the number of users that are allocated to the site and the expiry date for each license.

Select the appropriate license for the site and click "Assign". Once a license has been assigned to the Site, you will see a license expiry section on the edit page.

8.3. De-activating a Site

You may have site licenses that are currently assigned to a Site and you need to re-assign that site license to another Site. In this case you will have to unassign the site license from the Site it is currently assigned to. To do this, navigate to Sites and select the Site that you want to de-activate. Select the option ✕ Unassign License then select Yes to confirm. This will de-activate the Site and free up the site license so that it can be used again.

Note that de-activating a Site will retain all settings, including users and groups, but site users will not be able to log in to the Site until it is activated.

8.4. Customizing a Site Theme

Customizing a sub-site theme is done via the Themes tab (see section 0). All Themes created will then appear in the drop-down list when creating the sub-site. Click Save to save your settings.

8.5. Document deletion for a Site

Whilst it is possible to set the Contract Deletion settings for the entire license space, it is also possible to set it for individual sub-sites via the drop-down menu. The available options are Automatic and On Demand for more information on this functionality see section 2.1.10. Click Save to save your settings.

8.6. Adding a new user to a Site

To invite new users to the Site click the plus button in the "Add New Users" grid and enter the users email address and full name. You can also select whether the user will have the role User or Author within the site. Click on the plus button to add more users. Click Save to add the new users to the site.

For Windows Authenticated instances, typing the first three letters of the username or Active Directory group will initiate a search.

8.7. Adding multiple users to a Site

8.7.1. CSV file for importing multiple users into a Contract Express Site

Contract Express provides a sample file that can be used for importing multiple users. To access this file, navigate to Admin Settings **->** Sites **->** Import Users. This will display a modal with the option ⬇ Download sample file . Clicking on this will download a CSV file that can be filled out and used to add multiple users.

The file contains 2 columns:

- Full name: This is optional. This is the name that will be used if an invitation email will be sent out
- Email: **Compulsory**. This will be used to create a new user. The email address must have the correct email address format

Although it is only the email column that requires an entry, both columns must exist in the CSV file when importing users otherwise Contract Express will throw an error.

It is possible to import users using a CSV file which is not based on the sample file but the file must contain the columns Full name and Email.

8.7.2. Importing multiple users into a Contract Express Site

Once you have a CSV file which contains the relevant information (see 6.8.1 for details about the CSV file for importing), multiple users can be created by clicking on the "Import Users" option on the Sites tab in Admin Settings.
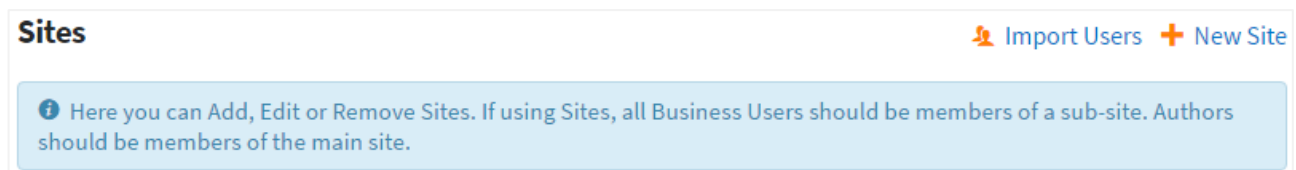
This will open a modal where you must select the site to add the users to and select the CSV file to use for importing users by clicking on "Choose File".

Import New Users   ✕

ℹ Here you can add multiple users to a Site by uploading a .csv file. A sample .csv file can be downloaded by clicking on the option below. Note that the file must contain the following columns: Full Name, Email.
Within the file, each user should be added as a new row and must contain a valid email address. The column Full Name is optional. Note that if the file contains a column called Row, this will not be used and all users will be added with the Role User.
Once the file has been uploaded, select the Site where the users should be added and you can choose whether to send an invitation email to each user. Note that the invitation email is used to allow users to create a password.

⬇ Download sample file

Select a Site

Select a Site ▾

Import CSV file

Choose File	No file chosen

☑ Send an invitation email to users

Additional Information

[   ]

Import	Cancel

You can also choose whether to send an invitation email to all users by selecting the "Send invitation email to users" checkbox. If this is selected then you will have the option to add any additional information to the email. Once you are happy click Import to create the users. If the users are supposed to receive an invitation email they will receive a link to join, with 48 hours to follow through on the invitation before the link expires.

8.8.Adding a new group to a Site

It is possible to create a new group as part of a Site. These groups can only be viewed and managed within the Site it was created. To add a new group navigate to Sites and select the relevant Site. In the Site Groups section select ➕ New Group then enter the name for the group on the next page.

The group can contain a mix of users within the Site and other groups that exist within the site Click the plus button, select either User/Group from the dropdown menu for that row then type in the beginning of a Group Name or user and the Site will find it and auto fill the rest of the name. For Windows Authenticated instances, typing the first three letters of the username or Active Directory group will initiate a search.

Add New Group

Group Name

HR

Group Members

Group ▾	EMEA	✕
Group ▾	US	✕
User ▾	john.doe@abc.com	✕
User		
Group		✚

Save | Cancel

8.9. Customizing the Welcome Screen for a Site

It is possible to customize the Welcome Screen for a Site which will differ from the Welcome Screen used for the main Site. The different Welcome Screen options will appear for members of that Site in place of the default Welcome Screen and the Welcome Screen configured for the main Site. Click Save to save your settings.

8.10.   Editing an existing Site

Click on the Site name in the Sites tab to open all the options. It is possible to change all but the name of the Site.

8.11.   Deleting a Site

1) Tick the box next to the sub-site's name. A Delete button will appear at the top of the screen. Click this button and confirm the deletion.

2) Or, open the desired sub-site by clicking on its name. Then use the 'Delete Site' button in order to delete the selected sub-site.

✕ Delete Site

⚠ **Deleting a Site will delete all settings and users**
   When deleting a site, note that this will also delete all users and groups within the site.
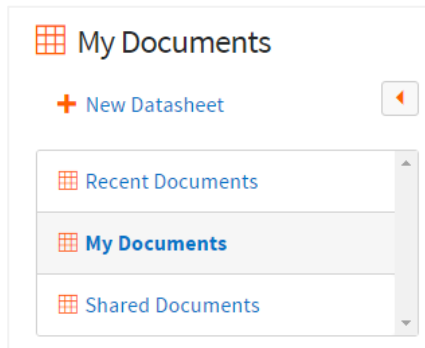
9. Datasheets

Datasheets are views that can be created and customized which allow you to view data captured across all Documents. This gives you the ability to view relevant information easily and quickly across many Documents at once.

By default the Datasheet customization feature is switched off and users will only be able to view and use the built-in Datasheets (My Documents/Shared Documents/Recent Documents).

9.1. Creating a custom Datasheet

To create a new Datasheet, open the Datasheets tab in Admin Settings and press the New Datasheet button. Alternatively, this option is also available on the main Documents and Matters pages above the list of Datasheets.

+ New Datasheet

This will open a page which will allow you to customize the Datasheet.

Name: Enter a unique name for the Datasheet. This will be the display name for the Datasheet. Note that this cannot be a name that is already in use.

Used In: Choose where this Datasheet will be visible. If Matters are enabled, this will be shown as an option.

- **Documents Grid/Matters Grid:** These are the pages which list all Documents or Matters
- **Document Details:** This is the details page of a Document
- **Matter Details:** This is the details page of a Matter

Based On: This option is only available if the Datasheet will be used in the Documents grid or Matters grid. Choose the default sorting and contents of the Datasheet.

- **Recent Documents\Matters:** Sorts the list in descending order of last modified but will not include folders
- **My Documents\Matters:** Sorts the list by name in ascending order and will include folders that belong to a user
- **Shared Matters\Documents:** Sorts the list by name in ascending order and will include folders that have been shared with a user

Sharing: This option is only available to Admin and Author users.

- **Shared:** Datasheet will be available for other users within the site
- **Only me:** Only the user creating the Datasheet will be able to view/use the Datasheet. Note that Matter/Document Details Datasheets <u>cannot</u> be set to Only Me

9.1.1.Adding and removing Columns to a Datasheet

To specify what data will be displayed in the Datasheet you will need to add the relevant data columns using the option.   **+ Add & Remove Columns**

This will open a modal with columns that can be added to the Datasheet.

Add & Remove Columns ✕

ℹ Selecting a template will populate its variables into the list below. Hold Shift/Ctrl to select multiple variables.

Templates

Metadata ▾

Variables

Doc Id (Integer)
Last Modified (Date)
Matter Number (Integer)
Modified By (String)
Name (String)
Previous Status (String)
Sharing (String)
Status (String)
Template (String)

Columns

Save | Cancel

The section on the left will list the variables per Template which are available for adding to the Datasheet and the section on the right lists variables that will be added to the Datasheet. Note that you can only view the variables of one Template at a time.

When you first access the modal you will see a list of metadata variables for a Document/Matter. To view Template variables, click on the Templates dropdown menu and select the desired Template. **Only Templates that you have been granted at least Read access and are set to Live will be listed in this dropdown list.**

Templates

Metadata ▾
Metadata
Matter
Non Disclosure Agreement

To add variables to the Columns section simply select all required variables from the Variables section and click on the '+' button. All selected variables will be listed in the Columns section. There is no limitation on how many times a variable can be added to the Columns section. To add Variables from a different Template, select another Template from the Templates dropdown menu.

⚠ **Ensuring access to items via a Datasheet**
The Name metadata Variable must be added to Datasheets for the Documents/Matters grids as it is required to access a Document/Matter from the grid.

To remove Columns, select the Variables in the Columns section and click on the '-' button.
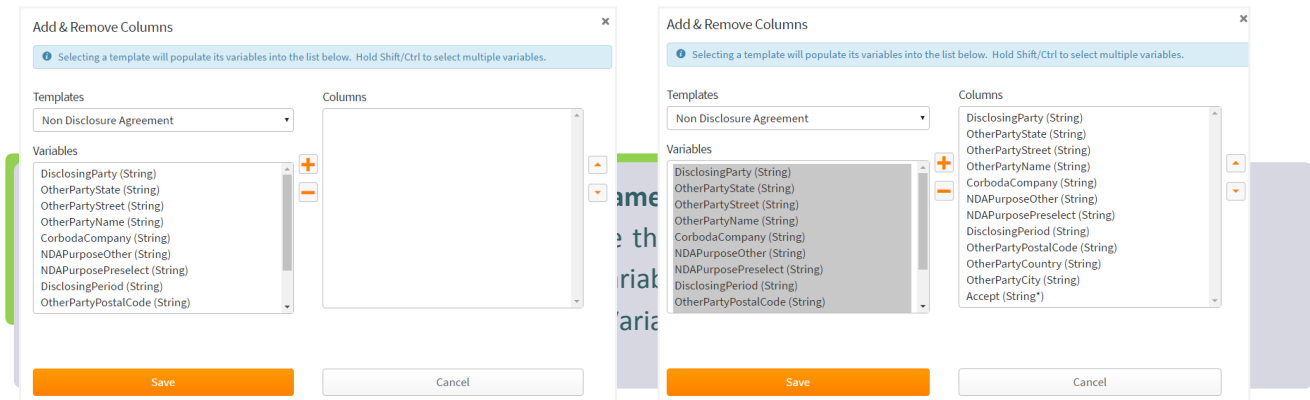
Use the arrow-up and arrow-down buttons to order the columns or this can be done on the Datasheet builder later by dragging and dropping the columns. Once you are happy with the list of Columns click Save to add these Columns to the Datasheet builder.

If a Variable is used in a Repeat you can also specify a specific repeat occurrence of the Repeat in the Datasheet builder (after saving the Columns) by entering the number of the Repeat in the Repeat Context field.

> 💡 **Want to edit a built-in Datasheet?**
> To edit one of the built-in Datasheets (Recent Documents/My Documents/Shared With Me), create a new Datasheet and give it the exact same title as the Datasheet that you wish to edit. This will replace the built-in Datasheet with the new Datasheet.

Press the Save button to finish creating the Datasheet.

9.1.2. Re-ordering Columns in a Datasheet

Columns that have been added to the Datasheet can be re-ordered by dragging and dropping the Columns to the desired location. A mouse click + Shift or a mouse click and Ctrl will select multiple rows.

9.1.3. Applying a default sort order to the Matters/Documents grid

When defining Datasheets for the Documents/Matters grid a default sort order can be applied to the Datasheet. This means that each time the Datasheet is accessed on the Documents of Matters page, the grid will be pre-sorted as defined in the Datasheet. Ad-hoc sorting can still be applied to the grid by clicking on the column headers. To apply a sort order to a Datasheet:

1. Open the Datasheets tab in Admin Settings and press the New Datasheet button
2. Scroll down to the section "Sorting"
3. **First:** this will be the first sort that is applied to the grid. Select a variable or metadata field by clicking on the "…" icon and choose whether to sort in ascending/descending order
4. **Second:** this will be the second sort that is applied to the grid after the first sort has already been applied. Select a variable or metadata field by clicking on the "…" icon and choose whether to sort in ascending/descending order

Click Save to save the Datasheet.

9.1.4. Pre-filtering the Matters/Documents grid

The Documents and Matters grids can be pre-filtered using custom Datasheets. This means that each time the Datasheet is accessed on the Documents or Matters page, the grid will be pre-filtered as defined in the Datasheet. Ad-hoc filtering can still be applied to the grid by clicking on the filter icon on the grid.

To apply filtering to a Datasheet:

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1. Open the Datasheets tab in Admin Settings and press the New Datasheet button
2. Add columns to the Datasheet as outlined in section 9.1.1
3. Scroll down to the section "Sorting" and check the checkbox "Enable filter conditions"
4. Select a variable or metadata field by clicking on the "…" icon
5. Next choose the operator for the condition by selecting the dropdown menu
6. Then enter the value that the Datasheet should be filtered against

If you want to add multiple filtering conditions, click on the green '+' icon to add another row. Another dropdown menu will appear at the end of the first row which allows you to choose whether the conditions should be combined as an 'and' or as an 'or'.

Where there are multiple conditions, they can be grouped together to determine the order in which the filtering is applied. For example, if we wanted to list Documents that satisfy 3 conditions:

(i)   The Document status is not Incomplete
(ii)   The template used for the Document is the "Non Disclosure Agreement"
(iii)   The value given for the variable "OtherPartyCountry" is "United States"

With the above conditions we first want the list of Documents to only display Documents that have been created using the Non Disclosure Agreement that are not in the Incomplete status. Then from that filtered list of Documents, we then want to only display Non Disclosure Agreement Documents that have the value "United States" for the variable "OtherPartyCountry". Defining this in the Datasheet we would:

1. Add a row with "Status" + "Not Contains" + "Incomplete"
2. Add a second row with "Template" + "=" + "Non Disclosure Agreement"
3. Add a third row with "OtherPartyCountry" + "=" + "United States"
4. Select the checkbox for the first and second rows
5. Click on the curly brackets icon to group the first 2 conditions together {}

9.2. Editing a Datasheet

Editing a Datasheet is done by clicking on the Datasheet name in the list of Datasheets. All settings are editable.

9.3. Deleting a Datasheet

To delete a Datasheet, click the checkbox next to the Datasheet's name and click Delete. Alternatively, open the desired Datasheet by clicking on its name. Then use the 'Delete Datasheet' button in order to delete the selected Datasheet.

9.4. Sharing a Datasheet

If you are an Author or Admin user, you will have the ability to create shared Datasheets. Shared Datasheets will be available for all users within the site and subsequent updates will be visible for all users.

9.4.1. Sharing a Datasheet that is used in the Documents/Matters grid

Once the Sharing value of a Datasheet has been set to "Shared", the Datasheet will automatically be available for all users to view.

9.4.2. Sharing a Datasheet that is used on the Document/Matter details page

A Datasheet to be used on the details page of a Document/Matter must be applied to the Template that will be used to create the Document/Matter. Note that a Datasheet for a Document/Matter details page must be set to Shared.

Navigate to Templates and select the appropriate Template - for Matters, this will only ever be the "Matter" Template. On the Template Details tab there will be a field "Datasheet" which contains a list of all Document/Matter details Datasheets. For the Matter template you will only be able to see Datasheets that have the "Used In" field set to "Matter Details". Select the desired Datasheet and this will be applied automatically. Any Document/Matter that is created using this Template will now use the customized Datasheet in place of the built-in Datasheet.
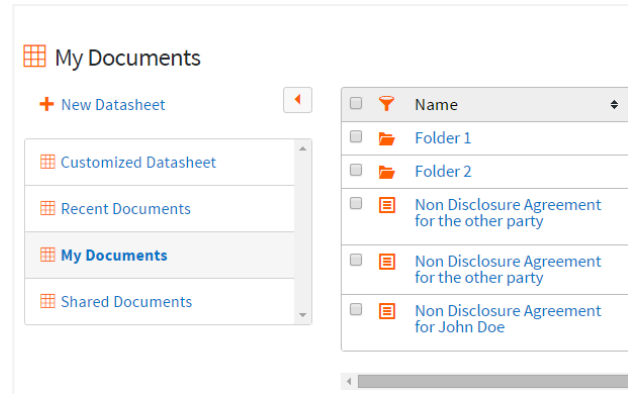

9.5. Viewing Datasheets

9.5.1. Viewing a Datasheet on the Document/Matter details page

To view a details page Datasheet, navigate to the Matter details page or the Document details page of a Matter/Document that was created using the Template in which the Datasheet was applied. The Datasheet can be found in the Overview section at the top of the page.

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9.5.2. Viewing a Datasheet on the Document/Matter grid

The list of Datasheets will be available on the left hand side of the Documents and/or Matters pages. Simply click on a Datasheet to switch views. The columns that were added to the Datasheet will be applied to the Documents/Matters grid.

9.6. Editing Questionnaire values within a Datasheet

It is possible to edit the questionnaire values of a Document straight from within a Datasheet as an alternative to viewing the Document and clicking on Edit Questionnaire. Most columns that are derived from a Template variable are subject to editing as long as that particular variable exists within the Document. Values that are editable will display the editing icon when hovering over the field and all validations that would apply when visiting the questionnaire page will apply within the Datasheet.
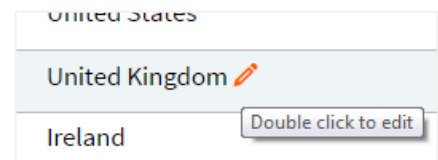
To edit values within a grid Datasheet, simply double click a field and start editing. Once finished, clicking Save will validate any changes and if there are no errors the values will be saved. Click Cancel to discard any changes that have been applied.
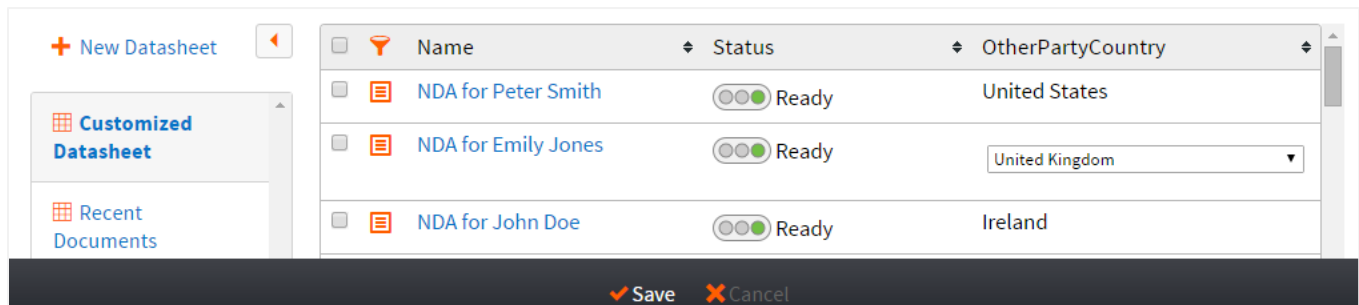
Editing values within a Datasheet on the details page for a Document can also be achieved by double clicking on a data value. See section 22.3.3 for details on editing values within a Datasheet on the Matter details page.

9.7. Exporting Datasheets

To export the data from a Datasheet, click on the Export button in the top left hand corner. This will download the Datasheet as a spreadsheet.

10. Customizing Themes

10.1.   Creating a new Theme

Open the Themes tab and click the New Theme button.

+ New Theme

To create a new Theme, open the Themes tab and press the New Theme button; you will then be asked for a Theme Name. Note that the Theme Name cannot be changed once you continue. Click Create.

The theme will be created and you will be directed to a page enabling you to customize your theme.

10.2.   Editing a Theme

Click on the name of the Theme you wish to edit. You will now be able to amend the details of this theme, the same way that you can create one. Note that the name of the Theme cannot be changed after it is first saved.

10.3.   Applying a Color Scheme to the Theme

While editing the theme you are presented with a series of options to change the colors applied to the web-site. Where these options correlate to is explained in section 10.4 below, this section will detail how to apply those different colors depending on what web-browser you are using.

Chrome / Firefox experience:

By clicking on the chosen color, a Color Editor will pop up.
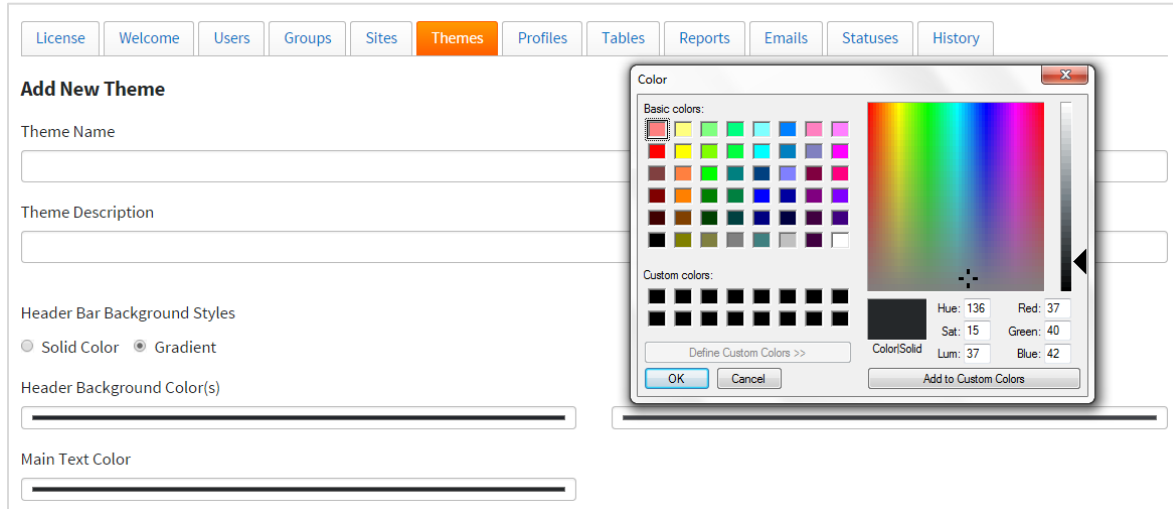
It is possible to simply choose colors via the Gradient on screen and apply them multiple times by using the 'Add to Custom Colors' button.

If you are looking to replicate your own custom colors, but do not know the exact color-codes for them, you may use the Color Editor here in conjunction with the one offered in the Paint application.

Simply take a screenshot of the color you wish to replicate, and open it in Paint.

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Using the color picker tool under the 'Tools' tab, simply click over an area of color for which you wish to know the codes. Then open the 'Edit Colors' box at the far right. This will give you each of the codes for a particular color, which you can then copy into the Color Editor inside Chrome.

IE / Safari experience:

In Internet Explorer or Safari the color selection is done not through a Color Editor, but with HEX Codes, as illustrated below:

This can be used in conjunction with the 'Inspect Element' tool in your browser. This is done by right-clicking an area on the website, choosing 'Inspect Element' and looking into the newly-opened right-hand box, as below:
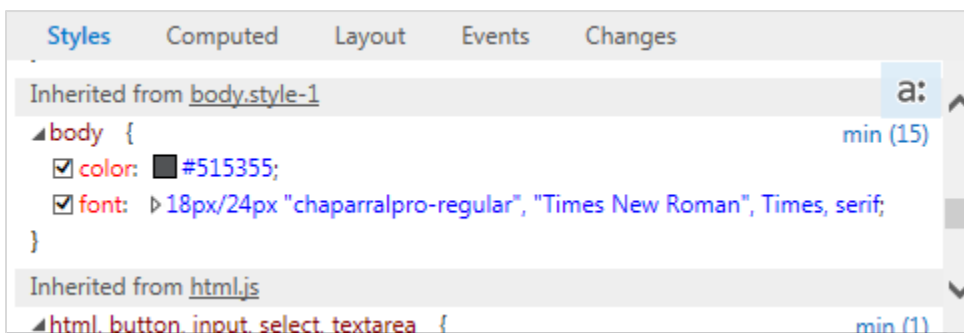
This will give you the HEX code for any block color used on a browsable page.

10.4.   Titles and Colors
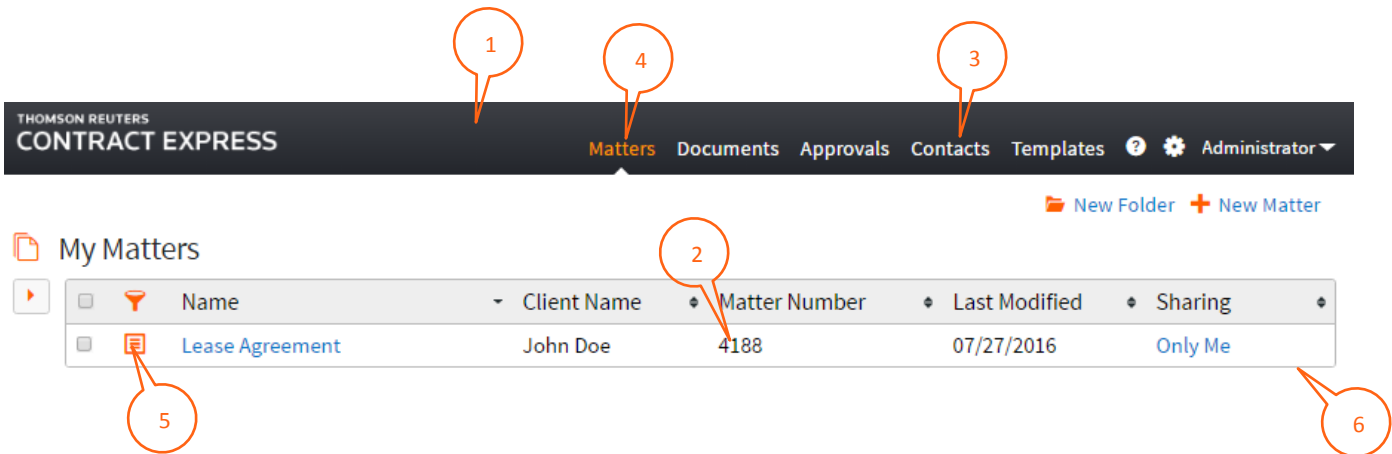
1 – Header Background color(s)

2 – Main Text Color

3 – Top Navigation Link Color

4 – Top Navigation Link Color – highlighted

5 – Icon Color

6 – Border Color

Where using a Gradient for the Header Bar Background Styles, it is the second color which will start from the top, and fade into the second one towards the bottom. This is shown below, where the first color chosen was white, and the second one blue:
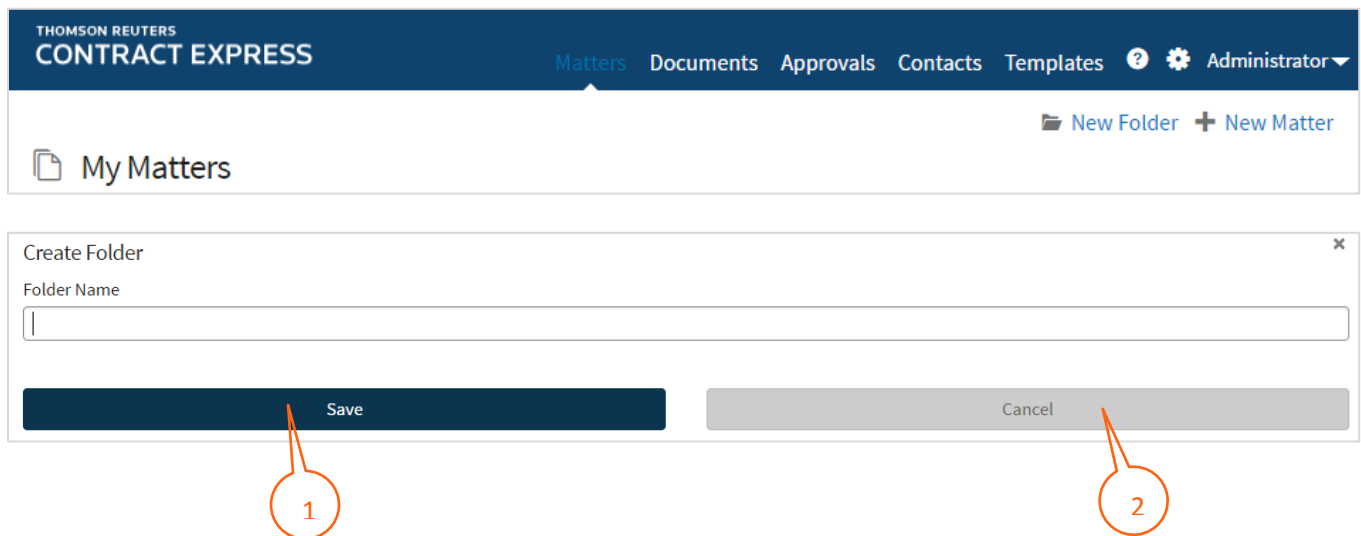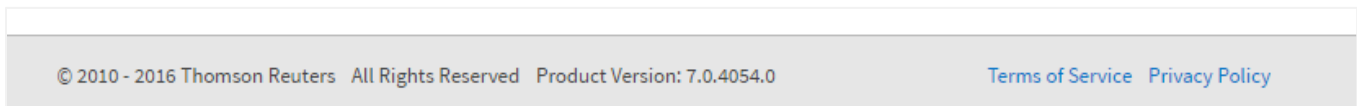

1 – Primary Button Color(s): as with the Header, it is possible to have one solid color or a gradient.

2 – Secondary Button Color: again, a solid color or gradient are possible.

Tab Style refers to the tabs seen in the Admin Settings, as illustrated below. Once again it is possible to use solid colors or a gradient:
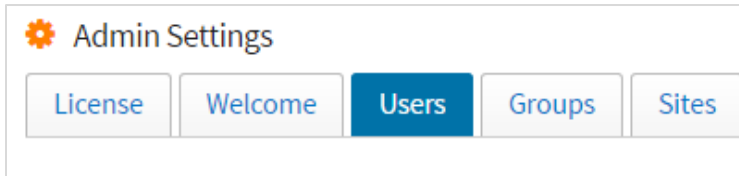
Finally, the Footer Background Color (here in default grey):

Note: Gradients are not compatible with Internet Explorer 8 and 9. If configured, only the secondary colour will be displayed.

10.5.   Adding a Logo

There are 3 views available when using Contract Express:

- Wide View –used when browsing on a desktop or laptop
- Tablet View – used when browsing on a tablet device or if the browser window is minimized to a similar width
- Mobile View – used when browsing on a mobile device or if the browser window is minimized to a similar width

You have the option of uploading a different logo for each of the 3 views using the Upload Logo option. To replace a logo select the Replace Logo option. Where only one logo has been uploaded, that logo will be used for all 3 views.

The recommended image dimensions for each view are:

- Wide View: 210 x 40
- Tablet View: 150 x 30
- Mobile View: 100 x 20

10.6.   Deleting a Theme

Click on the name of the Theme you wish to delete. Next click on the Delete Theme button in order to delete this Theme. Alternatively, you can select the Theme in the list of Themes and a Delete option should appear.

11. Profiles

11.1. Built-in Profile

The Built-in profile is the default profile applied to all sites if none other is applied. It is not possible to modify this profile.

11.2. Creating a new Profile

1) Open the Admin Settings, then the Profiles tab and finally click on New Profile.
2) Now give the new profile a name and description.

11.3. Profile Sections

Section name	Description
Questionnaire	The options here control the behaviour of your templates' online questionnaire.
Document	The options here control the behaviour of the generated document.
Locale	The options here control the behaviour of all pieces of information modified by locales. It is possible to set a specific country, but also to override certain parts using a customized Locale (see section 12).
Preview	The options here control the behaviour of the document Preview within the questionnaire.
Completeness	The options here control the completeness of the questionnaire.
Advanced	The options here are more advanced, such as Contract data retention, the removal of excluded spans and the representation of unresolved mark-up.

11.4.   Uploading a Profile

It is possible to upload profiles using the Upload Profile button.

Simply browse to the saved configuration file, press the Upload button, and it is now ready to be used.
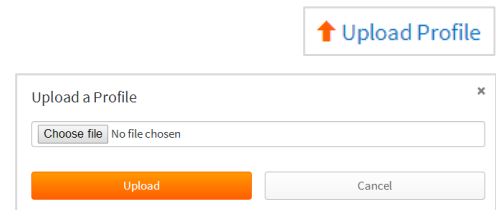
11.5.   Editing an existing Profile

Open the profile by clicking on its name, all settings are editable.

11.6.   Deleting a Profile

There are two ways to delete a profile:

1) Tick the box next to the profile's name. A Delete button will appear at the top of the Profiles screen, which you will need to press and then confirm.
2) Open the profile by clicking on its name. A Delete Profile button is available at the top of the screen, which you will need to press and then confirm.
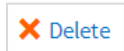
12. Locales

You can customize a standard locale using a customized Locale and apply the customized Locale to a Profile.

12.1.   Creating a new Locale

To create a new Locale, open the Locales tab and select New Locale.

Enter a Name and Description. For the Base Locale, select the standard locale that you want to customize.

By default each aspect of the Locale will be pre-populated with the settings derived from the Base Locale. These settings can be overridden by simply changing the value of the parameter. Where a parameter does not apply for a Base Locale, the parameter will be disabled. Click on the checkbox to enable the parameter and apply customizations. Disabling a parameter will use the settings of the Base Locale.

12.2.   Uploading a Locale

It is possible to upload Locales using the Upload Locale button.

Simply browse to the saved configuration file, press the Upload button, and it is now ready to be used.
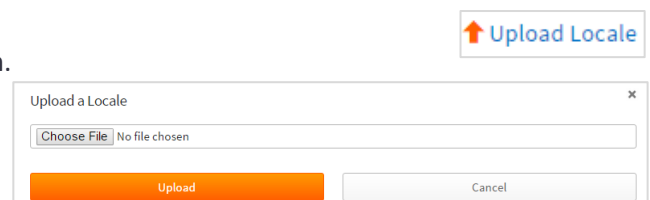
12.3.   Editing an existing Locale

Open the Locale by clicking on its name, all settings are editable.

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12.4.   Deleting a Locale

To delete a Locale click on the Locale name, select the Delete Locale option and confirm deletion.   ✖ Delete Locale
Alternatively select the checkbox next to the Locale name and select Delete.

13. External Tables

External tables permit the reference to SQL tables, SharePoint lists and OData sources in templates.

13.1.   Creating a new External Table

To create a new External Table, open the Tables tab and press the New External Table   **+ New External Table**
button.

The **Name** of the Table is a unique identifier which Contract Express will use when referencing a table for data lookups from mark-up expressions in a template.

The **Data Provider** is selected from SQL, SharePoint or OData.

The **Row Limit** means the number of rows the system will be looked into. If you do not wish to set a limit, enter the number 0.

Server: The value entered in this field depends upon the Data Provider selected above.

For SQL supply an ADO.Net connection string e.g. (configurable elements in italics)

> Data Source=*ServerName*;Initial Catalog=*DatabaseName*; User
> ID=*UserName*;Password=*Password*;Trusted_Connection=False;Encrypt=True;Connection
> Timeout=30;MultipleActiveResultSets=True

Note that we do not recommend the use of integrated security in SQL connection strings as this would allow for the access control lists on securable objects in the Contract Express database to be subverted by anyone allowed to create external tables.

For SharePoint supply the URL of the SharePoint site e.g.

> http://MySite/

For OData supply the URL of the OData service e.g.
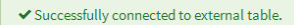
> http://services.odata.org/V4/Northwind/Northwind.svc/

Also for OData, you may optionally specify one or more custom headers using the **header** option:

> https://MyService/ --header "Authorization: Basic AAABBBCCCDDDEEEFFF"

Target: The value entered in this field also depends on the Data Provider selected above. For SQL it can be the name of a table or view, possibly qualified. For SharePoint it can be the name of a List, or if the site corresponds

to an instance of Contract Express for SharePoint it can be the name of a registered template. For OData it can be the name of a resource managed by the service.

Before saving, press the 'Test Connection' button in order to ensure everything has been entered correctly. A message telling you whether this was successful will be displayed at the top of the screen.

⟳ Test Connection

✔ Successfully connected to external table.

13.2.   Editing an existing External Table

Click on the name of the Table you wish to modify. You will be allowed to change all but the name of the Table.

13.3.   Deleting an External Table

There are two ways to delete an external table, note that any templates referencing these tables will cease to function correctly, references should be removed or edited in advance accordingly:

1) Tick the box next to the table's name. A Delete button will appear at the top of the External Tables screen, which you will need to press and confirm.

✖ Delete

2) Open the table by clicking on its name. A Delete External Table is available at the top of the screen, which you will need to press and confirm.

✖ Delete External Table

13.4.   Setting permissions on an External Table

In the grid of external tables, for those tables over which you have full control, you can click on the value in the sharing column. This will open the Permissions dialog where you can grant access to this table to other users. A user needs read access in order to retrieve data from the external table during the evaluation of mark-up either in a questionnaire or a generated document. Write access is needed to modify an external table definition and full access will allow that user to change access permission for others.

14. Configuring Alerts

Alerts are email notifications that are set up by Administrators about certain events and actions for a Document. Authors can enable alerts for their Templates and these alerts will be automatically applied to all Documents, created from these Templates. Users can then subscribe to alerts for Documents to receive email notifications when alert has been triggered.

14.1.   Creating a New Alert as an Administrator

To create a new alert open the Alerts tab in Admin Settings and click the New Alert option ✚ New Alert .

The **Title** is a name of the newly created alert (mandatory parameter). It is recommended to give the alerts meaningful names so that it is easier to understand what the alert is for.

Set the alert **Description** to explain the purpose of the alert.

Title and **Description** of an alert is displayed for all users with sufficient access rights to view a template and/ or a document that use this alert.

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14.1.1. Defining the Trigger Rule

The alert trigger defines a condition, upon which the system will send an email notification. Notifications can be sent immediately or with a configured delay, for more information about send-out rules see section 14.1.2.

To define the trigger rule for an alert:

1. In the **Trigger** section select a variable or metadata field by clicking on the "…" icon
2. Choose the operator for the condition by selecting the second dropdown menu
3. Then enter the value that defines the condition, which when true, will send out email notifications

If you wish to add multiple trigger conditions, click on the green '+' icon to add another row. Another dropdown menu will appear at the end of the first row which allows you to choose whether the conditions should be combined as an 'and' *(all conditions must be true for this alert to be triggered)* or as an 'or' *(at least one condition must be true for this alert to be triggered)*.

Where there are multiple conditions, they can be grouped together to determine the order in which they are applied. For example, to get an email notification about new documents with high priority, we can configure the trigger as follows:

(i)   The Document status is either Incomplete or Requires Approval
(ii)   The value of a template variable "Priority" is set by the User to "High"

To configure this trigger we need two groups of conditions defining the Status and the Priority value – where Status is Incomplete, the template variable Priority is High and where Status is Requires Approval and the template variable Priority is High. Defining this in the Trigger rule, we would:

1. Add a row with "Status" **+** "=" **+** "Incomplete"
2. Add a second row with "Priority" **+** "=" **+** "High"
3. Add a third row with "Status" **+** "=" + "Requires Approval"
4. Add a fourth row with "Priority" **+** "=" **+** "High"
5. Select the checkbox for the first and second rows
6. Click on the curly brackets icon to group the first 2 conditions together {}
7. Select the checkbox for the third and fourth rows
8. Click on the curly brackets icon to group the second 2 conditions together
9. Select "Or" in the last dropdown menu of the first group

Contract Express evaluates the trigger for Documents created using Templates that have this alert enabled every time the Document is changed. You can define whether Contract Express should send an email notification every time the Document has been changed and still meets the alert trigger condition, or only the first time the alert is triggered. Check **Send alert every time it meets the criteria above** to send email notification every time the Document changes and still meets the alert trigger condition.

14.1.2. Configuring Send-Out Rule

Alert notifications can either be sent immediately when the Document is changed in a way to meet the criteria defined in the trigger condition, or sent after a specified period of time.

To configure the rules for sending out email notifications for an alert:

1. If you want the system to send an email notification straight after the trigger condition has been met: in the **Send-out Rule** section choose "Send immediately"
2. If you want the system to send an email notification with a delay: in the **Send-out Rule** section choose the "Send with delay" option, and configure the delay below:
    a. Set the duration of the delay. Input a number of units (days/ months/ years) or select a variable or metadata field by clicking on the "…" icon in the **Number** column
    b. Select the units (days/ months/ years) in which the delay is calculated in the **Units** column
    c. Define in the **Before/After** dropdown whether you want the system to send the notification before or after the Date variable
    d. Select **Date variable** in the corresponding column – this date is used as a basis for calculation of the delay.
        Click the "…" icon and select a template variable or metadata field.
        Note that you may use the metadata field "Trigger date" to calculate a delay based on the date when alert has been triggered. At that, the notification can only be sent *after* the trigger date, i.e. if you have chosen "Trigger date", you can only choose "After" in the Before/After column.

You can configure multiple notifications for an alert. For example, if you want the system to send the notifications twice, 7 days before the "Expiration date" (template variable) and 3 days before the "Expiration date", you should configure the send-out rule as follows:

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Send-out Rule

○ Send immediately
◉ Send with delay

Number		Units		Before/After		Date Variable			
7	...	Days	▼	Before	▼	Expiration Date	...	✎	✖
3	...	Days	▼	Before	▼	Expiration Date	...	✎	✖
									➕

Using CEML Editor to calculate Date Variable

If there is no appropriate date variable for calculation of the send date, you can calculate it using CEML Expression Builder.

CEML (Contract Express Markup Language) is a distinct set of functions and variables using which, one can easily create expressions to evaluate the time of delivery of the alert. These are the same variables and functions, which are used during the template authoring process.

To create a CEML Expression:

1. Launch CEML Expression Builder by clicking ✎ button in the **Date Variable** column in the **Send-out Rule** section.
2. Insert needed CEML function by clicking ➕ Insert Function and choosing the function from the dropdown list. You can nest functions (use one function as an argument of another function), if needed.
3. Insert template variables, if needed, by clicking ➕ Insert Variable and choosing the template and the variable from the dropdown lists.

> ⚠ **Ensuring CEML Expression returns a date**
> Make sure that CEML Expression you have created returns a value of date type. To do that, check in the specification that CEML function you use returns date.

For example, if there is no template variable that indicates contract expiration date, but you have a variable "SigningDate" that indicates the signing date, you can calculate expiration date for 1-year contract using "YearsAfter" function.

Add CEML Expression ✕

Define the CEML expression for calculation of the Date Variable used for Send-out rule

＋ Insert Function ＋ Insert Variable

CEML Expression

YearsAfter("SigningDate", 1)

| Save | | Cancel |

You can find the description of CEML functions in the Contract Express Author Help, available via "Getting Started" button in the Contract Express ribbon in MS Word (you will need Contract Express Author installed).

Getting Started Help
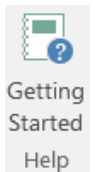
Contract Express Author supports an extensive list of functions. CEML Editor in Contract Express supports a selected set of functions focused on date calculation, that is:

Function Category	Function	Description
Arithmetic	*	arithmetic multiplication
	+	arithmetic addition
	-	arithmetic subtraction
	/	arithmetic division of a first number by a second number *Currently not to be used in this version of Contract Express, reserved for future use*
	//	arithmetic division of a first whole number by a second whole number rounded down to the nearest whole number
	Abs	the non-negative or absolute value for the given number
	Larger	the larger of the two numbers
	Mod	the remainder after the first number is divided by the second number
	Power	the first number raised to the power of the second number *Currently not to be used in this version of Contract Express, reserved for future use*
	Sign	determines if a number is positive, negative or zero
	Smaller	the smaller of two numbers
	Sqrt	the square root of a number *Currently not to be used in this version of Contract Express, reserved for future use*
	Round	round a number up/down to the nearest decimal place
	RoundDown	round a number down to the nearest decimal place *Currently not to be used in this version of Contract Express, reserved for future use*

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Function Category	Function	Description
	RoundUp	round a number up to the nearest decimal place *Currently not to be used in this version of Contract Express, reserved for future use*
	Truncate	truncate a number to a decimal place *Currently not to be used in this version of Contract Express, reserved for future use*
Data Type	DataType	the datatype of a value
Date Functions	Date	construct a date value from year, month and day components
	ISODate	convert a text value in ISO format to a date value
	Today	today's date
	Day	the day component of a date value
	Days360	the number of days between two dates assuming 360 days in a year
	DaysAfter	the date which is a number of days after a date
	DaysBefore	the date which is a number of days before a date
	DaysBetween	the number of days between two dates
	NearestWeekdayAfter	the date of the nearest weekday after a date
	NearestWeekdayBefore	the date of the nearest weekday before a date
	Weekday	the weekday number of a date
	EndOfMonth	the last day of the month as a number
	Month	the month component of a date value
	MonthsAfter	the date which is a number of months after a date
	MonthsBefore	the date which is a number of months before a date
	MonthsBetween	the number of months between two dates
	Year	the year component of a date value
	YearsAfter	the date which is a number of years after a date
	YearsBefore	the date which is a number of years before a date
	YearsBetween	the number of years between two dates
Logic	Is	test that a value equals another value
	IsAtLeast	test that a value is more than or equal to another value
	IsAtMost	test that a value is less than or equal to another value
	IsLessThan	test that a value is less than another value
	IsMoreThan	test that a value is more than another value
	IsNot	test that a value is not equal to another value
	Not	boolean negation
	Or	boolean disjunction
	And	boolean conjunction
	If	if a boolean then return a value else return another value

14.1.3. Specifying Notification Settings

To configure the notification settings for an alert you should:

1. Scroll down to the **Notification** section of the alert details page
2. Specify **Recipients**, if needed

All users creating a Document from the template associated with the alert will be automatically subscribed to this alert. If you want to subscribe someone specifically, you can add them as a Recipient. Please note that in this case the person you set as a recipient will get *all* the notifications generated by this alert (i.e. regardless of whether that Document has been shared with them).

Recipients		
Type	**Value**	
User ▼	accountant@company.com	✖
		➕

3. Add the **Subject** for the email

   You can use values of template variables or metadata parameters in your Subject. To insert them, click ➕ Insert Field and choose the needed parameter.

   If you have not specified the Subject, the system will use the default subject that is displayed as a placeholder in the Subject field.

4. Add the **Body** for the email

   You can use values of template variables or metadata parameters in your Body. To insert them, click ➕ Insert Field and choose the needed parameter.

   If you have not specified the Subject, the system will use the default subject that is displayed as a placeholder in the Body field.

14.2.   Viewing Alerts Usage

Administrators can view the list of Templates that use an alert in the **Used in Templates** column on the list of Alerts, or in the **Used in Templates** section of the alert details page.

Used in Templates
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15. Customizing Emails

It is possible to customize emails relating to invitations that are used in the system, under the Emails tab. In both cases you can add various predetermined Fields (such as the sender's User Name) to both the subject and body of the email via the Insert Field button. To access the customized e-mails go to the License Space and click on the Emails tab.

Emails

> ⓘ Here you can customize emails relating to invitations that are used in the system.

Email
🗒 User Invitation into the System
🗒 Guest Invitation to Edit a Contract
🗒 Guest Questionnaire Completion

15.1.   User invitation into the system

These are the emails that will be sent out upon first invitation of a user to your Contract Express license space.

User invitation into the system

Subject   + Insert Field

You are invited to become a user of ContractExpress

Body   + Insert Field

Dear {User:To:DisplayName},
{User:From:DisplayName} has invited you to join ContractExpress.

To accept, click the link below:
Join ContractExpress

| Save | Cancel |

15.2.   Guest invitation to edit a contract

These are the emails that will be sent out when inviting a guest (a user who is not a member of your license space) to edit a contract.

Guest invitation to edit a contract

Subject   + Insert Field

A ContractExpress questionnaire has been shared with you

Body   + Insert Field

{User:From} has shared a questionnaire with you on ContractExpress.

To view it, follow the url below:
{User:InvitationName}

{User:Comments}

| Save | Cancel |

15.3.   Guest Questionnaire Completion

These are emails that will be sent when a guest that has been invited to complete a questionnaire clicks on "Click here to notify owner you have finished making your changes".

Guest Questionnaire Completion

Subject   + Insert Field

{User:From:DisplayName} has completed the questionnaire

Body   + Insert Field

{User:From:DisplayName} has completed the questionnaire you shared on Contract Express. To view it, click the link below:

{User:InvitationUrl}

| Save | Cancel |

16.Approval, Negotiation and Document Statuses

These allow you to customize the various names of the stages at which an approval or contract may be. See section 18.13 for more details about approval steps.

16.1. Approval Statuses

Required	The Document requires approval
Irrelevant	*Currently not used in this version of Contract Express*
Compliant	Where an approval is applicable but not relevant because it does not meet the criteria outlined in the approval step
Exempt	*Currently not used in this version of Contract Express*
Waiting	Where the Document has been sent for approval, and is awaiting this approval
Approved	Where the approval has been granted
Rejected	Where the approval has been rejected
Queued	Where there are multiple sequential approvals and the preceding approvals are pending; the approvals that are not first are marked as such

16.2. Document Statuses

Incomplete	Where there are questions in the questionnaire have not been completed
Requires approval	Where an approval does not auto-start and needs to be sent out for approval
Awaiting approval	Where an approval has been requested and is awaiting an approval action
Rejected	Where the approval has been rejected
Ready	Where the approval has been granted, or where the document does not require approval and is complete
Sent for Signature	Where DocuSign is enabled, and the document has been sent for signature
Final Review	Currently not used in this version of Contract Express
Executed	Where DocuSign is enabled and the document has been signed in DocuSign
Exported	*Currently not used in this version of Contract Express*
Error	In case of an error at any point in the document workflow
Negotiating	Where the Document has been sent for negotiation, and is awaiting completion

16.3. Negotiation Statuses

Waiting	Negotiation has been requested for the Document
Internal Review	A Negotiator has taken the responsibility of the Negotiation for the Document
External Review	A Negotiator has pointed out the fact of the Document is sitting with an external party for an external review
Completed	The Negotiation is completed

17. History

The History tab gives you an overview of the updates that have been made at an administrative level, such as: users, profiles, license space, welcome screen, groups, sites, themes, tables, emails and statuses.

You can click on each change to reveal details.

History

Date	Title	User
28/04/2015 16:40:20	Subsite Created	alexandra.price@business-integrity.com

A sub site has been created with the following settings:
Name: Demo Site
Description: Site for Demps
Theme: Corboda

18. Setting up Templates

Templates are accessible through the Templates tab. For each template, 5 tabs will be available: the Template Details (which gives an overview on the versioning, Live status, sub-templates, Sharing and History), the Template Versions, the Approval Steps, the Workflow Steps (to be used with Matters, see section 22 for more details on Matters) and Negotiation.

18.1. Uploading a Template from the Browser

To upload a template:

1) Click on the Templates tab at the top.
2) Click on Upload Template in the top right of the screen.
3) Either simply drag and drop (multiple templates can be dragged in at once to bulk upload) your Template(s) into the designated area, or click on the 'Click Here' message to browse to your Template(s). If you have selected a Template you no longer wish to upload, it is possible to remove it by clicking 'Remove File'. Also, if using Chrome you can drag and drop a windows folder which contains multiple templates into the designated area.

Upload Templates

Click here
or Drag and drop files

Upload   Cancel

ⓘ 1 file(s) selected

Non Disclosure Agreement.doc

51.6 KB
Remove file

4) You will be shown a message informing you if the upload was successful and giving you the option to launch the questionnaire for each Template uploaded via the "Test Now" link.
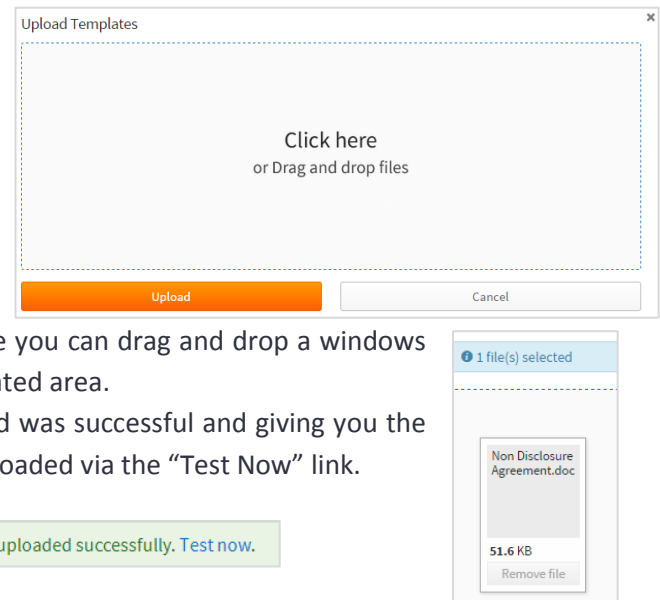
✔ File 'My First Template.docx' with template reference 'Demo' uploaded successfully. Test now.

18.2. Uploading a template from Contract Express Author

To test a template from within Contract Express Author, select "upload and launch" to test the current work you have done, or "Launch" to test the current version open in Contract Express Author without uploading it to the site from the Test button on the Contract Express ribbon. This will launch the questionnaire for that template – see 23.1.2 for more details on navigating the questionnaire.

18.3. The Template Details Tab

The majority of the actions available in this tab will only affect the latest version of the template, rather than all previous ones.

18.3.1. Sharing

Permissions can be configured for this template from this page and these permissions will apply to the entire template, no matter the version. See section 18.9 for more information about sharing permissions for templates.

18.3.2. Template URLs

Authors can share questionnaire URLs with users, meaning the user will be directed to the questionnaire for that template right away, rather than having to navigate through the site.

The two URLs are the Test Link (which picks up the latest version of the template which could be either Test or Live), and the Live Link (which picks up the latest Live version of the template.

From here you may also look into the Subtemplates associated with this template.

From this window you are able to choose to set all templates to Test or Live, or apply this individually. Please note that this will only list the Subtemplates that have also been uploaded to the site.

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18.3.3. History

This history includes changes such as: adding the template, new versions, deleting the template, approval changes, negotiation changes, sharing permission changes.

18.4.   Template Versions

Different versions of a single template can be stored within Contract Express. A new version is created each time a template with a pre-existing reference is uploaded to the system. These are displayed on the template versions page, accessed when you select a template from the "Templates" page.

Template Versions

☐ Show Deleted

	Version	Modified By ⇕	Valid From ⇕	Status ▲ ⇕
☐ ⬢	2.0	system	09/08/2015	Live

By default each version is named based on the date and time it was uploaded. Templates can be given customized versions in Contract Express Author by using the Template Properties button in the ribbon. If this is done then Author will prevent uploading of an updated template over a Live template unless the version is also updated.

This screen also displays who uploaded each version, when they did so, and what the status of each version is.

There are two status options for a template version. "Test" templates can only be launched from the Templates tab by the author. "Live" templates can be shared with other users, and used to generate documents more generally. Contract Express will look to the most recent Live version of a template when a User with appropriate privileges attempts to launch the questionnaire. Finally, "Deleted" versions are those which have been manually deleted by the user. See 18.8 for details on deleting a template.

To see more details about a particular template, click on the version number to go to the Version Details screen.

18.5.   Enabling/Disabling DocuSign for a Template

The "Use DocuSign" setting in Admin Settings controls whether DocuSign is available for users to complete workflows once a Document reaches the Ready status. Navigate to Admin Settings *(via the cogwheel)* **->** Under the License tab change the "Use DocuSign" setting to "Yes".

Use DocuSign: No ▼

Press the Save button at the bottom of the License Page screen to save your selection.

Switching on DocuSign in Admin Settings will enable the setting across the entire license space and apply to all templates but it is possible to enable DocuSign at the template level also.

To configure this at the template level, navigate to the template on the Templates page. On the Configuration tab check/uncheck the checkbox "Use DocuSign" in the DocuSign section.

DocuSign

☑ Use DocuSign

☐ Enable DocuSign for Guests

If the Use DocuSign option is selected, all Documents created by this template will have DocuSign enabled when the status is set to Ready.

18.5.1. Enabling/Disabling DocuSign for Guests

It is also possible DocuSign to be enabled for Contract Express users but disabled for Guest users.

Navigate to the template on the Templates page. On the Configuration tab check/uncheck the checkbox "Enable DocuSign for Guests" in the DocuSign section. Note the template must be set to Public in order to edit this setting.

18.6.   Enabling/Disabling Comments and Document Upload for a Template

While working with a Document, users with Write access can upload auxiliary documents (see section 24.8) and add comments (see section 24.10). This functionality can be enabled/disabled per Template.

To manage document upload for all Documents created from the Template navigate to the Template on the Templates page. On the Configuration tab check/uncheck the checkbox "Enable Document Upload".

To enable/disable comments functionality for the Documents check/uncheck the checkbox "Use Comments" on the Configuration tab of the corresponding Template.

Comments and Document Upload

☑ Use Comments

☑ Enable Document Upload

18.7.   Downloading a Template

All the templates which have been uploaded by authors are stored within Contract Express. These can be downloaded by going to the Template Versions tab and choosing a version of the relevant template. The option to download is then available at the top right of the screen. Alternatively, you can download the latest version of a template from the Template Details tab.
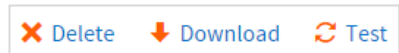
✗ Delete   ↓ Download   ↻ Test

⬇ Download Latest Version

It is also possible to download the latest versions of multiple templates simultaneously. To do so, navigate to the list of templates and select all templates to be downloaded. Select the "Download   ⬇ Download Templates Templates" option in the top right hand corner.

You will then get the option to either download the latest versions of all selected templates (this may include Live and Test versions) or only the latest Live versions of all selected templates. It is also possible to download the subtemplates for the selected templates. Once you have made your selection click on "Download" to download the templates in a zip file.

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18.8.   Deleting a Template

18.8.1. Deleting a Template

There are 3 ways of deleting a template:

1. On the Templates page, select the checkbox for a template (or multiple templates) and select the Delete option at the top right of the screen
2. Select a template and whilst on the Template Details tab there will be a Delete option at the top right of the screen
3. Delete all template versions (see section 18.8.3)

Deleting a template will delete all versions of the template and the template will be removed from the list of templates on the Templates screen.

18.8.2. Restoring deleted Templates

To access deleted templates, select the Show Deleted checkbox at the top left of the screen on the Templates tab; templates in this list can either be restored or permanently removed from the system. Note that once a template has been permanently deleted it **cannot** be restored.

Templates and Template Versions can also be restored from the respective pages by clicking on .

18.8.3. Deleting a Template Version

To delete a template version, select the check box for the template version on the Template Versions screen and use the Delete option that appears. Alternatively you can use the Delete option on the Template Version Details screen.

You can view deleted template versions using the Show Deleted checkbox on the Template Versions screen where you will see an option to restore a template version. Template versions can also be restored from the Template Version Details screen of a deleted template version.

Template Versions
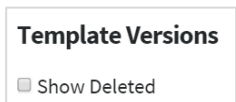
☐ Show Deleted

Deleting all versions of a template will delete the template itself which can then be accessed by selecting the Show Deleted checkbox on the main Templates screen.

18.9.   Sharing a Template with other users

18.9.1. Marking a Template as Live

Marking a template as "Live" enables you to share the template with other users. The most recent Live version of a template is the one which is made available to other users when a template is shared. Templates can be switched back to Test. It is possible to mark the latest version of multiple templates as Live simultaneously by selecting the appropriate templates from the list of templates on the Templates page and selecting the "Edit" menu option at the top of the page.

This will display a modal which allows you to edit the following:

Latest Version Status: This will set the latest version of all selected templates to Live/Test.

Set all Subtemplates to: This will set the latest version of each subtemplate of the selected templates to Live/Test.

Edit Templates   ✕

ⓘ *Here you can make updates to multiple templates. Note updates that apply to a Template Version will be applied to the latest versions of the selected Templates.*

Latest Version Status:

--Select an option--   ▾

Set all Subtemplates to

--Select an option--   ▾

⚠ **Templates with live Documents cannot be changed from Live to Test**

Note that once a Live template has been used to create any Documents via New Document/New Invitation/as part of a Matter, it is not possible to set the template back to Test unless those Documents have been deleted.

18.9.2. Sharing a Template

Once a template has been marked as Live you will be able to share it with other users within your license space and external users. This makes the template available for them to begin generating documents. To share a template, click on the link under the Sharing column in the templates tab, and choose "User Access". You can then add other users, groups or roles and set permissions for each. For Users to be able to generate documents using a template, they must be given "Read" access to the template. See section 6.6 for a list of permissions.

Permissions   ✕

ⓘ To enable questionnaire visibility for shared contracts, the user access for this template should be updated for the respective users/groups/roles. To enable sharing to guest users the template must be made public.

| Public Access | **User Access** |

	Type	Value	Access Level	
≡	User ▾	Admin@thomsonreuters.co	Full ▾	✕
≡	Role ▾	Author ▾	Write ▾	✕
≡	Role ▾	User ▾	Read ▾	✕
≡	Role ▾	Guest ▾	Read ▾	✕
				➕

Save   Cancel

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It is possible to update the permissions for multiple templates simultaneously by selecting the appropriate templates from the list of templates and selecting the "Edit" menu option at the top of the page.

This will display a modal which allows you to edit the following:

Sharing: Select the "Set Sharing Status" checkbox to edit the permissions for the templates. For all selected templates you can add users to each access lists, mark all templates as public and add all templates to the public page.

Edit Templates   ✕

> ℹ️ Here you can make updates to multiple templates. Note updates that apply to a Template Version will be applied to the latest versions of the selected Templates.

Latest Version Status:

--Select an option--   ▼

Set all Subtemplates to

--Select an option--   ▼

Datasheet:

--Select an option--   ▼

☑ Set Sharing Status

Sharing:

> ℹ️ To enable questionnaire visibility for shared contracts, the user access for this template should be updated for the respective users/groups/roles. To enable sharing to guest users the template must be made public.

| Public Access | **User Access** |

Type	Value	Access Level
		➕

| **Save** | Cancel |

18.9.3. Allow other users to edit a Template

To allow other users to edit a template, give them "Write" permissions on that template as described above. Please note that they must also be an Author to access the Templates tab.

18.10.   Public Templates

18.10.1. Make a Template visible for external use

Clicking on the link in the Sharing column under the Templates tab brings up the Permissions menu. If you check the box marked "Make Public", the system provides you with a Share Link and an Embed Code. The Share Link is a link to the questionnaire that can be used to generate documents without the need for a user account. Each time the link is opened, a new session of the questionnaire is begun.

Permissions   ✕

> ℹ️ To enable questionnaire visibility for shared contracts, the user access for this template should be updated for the respective users/groups/roles. To enable sharing to guest users the template must be made public.

| **Public Access** | User Access |

☑ Make Public

> ✔ Successfully saved permissions

| Share Link | Embed Code |

https://ce5dev.azurewebsites.net/v55/public?token=bD0xMTEyMiZ0PU5vbitEaXNjbG9zdXJlK0FncmVlbWVudCZITUFDU0hBMjU2PUFib2t4MHhQ

☐ Show on public page

The Embed Code provides an iframe which allows you to embed the questionnaire for that template within another web page.

18.10.2. Adding a Template to the Public Page

The public permissions also have the option to "Show on Public Page". The public page is a link where a number of templates can be stored for public access. You can find the link under License Details in the Admin Settings.

Allow Guests:	Yes, public page

18.11.   Applying multiple Profiles to a Template

It is possible for more multiple profiles to be assigned to a template which allows questionnaires launched from this template to use a combination of defined profiles. Note that if you are using Categories, then profiles assigned to templates within a category will override any profiles added to templates via Manage Profiles. To add profiles to a template, navigate to the Template Details page of the template and click on   ✎ Manage Profiles

Note that if you are using Categories, then profiles assigned to templates within a category will override any profiles added to templates via Manage Profiles. See section 20 for more information about Categories.

Choose either the "Live" or "Test" tab to add profiles for all Live or Test versions of the template. Click on the '+' icon to add a new row and select a profile from the dropdown menu. Note that defined settings within the first profile in the list of profiles will take precedence. Where there are profile parameters that are not defined in the first profile, Contract Express will look for the parameter definitions in the next profile listed and so on. If Contract Express cannot find a definition for the profile in any of the listed profiles, the setting defined in the Built-in profile will be used.

18.12.   Setting up SLA Metrics

Service Level Agreement metrics (SLA metrics) are configured per template and used for the system-wide KPI calculations. For more information about KPIs, see section 3.1.1.

If any SLA metric for a document is breached, this document will be marked as an overdue document and shown on the Overdue Items widget on the Admin dashboard (see section 3.1.2 about the Overdue Items widget).

SLA metrics are configured on the Metrics tab within a template.

The following default SLA metrics are preconfigured for every template:

- Approval Turnaround Time — how long a document stays in the 'Awaiting Approval' status (the default value is 2 days). If a document is in the Awaiting Approval status for longer than 2 days, the document will be classed as an overdue item until it leaves the Awaiting Approval status
- Negotiation Turnaround Time — how long a document stays in the 'Negotiating' status (the default value is 3 days). If a document is in the Negotiating status for longer than 3 days, the document will be classed as an overdue item until it leaves the Negotiating status
  Note that this metric is not available if Negotiations are disabled in Admin Settings (see section 2.1.13) or it is turned off for the Template

- Signature Turnaround Time — how long a document stays in the 'Sent for Signature' status (the default value is 1 day). If a document is in the Sent for Signature status status for longer than 1 day, the document will be classed as an overdue item until it leaves the Sent for Signature status

18.12.1.Turning SLA Metrics On/ Off

By default, SLA metrics are enabled for all templates. It means that for all documents created from these templates, SLA metrics will be tracked. These documents are taken into account when KPIs are calculated.

Uncheck 'Use SLA Metrics' checkbox to stop using them for documents, created from this template.

18.12.2.Editing SLA Metrics

To edit an SLA metric for a template, click its name. You can set up the following parameters for the chosen SLA metric:

- **Duration** — define the threshold value for the SLA metric. The duration can be set up in days or weeks
- **Notification settings** — define the recipients and contents of the e-mail notification that will be sent out when an SLA has been breached.
  o Recipients: Users and groups can be configured as the recipients of the notification. You can set up multiple recipients by clicking on the '+' icon.

  o Subject: Subject of the e-mail notification.
  o Body: Body of the e-mail notification.

Notifications

Fill in the details below to send an email when a Document created using this Template breaches SLA metric. The email will only be sent if both the subject and body contain text.

Subject   + Insert Field

Approval Turnaround Time is breached

Body   + Insert Field

Dear Sir/ Madam,

kindly review the overdue document

Within the Subject and Body of the notification e-mails, it is possible to use data drawn from Contract Express and the Template to relay more information to the recipient. A drop-down list presents individual variable from the template along with information that will be captured for each Document (e.g. the name of the Document).

18.13.   Setting up an Approval on a Template

18.13.1.Creating the Approval Trigger(s)

The first step is to set up the rules within the template that will trigger the approval process. Commonly an explicit true/false question is asked of the user in order to decide this, as in the example below. Alternatively, approvals can be dependent on the value entered in the questionnaire for any variable type. (Please note that computations used for approval triggers should have the "Save in session" checkbox checked within the variable editor). See the Contract Express Author manual for further information on how to create computation variables.

← Previous → Next ▤ Preview ↓ Download Answers ↑ Upload Answers ≋ Save & Close

Legal Approval

✔ Non disclosure agreement

✔ NDA

Does the other party wish to deviate from Corboda's standard terms?

● Yes ○ No

If the other party wishes to deviate from Corboda's standard terms then legal approval of this document is required.

Enter the details of the deviating request:

Save & Close

Once the triggers have been added, upload the template to Contract Express, .make the template 'Live' and set the applicable sharing permissions.

18.13.2.Adding a new Approval Step

This section reviews how to create a single approval step. Note that more than one approval step can be created for a given template. For example, a template may require both legal and business approval depending on triggers (as explained in Section 18.13.1) within the template.

You can create an approval step by selecting the relevant template, then clicking "New Approval Step" on the Approval Steps tab.

1. **General**

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a. Give the Approval step a title. The title must be unique for all approval steps associated with this template.

b. **Auto Start** controls whether on completion of the questionnaire the user must request approval or if the process is automatically initiated. Users will still be able to manually start the approval if all documents are not complete.

c. Choose whether an approver should be able to edit the questionnaire with the **Approver Edit** check box.

2. **Rules**

    a. **Applicable**: Controls whether an approval is applicable to a given questionnaire. This would generally be set to "Always" but for some templates it can be useful to bypass certain approvals for some variations. Documents that never pass the applicable rule (i.e. the condition for the applicable rule is not calculated as true) will not show approvals as part of their history. Setting "Dependent on Rule below" will provide a trigger for the approval, based on the value of variables from the template which have been set up in section 18.13.1 above.

The rule can be based on a combination of conditions. To do this, click on the green '+' icon to add another row. Another dropdown menu will appear at the end of the first row which allows you to choose whether the conditions should be combined as an 'and' (all conditions must be true for this approval to be triggered) or as an 'or' (at least one condition must be true for this approval to be triggered).

Where there are multiple conditions, they can be grouped together to determine the order in which they are applied. For example, if we want to create an approval for all European non

disclosure agreements, based the auto-provisioned non disclosure agreement template, where the approval is triggered whenever an agreement is a business relationship or the disclosing period is 1 year, we would create the following applicable rule:

    i.   Set the applicable rule to **dependent on rule below**

    ii.   For the first row select "CorbodaCompany" **+** "=" **+** enter the value "Europe"

    iii.   Click on the green '+' icon to add a new row and select "And" from the new dropdown menu in the first row

    iv.   Set the second row to "NDAPurposePreselect" **+** "=" **+** enter the value "Business Relationship"

    v.   Click on the green '+' icon to add a new row and select "Or" from the new dropdown menu in the second row

    vi.   Set the third row to "DisclosingPeriod" **+** "=" **+** enter the value "one (1) year"

    vii.   Select the checkbox for the second and third rows

    viii.   Click on the curly brackets icon to group the last 2 conditions together

b. **Required**: Controls whether an approval is enforced for a given questionnaire.

    i.   Leave this dropdown as "Always" if you want all applicable documents to go through this approval.

    ii.   Setting "Dependent on Rule below" will provide a trigger for the approval, based on the value of variables from the template which have been set up in section 18.13.1 above.

        The rule can be based on a combination of conditions. To do this, click on the green '+' icon to add another row. Another dropdown menu will appear at the end of the first row which allows you to choose whether the conditions should be combined as an 'and' (all conditions must be true for this approval to be triggered) or as an 'or' (at least one condition must be true for this approval to be triggered).

        Where there are multiple conditions, they can be grouped together to determine the order in which they are applied by selecting the conditions that will be grouped together and clicking on the curly brackets

c. **Approvers**: This defines the list of Approvers for this process. This can be set either to individual users and/or groups. More Approvers can be added using the plus button.

    i.   If there is more than one approver listed in an approval step, the first approver will be the primary approver, with subsequent approvers added to the approval step listed as alternate approvers.

    ii.   **Data Driven Approvers**: It is also possible to specify different approval routes in Contract Express by selecting **Add Data Driven Approvers**. With this you can control to which approver the document will be sent to depending upon the answers the user

gives in the questionnaire. Clicking this option will add a new section where you must add:

    1. The condition which must be true in order for this set of users and/or groups to be the approvers

    2. The list of approvers. Use the '+' button to add multiple approvers

iii. When the approval is triggered, Contract Express will decide which set of approvers are responsible by working down the list of data driven approvers. If the first condition is true, the first set of approvers will be assigned the approval task and ignore the next sets of approvers. If the first condition is not met, Contract Express will continue working down the list of data driven approvers. If no conditions are met, Contract Express will use the set of approvers in the **Approvers** section as the default approvers.

3. **Notifications**

This defines the notification text that will be emailed at certain stages of the approval process. All emails will contain a link to the item as standard. Depending on each stage, emails can be sent to the owner, primary approver, or all approvers.

Request: is the notification that will be sent to the specified approver(s) at the point the approval process is commenced. This applies whether the approval is set to begin automatically or manually. You can configure whether this will be sent to the primary approver or to all approvers.

Forward: is the notification that will be sent to the new approver if an approval task is forwarded from one approver to another.

Approve: is the notification that will be sent to all approvers and the document owner when the document has been approved.

Reject: is the notification that will be sent to all approvers and the document owner when the document has been rejected.

Using fields within Notifications

Within the Subject and Body of the notification e-mails, it is possible to use data drawn from Contract Express and the Template to relay more information to the recipient. A drop-down list presents individual variable from the template along with information that will be captured for each Document (e.g. the name of the Document).

In the Subject you have the option to bring through the Document name, or the approval title as well as the approval trigger. Note you can use additional variables from within the template if you wish in the Subject field.

The images below show the drop-down selections that are available in both the Subject and Body of the e-mail notification. Plain text can be added as well.

Approval:Title. This field corresponds with the name of the approval step.

Approval:ContractName. This field will insert the name of the Document.

Approval:ApproverName. This field will pull in the name of the approver for this approval step.

Approval:Comment. There is a "comments" box that appears at various stages of the approval process if the document owner or the approver wishes to add comments. This field can added to the body of any of the notification emails, and will pull in the comments at that specific point in the approval process.

Notifications

| Request | Forward | Approve | Reject |

Send to : ● Primary approver ○ All approvers   ❷

Subject   ➕ Insert Field

| Approval:ContractName   ▼ |

---Select a field ---
Approval:Title
Approval:ContractName
LegalYN

Notifications

| Request | Forward | Approve | Reject |

Send to : ● Primary approver ○ All approvers   ❷

Subject   ➕ Insert Field

| {Approval:ContractName} |

Body   ➕ Insert Field

| Approval:Comments   ▼ |

---Select a field ---
Approval:Title
Approval:ContractName
Approval:Comments
LegalYN

Note that notification e-mails will only be sent if both the Subject and Body contain text or fields.

Once you have specified the required information for this approval, click Save and the approval will now be active for that template.

As noted above, more than one approval step can be created for each template.

📚 **Non Disclosure Agreement**

| Template Details | Template Versions | **Approval Steps** | Workflow Steps | Negotiation | Metrics |

Approval Steps   ✏️ Manage Order ➕ New Approval Step

☐	Name	⬍ Order	▼ Active	▲
☐ 📚	Legal	1	Yes	

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18.13.3.Editing an Approval Step

You can edit an approval step by going to the Templates tab and selecting the relevant template, then choosing the Approval step you wish to edit. This will return you to the screen you saw when the approval step was created.

18.13.4.Manage Approval Order

If more than one approval step has been defined for a given template, you can specify the order in which the approval steps should be activated.
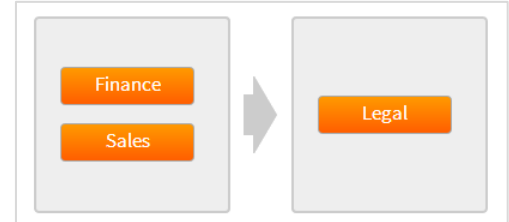
Approvals can be run in parallel or series. Ordering approvals is done through the Manage Order button. Approvals shown in the same section will be run in parallel. Use the 'Add Section' button and drag and drop an approval to move it to another section. The sections will run sequentially from left to right.

18.13.5.Deleting an Approval Step

To delete an approval step, simply select it and click the "Delete" button which appears.

18.13.6.The Approval Process: Users

Requesting Approval:

Once the questionnaire has been completed, if Approval is required then this will be presented to the user as the status with an option to "Request" this approval (unless Auto Start has been enabled as per the previous section). What document access the Business User has at this point can be configured in the Profile settings to no access, read-only access or unrestricted. In the screenshot below, the Business User has been given read-only access to the document.

Once the user clicks Request they can enter any comments they wish to direct to the approver.

Request Approval   ✕

Comments:

Can Finance sign off on this please?

| OK | Cancel |

Approval Overview:

A full view of the approval processes for a document can also be found in the document details page by clicking on the title of the document:

📄 NDA for Corboda   ➕ Clone   ⬇ Download Answers   ✏ Edit Questionnaire

Overview

Status:	Sharing:	**Next Steps**
⚫⚫⚫ **Awaiting Approval**	**Only Me**	View Document Flow ▾
		⤴ Review Approvals

Approvals

Title	Primary Approver	Other Approvers	Requested	Status	Actions
Finance	ekaterina.slisenko@tr.com		15:59:24	Waiting	
Legal			15:59:24	Required	✔ Request

Users can review the questionnaire once an item has been sent for approval, however the questionnaire will display the answers in read only mode.

Post-Approval:

Once the document has received all relevant approvals the user will be able to access the document as configured in the Profile settings. The settings are no access, read-only access or unrestricted. In the screenshot below, the Business User has been given unrestricted access to the document.

When the Status traffic light moves to green with a status of "Ready", then the user knows that their document has received all relevant approvals. The user will typically be notified of the approval via the "Approval" e-mail notification that was created in an approval step. Or, the user can monitor his/her document status by logging into Contract Express.

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Rejected Documents:

If an Approval is not granted, the user's access to their generated document will be restricted as configured in the Profile settings. They should select the Edit Questionnaire button and amend their answers to comply with the approval requirements.

Once the document has been approved the user may access their documents depending on the Profile settings configured.

18.13.7.The Approval Process: Approvers

Approvers can view all documents awaiting their approval under the Approvals sub-tab of the Tasks tab in Contract Express. To review the document an approver should click the link with the document's name.

Alternatively, if the notifications have been set up at the point of Request, the approver can follow the link in the e-mail notification sent to them for a direct link to the item awaiting approval. The approver will then have the option to Approve, Reject or Forward the item. Approvers will also have access to the Word document of the item and have permission to edit the questionnaire, if Approver Edit was set in the approval step or they have the role of Admin.

If an approver rejects an item, the approver still retains the ability to revoke that approval on the Document details page. Revoking an approval will undo a rejection action and the approval state will return back to Awaiting Approval.

18.14. Setting up a Negotiation on a Template

18.14.1. Turning Negotiation On/ Off for a Template

Administrators can enable or disable negotiations via the License tab in Admin Settings (for more information see section 2.1.13).

Turning on Negotiations in Admin Settings will enable the setting across the entire license space and apply to all templates but it is also possible to enable Negotiation per template.

To configure this per template, navigate to the template on the Templates page. On the Negotiation tab check/uncheck the checkbox "Use Negotiation".

If the Use Negotiation option is selected, all Documents created by this template will allow for negotiations to be requested when the status of the Document is Incomplete, Requires Approval or Ready.

Voiding Active Negotiation tasks when Disabling Negotiation

When turning off Negotiations, the system will ask you whether you want to allow all active negotiations for Documents created from this template to be completed or whether you want to void all active negotiation tasks. If you want to void active negotiation tasks, select the 'Void active negotiations' checkbox. As a result, all active negotiation tasks for the Documents from this template will be voided and corresponding Documents will return to the statuses from which negotiation had been requested. If you do not choose to void the active negotiations, users will no longer be able to request negotiations for these Documents and all pending negotiations for Documents created using this template will continue until they are either completed or revoked.

Disabling Negotiation   ✕

You are going to disable negotiation for the template(s) that could have active negotiation tasks. If you want to void these tasks check "Void active negotiations" checkbox.

Otherwise, these tasks will remain active and negotiators will be able to complete them.

☑ Void active negotiations

OK	Cancel

Changes in Contract Express when Negotiation is Disabled for a template

If the Negotiation is disabled for the template, the following changes will occur in the Contract Express:

1. Users will not be able to request negotiation for the Documents created from this template
2. The Negotiation Turnaround Time metric is not available on the Template details tab for a template (see section 18.12 for details about metrics)

18.14.2.Configuring Negotiations

If negotiations are enabled, a negotiation step is preconfigured by default for every imported template. This section covers how to reconfigure a negotiation step for a template. Note that only one negotiation step can be configured for a given template.

You can configure a negotiation step by going to the Templates page, selecting the relevant template and then clicking the Negotiation tab.

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1. **General**: Give the Negotiation step a title. By default, the title is "Negotiation" but this can be changed.
2. **Negotiators**: This defines the list of Negotiators for this process. This can be set either to individual users and/or groups. More Negotiators can be added using the '+' button.
   If there is more than one negotiator listed in a negotiation step, the first negotiator in the list will be the primary negotiator, with subsequent negotiators added to the negotiation step listed as alternate negotiators.
3. **Notifications**: This defines the notification text that will be emailed at certain stages of the negotiation process. All emails will contain a link to the Document as standard. Depending on each stage, emails can be sent to the owner, primary negotiator, or all negotiators.
   a. **Request**: is the notification that will be sent to the specified negotiator(s) at the point the negotiation process is commenced. You can configure whether this will be sent to the primary negotiator or to all negotiators.
   b. **Forward**: is the notification that will be sent to the new negotiator if a negotiation task is forwarded from one negotiator to another.
   c. **Complete**: is the notification that will be sent to the requestor of the negotiation when the negotiation has been completed.

Using fields within Notifications

Within the Subject and Body of the notification e-mails, it is possible to use data drawn from Contract Express and the Template to relay more information to the recipient. A drop-down list presents individual variable from the template along with information that will be captured for each Document (e.g. the name of the Document).

In the Subject you have the option to bring through the Document name, or the negotiation title as well as the negotiator's name. Note you can use additional variables from within the template if you wish in the Subject field.

The images below show the drop-down selections that are available in both the Subject and Body of the e-mail notification. Plain text can be added as well.

Negotiation:Title This field corresponds with the name of the negotiation step.

Negotiation:ContractName This field will insert the name of the Document.

Negotiation:NegotiatorName. This field will pull in the name of the primary negotiator.

Negotiation:Comments There is a "comments" box that appears at various stages of a negotiation task if the negotiator/requestor wishes to add comments. This field can be added to the body of any of the notification emails, and will pull in the comments at that specific point in the negotiation process.

Notifications

Request | Forward | Complete

Send to : ◉ Primary negotiator   ○ All negotiators

Subject   ✚ Insert Field

{Negotiation:ContractName}

Body   ✚ Insert Field

---Select a field ---   ▼

---Select a field ---
Negotiation:Comments
Negotiation:ContractName
Negotiation:NegotiatorName
Negotiation:Title
Accept

Note that notification e-mails will only be sent if both the Subject and Body contain text or fields.

Once you have specified the required information for the negotiation, click Save to apply all the changes to the template.

18.14.3.Editing a Negotiation Step

You can edit a negotiation step by going to the Templates tab, selecting the relevant template and selecting the negotiation in the Negotiation tab.

18.14.4.The Negotiation Process: Users

Requesting a Negotiation:

For additional information about Document statuses see section 16.2.

To request negotiation, click on the "Request Negotiation" option within the Next Steps section of the document details page. Not that this option is only available Document when the Document is in the following statuses:

- Incomplete
- Requires Approval
- Ready

NDA for Corboda

Overview

Status: Ready
Sharing: Only Me

Next Steps
View Document Flow

Edit Questionnaire
OR Request Negotiation
OR Upload Signed Document Manually

☐ Suspended

Approvals

Title	Primary Approver	Other Approvers	Requested	Status	Actions
Finance	ekaterina.slisenko@tr.com		12/23/2016	Approved	
Legal	ekaterina.slisenko@tr.com		12/23/2016	Approved	

Once the user clicks on Request Negotiation they can enter any comments they wish to direct to the negotiator.

Request Negotiation ✕

Comments:

The document needs negotiation

OK   Cancel

Once negotiation process has been started, the Document is moved to the status "Negotiating" and becomes non-editable for all users except negotiators configured for that template and administrators.

Negotiation Overview:

A view of the negotiation processes for a document can also be found in the document details page

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If a Business user has read or write access to the Document, they can revoke the negotiation by clicking "Revoke" in the Negotiation section of the document details page. The user can only revoke a negotiation when it is in the "Waiting" status (a negotiator hasn't started working on it yet). If a negotiation is revoked, the negotiation section will no longer be displayed and the Document will revert back to the status it was in when the negotiation was requested.

Post-Negotiation:

Once the negotiation has been completed, the document will move into one of the following statuses:

- Ready – if the Document does not require approvals, or all necessary approvals have been granted previously and the negotiator has not restarted them, during the negotiation
- Requires Approval – if the Document requires approvals

When the negotiation has been completed, the requestor will get an e-mail notification, if it has been configured for the negotiation step.

When the negotiation is completed, the Negotiation section will no longer be displayed on the document details page. The user can view details of the negotiation process in the History of the document.

+ Clone   ↓ Download Answers   ✎ Edit Questionnaire   ▤ Rename   ✕ Delete

▤ **SPA 6**

Overview

Status:
◎◎◉ **Ready**

Sharing:
Shared

☐ **Suspended**

Next Steps
View Document Flow   ▼

✎ Edit Questionnaire
OR   ❤ Request Negotiation
OR   ↑ Upload Signed Document Manually

Documents

Document	Actions
▤ SPA 6	↑ Upload File ▤ View Versions

History

Date	Title	User
12/27/2016 16:15:51	Status changed to Ready	ekaterina.slisenko@tr.com
12/27/2016 16:15:51	Negotiation completed	ekaterina.slisenko@tr.com
12/27/2016 16:15:42	Negotiation grabbed	ekaterina.slisenko@tr.com
12/27/2016 12:07:40	Status changed to Negotiating	ekaterina.slisenko@tr.com
12/27/2016 12:07:40	Negotiation requested	ekaterina.slisenko@tr.com
12/27/2016 12:06:56	Answers updated	ekaterina.slisenko@tr.com
12/27/2016 12:06:37	Item created	ekaterina.slisenko@tr.com

18.14.5.The Negotiation Process: Negotiators

Negotiators can view all Documents awaiting negotiation under the Negotiations tab in the Tasks page.

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Analytics   Documents   Tasks ⑧   Contacts   Templates   ❓ ⚙   ekaterina.slisen... ▼

☑ **Tasks**

Negotiations   Approvals

Document	Negotiation Title	Negotiator	Requester	Due Date	Current status
SPA sdg	Negotiation	ekaterina_slisenko@epam.com	ekaterina.slisenko@tr.com	**12/19/2016**	Waiting
NDA for the other party	Negotiation	kate.slisenko@gmail.com	ekaterina.slisenko@tr.com	**12/23/2016**	Waiting
NDA for Corboda	Negotiation	ekaterina_slisenko@epam.com	ekaterina.slisenko@tr.com	**12/29/2016**	Waiting
SPA test	Negotiation	ekaterina_slisenko@epam.com	ekaterina.slisenko@tr.com	**12/30/2016**	External Review

Alternatively, if the notifications have been set up at the point of Request, the negotiator can follow the link in the e-mail notification sent to them for a direct link to the Document awaiting negotiation. The negotiator will then have the option to Grab, Forward or Revoke the item. Negotiators will also have access to the generated document and have permission to edit the questionnaire.

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Negotiators can perform the following actions with the negotiation task:

- Grab — the negotiator takes responsibility of the negotiation and becomes the primary negotiator (if they were not so already). The negotiation status will change to 'Internal Review'.

Document	Negotiation Title	Requested By	Negotiator	Last Modified	Current status	Action
SPA test	Negotiation	ekaterina.slisenko@tr.com	ekaterina.slisenko@tr.com	12/28/2016	Internal Review	↻ External Review ✔ Complete ➡ Forward

- External Review — the negotiator points out the fact that the Document has been sent to an external party for external review. The negotiation status will change to 'External Review'.

Document	Negotiation Title	Requested By	Negotiator	Last Modified	Current status	Action
SPA test	Negotiation	ekaterina.slisenko@tr.com	ekaterina.slisenko@tr.com	12/28/2016	External Review	↻ Internal Review ✔ Complete ➡ Forward

- Internal Review — the negotiator points out the fact that they are working on the Document. The negotiation task will change to 'Internal Review'.

- Complete — the negotiator has completed the negotiation. The negotiation status changes to 'Completed' and is no longer available via the Tasks tab or the document details page.

- Forward — the negotiator redirects the negotiation task to the other user, who then becomes the primary negotiator for this Document. If the notification for the forward action has been set up, this person also receives an e-mail notification. A negotiation task can be forwarded to any user when the task is in any status except "Completed". When the negotiation is forwarded, the status will not change.

Forward Item   ✕

Type	Value
User ▾	ekaterina.slisenko@tr.com

Comments:

Kindly review the document

OK	Cancel

Administrators can view the average duration of the negotiation between its request and completion by building the 'Average Negotiation Cycle Time by Template' report (see section 3.2.8). Statistics on the negotiation tasks by a specific date, broken down by the negotiation status is available in the 'Total Negotiations by Status' report (see section 3.2.7).

18.15.   Applying Alerts to a Template

General alert settings in Contract Express are configured in Admin Settings, see section 14.

Alerts that have been enabled for a template are displayed on the Alerts tab. To view the details of the alert, click its name.

To enable an alert for a template:

1. Select the required template on the Templates page
2. Go to the Alerts tab
3. Click ✚ Enable Alerts and choose the alert(s) you wish to enable for the template

Note that the selected alerts will be automatically enabled for new documents, created from this template.
To activate an alert for existing Documents, you need to go to the document details page of the corresponding document and subscribe to the alert (see section 24.11).

To disable alerts for a template select the required alert(s) and click ✖ Disable Alerts. Note that the alert will be disabled for all Documents, created from this template.
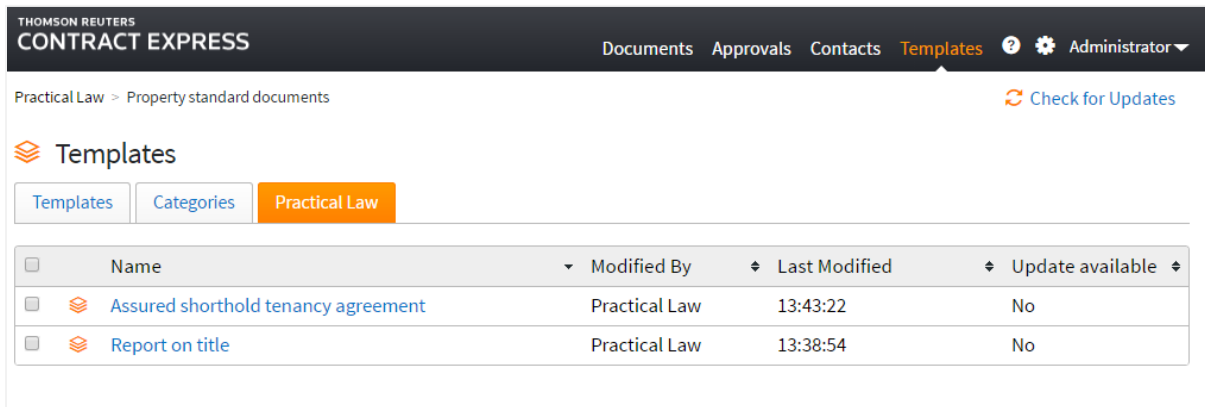
19. Practical Law Templates

Practical Law automates a collection of templates which are kept up to date by our expert in-house team. In order to access these templates your site must be have a license file which enables this feature. If you should be able to access this feature but are unable to, please contact contractexpress-support@thomsonreuters.com.

By default, Contract Express will check for updates to the Practical Law templates every hour. To change this frequency, please see the Contract Express Enterprise Installation Manual.

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19.1.   Browsing the Practical Law Template list

The Practical Law templates are accessible via the Templates page on the Practical Law tab. Templates may be listed within categories and simply clicking on a category will display its contents. In the Practical Law templates grid, each template will state the last time it has been modified and whether there is an update available. See section 19.2.3 for details about available updates.

You can click on the name of a template to view more details about the template.

On the Template Details page of the template within the Practical Law repository you will be able to see:

1. A description of the template
2. A preview of the template
3. When the template was last modified
4. If there is an available update for the template. See section 19.3 for more details
5. A list of subtemplates that are used by the current template
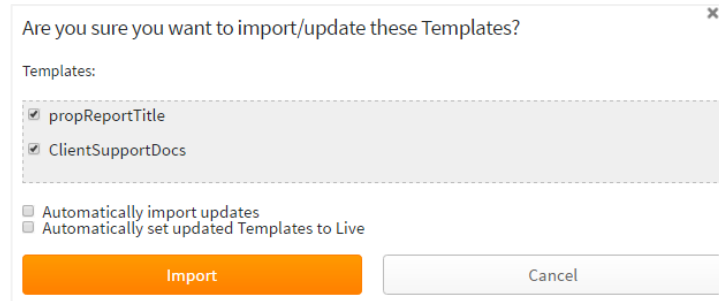
19.2. Using Practical Law Templates

19.2.1. Importing Practical Law Templates

In order for a Practical Law template to be used within a license space, the template must be imported so that it sits within the regular templates list on the Templates tab. To import a template click on the template name to navigate to the Template Details page and select Import Template.

A confirmation modal be displayed which will list the template that has been selected. Note that by default all subtemplates will be selected for import and will be listed in this confirmation modal.

The subtemplates can be deselected in the confirmation modal and only templates that are selected will be imported. The confirmation modal has two checkboxes: "Automatically import updates" and "Automatically set updated Templates to Live". See sections 19.2.2 and 19.2.3 for details.
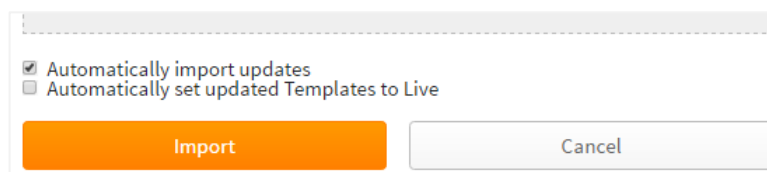
Select Import to complete the Import. This will import the Practical Law template(s) into the Templates tab to be used within the site. If the import is successful, a success banner will be displayed with links to view the template details.
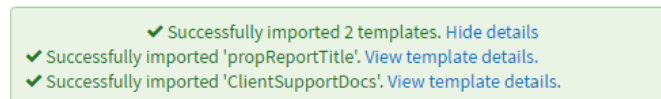
Alternatively, you can multi select templates in the grid on the Practical Law tab. This will also allow you to import an entire suite of templates within a category.

19.2.2. Automatically import updates

When importing a template from Practical Law, there will be a checkbox on the confirmation modal labelled "Automatically import updates".

If this is checked, any updates that are made to the template(s) within Practical Law will automatically be pulled into your license space as a new version when Contract Express checks the Practical Law repository for updates. See section 19.3 for more details on checking for updates.

This setting can be changed at a later time on a template by template basis via the Template Details page **of the imported template.** Once the template has been imported, Navigate to Templates -> Select the imported template. The option will be available on the Template Details page.

19.2.3. Automatically set updated Templates to Live

When importing a template from Practical Law, there will be a checkbox on the confirmation modal labelled "Automatically set updated Templates to Live".

If this is checked, whenever any updated templates are automatically pulled into the license space from Practical Law (see section 19.2.2 for details on automatic updates), these templates will automatically be set to Live.

This setting can be changed at a later time on a template by template basis via the Template Details page **of the imported template**. Once the template has been imported, Navigate to Templates -> Select the imported template. The option will be available on the Template Details page.

19.2.4. Editing Templates sourced from Practical Law

Once a template has been imported into your license space, it can be used as a regular self-sourced template. Section 18 has more details on setting up templates. The template can be downloaded, edited in Contract Express Author and uploaded back into Contract Express.

19.2.5. Make Practical Law sourced Templates available for Users

Once a template has been imported into your license space, it can be used as a regular self-sourced template. See section 18.9 for details about sharing templates with other users.

19.3.   Check for any updates to Templates sourced from Practical Law

19.3.1. Automatic update checks

In order for the Practical Law templates within the Practical Law tab to be kept up to date, Contract Express will perform automatic checks every hour to see if there are any updates in the Practical Law template repository. The frequency of these checks can be updated by your system administrator.

In cases where a template has been imported into your license space, if Contract Express finds that there has been an update to your imported template within Practical Law template repository, this will be reflected in a number of locations:

1. The list of Practical Law templates in the **Practical Law tab** – the "Update available" column
2. On the Template Details page of the template in the **Practical Law tab** – the "Update available" field on the right hand side of the screen

Last modified:
15:35:38

Modified By:
Practical Law

Update available:
Yes

📄 Subtemplates

3. The list of templates in the **Templates tab** – the "Update available" column
4. On the Template Details page of the imported template in the **Templates tab**

≋ propReportTitle

| **Template Details** | Template Versions |

Latest Version:
1.03

Update available from Practical Law:
Yes Update now

If there are available updates, these can be pulled into your license space by selecting the desired templates in either the Templates tab or the Practical Law tab and clicking Update. You will be asked to confirm which templates you wish to update and once this is confirmed, the template(s) will be updated.

⟳ Update

Alternatively, on the Template Details page of the imported template there will be an option to update the template if there are any available updates. Click on "Update now" option to update the template.

≋ propReportTitle

| **Template Details** | Template Versions |
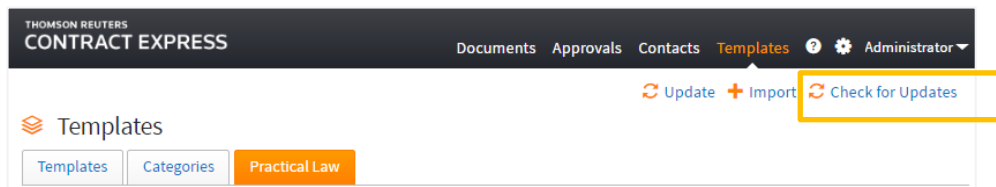
Latest Version:
1.03

Update available from Practical Law:
Yes Update now

19.3.2. Check for updates manually

Contract Express will automatically check for updates every hour by default. However, it is possible to check for updates on an ad-hoc basis. You can manually check for updates in any of the following locations:

1. The list of Practical Law templates in the **Practical Law tab**

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Documents   Approvals   Contacts   **Templates**   ❓ ⚙ Administrator ▾

⟳ Update   ➕ Import   ⟳ Check for Updates

≋ Templates

| Templates | Categories | **Practical Law** |

2. The list of templates in the **Templates tab**
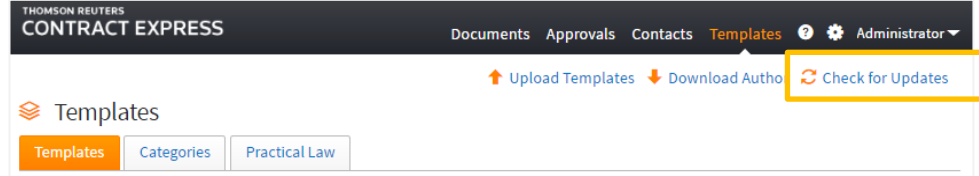
If there are available updates, these can be pulled into your license space by selecting the desired templates in either the Templates tab or the Practical Law tab and clicking Update. You will be asked to confirm which templates you wish to update and once this is confirmed, the template(s) will be updated.

Alternatively, on the Template Details page of the imported template there will be an option to update the template if there are any available updates. Click on the "Update now" option to update the template.
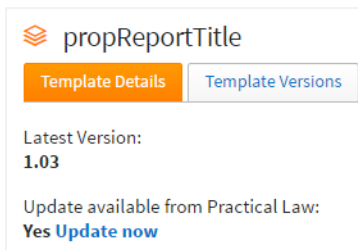
20. Categories

20.1.   Creating Categories

Categories are designed to control the way users experience templates. Categories allow templates to be organized into related groups. This might be by business function, say Sales or Finance, or by region, say United States or Europe. Such categories can be nested so you might have business function within region, say a United States/Sales category, and a Europe/Sales category. This aspect of categories is just like the nested folder structures familiar to users of many other systems. One important difference is that a template can be associated with multiple categories, so the same template might be added to both the Unites States/Sales category and the Europe/Sales category.

In order to make use of categories, you will need to enable them in your License Space settings, under the License tab. By default they are switched off.

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To create a new Category click on the Templates tab then select Categories. Select "New Category" and give your category a name. Click Save. If you click into the Category and select New Category, this will create a nested Category.

20.2.   Adding Templates to Categories

Within each category, each template may be associated with a Profile and given a name. The Profile allows many aspects of a template's questionnaire or generated document behaviour to be modified. Renaming allows such a profiled template to be given a more specific or appropriate name for the category from which it is being accessed, for example "Software License" in the United States or "Software Licence" in Europe. Profiles can also be set for guest templates.

Template authors can directly browse the underlying templates, but business users will only access the renamed, profiled templates allocated to categories to which they have been granted access when they click on either "New Document", "New Invitation" or when adding a new Workflow Item where using Matters.

To add a template to a category, click on the name of the category then select Add Template. This will present a modal where you can specify the templates to be added to the

category along with the profile and template name within the category. Note that you are able to rename templates when adding them to categories but this will **not** affect the name of the underlying template in the main template list.

You can apply a profile to all templates being added to the category or you can select each profile using the dropdown menu within the Profile column.

Once you have added a template to a category, you may remove the template from the **main Categories list under the Categories tab**. This will not affect the copy of the template that has been added to the category/categories. **Make sure that you do not delete the template from the main Templates list** (under the left hand tab) since this will remove all copies of that template including those within categories.

Each template copy that is added to a Category will have template links which consists of 2 URLS:

1. Test Link: The latest version of the main template (which can be either Test/Live) + the assigned profile.
2. Live Link: The latest version of the main template that has been marked as Live only + the assigned profile.

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20.3.   Edit Templates within a Category

Once templates have been added to a category, they can be modified by selecting the appropriate templates from within the category and clicking on "Edit Templates". You can modify the profile, template and name for all templates.

Select a Profile for all Templates

| Default | ▾ |

Name	Template	Profile	
Non Disclosure Agreement in the United Sta	Non Disclosure Agreement ▾	PDF Read Only ▾	✕

| Save | Cancel |

To remove templates from a Category, select the desired templates from the list within the Category and click on "Remove". Note that this will only remove the templates from the current category but **will not delete the underlying template from the Templates tab.** See section 18.8 for information about deleting the underlying template.

20.4.   Moving Categories

To move a Category to a different location, select the checkbox for the Category and select ▣ Move . Select the destination for the Category and click Save to move the Category.

If the destination already contains a Category with the same name or contains templates with the same profile and name as templates in the Category that is being moved, you will not be able to move the Category.

20.5.   Viewing all Categories where a Template exists

It is possible to view all Categories that a template has been copied to. To view this list of Categories click on the template on the Templates grid and select the Related Categories tab.

Non Disclosure Agreement

| Template Details | Template Versions | Related Categories | Approval Steps | Workflow Steps | Negotiation | More ▾ |

Related Categories

Name in Category	⬍	Category Path	▾	Profile	⬍
Non Disclosure Agreement in the United Kingdom		Categories\EMEA Agreements			
Non Disclosure Agreement in the United States		Categories\US Agreements		PDF Read Only	

Name in Category: This is the name that was assigned to the template when it was added to the Category. Click on this link to launch the template as it has been added to the Category (i.e. with the assigned Profile).

Category Path: This is the location of the Category where the template exists. Click on the link to navigate directly to that Category

Profile: This is the Profile that was assigned to the template when it was added to the Category. Click on this link to view the Profile properties

21.Contacts

A Contact contains information, such as name and address, about an individual or organization, much like an email contacts list or address book. The information captured in a Contact is determined by the auto-provisioned Contact template which can be amended.

Contacts may be created individually in Contacts, via the questionnaire or imported from an email platform, for example a Gmail or Outlook Contacts list/address book.

21.1.   Creating a new Contact

21.1.1. Creating a Contact from the Contacts list

Contacts can be created via the Contacts page in Contract Express and immediately added to your main list of Contacts. To create a Contact, navigate to the Contacts page and click New Contact. Select the Contact type and enter the Contact information, making sure any mandatory fields, marked with an *, are filled in and click Save & Close. The new Contact will be added to the list of Contacts.
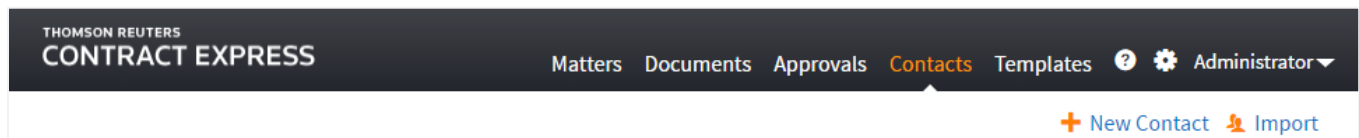
21.1.2. Creating a Contact from a Document

To create a Contact from a Document create a new Document (see Creating a new Document) or open an existing Document (see Editing a Questionnaire) that has a Template that supports Contacts. A "**Set <contact type>**" button will be displayed which indicates where a Contact may be inserted, click one of these to insert a Contact.

Details for the landlord

Add a contact as the landlord

[✎ Set Landlord]

Click Set Landlord to add a contact as the landlord

Details for the Tenant

Add a contact as the tenant

[✎ Set Tenant]

Click Set Tenant to add a contact as the tenant

Will a guarantor be required for this tenant?

◎ Yes
◎ No

[Save & Continue]

This Document supports Contacts in two places, for the Landlord and the Tenant; clicking Set Landlord and Set Tenant adds a Contact for the Landlord and Tenant respectively.

To create a new Contact select New Contact in the Contacts selector, choose a Contact type and click Select. By default, this new Contact will be saved to your list of Contacts; to prevent this, and create a local Contact (to be used within this Document only), uncheck the "Save to Contacts" checkbox before clicking Select.

Search... 🔍   All Contact Types ▾

ⓘ Tick "New Contact" at the top of the list below

Name	▾ Address	⬍
◉ ➕ New Contact		

☑ Save to Contacts

[Select]   [Cancel]

Enter the Contact information, making sure any mandatory fields, marked with an *, are filled in. If appropriate, uncheck Save to Contacts to prevent it from being added to your list of Contacts. Continue editing the Document and click Save & Continue when finished to save the Document and all of its Contacts.

21.2.   Importing Contacts

Many email platforms, such as Gmail and Outlook, allow the Contacts list/address book to be exported in CSV format. The exported file may then be imported into Contract Express.

21.2.1. Exporting Contacts to a CSV file

Export the Contacts list/address book in CSV format. For details on how to do this for Gmail and Outlook 2007, 2010, 2013 and 2016 please see https://support.office.com/en-us/article/Export-contacts-from-Outlook-10f09abd-643c-4495-bb80-543714eca73f. For other email platforms a Google search along the lines of "export [chosen email platform] contacts to CSV" should provide instructions.

21.2.2. Importing Contacts to your Contacts list

Navigate to the Contacts page in Contract Express and click Import. Click Browse to select the correct CSV file and click Upload. Note: duplicates are not imported and importing Contacts will add Contacts to the list but will not replace any entries which may have already been created manually in Contract Express.

21.3.   Managing Contacts

21.3.1. Viewing the usage of a Contact

It is possible to find out all of the places where a Contact is being used by clicking the appropriate "View Usage" link in the Contacts list.

	Name	Address	Type	Usage
☐	THOMSON REUTERS GROUP LIMITED	The Thomson Reuters Building 30 South Colonnade, South Colonnade, Canary Wharf, London, E14 5EP	Company	View Usage

This will display a modal which will list all of the places that the contact is being used. A contact may be used in:

1. A Matter
2. A Document
3. A Contact – if the contact exists in your list as a result of importing it as an appointment when using Companies House search. See Importing Company data from Companies House.

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Used in	Type	Modified by	Last Modified	Contact update available
Checklist: employment contract	Document	Administrator	09:27:31	No

21.3.2. Editing a Contact from your list of Contacts

To edit a Contact from the Contacts list navigate to the Contacts page in Contract Express and click the appropriate Contact Name link. Update the Contact as required and click Save & Close. The Contact entry will be updated.

21.3.3. Editing a Contact from a Document

To edit a Contact from a Document open a Document that contains Contacts (see Editing a Questionnaire) and either modify a Contact inline, or click Change to replace it with an alternative. Note that if the checkbox "Save to Contacts" is selected, any changes made to the Contact within the Document will overwrite the entry in your main

list of Contacts. Continue editing the Document if required and click Save & Continue when finished to save the Document and all its Contacts.

> ⚠️ **Editing a Contact in the Document may automatically update Contact entries in Contacts**
> Note that if the checkbox "Save to Contacts" is selected, any changes made to the Contact within the Document will overwrite the entry in your main list of Contacts.

21.4. Deleting a Contact

21.4.1. Deleting a Contact from the Contacts list

To delete a Contact from the Contacts list navigate to the Contacts page in Contract Express, select the appropriate Contact(s) and click the Delete menu option.

> ⚠️ **Contacts in use cannot be deleted**
> Contacts that are in use in either a Document, Matter or in association with another Contact cannot be deleted. You must first delete the item that is using the Contact for it to be enabled for deletion. See section 21.3.1 for details on viewing contact usage.

21.4.2. Deleting a Contact from a Document

To delete a Contact from a Document open a Document (see Editing a Questionnaire) that has a Template that supports Contacts. The existing Contacts should be indicated. Click Remove to remove the Contact from the Document. Note that this will only remove the Contact from the Document but will not Delete the Contact from your list of Contacts.

21.5. Changing what data is captured for a Contact

The information captured in a Contact and how it displayed is determined by the auto-provisioned Contact Template and Contact Profile. This information can be edited by replacing the Contact Template or the Contact Profile in Contract Express but the Profile name and Template reference **must not be changed** as the Contacts feature relies on name and the reference being set to "Contact".

> ⚠️ **Contact Profile uses the English (UK) locale**
> Note that the auto provisioned Contact Profile uses the English (UK) locale. Please update the locale if necessary – see section 21.5 for details about editing Profiles

A Contact may be more complex, for example referencing other Contacts. These Contacts are created, modified, and deleted, in the same way as simpler Contacts (see Creating a new Contact, section 21.1 and Deleting a Contact) but contain locations where other Contacts may be added much like a Document (see Creating a Contact from a Document). Contacts that are referenced are displayed in the Contact references list.

22.Matters

Matters offer the ability to create a collection of Documents that relate to the same real world matter. A user is able to create multiple Documents which share the same data without having to complete multiple questionnaires in one go. Users can start a Matter, create a Document and will see recommended steps of what Documents to create next after each stage.

Creating a Matter is done via the Matters page only. This is a repository of all the Matters generated by and shared with the user. They can be organised in various ways such as alphabetically or by status, by clicking on the appropriate column heading. Users have the ability to create folders in order to file their Matters and are able to invite other users to their Matter.

22.1.   Setting up Matter Workflow Steps

Workflow Steps are the recommendations that a user will see during a Matter. These recommendations can be links which jump straight into a new question session and create a new Document within a Matter.

22.1.1. Matter Template

The Matter Template is crucial for Matters and is the top most Template of any Matter. When a user starts a new Matter, this is the Template that will be launched. If your license space has the Matters feature enabled this template will be auto-provisioned. The contents of this Template can be edited by downloading the Template, modifying and uploading it back into the site. To ensure that the modified Template is used for Matters**, the Template reference must not be changed**.

An approval cannot be applied to an entire Matter but it is still possible to add Approval Steps to the Matter template. If an approval step is added to the Matter template, the approval will be evaluated for standalone Documents created using the Matter Template.

22.1.2. Adding a new Workflow Step

Workflow Steps are used to drive the next steps during a Matter. You can create a Workflow Step by going to the Templates tab and selecting the relevant template, then click "New Workflow Step". If applicable, Workflow Steps should be added to the Matter Template to start the display of Workflow Steps within a Matter but Workflow Steps can be added to any Template.

 Title: Enter a title for the Workflow Step. This is what will be displayed as a next step during a Matter. The title is compulsory and must be unique for this template.

Workflow Type: When this workflow step is selected during a Matter, it is possible for repeated data captured in the questionnaire for this template to be separated into separate Documents. This is explained further in section 22.1.3. Choose whether this Workflow Step should create a single Document when launched or create multiple documents from repeated data when launched.

Template: This is the Template that will be launched when the user clicks on the Workflow Step during a Matter. By default this is set to "Any" which means that when the user selects the Workflow Step they will have the choice of which Template to launch. The Template chosen by the user will use the site default profile or where using Categories, the profile that was configured.

Add Workflow Step

Title

Workflow Type

Single Document Creation

Template

Employment Agreement

Applicable

Dependent on rule below

Variable Rule
☑ Enable variable rule

OtherPartyCountry (String)   =   United States

Status Rule   ✕ Remove

Exists   Non Disclosure Agreement   status is   Ready

➕ Add Contract Status Rule

However, if you choose to specify the Template to be used you can do so by selecting a Template from the dropdown menu. This will then display 2 additional fields: Profile and Cardinality.

Applicable: Controls when to display the Workflow Step as a recommendation. By default this is set to "Always" but can be changed to be dependent on a particular condition by setting it to "Dependent on rules below". The condition is fulfilled if <u>all of the rules specified are met</u>. There are two different types of rules that can be configured:

- <u>Variable Rule</u> – based on the value of a single variable within the template.
- <u>Status Rule</u> – states whether the Matter contains a Document created using a specific Template. The rule can also specify the Document status. This rule can also be negative and state whether a Matter does not contain a Document created using a specified Template. In the screenshot to the right the rule states '**A Document created using the Non Disclosure Agreement exists in the Matter and the status is Ready**'. Multiple status rules can be added to the condition.

Profile: A profile can be selected which will be used for the Workflow Step. A Profile allows many aspects of a template's questionnaire or generated document behaviour to be modified. See section 11 for more details on Profiles.

Cardinality: Enter a number value to specify how many times this Workflow Step will be displayed during the lifetime of the Matter. If this is set to 1, the Workflow Step will only ever be recommended once. Once a Document has been created using this Workflow Step it will not be displayed again throughout the lifetime of the Matter. Setting the value to 0 will allow the Workflow Step to be displayed an unlimited number of times.

Once the details of the Workflow Step are completed click Save.

22.1.3. Adding a new Workflow Step that creates multiple Documents

During a Matter, it is possible for repeated data in one Document to be separated into multiple Documents. For example, if we have a contract within a Matter that captures all of the employees within a department and from that contract we want to generate individual contracts for each of these employees which contains data captured in the initial contract and will be used to capture additional information, we would have the following:

- A template which captures the number of employees within that department in a repeat "EmployeeCount" and each employee will be added as a new repeat– Template A
- A template that will be used for individual employees that has the same variables used within the repeat in Template A – Template B

We will have the following Workflow Step:

1. A new Workflow Step on Template A with the settings below:

Title: Enter a title for the Workflow Step that will be displayed as a next step during a Matter. The title is compulsory and must be unique for this template.

Workflow Type: Select "Multiple Document Creation"

Template: This is the Template that the employee information from Template A will be written to for each template. Select Template B. *It is possible for you to set this to <Any> which allows the user to choose the*

template. The multiple document creation will only occur if the template selected by the user contains the variables outlined in the next step

Repeat Variable: This is the repeat variable that controls the number of Documents that should be created. In our example this is "EmployeeCount".

Applicable: Controls when to display the Workflow Step as a recommendation. By default this is set to "Always" but can be changed to be dependent on a particular condition by setting it to "Dependent on rules below". The condition is fulfilled if <u>all of the rules specified are met</u>. We will keep this set to "Always".

Profile: A profile can be selected which will be used for the Workflow Step. We will keep this as the default Profile for the License Space. See section 11 for more details on Profiles.

Cardinality: This determines how many times this Workflow Step will be displayed during the lifetime of the Matter. If this is set to 1, the Workflow Step will only ever be recommended. Setting the value to 0 will allow the Workflow Step to be displayed an unlimited number of times. We will set this to 0.

Below is an illustration of what will happen during the Matter

22.1.4. Editing a Workflow Step

You can edit a Workflow Step by going to the Templates tab and selecting the relevant template, then choosing the Workflow Step you wish to edit. All settings are editable.

22.1.5. Managing Workflow Step Order

You can control the order in which the Workflow Steps are displayed during a Matter. This is done through the Manage Order button with the list of Workflow Steps. Drag and drop a Workflow Step to change the order. Click Save to save your changes.
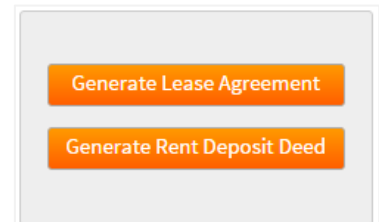
22.1.6. Deleting a Workflow Step

To delete a Workflow Step, simply select it from the list of Workflow Steps and click the "Delete" option. Alternatively, on the list of Workflow Steps select the checkbox and click "Delete".

22.2. Creating a new Matter

To initiate a Matter click on the New Matter option on the Matters page. This will launch a questionnaire session for the Matter Template. See section 22.1.1 for more details about the Matter Template. Clicking Save & Close on the questionnaire will end the question session and redirect to the Matter details page.
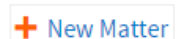
22.3. Working through a Matter

22.3.1. The Matter details page

This page contains the attributes of a Matter and is the landing page after initially creating a Matter.

Overview: This section contains the Matter details Datasheet (see section 0 for more details about Datasheets).

Workflow Steps: There is a list of possible Workflow Steps located on the right hand side of the page. The options displayed in this list depend on the Workflow Steps that have been configured by an Author or Admin user. See section 22.1 for more details.

Workflow Items: A list of Documents that have been created using a Workflow Step via a Matter.

Related Matters: A list of Matters that have been linked to the current Matter that is being viewed.

History: A consolidated history of all Workflow Items. History entries that are specific to the entire Matter will have the Metadata column checked.

22.3.2. Progressing through a Matter

Once a Matter has been initiated, the next steps to progress through the Matter will be displayed within the Workflow Steps area. There are 2 types of Workflow Steps:

(i) Workflow Steps with pre-assigned Templates

Clicking on this option will direct the user straight into the questionnaire using the Template that was configured for the Workflow Step (see section 22.1.2 for more details). On completion of the questionnaire the user will land on the Document details page for the Workflow Item created via that Workflow Step. From there it is possible to navigate back to the Matter by clicking on the Matter link on the Document details page.

Assignment of Lease

Overview

Status:
Incomplete

Matter:
Lease Transaction for John Doe
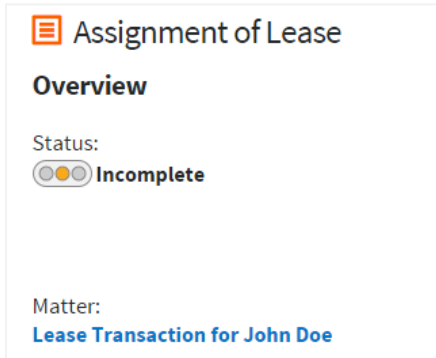
(ii) Workflow Steps which offer user the option to select a Template

Clicking on this option will direct the user to a list of Templates to choose from. The Templates in this list will be the same list of Templates a user is able to access via the New Document/New Invitation link on the Documents page. Once a Template is selected the user will be redirected to the questionnaire and then on completion of the questionnaire the user will land on the Document details page for the Workflow Item created via that Workflow Step. From there it is possible to navigate back to the Matter by clicking on the Matter link on the Document details page.

Assignment of Lease

Overview

Status:
Incomplete

Matter:
Lease Transaction for John Doe

(iii) Workflow Steps that create multiple Workflow Items

Workflow Steps may be set up so that when clicked, they automatically create multiple Workflow Items based on data entered in an existing Workflow Item within the Matter (see section 22.1.3 for details about configuration). Clicking on this Workflow Step does not require any user input so you will not be directed to the questionnaire, but the new Workflow Items can be found in the Workflow Items section of the Matter.

22.3.3. Renaming and Editing a Matter

Editing the data of a Matter can only be done via the Datasheet on the Matter details page. Within the Overview section, values that can be edited will display a pencil icon when hovering over that value. Double click on the

value to start editing. Once completed, clicking on Save will save the changes and clicking on Cancel will revert all changes.

A Matter can be renamed either via editing the Datasheet or by clicking on the Rename menu option.

22.3.4. Sharing a Matter

Users can share Matters with other users within the site by selecting the relevant Matter and clicking the Sharing option. By default the Matter will retain the permissions set on the folder that it sits within or if it is in My Matters it will default to that user. Uncheck the Inherit Permissions box.

This will allow the user to set permissions for this Matter. Access can be granted by user, role or group.

22.3.5. Access Levels

As well as granting users, groups or roles access to the Matter it is also possible to specify the level of access granted. This is done through the Access Level dropdown option available when granting permissions to the Matter.

The Access Levels can be found in section 6.6.

22.3.6. Matter History

The History section is a consolidated history of all Documents within the Matter. History entries that correspond to the Matter will have a tick within the Matter column and entries for individual Work Items will be left blank.

22.3.7. Ending a Matter

It is possible to end a Matter by deleting it. This can be done by selecting the Matter in the grid of Matters and selecting the Delete option. Alternatively, click on the Delete option on the Matter details page. Please note that the Matter and all associated Documents that are a part of that Matter will be deleted permanently.

1.1.1. Creating a new Matter from an existing Document

There may be cases where a standalone Document (i.e. Document that is not part of a Matter) is created and at a later point that Document is required to be a part of a Matter. An existing Document can be converted into a Matter by clicking on the "Convert to Matter" option under "More" on the document details page of the Document that needs to be converted.
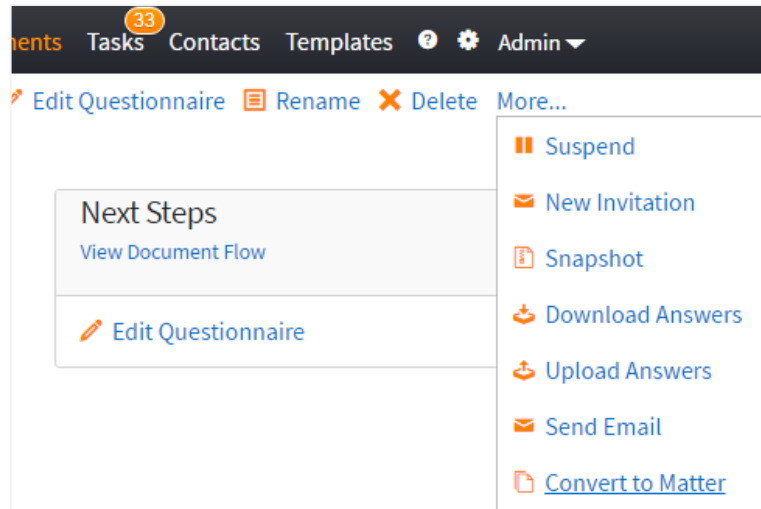
This will launch a questionnaire session using the Matter template. Clicking Save & Close on the questionnaire will end the question session and redirect to the Matter details page for the new Matter.

The existing Document will now be listed as a Workflow Item within the Matter and any Workflow Steps that were set up against the Matter template and the template used to create the original Document will be available in the Workflow Steps section.

23. Creating Documents

Creating documents is done via the Documents page. This is a repository of all the documents generated by the user. They can be organised in various ways such as alphabetically or by status, by clicking on the appropriate column heading. Users have the ability to create folders in order to file their documents.
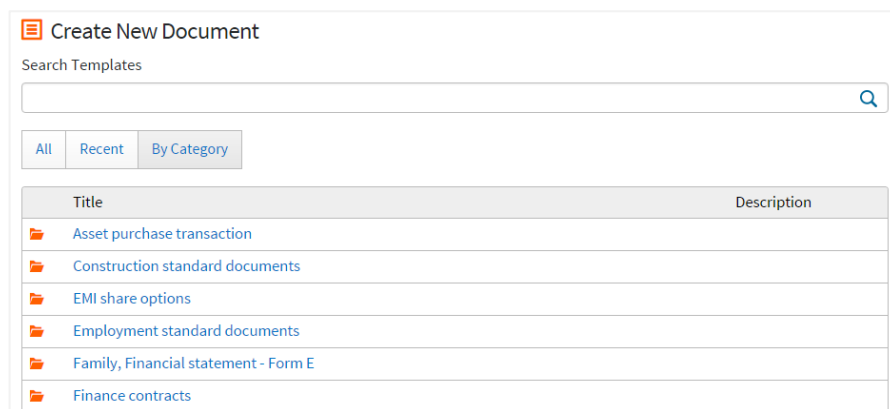
Users also have the ability to invite Guests or other users to complete a questionnaire and create a Document by using the New Invitation button, if your licence permits it and Forms Based Authentication is used.

23.1.   Creating a new Document

23.1.1. Choosing a Template

To begin generating a document, go to the Documents tab and click "New Document". This then gives you a list of the templates you have permission to use, divided into tabs of "All" (all the available templates in alphabetical order), "Recent", and "By Categories", which allows the templates to be sorted by folders (see section 19). You can also search for a template (for best results set the display to "All") using the search box. Selecting a template will launch the questionnaire.

23.1.2. Search for a Template

When users click New Document in the Documents tab they also have the option to search for the document they need to create. Start typing the name of the document in the search bar and Contract Express will narrow the list of available documents down until the relevant document is displayed. Users can then click on the document name and begin the questionnaire.

23.1.3. Navigating through the Questionnaire

The Questionnaire screen consists of three main sections. On the left, all the different pages of the questionnaire are listed, with the icons beside turning green to show when a page has been completed (i.e. all questions answered). At the top of this column is a progress bar, which fills as the user completes the questionnaire.

To the right is the main questionnaire, presented in a single-column format. Once a page has been completed, click "Save & Continue" to go on to the next page of the questionnaire.

Alternatively, the top of the screen provides further navigation options. Use "Previous" and "Next" to navigate the questionnaire, or use "Save & Close" to save and generate a document with the answers so far. Questionnaires can be revisited, by clicking on the appropriate item in the Documents screen and choosing Edit Questionnaire.

23.1.4. Preview

Contract Express gives users the ability to view the Word document underneath the questionnaire and see the answers given in the questionnaire updating the document in real time. The availability of the Preview button is dependent on a suitable screen resolution being available to use the functionality (see 23.1.10).

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The preview button can be enabled or disabled in the Profiles, specific Profiles can be applied to a template, using Categories.

23.1.5. Importing Company data from Companies House

Where enabled via the Template (See the Contract Express Author Getting Started Manual) it is possible to import the data of a company from Companies House into the questionnaire. Locate and click on the Search Companies House button.

This will display modal with a search field where you can search by the company name or registered number. The search result will list all of the companies in Companies House that match your search. Note that results that are greyed out are not available to be imported into the questionnaire due to restrictions set within the Template.

To import a company, either click on the company name or click on the information icon for that company to display the company information. Here you can see information about the company stored in Companies House along with the appointments assigned to the company. By default, these appointments will be imported along with the company but this can be changed by de-selecting the unnecessary appointments.

If you are happy to import the selected company, click the select button and the company will be imported into the questionnaire.

23.1.6. Importing Company data from the Dutch Chamber of Commerce

Where enabled via the Template (See the Contract Express Author Getting Started Manual) it is possible to import the data of a company from the Dutch Chamber of Commerce into the questionnaire. To do this, locate and click on the Search Company button.

This will display modal with a search field where you can search by the company name or registered number (KvK number). The search result will list all of the companies in the Dutch Chamber of Commerce that match your search.

Search Dutch Chamber of Commerce for a Company

Kamer van Koophandel

Company Name	KvK Number	Branch Number	RSIN Number	Company Status	
Hong Kong Kamer van Koophandel	34390571	000011568887	822352035	active	ℹ
Kamer van Koophandel	59581883	000015063097	823807071	active	ℹ
Kamer van Koophandel	59581883	000009548734	823807071	active	ℹ
Kamer van Koophandel	59581883	000024224936	823807071	active	ℹ
Kamer van Koophandel	59581883	000004803183	823807071	active	ℹ
Kamer van Koophandel	59581883	000028884159	823807071	active	ℹ
Kamer van Koophandel	59581883	000002391082	823807071	active	ℹ
Kamer van Koophandel	59581883	000015188809	823807071	active	ℹ
Kamer van Koophandel	59581883	000002391090	823807071	active	ℹ
Kamer van Koophandel	59581883	000004906977	823807071	active	ℹ

1 - 10 of 812 results.

More

To import a company, either click on the company name or click on the information icon for that company to display the company information. Here you can see information about the company stored in the Dutch Chamber of Commerce.

Kamer van Koophandel

KvK Number: **59581883**

Branch Number: **000015063097**

RSIN Number: **823807071**

Registration Date: **2014-01-02**

Address: **300 St.-Jacobsstraat, Utrecht, Nederland, 3511BT**

Legal Form: **Publiekrechtelijke rechtspersoon**

Legal Person: **false**

Number of Employees: **0**

Web Sites:

www.kvk.nl

| Select | Back to list | Cancel |

If you are happy to import the selected company, click the select button and the company will be imported into the questionnaire.

23.1.7. Using Post Code search to search for an address
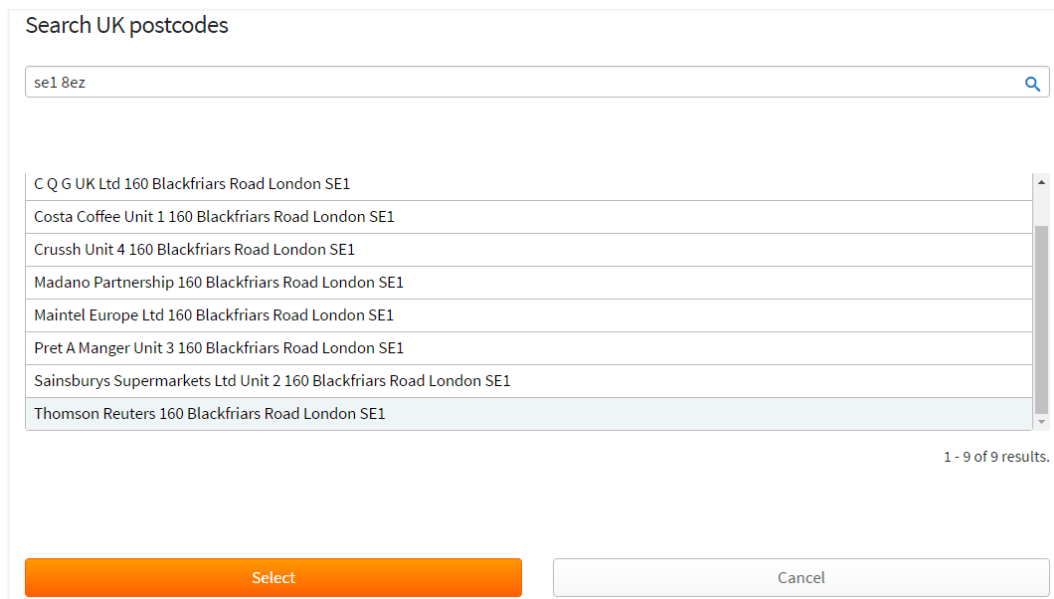
Where enabled via the Template (See the Contract Express Author Getting Started Manual) it is possible to search for an address and import the address into the questionnaire. Note that this feature is only applicable for UK post codes. Locate and click on the "Search Post Code" button.

This will display modal with a search field where you can search by a full or partial postcode. Either select an entry in the search result and click Select or double an entry in the search result to import the address. If you are searching against a partial postcode, you will be required to drill down in the search result until you have reached the required address.

23.1.8. Searching for Contract Express users in the questionnaire
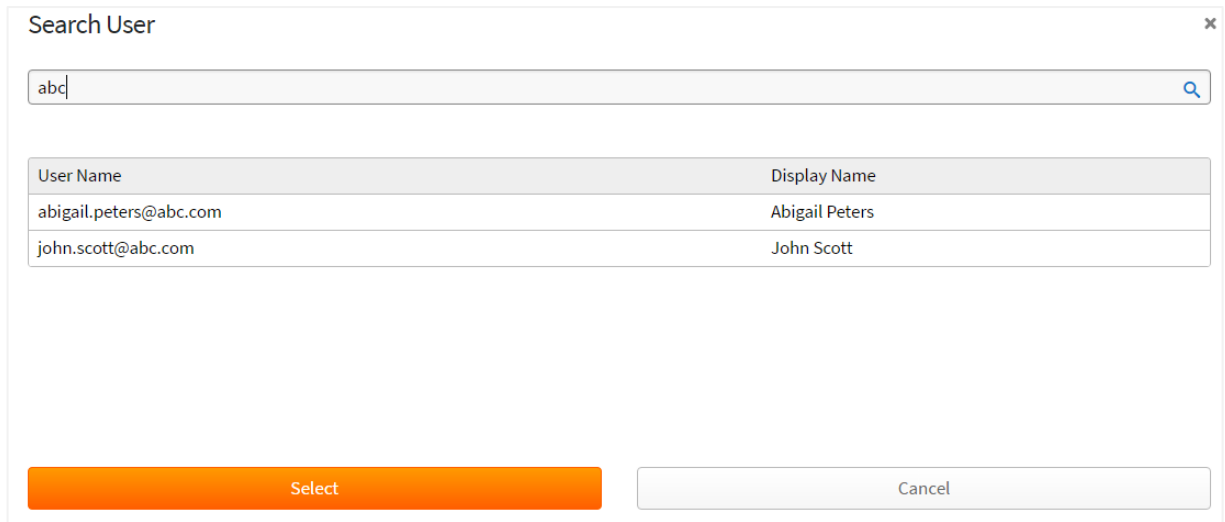
Where enabled via the Template (See the Contract Express Author Getting Started Manual) it is possible to search for other Contract Express users and import their details into the questionnaire. To do this, locate and click on the "Search User" button.

This will display modal with a search field where you can search for a user by their user ID. You can enter the full or partial user ID. Select an entry in the search result and click Select to import the user.

23.1.9. Navigating multiple documents using Preview

If more than one document is being created through one questionnaire the user can view each document individually in preview mode by selecting the tabs found at the top of the preview page.
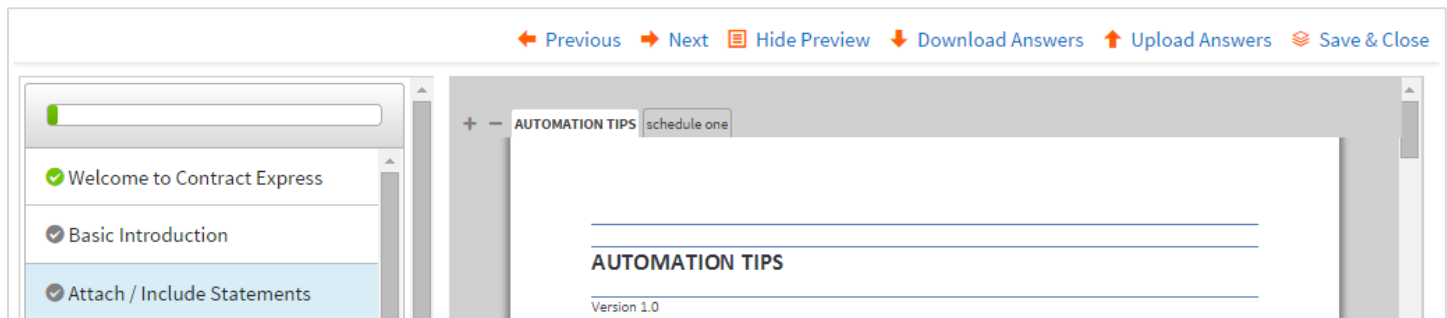
23.1.10.Views in the Questionnaire

The view of the questionnaire alters depending upon the device the user is viewing the site on. The questionnaire alters dynamically to accommodate the variations of screen size and device the user may view the questionnaire in.

PC View: This offers the full range of functionality available in Contract Express 6. The navigation pane is set to the left of the main body of the questionnaire with the additional options such as Preview, and up and down loading answers contained in the tab along the top.

Tablet View: The navigation pane when viewed on a tablet is placed above the main body of the questionnaire and can be selected as a dropdown by the user.

Preview is available in this view. The navigation pane will remain at the top of the questionnaire if activated.

The Options to upload and download answers are not available during the questionnaire session in this view but users are able to download the answer file upon completion of the questionnaire.

Mobile View: The questionnaire can also be viewed on smartphone devices. Note that the Preview, and uploading and downloading answers options are not available in this view.

23.1.11.Downloading answers from the Questionnaire

Users are able to download answer sets during the questionnaire and when the questionnaire is complete by clicking the Download Answers option. The answers are stored in an xml file and can be saved and renamed if required, for later use. Answers can be downloaded during or upon completion of the questionnaire.

23.1.12. Cloning a Document

It is possible to quickly create a new Document which contains the same answers as an existing Document using "Clone". The new Document can be based on the same template as the original Document or based on a different template as the answers are based on the names of the variables in the Contract Express template, so if there are consistent variable names in both templates the answers can be cloned into the new Document.

To clone a Document navigate to the document details page of the Document you wish to clone and select **+ Clone**

Then choose whether to base the new Document on the same template as the original Document or a different template.

If you choose to you the same template then you will be directed to the questionnaire for the new Document with the answers pre-populated. Save and Close the questionnaire to view the new Document's details. Alternatively,

if you choose to use a different template then you will be directed to a list of templates where you can select the desired template. Once you have selected the template you will be directed to the questionnaire for the new Document with the answers pre-populated for any corresponding answers. Save and Close the questionnaire to view the new Document's details.

23.1.13.Uploading answers to the Questionnaire

If a user has an answer set for a document they wish to use, once in the questionnaire the ⬆ Upload Answers options should be selected.

Select the answer file and click open. The existing answers will be populated in the questionnaire which the user can then edit if necessary.

Note that the answer files are based on the names of the variables in the Contract Express templates, thus, answer sets can be shared between differing templates provided the underlying variable names are consistent.

23.2.   Multi Document creation

In order to batch create multiple Documents a CSV file must be imported into Contract Express using the Import button on the Documents page. It is possible to obtain a pre-set CSV file to be used for the batch creation by:

(a) Exporting a Datasheet on the Documents page. See section 9.7 for details. The Datasheet must contain a **Doc Id** column and a **Template** column for this function to work. Exporting the Datasheet will output a spreadsheet with columns for any Variables that have been added to the Datasheet as a Column.

(b) Exporting a CSV file with all Variables from the applicable Template. This option is only available to Admins and Authors via the Templates page on the Template Details tab. Click on Export to download the CSV file.
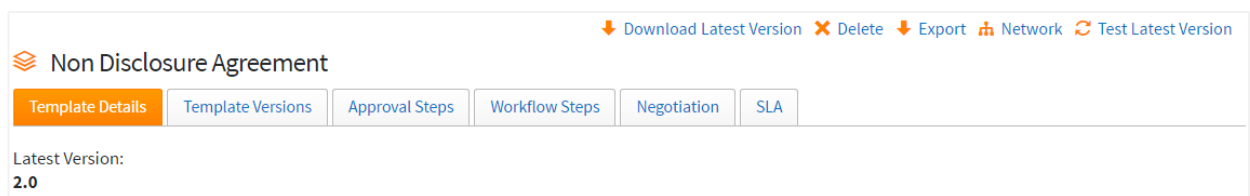
Once the CSV has been downloaded, you can open the file and start editing. Once the amendments have been made, save the changes and import the file into Contract Express using the Import option on the Documents page.

23.2.1. Creating new Documents

- Add applicable data in the variable columns
- Fill in the 'Template' column with the Template reference of the Template that will be needed to create the Document(s)
- Ensure the Doc ID column is left blank   ⬆ Import

23.2.2. Editing existing Documents

- Add/update applicable data in the variable columns
- Ensure the 'Template' column is populated with the Template reference of the Template that will be used to amend the Document(s)
- Ensure the Doc ID column is populated with the Document ID of the Document that will be updated

> ⚠ **Editing Documents where permissions are set to Read-only**
>
> Note that it is not possible to update Documents where you only have Read permissions on the Document.

24. Managing Documents

24.1. Editing a Questionnaire

To edit an existing generated document's questionnaire users should click on the name of the document on the Documents page. In the document details page the option to Edit Questionnaire is available which will allow users to alter their answers and produce an updated version of the document.

24.2. Renaming a Document

Completed documents can be renamed by selecting the title of the applicable document in the Documents page. This will take users to the details of that document on a new page where the Rename option should be selected.

24.3. Deleting a Document

Users can delete documents by selecting the checkbox next to the relevant document on the Documents page. Note that multiple documents can be deleted at once by selecting multiple checkboxes.

24.4. Suspending a Document

Suspended documents are temporarily inactive documents, which are excluded from analytical reports by default.

Users can suspend Documents by selecting the checkbox next to the relevant Document on the Documents page and clicking on the option 'Suspend' . Note that multiple Documents can be suspended at once by selecting multiple checkboxes. Alternatively, Documents can be suspended using the option ‖ Suspend on the document details page.

When a Document is suspended, the icon will for that Document is greyed .

To re-instate the Document, use the option ▶ Continue on the Document details page.

24.5.   Sharing Documents

24.5.1. Share an Existing Document with a Guest

This feature is only available where either Forms Based Authentication or Mixed Mode Authentication are enabled.

To share a document with someone who is not a member of the site, click on the Sharing column of the document required. Under the Guest Access tab check the checkbox marked Invite Guest then enter the name and e-mail address of the Individual. You can also choose whether the guest's access to the documents will be subject to an approval. If this checkbox is selected and the template is setup such that at least one approval will be triggered when the guest fills out the questionnaire, during the approval the availability of the document for the guest user will depend on how it has been setup in the profile. If the template does not have an approval setup, an approval will be applied to the Document with the inviter as the primary approver. This approval can be viewed on the Document details page.

Click Send Invitation. An e-mail will be sent to the guest which will allow them access to the questionnaire for the selected document (depending on configuration). Guests have 48 hours to follow this link, after which it expires. The Guest may edit this questionnaire as necessary but will not have access to any other part of the site.

You can also click on the link in the 'Sharing' section of the Document details page to access these settings.

When the questionnaire is complete the Guest can download the generated document and notify the user through CE5 if they wish. The Guest may also alter the questionnaire by selecting Edit Questionnaire.

The original copy of the generated document will remain unaltered in the host's site.

24.5.2. Share a Document with users

Users can share Documents with other users by selecting the relevant Document and clicking the Sharing column and selecting the Users Access tab. By default, the Document will retain the permissions set on the folder that it sits within or if it is in My Documents it will default to that user. Uncheck the Inherit Permissions box.

This will allow the user to set permissions for this document. Access can be granted by user, role or group.

24.5.3. Access Levels

As well as granting users, groups or roles access to the Document it is also possible to specify the level of access granted. This is done through the Access Level dropdown option available when granting permissions to the Document.

The Access Levels can be found in section 6.6.

24.5.4. Recommended sharing settings for a Document

A template can be set up so that when Documents are created using the template, Contract Express will suggest which users should have permissions on the Document and what access level they should have if they do not already have permissions on the Document (See the Contract Express Author Manual for information about setting this up on the template).

Once a Document has been created, Contract Express will check the current permission settings on the Document against the expected permissions defined by the template. If Contract Express finds that (i) there are users defined in the template that do not have permissions on the Document and (ii) there are users with permissions on the Document that do not have the same access level defined in the template, then you will see the following message on the Document details page.

⚠ Click here to review sharing recommendations

Click "here" to view the recommendations.

Rows that are highlighted in red are the suggestions from the template and rows that are not highlighted are the current permissions on the Document.

If you are not happy with the suggested settings, then click the "x" for that row to remove whichever rows you do not want to apply or click Cancel to not apply any of the settings. Note that if the suggestions are not applied to the Document then you will continue to see the alert about the template recommendations.

If you are happy with the recommendations, click Accept to apply those changes to the Document permissions. The template recommendations alert will no longer be displayed until Contract Express finds that the template recommendations and Document permissions do not correspond.

24.6.   Sending an email to shared users of a Document

There may be times during a Document's lifecycle when an arbitrary email needs to be sent to other collaborators of a Document. This can be done using the "Send Email" option on the document details page under "More". Note that only users with Full access have the ability to send ad-hoc emails.

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Here you can choose the recipients from the list of shared users. By default only users with Full or Write access are displayed. Select the "Include Groups" and "Include those with Read access" as necessary. The **Subject** and **Additional Information** sections must be completed in order for the email(s) to be sent.

24.7.   Moving a Document through the Document Flow

Every Contract Express document moves through its lifecycle from the Incomplete to the Executed status. The Next steps section on the document details page to facilitate this process.

Users can perform different actions with the document depending on its current status. To view the scheme of the document flow click 'View Document Flow' link in the Next steps section. Hover over the information icon to view the description of the action that leads to the transition between statuses.
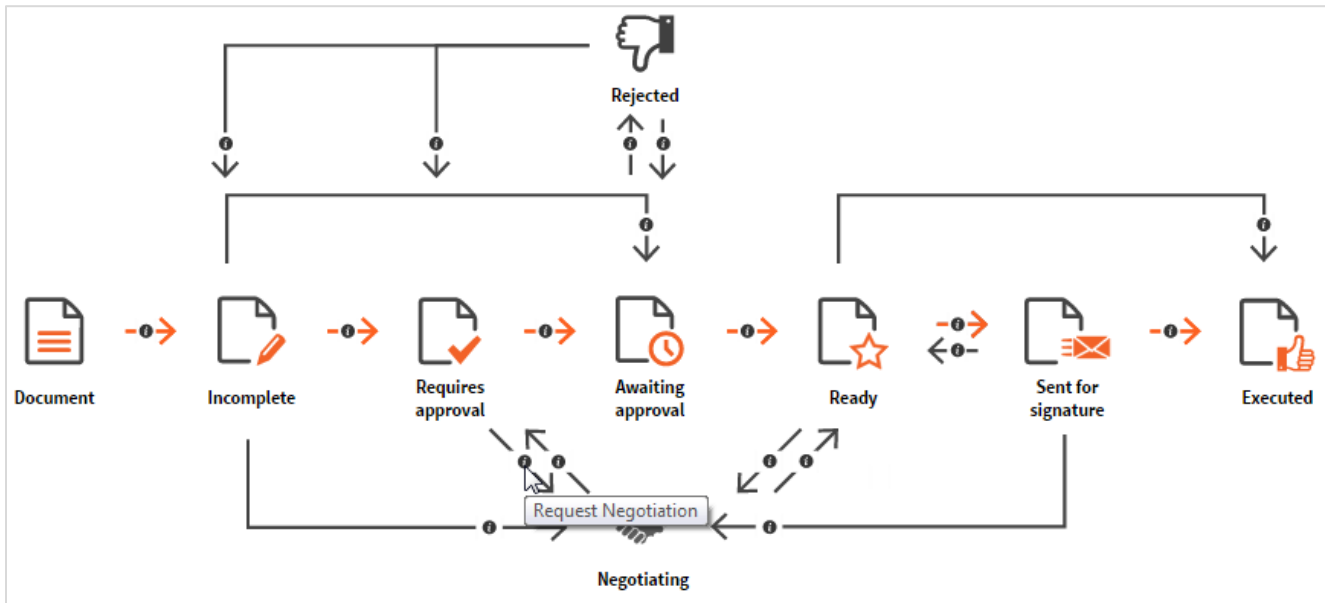
24.8.   Adding and Managing Auxiliary Documents

At any stage of the document lifecycle, users can attach auxiliary documents to the Contract Express Document by uploading them via the Document details page. This option is only available if this functionality has been enabled for that template (see section 18.6). These documents also can be sent to DocuSign for signature along with the Contract Express generated documents.

Contract Express supports any file format that can be signed via DocuSign. Although Contract Express itself does not impose restrictions on the file size of the uploaded documents, it is highly recommended not to exceed the limitation of 25 Mb for a single file due to DocuSign limitations (for more details see DocuSign Documentation). Also, see section 25 for more information about signing documents via DocuSign.

To upload auxiliary documents:

1) Click ✚ Upload New Document in the Documents section on the Document details page.
2) Either drag and drop your document(s) into the designated area or click on the 'Click Here' message to browse for your document(s). Note that it is possible to upload multiple documents using either option. If you have selected a document you no longer wish to upload, it can be removed by clicking 'Remove File'. Also, if using the Chrome browser you can drag and drop a windows folder which contains multiple documents into the designated area and all documents within that folder will be added.

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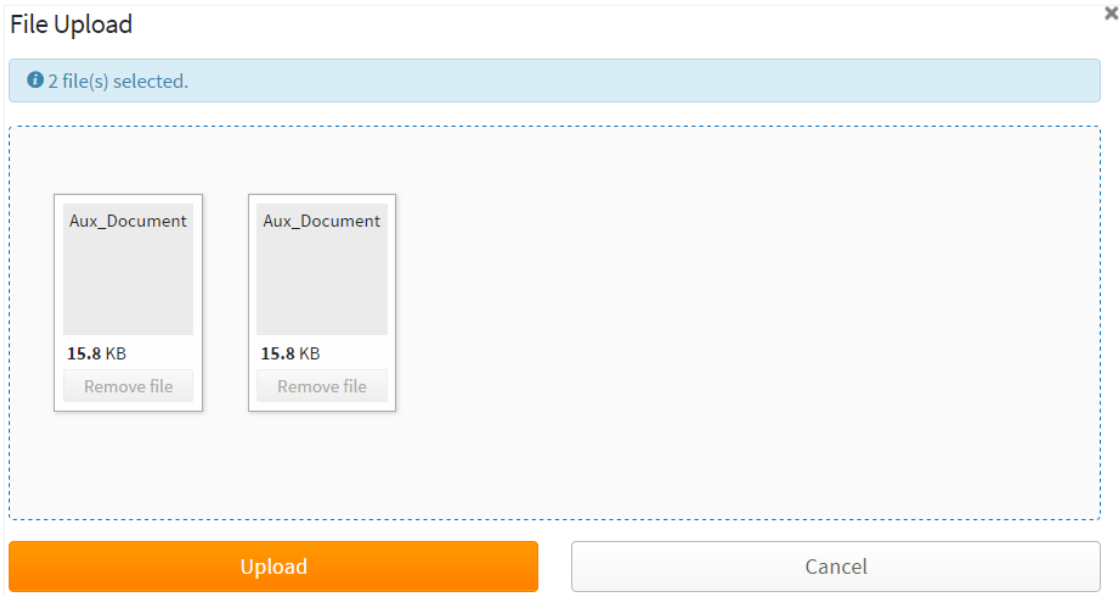
3) Click "Upload" to upload the selected documents. You will be shown a message informing you whether the upload was successful with the option to view the list of uploaded documents by clicking "View Details".
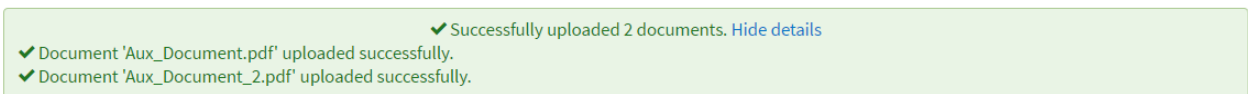
Uploaded documents will be added in the Documents section of the Document details page.

Contract Express supports version control for the uploaded documents. To upload an updated version of the document you can either:

- upload an updated version of the document *with the same name* via the ✚ Upload New Document link
- use the ⬆ Upload File button in the row of the document to be updated. In this case you can upload a document *with any name* and it will be treated as the next version of the corresponding document.
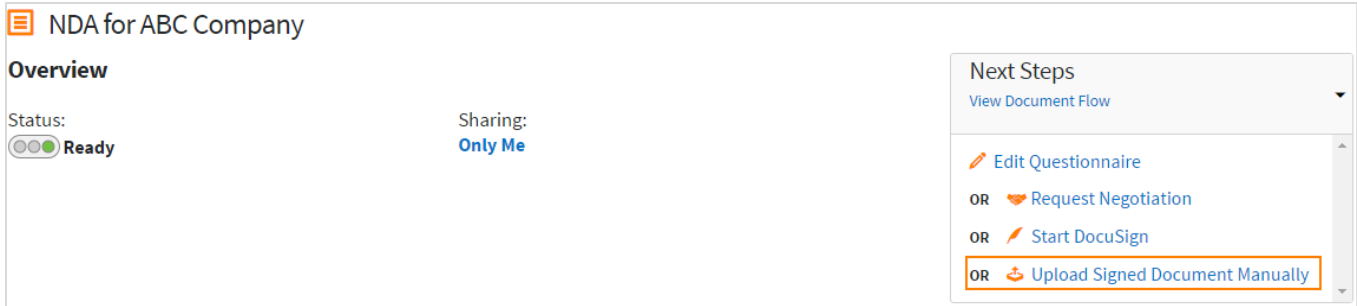
To view the versions of the uploaded auxiliary document, click ↺ View Versions . In the opened window you can download any version of the document.

The uploaded auxiliary documents can be deleted, if they are not yet signed or sent for signature. To delete an auxiliary document, click ✖ Delete .

24.9.   Uploading Signed Document Manually

Once a document is Ready, you may use the DocuSign feature within Contract Express to sign the document (for more details see section 25) or upload the signed document manually.

To upload the signed document, choose the 'Upload Signed Document Manually' option in the Next steps section.
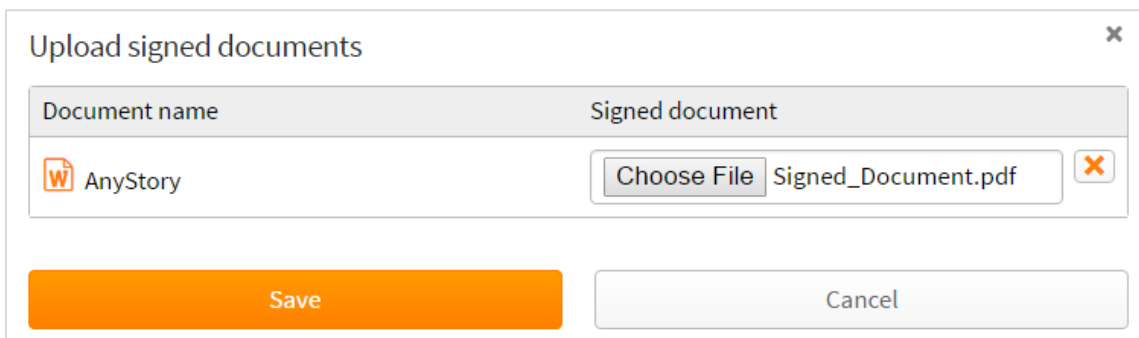
In the opened modal window choose the document for upload from your local disk and click Save. If the document has been created from a template with subtemplates, user can upload a separate PDF document for every generated MS Word document.

User can upload signed documents several times, if needed.
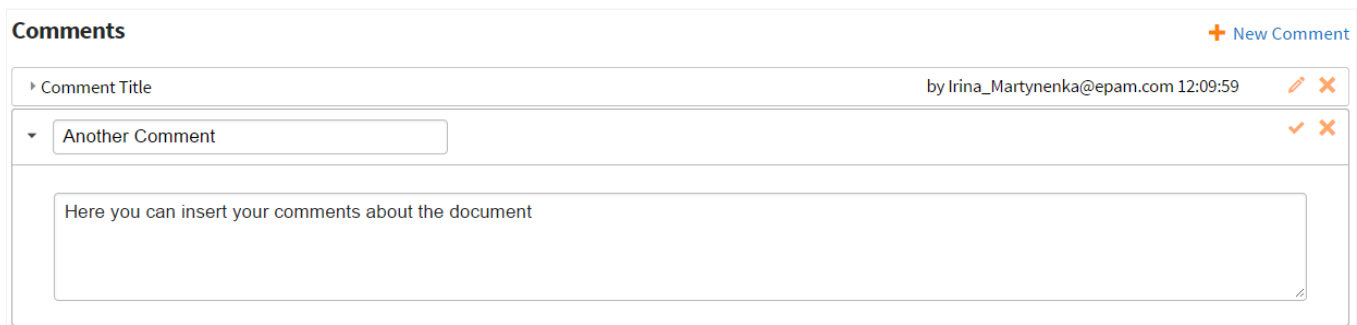
Once the finalized signed documents have been uploaded, user can change the document status to Executed by choosing 'Mark as Executed' option in the Next steps section.

Users can download both the pre-signature version, and the signed version of the document.

24.10.   Adding Comments

Users with Write access to a Document can leave comments on the Document details page if the Comments functionality is enabled for the template that was used to create the Document (see section 18.6).

Click ➕ New Comment to add a comment. In the opened section add the title and body for a comment and click ✔ to save the comment.

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To edit an existing comment, click ✏ and to delete a comment, click ✖.

You can expand and collapse a comment by clicking on the comment title.

24.11.   Subscribing to Alerts

All alerts enabled for a template, from which the document has been created, are displayed in the Alerts section of the document details page.

Users with Write access to the document can subscribe to the alerts by choosing the needed alert(s) and clicking ✚ Subscribe. User can see the status of his/ her subscription to the document's alerts in "I'm Subscribed" column of the Alerts table.

Alerts   ✚ Subscribe

☑	Alert	Description	I'm Subscribed
☑	Expiration Alert	Alert notifies the user about contract's expiration 10, 7 and 3 days before its expiration	No

Users also can manage their subscriptions to alerts from the "My account" (see section 26.13).

24.12.   Document History

✚ Clone ⬆ Upload Answers ⬇ Download Answers 📄 Snapshot ✉ New Invitation ✏ Edit Questionnaire ▦ Rename ✖ Delete ❚❚ Suspend

▦ NDA for ABC Company

Overview

Next Steps
View Document Flow

Status:
◯◯◯● Ready

Sharing:
Only Me

Approvals

Title	Primary Approver	Other Approvers	Requested	Status	Actions
Approval			12/16/2016	Approved	

Documents

Document	Actions
▦ NDA for the other party	⬆ Upload File ↻ View Versions

History

Date	Title	User
02/03/2017 19:10:01	Status changed to Ready	ekaterina.slisenko@tr.com
02/03/2017 19:10:01	Approval approved	ekaterina.slisenko@tr.com
02/03/2017 18:15:42	Status changed to Awaiting Approval	ekaterina.slisenko@tr.com

A history of the Document is available in the Document details page. This logs changes such as: Document creation, questionnaire edits, permission updates, negotiations and approvals, DocuSign updates, re-naming of the Document and uploading of answers.

24.13.   Document Snapshot

An additional button is available to Authors and Administrators - the Snapshot. This creates a .zip file containing .xml documents pertaining to possible Document issues, answer files, and .docx files of all the templates involved, as well as the generated documents.
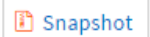
24.14.   Document Versions

24.14.1.Uploading a new version of a Contract Express generated document

> ⚠ **Permissions required in order to upload versions**
>
> Only users with **unrestricted access** to the generated document will have the ability to upload a new version of the generated document. If you think you should be able to upload a new document version but are unable to, please check with your System Administrator.

Documents

Filename	Actions
📄 Non Disclosure Agreement for John Doe	⬆ Upload File 📋 View Versions

The option to upload a new version of a document can be found on the Document details page. Click on the Upload File button for the relevant document. A popup will be displayed which will allow you to upload a document and add a comment. Comments added during the upload will be added to the History.

Once a new document has been uploaded, the status of that document will change to "Manually Edited".

Documents

Filename	Status	Actions
📄 Non Disclosure Agreement for John Doe	🚩 Manually Edited	⬆ Upload File 📋 View Versions

If a new document has been generated after a manually edited document has been uploaded, these changes will be overwritten and the status of the document will change to "Merge Manual Edits". You will be required to re-apply the manual edits if necessary.

New document versions can be uploaded and manual edits can be re-applied directly via Contract Express Negotiator version 3.0 onwards. Please see the Contract Express Negotiator manual for more details.

24.14.2. Uploading a new version of an auxiliary document

Contract Express supports version control for auxiliary documents that are uploaded. To upload an updated version of an auxiliary document you can either:

- upload an updated version of the document _with the same name_ via the **+ Upload New Document** option
- use the **⬆ Upload File** button in the row of the document to be updated. In this case you can upload a document _with any name_ and it will be treated as the next version of the corresponding document.

To view the versions of the uploaded auxiliary document, click **↻ View Versions**. In the opened window you can download any version of the document.

24.14.3.Viewing document versions

To view the versions of a document, click on the View Versions button for the appropriate document. A list of the versions of the document will be displayed along with: any comments added during upload, the option to download any version of the document and a notification as to whether that document version is complete. Note that documents that have not been generated by the system will always have the Complete column set to Yes.

Non Disclosure Agreement for John Doe

Version History

#	Status	Created	User	Complete	Comment	Download
3	Generated	13:30:07	sandra1@business-integrity.com	Yes		⬇ Download
2	Uploaded	13:29:38	sandra1@business-integrity.com	Yes		⬇ Download
1	Generated	13:24:25	sandra1@business-integrity.com	Yes		⬇ Download

⚠ **Restriction on prior versions of an approved document**
Users are unable to download previous versions of a generated document once it has been approved.

24.15.   Document Folders

Folders can be created by users to organise and share their generated documents.

24.15.1.Creating a new Folder

To create a new folder, click on the New Folder option on the Documents page.
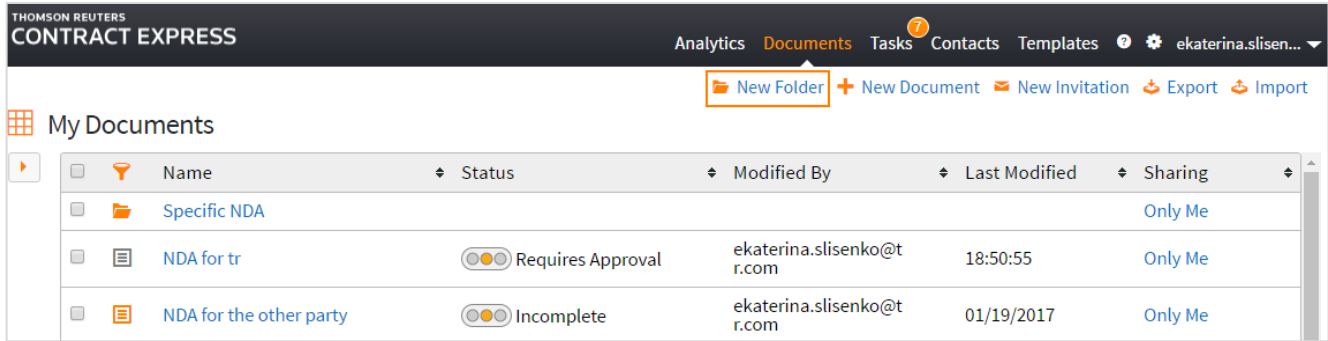
24.15.2.Creating a new Document within a Folder

To create a new document within a folder, click on the New Document option when in the applicable folder.

24.15.3.Moving a Document into a Folder

To move a document to a folder, select the checkbox next to the document name on the Documents page and select Move. Select the name of the folder you want to move the document to and click Save. Note that if the Document and folder have different permissions set up, they will continue to have different permission sets (i.e. moving a Document into a folder will not change the permissions on the Document).0020

24.15.4.Deleting a Folder

Folders can be deleted in the same way as documents, by checking the box next to the Folder name and selecting Delete.

24.15.5.Folder permissions

Settings permissions on folders is achieved in the same way that permissions are set on the individual documents. Click on Only Me in the Sharing column of the applicable folder. You may then specify the permission set for the folder. The same method is used for setting sub folder permissions.

24.15.6.Permissions on sub-folders and Documents within folders

If a new item (folder or document) is created within a folder it will by default inherit the permissions of the folder, if however an existing item is moved inside a folder it will retain its original permissions (selecting the Inherit Permissions button will match and link it to the immediate folder it is in).

Permission can be granted to the sub folder and the documents within the sub folder without overriding the permissions on the top folder. For example, if the main folder is not shared but permission has been granted to a sub folder and the documents within it, the user receiving those permissions will only be able to see the sub folder and the documents assigned to them.

25.DocuSign

Once a document is Ready, you may use the DocuSign feature within Contract Express from the Document details page. In order to do so, each user will need to have their own DocuSign account. To start the process, choose the Start DocuSign option in the Next step section of the document details page. This will open a DocuSign popup window.

Note that if you have previously uploaded any auxiliary documents (see section 24.8), these documents are included in the DocuSign envelope by default and displayed on the right-hand side panel of the DocuSign window. You can manage the list of the documents you want to send to DocuSign by clicking the cog icon and choosing "Edit Documents" option.
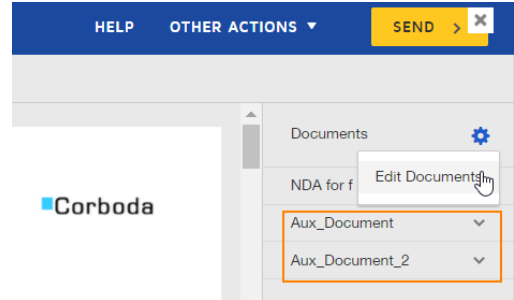
After starting the DocuSign request you may save it as a draft and either follow up by completing or cancelling the request. Clicking 'Complete DocuSign' will reopen the DocuSign popup and allow you to continue the request.
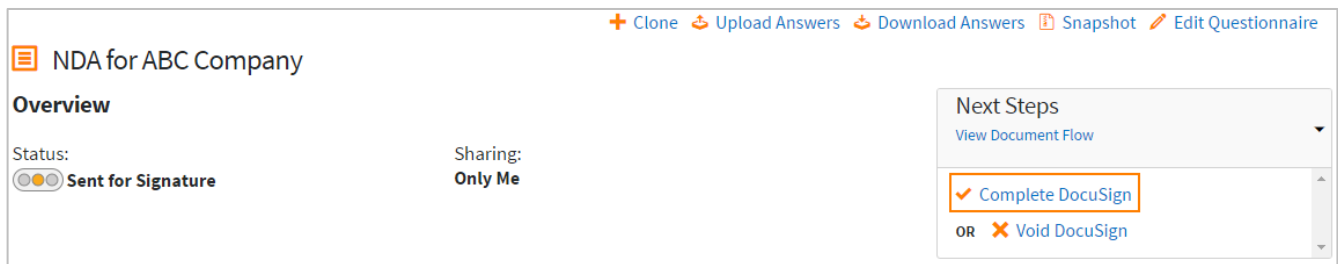
⚠ **User permissions during a DocuSign request**
Note that once the DocuSign request has started, the permissions on the entire Document including all of the generated and uploaded documents within it will be reduced to Read for all users with access to the Document. The permissions will be reinstated once the associated DocuSign envelope has reached its final state or the association between the Document and the DocuSign envelope has been removed by using the "Cancel" button.

Once the request has been sent, you have the option of cancelling the request ('Void DocuSign' option).
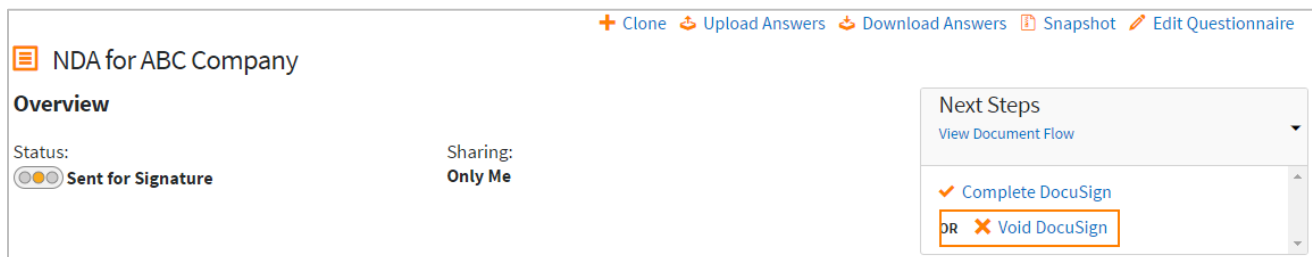
Once signed and the DocuSign process has been completed, the document status will change to Executed, and all DocuSign details are added to the Document History at the bottom of the page.

Two versions of the document are then available for download: both the pre-signature version, and the signed version.

You will only be prompted for your DocuSign credentials the first time you interact with DocuSign. Each subsequent time you interact with DocuSign, that same user account will be used. To change accounts or re-enter credentials you can do this within My Account (see section 26.10).
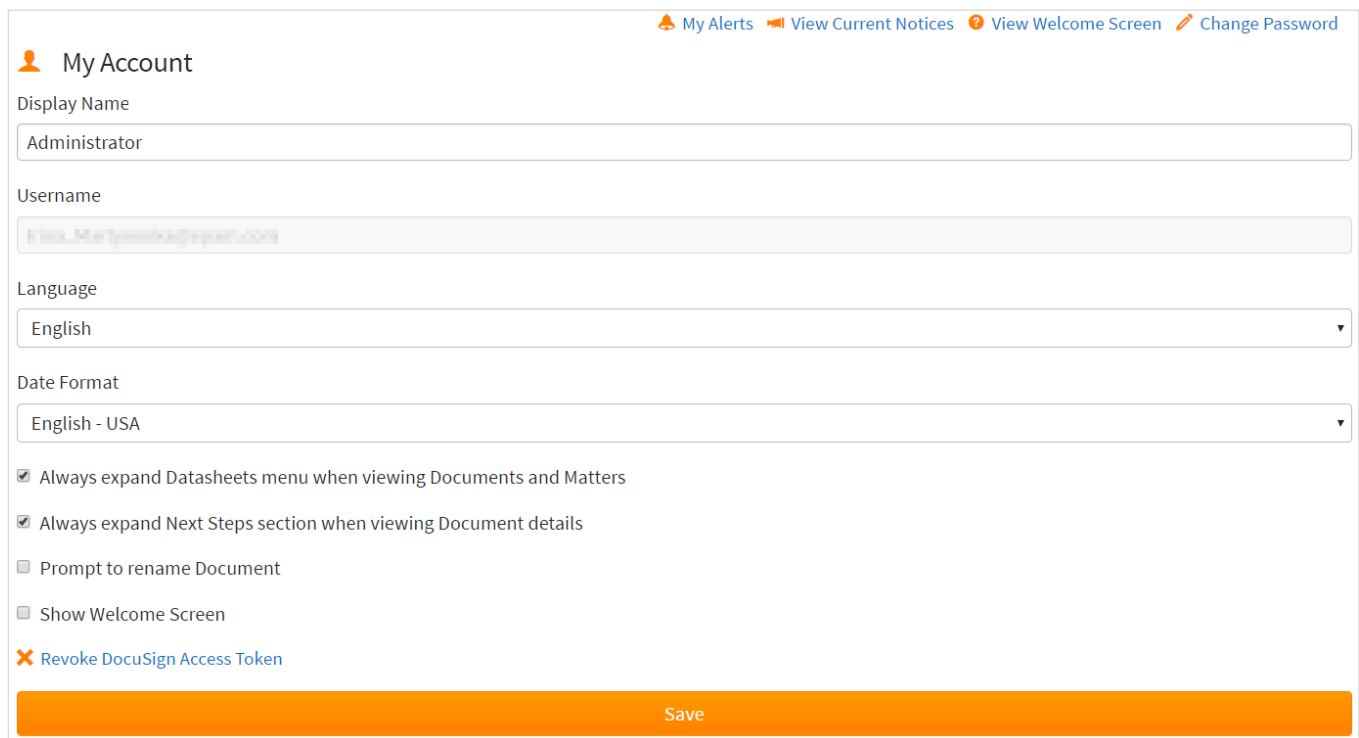
26.User Settings

26.1.   My Account

User settings are available by selecting My Account from the User drop down in the top right corner.

26.2.   Display Name

Users are able to change their display name by clicking on My Account and editing the Display Name in the space provided, the User Name may not be edited.

26.3.   Username

For windows authenticated users, the field can be updated with an email address in order to send and receive emails. Simply enter an email address and click Save.

This field cannot be edited for users who use an email address and password to enter the site.

26.4.   Language

Users are able to change the language of the Contract Express web interface. Currently Contract Express supports two locales: English and French Canadian.

26.5.   Date Format

Users are able to change the language settings for their questionnaires by going to My Account and selecting the required locale from the options available in dropdown list "Date Format". This parameter affects the input of currency and dates.

Note that this will affect the language displayed for Preview in the questionnaire, however it will _not_ affect the output documents. The locale for generated documents can be changed via a document locale parameter in Profiles (see section 11) or the locale spans in the template itself. See the Author manual for further details on template locale spans.

26.6.   Show a menu of Datasheets when viewing Documents and Matters

This setting chooses the default behaviour for the Datasheets navigation menu that is displayed on the Matters and Documents pages. If enabled, each time a user visits either of these pages the menu will always be displayed. If disabled, the menu will always be hidden but can be viewed easily by expanding the menu using the expand/collapse icon.   ◀

26.7.   Show Next steps section expanded

This setting defines the default behaviour for the Next steps section of the document details page. If enabled, each time a user visits any document details page, the section will always be expanded. User can expand/ collapse the section using the corresponding icon.

Next Steps
View Document Flow   ▲
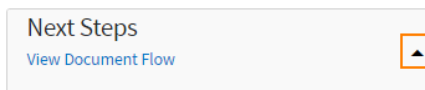
26.8.   Prompt to Rename Questionnaire

This setting allows individual users to set whether they can change the name of the

⬆ Upload Answers   ⬇ Download Answers   Snapshot   ✎ Edit Questionnaire   Rename   ✖ Delete

Document set. Users are then able to do this from the Document page, by clicking the 'Rename' button.

26.9.   Showing the Welcome Screen

This also allows users to individually decide whether they wish for the Welcome Screen to be displayed to them upon login.

26.10.   Revoke DocuSign Access Token

Applicable only for License Spaces where the DocuSign feature has been enabled in Admin Settings. This setting allows you to be prompted to re-enter your DocuSign credentials the next time you interact with DocuSign.

26.11.   Password changes

26.11.1.Forgot password and resetting the password

Users are able to reset their password by selecting the "Forgot your Password?" link on the login page. This will send the user an e-mail with a link to follow in order to reset their password.

26.12.   Bookmarking pages in Contract Express

Each page within the site can be bookmarked which enables quick access to a desired location. All pages can be bookmarked simply by adding the bookmark via the browser except for the Login page. When adding the bookmark via your browser, edit the URL to ensure that everything after ".net/" is replaced with "/app".

26.13.   Managing Alerts Subscription

Users can manage their subscriptions to Document alerts by clicking 🔔 My Alerts option in My Account. The user will be able to see a list of alerts for all Documents, to which s/he has at least Write access. If there are no alerts enabled for any templates, the list of alerts will be empty.

To subscribe to a Document's alert(s):

1. Click "My Alerts" in My Account
2. Search for a required Document by clicking the 🔽 icon in the table.
3. Choose the alert(s).
4. Click "Subscribe".

Users can also subscribe to alert(s) via the document details page of the corresponding Document (see section 24.11).

27. Client Engagement

Contract Express is designed to offer a smooth path for the gradual engagement of new clients to your business. There are three stages to this:

- **Public page**. This offers anonymous access to anyone who browses to the page and can act as a "shop front" to your business. This offers a low barrier to new users who can benefit from templates you explicitly make available, which can then form the start of their relationship with your business.

- **Invited guest**. In this scenario the guest does not need to be a registered user of Contract Express; all you need is their email address. You can invite them to complete a questionnaire, review their answers and the generated documents, and if appropriate grant them access to these documents, perhaps as PDF files.

- **Extranet**. You can create a sub-site within your license space, and invite outside parties to become a registered user of Contract Express. This is especially useful if the client is an organisation and you want many people within that organisation to interact with your templates in Contract Express. The sub-site prevents users inside the sub-site seeing details of users in your license space who are not members of the sub-site. The sub-site can also be "themed" to suit the client organisation, say with their logo and corporate colours.

27.1. Using the site as an anonymous user

27.1.1. Adding a Template to the Public Page

Before making a template public Administrators should check that the license allows Guest Access. This can easily be checked under the License Space tab in the Admin Settings page. The Allow Guests line should be set to Yes.

If the Allowed Guests line is set to No please contact contractexpress-support@thomsonreuters.com for licensing information and support.

Authors should also check that the template is marked as Live in order to share with Guests (it does not have to be shared with Users other than the template author though).

If the criteria is met then the template can be made public by clicking on the Sharing column for the relevant template and selecting Make Public, then Show on Public Page.

This will add the template to the Public Page which is accessed through the link available from the Admin Settings page. See Section 2.1.

27.1.2. Creating a Document via the Public Page

Guests who are accessing the site through the public page will be presented with a list of available templates that have been made available on the Public Page.

Guests should select the name of the document required which will direct them to the questionnaire as normal. Guests accessing questionnaires in this way will not have access to any other part of the Contract Express site.

27.1.3. Viewing Documents created via the Public Page

Once the users have completed the questionnaire the user may download the generated document.

Users of the site who have the document shared with them will be able to access the generated documents through Shared Documents in the Documents tab -> Workspaces -> Guest -> Select the date that the guest user created the Document.

27.1.4. Using DocuSign with Documents created via the Public Page

Guests who create documents via the Public Page can send documents for e-signature using DocuSign. This is only enabled if it has been configured in the License Space settings in Admin Settings (see section 2.1.11).

When all questions have been completed and the questionnaire has been Saved and Closed the guest will be able to start a DocuSign request. See section 25 for more details on DocuSign within Contract Express.

If all questions in the questionnaire have not been completed, upon a Save and Close the guest will be informed that they are unable to start the DocuSign process until the questionnaire is complete.

27.2.   Creating Documents as a Guest

27.2.1. Sending a New Invite to a blank Questionnaire

Users can send invitations to complete a new Questionnaire to external individuals or to other users of the Contract Express system. To send an invite to a *blank* Questionnaire, users should click on the New Invite button found on the Documents page. Users will then see a list of available documents which they can choose from.
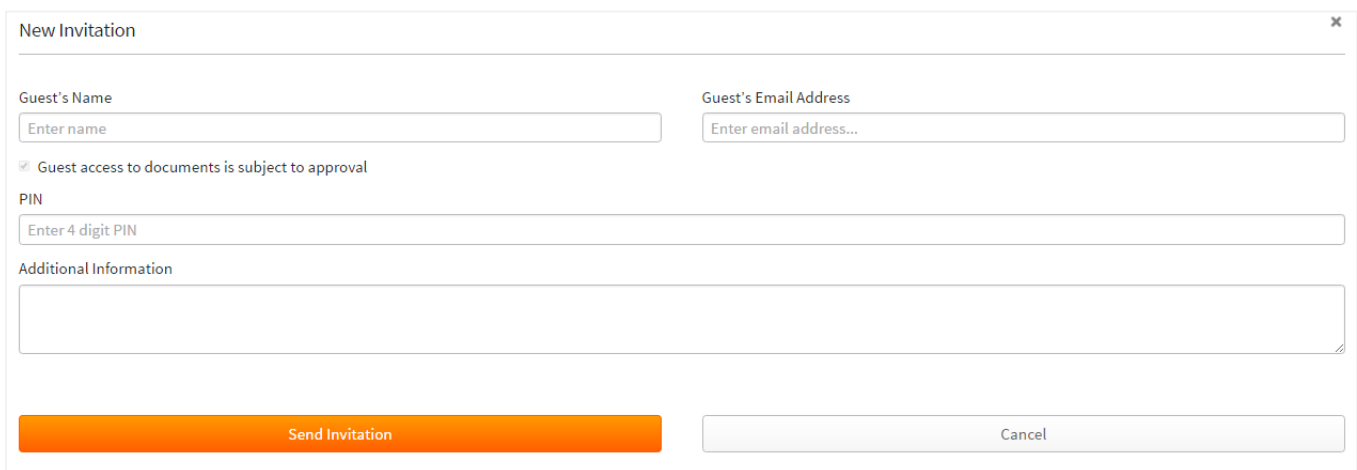
Note that the underlying templates must have a Live version, be shared with the User sending the invite, and marked as Public, in order to appear in this list.

Select the applicable document and specify the guest's name, e-mail address and choose whether to restrict the guest's access to the generated documents as configured in the profile by selecting the checkbox "Guest access to documents is subject to approval". The configuration for the Pre-approval restriction and Post-approval restriction will be applied.

You can also choose whether the invitee will be required to enter a PIN when they follow the link in the invitation. To enable this, create a PIN by entering the value in the PIN field.

Once you select Send Invitation, an invitation will be sent via e-mail inviting the guest to complete the questionnaire.

The host can view the Guest's generated document under My Documents. The sharing will be set to Guest.

27.2.2. Sending a New Invitation to a first draft Questionnaire

If a user wishes to send a Questionnaire in which they have already completed some or all of the answers, the Sharing column of the applicable document should be selected from the Documents page.

The questionnaire that the Guest will view through the invite will contain the pre-populated answers the host has specified. The Guest may then edit the questionnaire as necessary and the edited version will be updated in the host's document upon completion by the Guest. You can restrict the guest's access to the generated documents as configured in the profile by selecting the checkbox "Guest access to documents is subject to approval". The configuration for the Pre-approval restriction and Post-approval restriction will be applied.

27.2.3. Creating a Document using a New Invitation

Upon receipt of the invitation, the Guest should follow the link contained in the invitation e-mail.
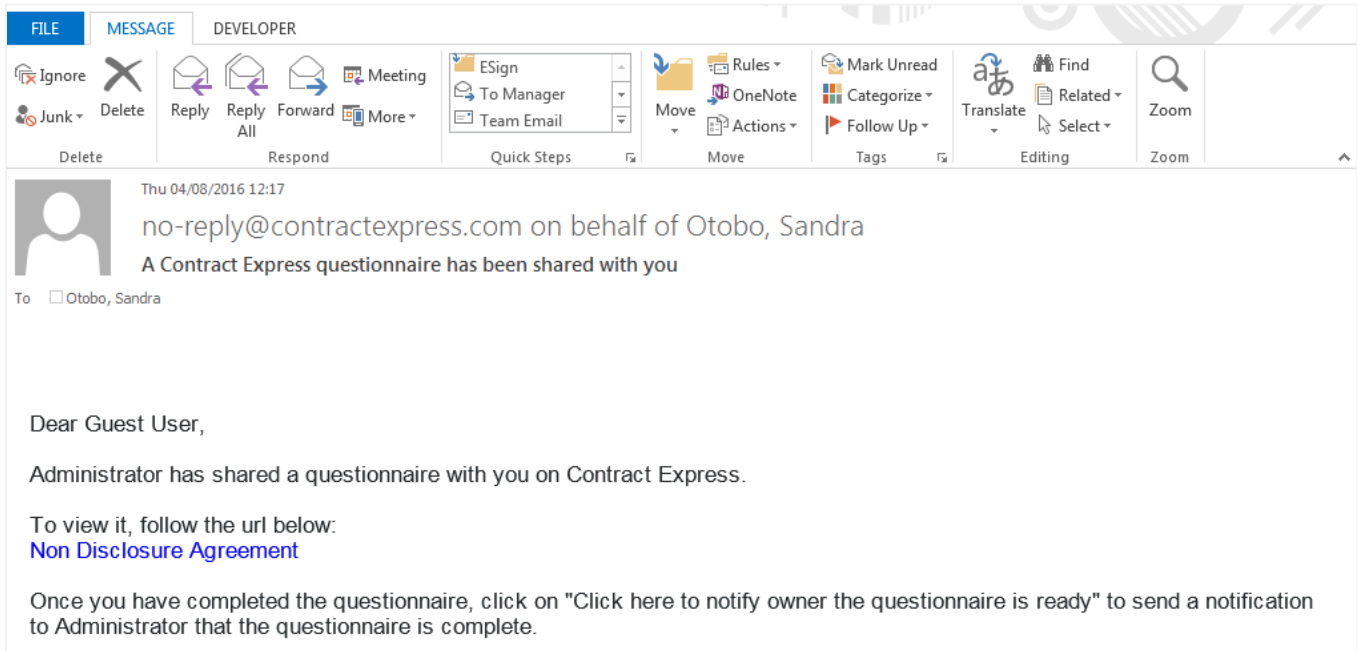
This will direct the Guest to the questionnaire of the document they are invited to complete. This link will not provide Guests access to any other part of the site.

This link will direct the Guest to the same questionnaire session even if the browser is closed and the edited answers will also be updated. If the Guest closes the browser then returns to the questionnaire later, the edited answers will appear in the questionnaire.

27.2.4. Notifying the sender that the Questionnaire is complete

Upon completion of the questionnaire Guests are able to download the generated document (if configured via the profile) and notify the host independently. Alternatively an automatic e-mail may be sent to the host notifying them that the questionnaire has been completed by the Guest. This can be done by clicking on "Click here to notify owner you have finished making your changes" at the end of the questionnaire session.

✔ The owner of the questionnaire has been notified about completing the questionnaire. You may close this browser window.

▤ Generated Documents

Documents

▤ NDA for Liam Hounslow

✉ Click here to notify owner you have finished making your changes

27.2.5. Viewing Documents created via a New Invitation

The document shared with the Guest will be updated with the Guest's changes to the questionnaire and applied to the document in the Documents page. The host can also view the document created by the user by clicking the link contained in the notification e-mail.

Admin users can also see documents created by Guest users through the Documents tab -> Shared Documents and navigating to the Guest workspace.

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CONTRACT EXPRESS Analytics Documents Tasks Contacts Templates ❓ ⚙ Administrator ▾

＋ New Document ✉ New Invitation ⬇ Export ⬆ Import

▦ Recent Documents

		Name	Status	Modified By	Last Modified	Sharing
☐	▤	NDA for Liam Hounslow	Incomplete	Liam Hounslow	08:40:23	Guest
☐	▤	Assignment of Lease	Incomplete	Administrator	08:30:22	Guest
☐	▤	NDA for John Doe	Ready	Administrator	08:29:36	Only Me
☐	▤	NDA for Harry Newman	Incomplete	Administrator	08:29:05	Only Me

27.3. Using the site as a member of a sub-site

27.3.1. Logging in to a sub-site

Users should be added to sub-sites by the Administrator under the Sites tab in the Admin Settings page, see section 8 for more details on creating sub-sites.

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Upon logging in members of a sub-site will automatically be directed to the specified sub-site.
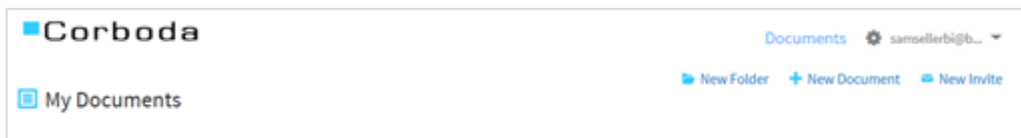
Users may only be members of one sub-site at any given time. Users may be moved from one sub-site to another by the Administrator in the Sites tab of the Admin Settings page by removing the applicable user from the old site and adding them to the new site.