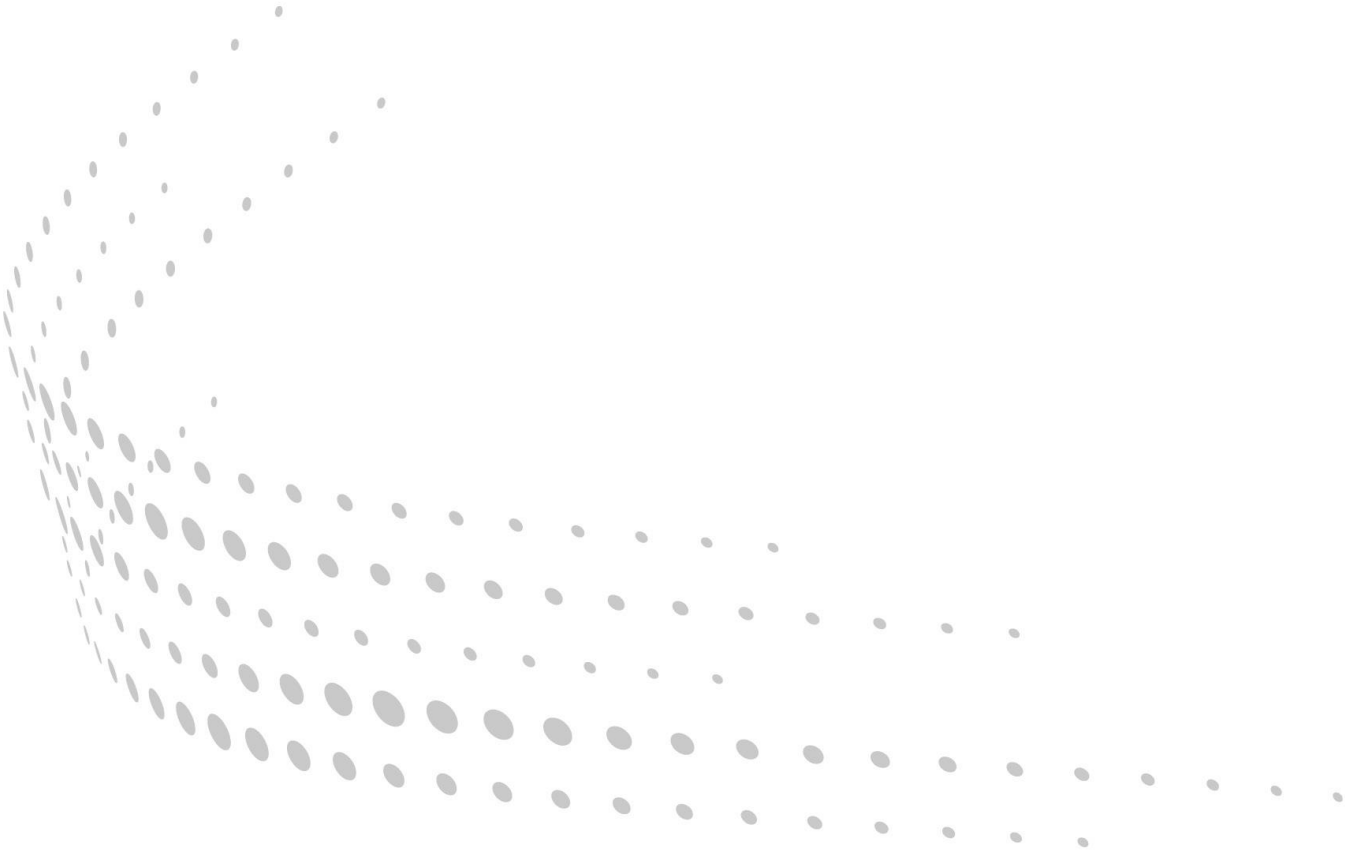


Negotiator User Manual

Thomson Reuters Contract Express

Version 7.2 | July 17, 2017



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For technical support contact: contractexpress-support@thomsonreuters.com

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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 that allows users to create documents from automated Contract Express templates, and to enable them to share Contract Express templates with clients using client microsites or publicly available templates. Small corporate legal departments can also use Contract Express for self-service contract creation, approvals and e-signature. Contract Express is available as an on-premises solution or as Software as a Service (SaaS).
- **Contract Express for SharePoint®:** This application, for the Microsoft SharePoint 2013/2016 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 document automation solution to corporate legal departments with self-service contract creation capabilities for end users, matrix-based approvals, document versioning, e-signature, search and reporting. Law firms that use SharePoint as an extranet based platform can also use Contract Express for SharePoint to provide self-service document automation for their clients.
- **Contract Express for Salesforce®:** This application is available on the Salesforce AppExchange and directly integrates an organization's Salesforce Org. with the core document assembly, and contract creation, capabilities of Contract Express. Contracts can be initiated from any Salesforce record, or object, and all of the contract documents and data are stored within the organization's Salesforce Org. This solution can be used by corporations for revenue generating contracts, NDAs, Employment Agreements and Sourcing Agreements.

Common to all three products is the unique, and patented, Contract Express® document generation engine. One benefit of this is a template created for one product can be used in another. Contract Express for SharePoint® and Contract Express for Salesforce® have the Contract Express® product embedded inside the solution.

1.2 Contract Express Negotiator

This manual assumes you are familiar with Contract Express, Contract Express for Salesforce, and Contract Express for SharePoint. Separate manuals are available for these products; please refer to them for more information.

Contract Express Negotiator allows a lawyer to collaborate with other users to create, and modify, documents. It aims to make the lawyer's role, during the creation and negotiation of documents, easier and simpler. Like Contract Express Author, it is a managed COM Add-In for Microsoft Word 2007, 2010, 2013, and 2016, built on the Microsoft .Net Framework 4.5 using Visual Studio Tools for Office version 4.0.

2. Requirements and Installation

2.1 Hardware Requirements

It is recommended that you have

- Dual Core 2GHz
- 1GB RAM
- 1024 × 768 minimum screen resolution

2.2 Software Requirements

You must have

- Windows 7, 8, or 10
- Microsoft .Net Framework 4.5
- Word 2007, 2010, 2013, 2016
- Visual Studio Tools for Office Runtime 4.0
- Internet Explorer (9 or newer), Microsoft Edge, Firefox, Google Chrome, or Safari

Additionally, if you are using Word 2007 you must have the Microsoft Office 2007 Primary Interop Assemblies.



Security summary for installing Contract Express Negotiator

All of the software must be installed by a user who is a member of the local administrators group.

2.3 Installing the Required Software

The required software can be installed on each machine requiring Contract Express Negotiator or can be pushed out en masse by your central packaging team. The software can be downloaded from

| | |
|--|---|
| Microsoft .Net 4.5 | http://www.microsoft.com/en-us/download/details.aspx?id=40779 |
| Visual Studio Tools for Office Runtime 4.0 | https://www.microsoft.com/en-us/download/details.aspx?id=48217 |
| Microsoft Office 2007 Primary Interop Assemblies | http://www.microsoft.com/downloads/details.aspx?familyid=59daebaa-bed4-4282-a28c-b864d8bfa513 |

2.4 Installing Contract Express Negotiator

You can download the installer from the [Thomson Reuters Downloads site](#). Alternatively, if you are using Contract Express for Salesforce or Contract Express, you can download the installer from your instance. In all cases the version of Contract Express Negotiator is the same.

2.4.1 From Contract Express

Select Download Negotiator on the Tasks tab to download Contract Express Negotiator.



I do not see the Negotiator tab in Word

Contract Express Negotiator may be not be enabled. To enable it go to the COM Add-Ins section of Word Options and make sure Contract Express Negotiator is checked.

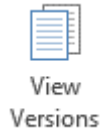
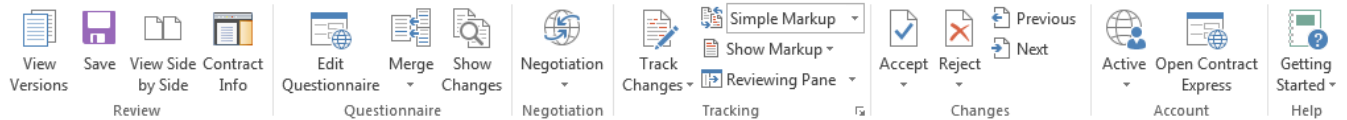
If Contract Express Negotiator is not in the COM Add-Ins list it may not be installed or you may not have the appropriate permissions. Either contact your administrator to obtain the necessary permissions or download Contract Express Negotiator.

2.4.2 From Contract Express for Salesforce

Select Contract Express for Salesforce from the list of available Salesforce apps and download Contract Express Negotiator from the Contract Express tab.

3. Contract Express Negotiator Ribbon

3.1 When Using Contract Express



See Viewing and Comparing Document Versions.



See Saving a Document to Contract Express and Saving a Document to Contract Express with Data Synchronisation.



This displays two documents side by side.



See Viewing Document Information.



See Editing the Questionnaire.














See Merging Changes into the Current Document.



See Viewing all Changes since the Document was last Generated by Contract Express.



See Negotiation in Contract Express Negotiator.















| | | |
|---|--|---|
|  Track Changes ▾ |  Simple Markup ▾  Show Markup ▾  Reviewing Pane ▾ | See Tracking Changes. |
|  Accept ▾ |  Reject ▾ | See Tracking Changes. |
|  Active ▾ |  Previous  Next | See Connecting to Contract Express. |
|  Open Contract Express | | See Launching Contract Express from Contract Express Negotiator. |
|  Getting Started ▾ | | This opens the Contract Express Negotiator Help pages including this manual and the Contract Express Negotiator Knowledge Base. |











Contract Express Negotiator icons

This manual was created using Contract Express Negotiator in Microsoft Word 2016. If you are using a different version of Word the icons may be a little different. This will not alter the Contract Express Negotiator functionality.

3.2 When Using Contract Express for SharePoint

| | |
|--|--|
|  View Versions | <p>See Viewing and Comparing Document Versions.</p> |
|  Save | <p>See Saving a Document to Contract Express and Saving a Document to Contract Express with Data Synchronisation.</p> |
|  View Side by Side | <p>This displays two documents side by side.</p> |
|  Contract Info | <p>See Viewing Document Information.</p> |
|  Track Changes | <p>See Tracking Changes.</p> |
|  Simple Markup ▾  Show Markup ▾  Reviewing Pane ▾ | |
|  Accept ▾  Reject ▾  Previous  Next | <p>See Tracking Changes.</p> |
|  Connections | <p>See Connecting to Contract Express.</p> |
|  Getting Started ▾ | <p>This opens the Contract Express Negotiator Help pages including this manual and the Contract Express Negotiator Knowledge Base.</p> |

3.3 When Using Contract Express for Salesforce

| Icon | Description |
|---|---|
|  | See Viewing and Comparing Document Versions. |
|  | See Saving a Document to Contract Express and Saving a Document to Contract Express with Data Synchronisation. |
|  | This displays two documents side by side. |
|  | See Viewing Document Information. |
|  | See Tracking Changes. |
|  | See Tracking Changes. |
|  | See Connecting to Contract Express. |
|  | This opens the Contract Express Negotiator Help pages including this manual and the Contract Express Negotiator Knowledge Base. |

4. Working with Contract Express Negotiator

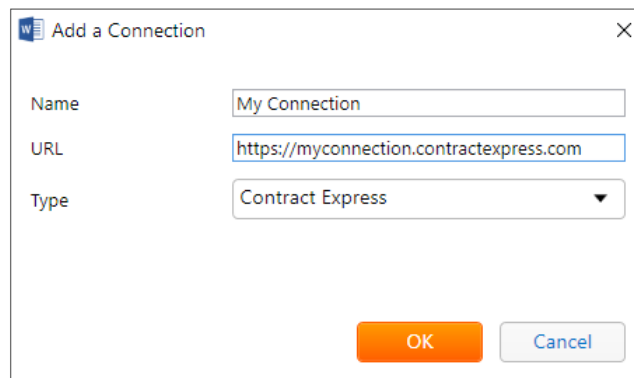
4.1 Managing Your Contract Express Connections

To manage your connections click the **Connections** button on the Contract Express Negotiator ribbon.

You can add, edit, and remove connections from the list. Click **Save** to save the changes.

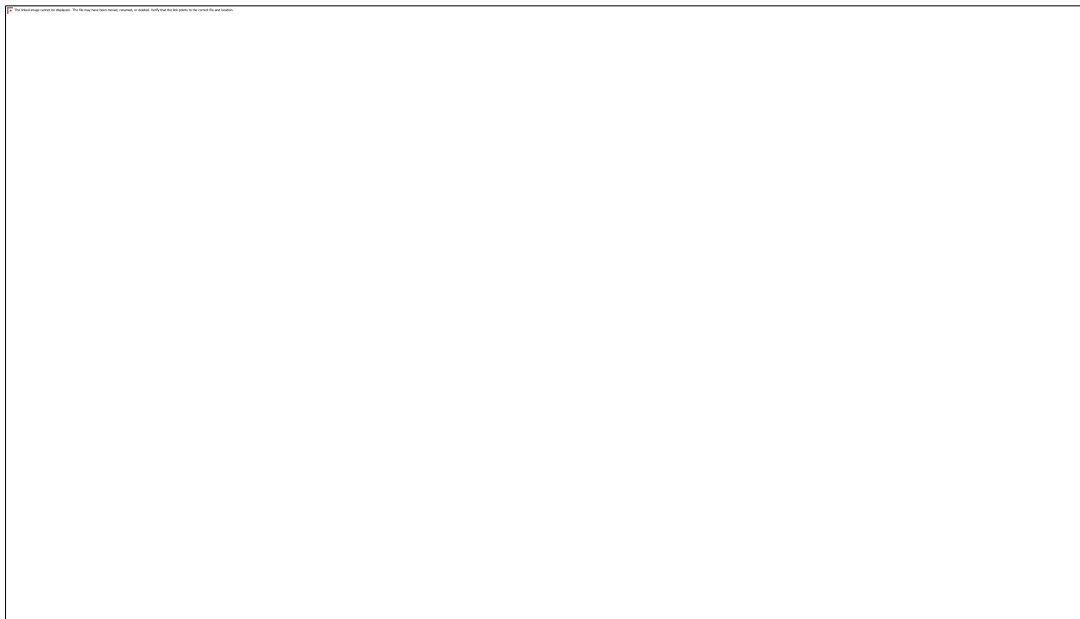
4.1.1 Adding a Connection

To add a connection click **Add** and enter the connection details then click **OK**.



The screenshot shows a dialog box titled "Add a Connection". It contains three input fields: "Name" with the text "My Connection", "URL" with the text "https://myconnection.contractexpress.com", and "Type" with a dropdown menu showing "Contract Express". At the bottom right are "OK" and "Cancel" buttons.

The new connection will now appear in the list and be selected.



4.1.2 Editing a Connection

To edit a connection select a connection and click **Edit**. Then modify the connection as required and click **OK** to accept the changes.

If you have modified your current connection, you will need to reconnect to Contract Express.

4.1.3 Removing a Connection

To remove a connection select the connection and click **Remove**.

4.1.4 Changing Connections

To change connections select another connection in the list in Connection Settings.

4.1.5 Saving Your Changes

When you have finished managing your connections click **Save** to save your changes. All changes to the connections list will be saved and, if you have changed connection all open Contract Express Negotiator panes will be closed and you will have to reconnect to Contract Express again.

Note modifying the connections list and changing connection are independent operations; if the selected connection has not changed, or been modified, you will not need to reconnect even if you have modified the connections list.

4.1.6 Discarding Your Changes

To discard your changes click **Cancel**.

4.2 Connecting to Contract Express

Almost all Contract Express Negotiator functionality requires you to log in to Contract Express. To log in, click any of the buttons and you will be asked to connect; this is silent if Contract Express is configured to use Windows Authentication. Once you have connected successfully you can use all of the Contract Express Negotiator functionality without logging in again until you close Word.

Note if you have not added a Contract Express connection you will be asked to add one before continuing – see section 4.1.1.

4.3 Opening a Contract Express Document

With the exception of Contract Info all functionality in Contract Express Negotiator is enabled only if the current document was generated by Contract Express and is associated with a Contract Express Document.

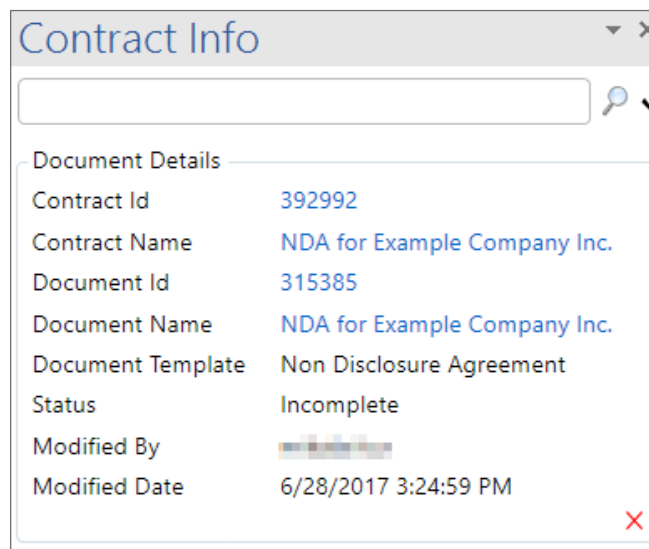
When you open a document in Word, Contract Express Negotiator checks to see if it has been generated by Contract Express and if it is associated with a Contract Express Document.

4.4 Viewing Document Information

Contract Info shows details about Contract Express Documents. Each Contract Express Document has its own **Document Details** entry that includes the

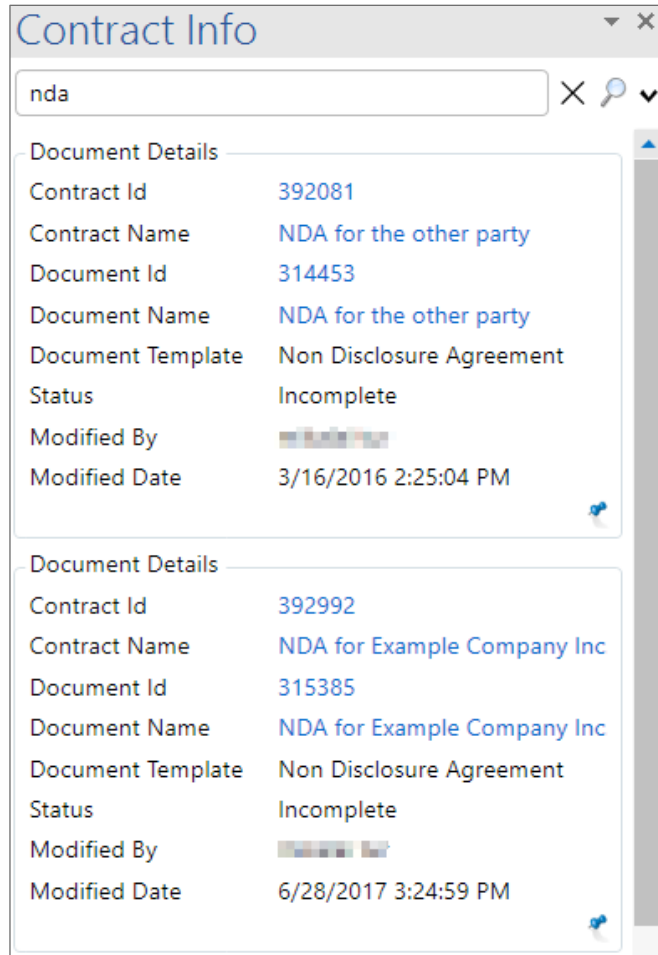
- Contract ID as a link to the Document's Document Details in Contract Express.
- Contract Name as a link to the Document's Document Details in Contract Express.
- Document ID as a link to the latest generated version of the Document in Contract Express.
- Document Name as a link to the latest generated version of the Document in Contract Express.
- Status of the Document.
- Name of the last user to modify the Document.
- The date and time the last modification was made.

When the current document is associated with a Contract Express Document, Contract Info has a single Document Details entry showing the Document Details for the associated Document. In all other cases, Contract Info has multiple Document Details entries showing the Document Details for all of the Documents that you have access to.

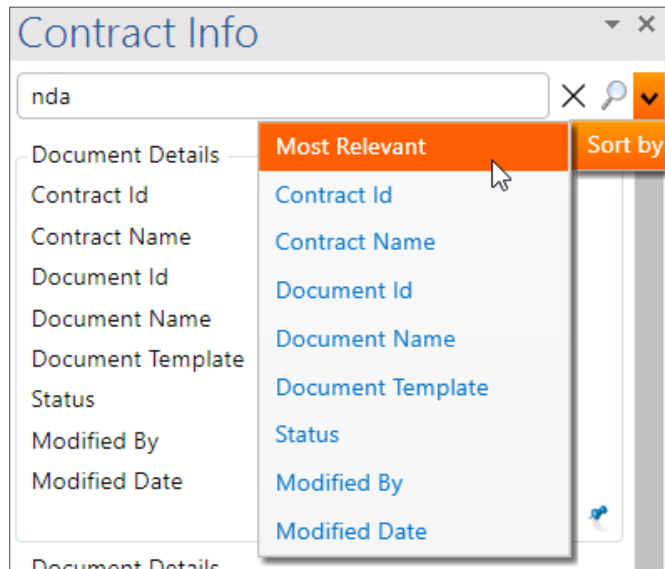


4.5 Searching for a Document


To search for a Document in Contract Express, click the **Contract Info** button on the Contract Express Negotiator ribbon to open Contract Info and enter a search string in the search box.





By default, the results are sorted by relevance but you can change the order with the **Sort by** button.




4.6 Changing the Current Document's Contract Express Document Association


To change the Contract Express Document that the current document is associated with, click the **Contract Info** button on the Contract Express Negotiator ribbon, search for the desired Document and click the  in the bottom right corner of its Document Details. For more information on searching for Documents see section 4.5.


| Document Details | |
|-------------------|---|
| Contract Id | 392081 |
| Contract Name | NDA for the other party |
| Document Id | 314453 |
| Document Name | NDA for the other party |
| Document Template | Non Disclosure Agreement |
| Status | Incomplete |
| Modified By |  |
| Modified Date | 3/16/2016 2:25:04 PM |



4.7 Disassociating the Current Document from its Contract Express Document

To dissociate the current document from the Contract Express Document it is associated with, click the **Contract Info** button on the Contract Express Negotiator ribbon and click the  in the bottom right corner of the Document Details.

| Document Details | |
|-------------------|---|
| Contract Id | 392992 |
| Contract Name | NDA for Example Company Inc. |
| Document Id | 315385 |
| Document Name | NDA for Example Company Inc. |
| Document Template | Non Disclosure Agreement |
| Status | Incomplete |
| Modified By |  |
| Modified Date | 6/28/2017 3:24:59 PM |



4.8 Tracking Changes

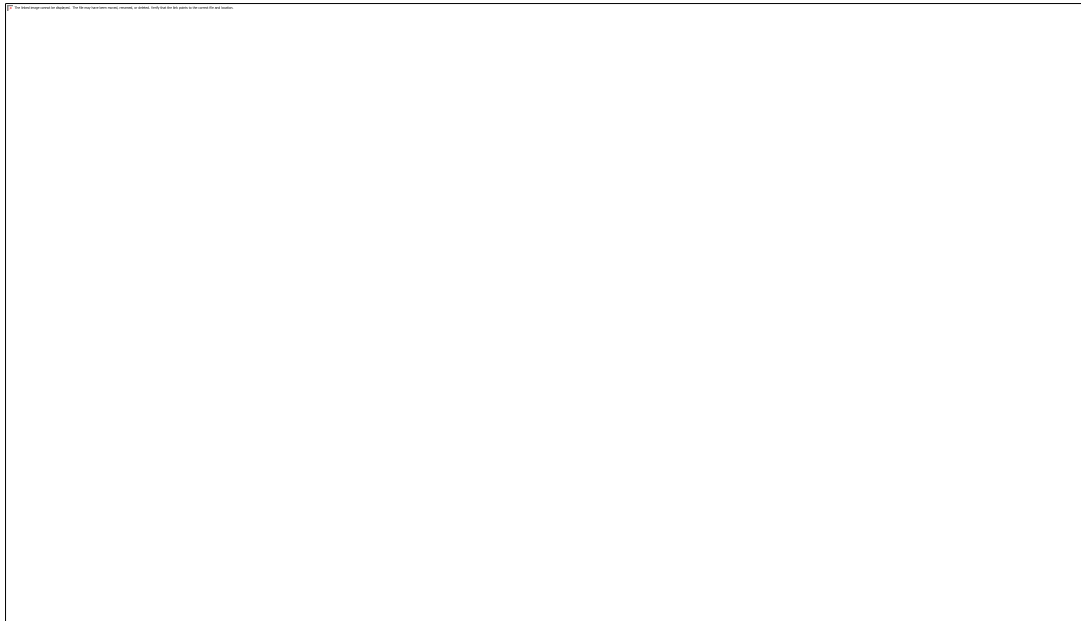
The **Tracking** and **Changes** groups from the Word **Review** ribbon have been added to the Contract Express Negotiator ribbon so that you can view, and manage tracked changes from document comparisons without having to switch ribbons. These groups and the behaviour of their buttons are unchanged from the standard Word functionality.

Similarly, the **View Side by Side** button in the Contract Express Negotiator **Review** group is the standard Word button from the Word **View** ribbon. Its functionality has not been altered from the standard Word functionality.

4.9 Viewing and Comparing Document Versions

Contract Express Negotiator can be used to compare and highlight differences between versions of a Document. This comparison may be made between modified or generated versions.

To view a different version, or to compare the open version with another one, click the **View Versions** button on the Contract Express Negotiator ribbon, select the required version, and then click **View** or **Compare**.



4.10 Editing the Questionnaire

To edit the Questionnaire click the **Edit Questionnaire** button on the Contract Express Negotiator ribbon. This opens the Questionnaire associated with the current document in Contract Express.



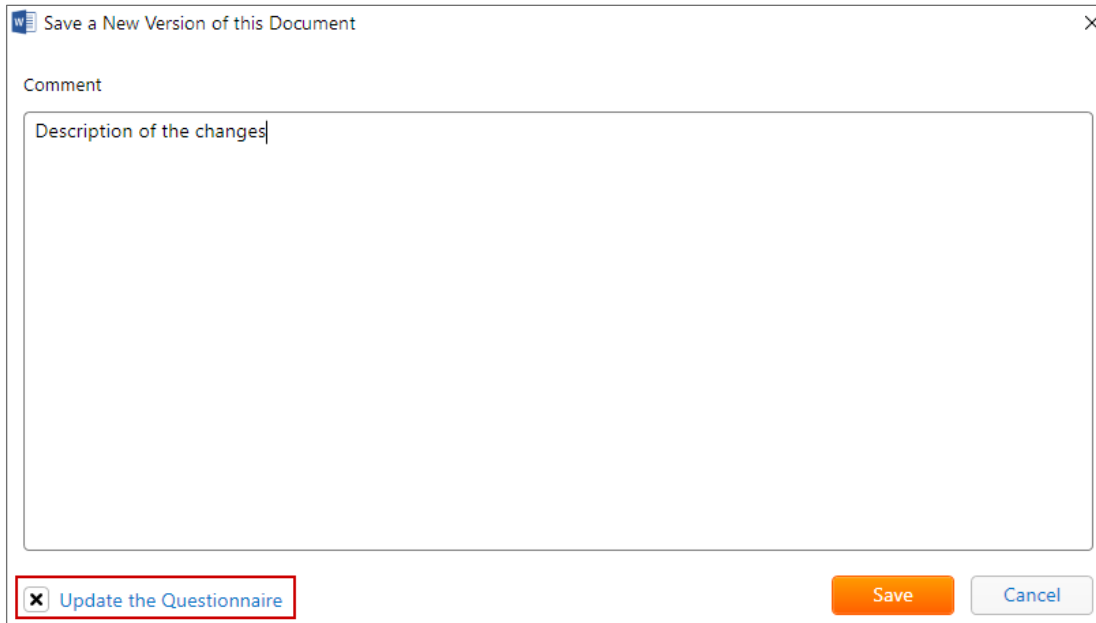
Edit
Questionnaire

Editing the Questionnaire generates a new version of the Document that will **not include any changes that have been made manually**; any changes must be merged, for more information see section 4.13.

4.11 Saving a Document to Contract Express

When you save the current document to Contract Express it will be saved to its associated Document as a new version.

If Data Synchronisation is enabled Contract Express will try to update the Questionnaire data when you save the Document. If you do not wish to do this uncheck the **Update Questionnaire** box before saving. For more information on Data Synchronisation see 4.12.



If Data Synchronisation is not enabled the Update Questionnaire box will be disabled and Contract Express will not try to update the Questionnaire data when you save.

In both cases, to save the current document to Contract Express, click the **Save** button on the Contract Express Negotiator ribbon, add a comment if needed, and click **Save**.

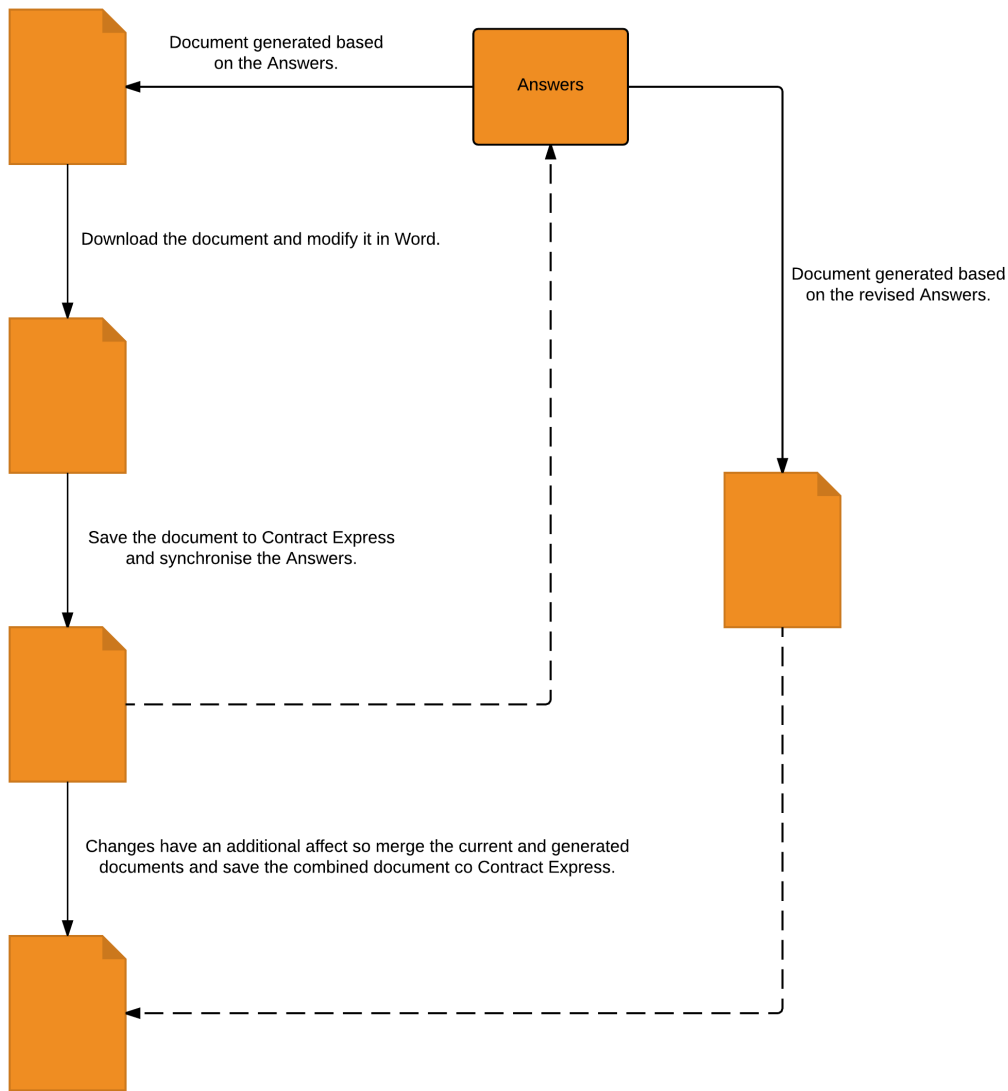
Comments are visible in the Document Version History. To see this in Contract Express Negotiator click the **View Versions** button on the Contract Express Negotiator ribbon. Alternatively, look on the Document Details page in Contract Express.

4.12 Saving a Document to Contract Express with Data Synchronisation

4.12.1 What is Data Synchronisation?

Prior to Contract Express 7.1, a document generated by Contract Express was disconnected from the Questionnaire data that was used to generate it. When you updated a variable in the document in Word the change was not captured in Contract Express. This means that you could not guarantee that the Questionnaire data in Contract Express matched the Questionnaire data in the current document, unless you merged the documents as described in section 4.13.

Contract Express Negotiator Data Synchronisation recognises changes to the Questionnaire data made in Word and allows them to be saved to Contract Express. Furthermore, it uses the same intelligent reasoning engine that is used in the Contract Express dynamic decision trees to identify parts of the document that are affected by the changes to the Questionnaire data.

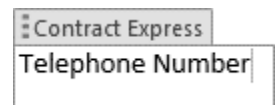


Data Synchronisation uses Word content controls to identify Questionnaire variables, enabling any Questionnaire data changes to be easily synchronised with Contract Express.

4.12.2 What is a Content Control?

A content control is a control that can be used to identify and control the content of a region of a document, for example restricting the allowable values or linking a value to a name in an address book. Content controls can take many forms but Contract Express only uses plain text content controls; these have a title, border, and value. When the document is printed the content control border and title are not visible.

When Data Synchronisation is enabled, Contract Express adds a content control to the Document wherever a Questionnaire variable appears. These content controls are titled **Contract Express** and contain a variable from the Questionnaire used to generate the Document.



4.12.3 Data Synchronisation in Contract Express Negotiator

You must enable Data Synchronisation in Contract Express; for more information please see the Contract Express Admin Manual.

The main difference between a Data Synchronisation enabled Contract Express Document and a standard Contract Express Document is the content controls used for the Questionnaire variables. These are easily identifiable as their colour changes when you hover over them, they have a border, and are titled **Contract Express**, when you click on them.

A standard text control with the text 'Telephone Number' and a cursor at the end.

A text control with a grey header 'Contract Express' and a white box containing 'Telephone Number' with a cursor at the end.

4.12.4 Saving the Document with Data Synchronisation

When you save the current document to Contract Express it will be saved to its associated Document as a new version.

Additionally, when you save with Data Synchronisation enabled Contract Express will try and update the Questionnaire to synchronise it with the Questionnaire data in the current document. If you do not wish to do this uncheck the **Update Questionnaire** box before saving.

A dialog box titled 'Save a New Version of this Document' with a close button (X) in the top right. It contains a 'Comment' section with a text area containing 'Description of the changes'. At the bottom, there is a checkbox labeled 'Update the Questionnaire' which is checked and highlighted with a red box. To the right of the checkbox are 'Save' and 'Cancel' buttons.

For the Data Synchronisation to be successful there must not be any discrepancies between the Questionnaire and the Questionnaire data in the current document.

If a change causes discrepancies you must resolve them before confirming the save.

If a change has an additional affect, for example on a span, the save will be terminated and you must merge the current and generated documents, as described in section 4.13, and then save again.

4.12.5 Resolving the Answers

Each suggested answer is determined based on the current selection in the document, where the currently selected instance, or the one nearest to it, is the suggestion in each case; and the first non-matching instance after this will be the first discrepancy.

For example, if you have multiple instances of a variable Address and your current selection means that 5 Canada Square is the suggested answer, each occurrence of Address that is not 5 Canada Square will be marked as a discrepancy in **Resolve Answers**.

Resolve Answers

A data discrepancy has been found with the answers in this document. The answer highlighted in the document has been altered elsewhere.

Select **Accept** to use the suggested answer below. ?

5 Canada Square

Alternatively, you can change the highlighted answer in the document by answering the question(s) below and selecting **Accept**.

Address - first line

5 Canada Square

Accept ▼ Reject ▼ Skip

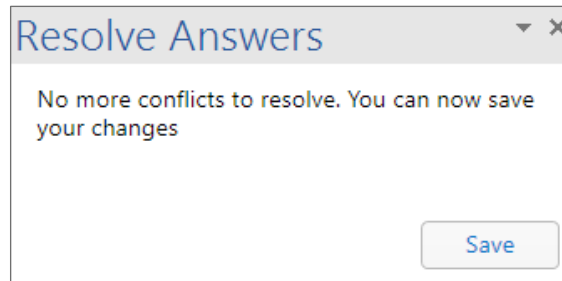
If the suggested answer is invalid, for example because it is outside of the specified range, the suggested answer will default to the variable's original value in the document.

For example, if you have a variable Age that is restricted to 0 to 120 and have changed its value from 30 to 130 it will be marked as a discrepancy in **Resolve Answers** and the suggested answer will be 30.

The discrepancy in question is selected in the document and you can resolve it by accepting, rejecting, or modifying the suggestion. Alternatively, you can skip a discrepancy and resolve it later.

The answers must be self-consistent, i.e. a variable may only have a single value, and resolving one discrepancy may lead to another.

You will continue to cycle through the discrepancies until they are all resolved; once this has been done you will be asked to confirm the save. To do this click the **Save** button in Resolve Answers.

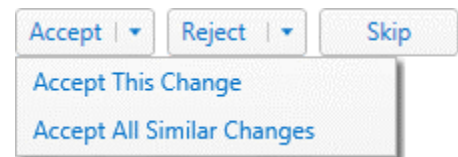


If the changes have an additional affect, for example on a span, the save will be terminated and you will be asked to merge the current and generated documents, as described in section 4.13, before saving again.

(a) Accepting the Suggestion

To resolve a discrepancy with the suggested answer click the **Accept** button or click the ▼ next to the Accept button and select **Accept This Change**. In the first example, this would replace the selected instance of Address with 5 Canada Square.

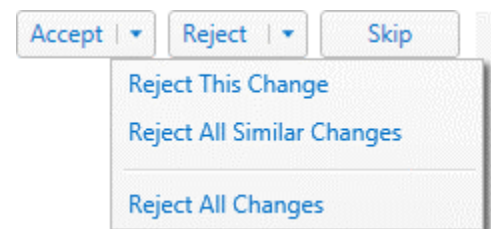
To resolve all matching discrepancies with the suggested answer click the **Accept** button or click the ▼ next to the Accept button and select **Accept All Similar Changes**. In the first example, this would replace all instances of Address with the same value as the one selected with 5 Canada Square.



(b) Rejecting the Suggestion

To resolve the discrepancy by rejecting the suggested answer click the **Reject** button or click the ▼ next to the Reject button and select **Reject This Change**. In the first example, this would reject the selected instance of Address.

To resolve all matching discrepancies by rejecting the suggested answer click the **Reject** button or click the ▼ next to the Reject button and select **Reject All Similar Changes**. In the first example, this would reject all instances of Address with the same value as the one selected.



To reject all suggestions for all discrepancies click the **Reject** button or click the ▼ next to the Reject button and select **Reject All Changes**.

Resolving the discrepancy with rejection removes the content control and, more importantly, removes the instance from the Data Synchronisation. Once this has happened Data Synchronisation cannot happen for the instance unless the current and generated documents are merged as described in section 4.13. To simply ignore the discrepancy for now and come back to it later use Skip as described in 4.12.5(d).


(c) Modifying the Suggestion

To resolve the discrepancy with an alternative answer to the one suggested modify the text in the box immediately above the Accept, Reject, and Skip buttons. The box will be titled with the name of the variable, in the first example this is Address.

Address

If the modified answer is invalid an error message will be shown immediately below it suggesting how you might correct it. In the second example this error message tells you that you must enter a number between 0 and 120.

Age



 Enter a whole number that is between 0 and 120

To accept this answer click the **Accept** button or the  next to the Accept button as described in section 4.12.5(a).

Accepting a modified answer resolves the discrepancy and removes it from the list of discrepancies. However, it may lead to new discrepancies, for example if you accept an answer not currently in the current document.

(d) Skipping the Discrepancy

To skip the discrepancy click the **Skip** button.

Accept |  Reject |  Skip

Skipping a discrepancy ignores it for now, allowing you to come back to it later.

4.13 Merging Changes into the Current Document

The first version of a Document is generated by Contract Express based on the Document Template and Questionnaire. You can open and modify it in Word in the same way as any other Word document. It can be saved to Contract Express using the Contract Express Negotiator ribbon, see sections 4.11 and 4.12 for more information.

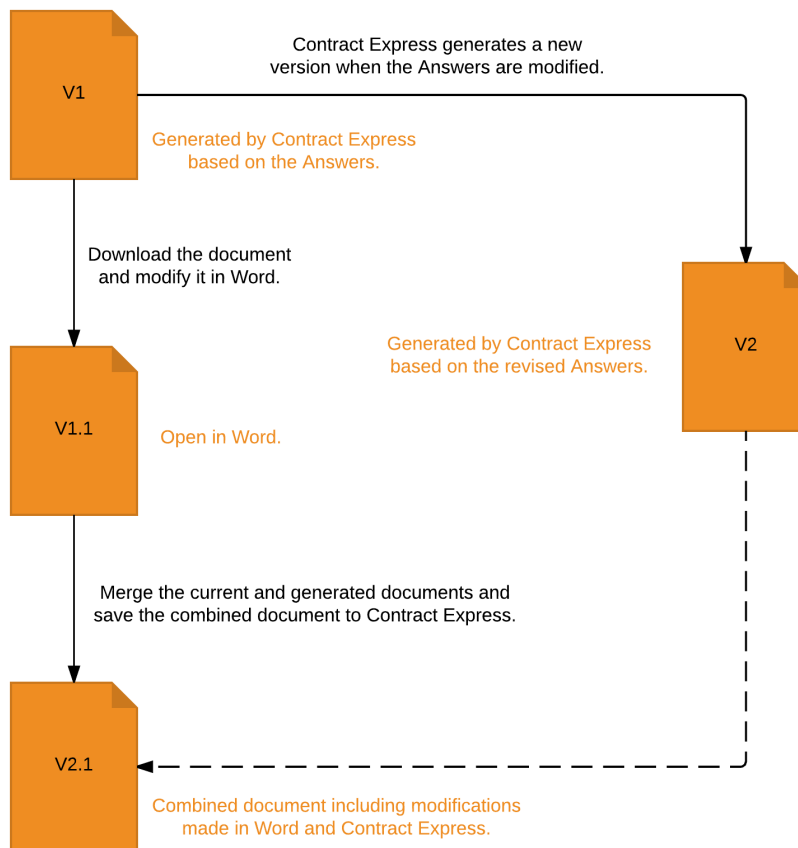
If changes have been made to multiple versions of a Document they must be **merged into the current document** before it is saved or they will be lost. For example, if you change version 2 after version 3 has been created the changes to version 2 must be merged into version 3 before it is saved or they will be lost.

When all of the changes are manual a simple comparison of the documents is often sufficient, see section 4.9 for more details.

When the Questionnaire is edited it creates a new generated version and **discards all existing changes**, see section 4.10 for more information. In situations where you have changes to documents created with multiple versions of the Questionnaire you must merge them to bring all the changes into the current document before saving.

For example, if you have three versions of a Document where

- **Version 1** is the Document generated from the original Questionnaire
- **Version 1.1** is the modified Document; i.e. Version 1 after some changes
- **Version 2** is the Document generated from the modified Questionnaire and does not include the changes in Version 1.1



When you have Version 1.1 open in Word, you can use Contract Express Negotiator to merge it with Version 2 to bring in any changes resulting from the modification of the Questionnaire. You can then save the merged document to Contract Express as Version 2.1.

To merge the documents click the **Merge** button on the Contract Express Negotiator ribbon. This will merge the documents and use Track Changes to show all of the changes, differentiating those made manually from those resulting from the modifications to the Questionnaire. It is advisable to go through the changes before saving the merged document to Contract Express; for more information on saving a document see sections 4.11 and 4.12.

4.14 Viewing all Changes since the Document was last Generated by Contract Express

To show all changes that have been made to the current document since it was last generated by Contract Express click the **Show Changes** button on the Contract Express Negotiator ribbon.



Show
Changes

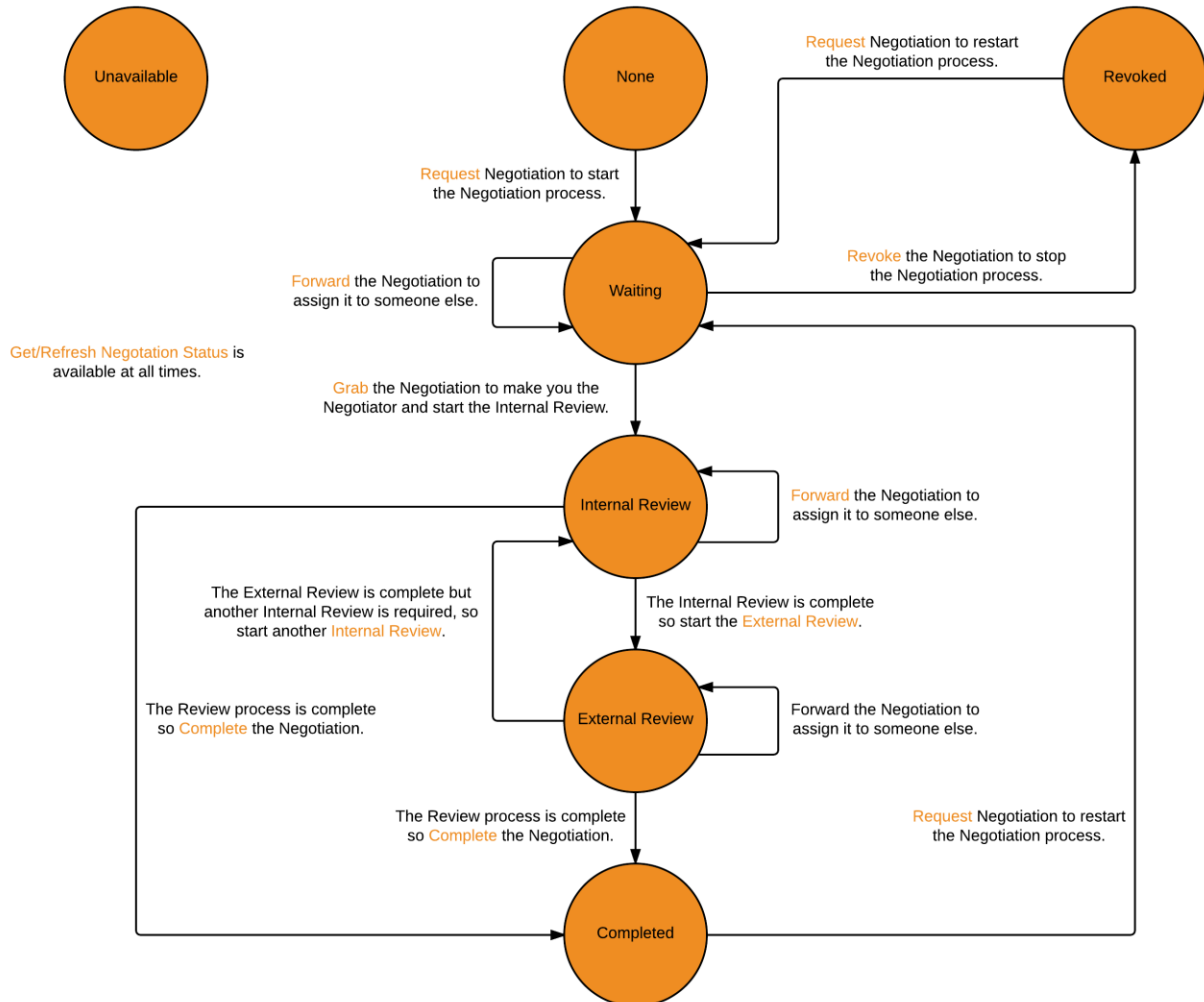
4.15 Negotiation in Contract Express Negotiator

The Contract Express Negotiation functionality allows a Contract Express document to be taken through a negotiation by way of a series of state changes. These changes are made manually and are designed to reflect the real life negotiation process.

The process is divided into a series of stages; at each stage different state changes are possible. Each **Negotiation Status** corresponds to a stage and each **Negotiation Action** corresponds to a state change. See the diagram below for more information.

For more information about the Negotiation process see the Contract Express Admin Manual for Contract Express Version 7.1.

Negotiation is **Unavailable** while the Document has an active Approval or has been Sent for Signature.



A Contract Express user's ability to Negotiate with a Document is governed by two settings

1. Their Read/Write access to the Document
2. Their presence on the Document Template's list of Negotiators

If a user has **at least read access** they can **Request** and **Revoke** Negotiation; if a user is **on the list of Negotiators** they can **Grab**, **Forward**, move to **Internal Review** and **External Review**, and **Complete** Negotiation. In both cases a user can **Get** and **Refresh** the Negotiation Status.

The **Negotiation** button is only enabled when the current document is a Contract Express Document. If multiple documents are open the **Negotiation** button is only enabled for the Contract Express Documents.

The **Negotiation** button is used to get, refresh, and update the Negotiation Status. Updates are made with the associated menu.

Additionally, the **Negotiation** button displays

- The Negotiation Status when the current document is a Contract Express Document and Contract Express Negotiator is logged in to Contract Express.
- “Unavailable” when Negotiation is unavailable because the Document has been “Sent for Signature” or has an active Approval.
- “Negotiation” in all other cases.

If multiple documents are open the display reflects the current document.

When changing documents the display can take a short time to update, this is because Contract Express Negotiator has to get the Negotiation Status from Contract Express.

Hovering over the **Negotiation** button and associated menu shows more information, relevant to the current situation, in a tooltip, much like many other buttons and menus in Word.



The Negotiation Status is unknown because Contract Express Negotiator is not logged in to Contract Express or do not have access to this Document.



Negotiation has never been attempted with this Document.



Negotiation has been Requested for this Document.



The Negotiation for this Document is in Internal Review.



The Negotiation for this Document is in External Review.



The Negotiation for this Document is Complete.




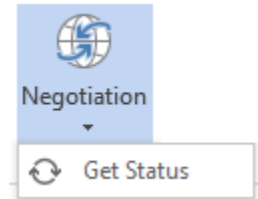
The Negotiation for this Document has been Revoked.



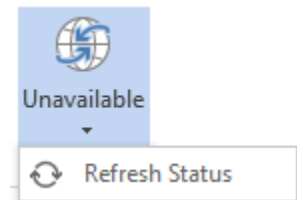
Negotiation is currently Unavailable for this Document. This is because the Document has been “Sent for Signature”, has an active Approval, or has been turned off in Contract Express. For more details on turning the Negotiation process on/off see the Contract Express Admin Manual for Contract Express Version 7.2.

4.15.1 Getting the Negotiation Status

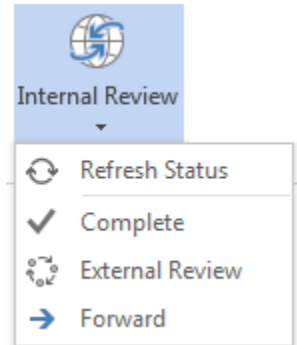
To get the Negotiation Status for the current document click the  in the upper part of the **Negotiation** button on the Contract Express Negotiator ribbon. Alternatively, click the lower part of the **Negotiation** button and select **Get Status** on the menu. If you are not currently logged in to Contract Express you will be asked to do so; for more information on logging in to Contract Express see section 4.2.



If this is the first time you are getting the Negotiation Status, i.e. if you have to log in to Contract Express, “Negotiation” will be replaced with the current Negotiation Status from Contract Express, or “Unavailable” if Negotiation is currently Unavailable for this Document. Additionally, “Get Status” will be replaced with “Refresh Status” and the appropriate Negotiation Actions will be added to the menu.



If this is not the first time you are getting the Negotiation Status, i.e. if you do not have to log in to Contract Express, the Negotiation Status will be updated unless Negotiation is Unavailable where it is replaced with “Unavailable”. Additionally, the Negotiation Actions will be updated on the menu.



The Negotiation button is displaying the wrong Negotiation Status

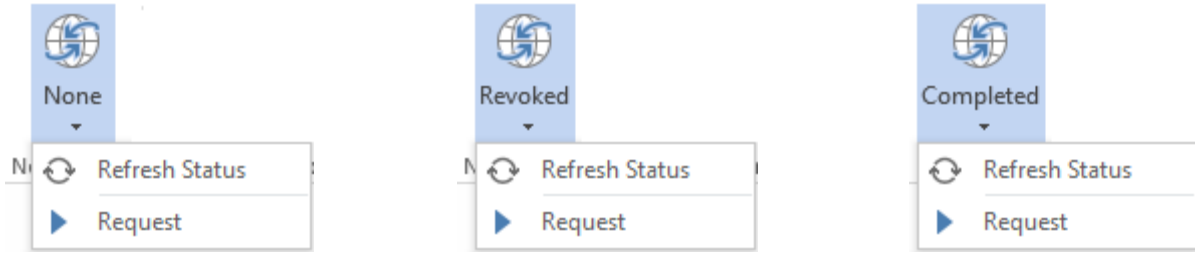
The Negotiation Status may be out of date; try refreshing the Negotiation Status. If the Negotiation Status is still “wrong” you may not be where you expect in the Negotiation process, please see the Document Details in Contract Express for more information.

4.15.2 Updating the Negotiation Status

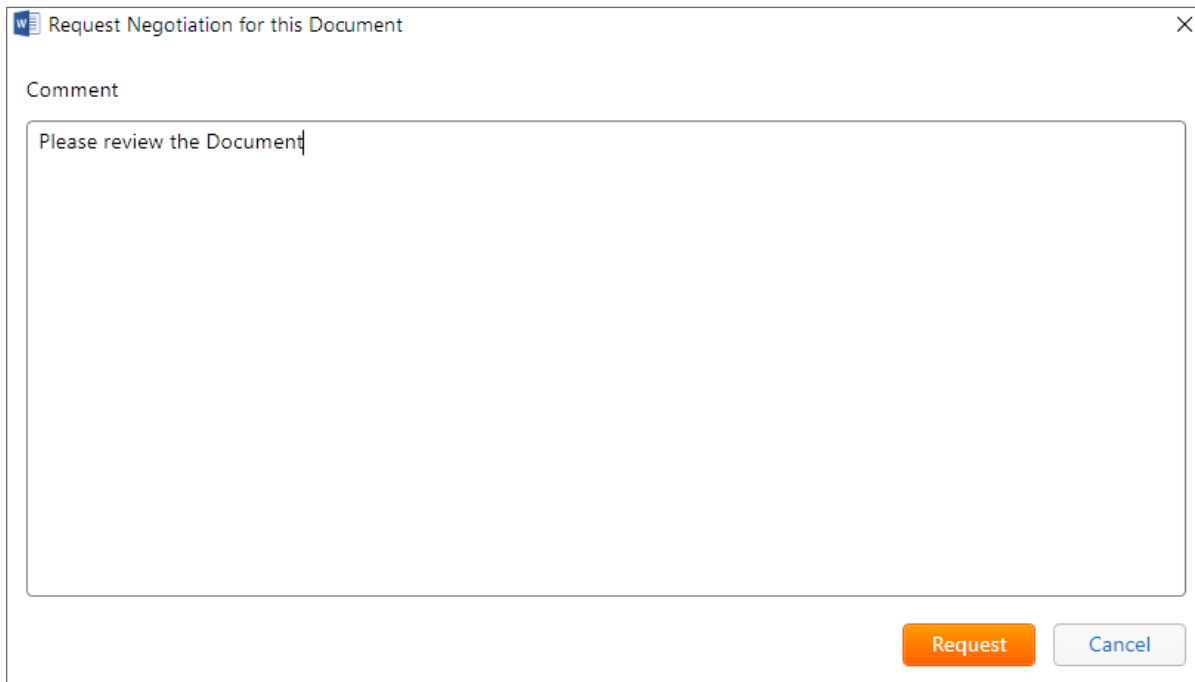
The first step in the Negotiation process, see the diagram above, is to **Request** Negotiation. Once Negotiation has been Requested you can take ownership of, or **Grab**, the Negotiation and perform further updates yourself or **Forward** the Negotiation to another Contract Express user or group.

(a) Requesting Negotiation

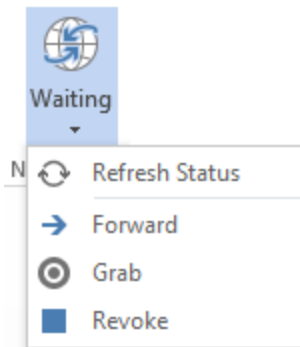
You can **Request** Negotiation when the Negotiation Status is **None**, **Revoked**, or **Completed**. To do this for the current document click the **lower part of the Negotiation button** on the Contract Express Negotiator ribbon and select **Request**.



The **Request Negotiation Window** will then be displayed where you can, optionally, enter a comment. Click the **Update** button to request the negotiation.

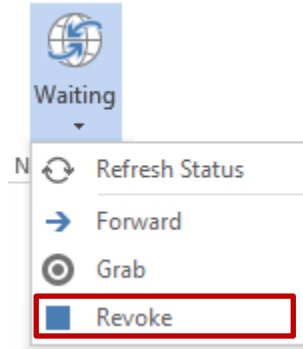


The Negotiation Status will change to **Waiting** and the Negotiation button and menu will be updated accordingly.



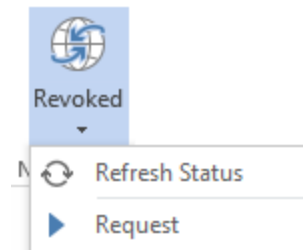
(b) Revoking the Negotiation

You can **Revoke** the Negotiation when the Negotiation Status is **Waiting**. To do this for the Negotiation for current document click the **lower part of the Negotiation button** on the Contract Express ribbon and select **Revoke**.



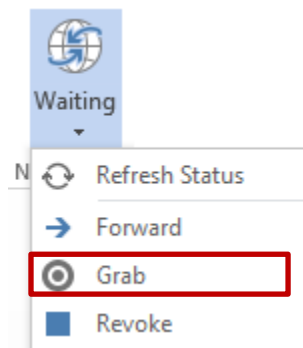
The **Revoke Negotiation Window** will then be displayed where you can, optionally, enter a comment. Click the **Revoke** button to revoke the negotiation.

The Negotiation Status will change to **Revoked** and the Negotiation button and menu will be updated accordingly.



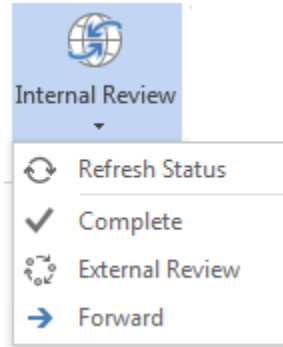
(c) Grabbing the Negotiation

You can **Grab** the Negotiation when the Negotiation Status is **Waiting**. To do this for the Negotiation for the current document click the **lower part of the Negotiation button** on the Contract Express ribbon and select **Grab**.



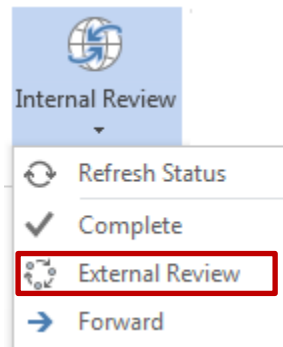
The **Grab Negotiation Window** will then be displayed where you can, optionally, enter a comment. Click the **Grab** button to grab the negotiation for this document.

You will become the Negotiator, the Negotiation Status will change to **Internal Review**, and the Negotiation button and menu will be updated accordingly.



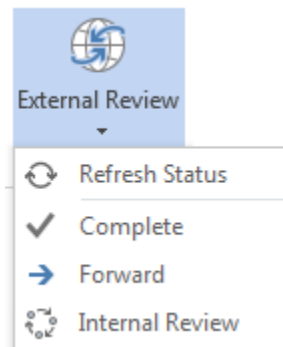
(d) Moving the Negotiation to External Review

You can move the Negotiation to **External Review** when the Negotiation Status is **Internal Review**. To do this for the Negotiation for the current document click the **lower part of the Negotiation button** on the Contract Express ribbon and select **External Review**.



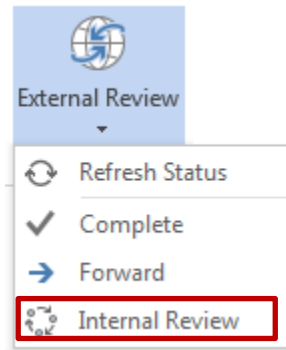
The **Move Negotiation into External Review Window** will then be displayed where you can, optionally, enter a comment. Click the **Review** button to perform the update or the **Cancel** button to cancel it.

The Negotiation Status will change to **External Review** and the Negotiation button and menu will be updated accordingly.



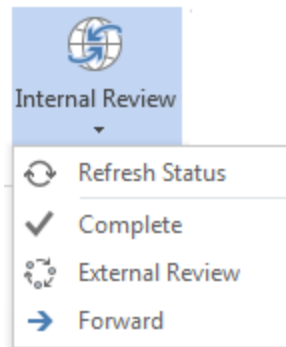
(e) Moving the Negotiation to Internal Review

You can move the Negotiation to **Internal Review** when the Negotiation Status is **External Review**. To do this for the Negotiation for the current document click the **lower part of the Negotiation button** on the Contract Express ribbon and select **Internal Review**.



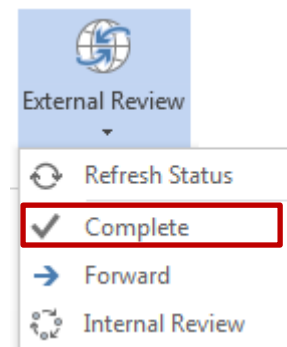
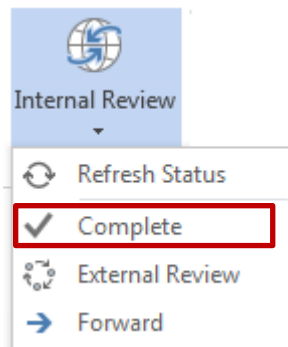
The **Move Negotiation into Internal Review Window** will then be displayed where you can, optionally, enter a comment. Click the **Review** button to perform the update or the **Cancel** button to cancel it.

The Negotiation Status will change to **Internal Review** and the Negotiation button and menu will be updated accordingly.



(f) Completing the Negotiation

You can **Complete** the Negotiation when the Negotiation Status is **Internal Review** or **External Review**. To do this for the Negotiation for the current document click the **lower part of the Negotiation button** on the Contract Express ribbon and select **Complete**.



If there are no completed Approvals for the Document the **Complete Negotiation Window** will then be displayed where you can, optionally, enter a comment. Click the **Complete** button to complete the negotiation.

If there is at least one completed Approval for the Document the **Complete Negotiation Window**, with an option to restart the Approvals for the Document, will then be displayed where you can check **Restart the Approvals for this Document** to restart the Approvals and, optionally, enter a comment. Click the **Complete** button to complete the negotiation.

Complete the Negotiation for this Document

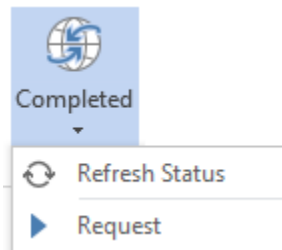
Comment

Negotiation completed, approvals required

Restart the Approvals for this Document

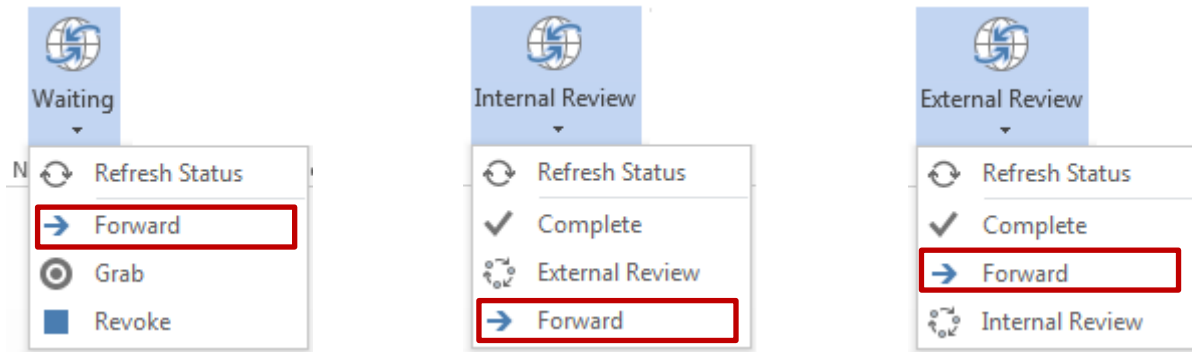
Complete Cancel

The Negotiation Status will change to **Completed** and the Negotiation button and menu will be updated accordingly.



(g) Forwarding the Negotiation

You can Forward the Negotiation when the Negotiation Status is **Waiting**, **Internal Review**, or **External Review**. To do this for the Negotiation for the current document click the **lower part of the Negotiation button** on the Contract Express ribbon and select **Forward**.



The **Negotiation Forward Window** will then be displayed where you must select whether to Forward to a Contract Express User or Group and enter a valid User or Group name and can, optionally, enter a comment.

 A screenshot of the 'Forward the Negotiation for this Document' dialog box. The dialog has a title bar with a close button. It contains a 'Type' dropdown menu set to 'User' and a text input field containing 'negotiator@company.com'. Below this is a 'Comment' text area with the text 'Please review'. At the bottom right, there are two buttons: 'Forward' (orange) and 'Cancel' (grey).

As well as full entry, i.e. entering the full User or Group name, the User and Group box supports searching. The search is not case sensitive and the list of options reflects the text currently entered; to refine the search simply enter more text. If no options are shown it means there are no matches in Contract Express.

To search enter some text and then choose from the options given. For example, to search for a Group called Negotiators set the **Type** to **Group** then enter “neg” and select “Negotiators” from the list.



My User or Group is not appearing in the list of options for Forwarding

The entered User or Group name is not in Contract Express. Check that the User or Group name is correct or contact your Contract Express Administrator.

Click the **Forward** button to perform the Forward or the **Cancel** button to cancel it.

If the selected User or Group exists in Contract Express, the Negotiation will be Forwarded to them and they will become the Negotiator.

Forwarding does not affect the Negotiation Status.

4.16 Launching Contract Express from Contract Express Negotiator

Click the **Open Contract Express** button on the Contract Express Negotiator ribbon to launch Contract Express in your default browser.

