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https://kn	{'Title': 'iSheet section features for end users', 'Data': ['\nAs noted in Add\xa0and configure\xa0secti
https://kn	{'Title': 'Dashboard Panel - Collaborate Sites', 'Data': ['\nThe content within a dashboard is created b
https://kn	{'Title': 'How to add or amend Forms', 'Data': ['\n\nPlease note that when a form is public (e.g. when
https://kn	{'Title': 'Re-order related materials inside publications', 'Data': ['\nUsers can now re-order related m
https://kn	{'Title': 'Microsoft Azure AI for tag suggestions', 'Data': ['\nIntegration with Microsoft Azure AI allows
https://kn	{'Title': 'Place charts into a wiki', 'Data': ["\nYou can add data visualisation charts to a wiki.\xa0To do
https://kn	{'Title': 'Display external content in rich text pages', 'Data': ['\nMany types of content in Collaborate,
https://kn	{'Title': 'Embed media and images with the rich text editor', 'Data': ['\nThe rich\xa0text editor allows
https://kn	{'Title': 'Embed RSS feeds with the rich text editor', 'Data': ['\nExternal RSS feeds can be embedded u
https://kn	{'Title': 'Embed dynamic site content with Lists', 'Data': ["\nThe rich\xa0text editor can be used to sh
https://kn	{'Title': 'Miscellaneous rich text editor features', 'Data': ['\nView and edit the HTML source\nClick\xa
https://kn	{'Title': 'Use tables to create a two column home page', 'Data': ['\nA table is a perfect format for som
https://kn	{'Title': 'Module content elements in Publisher', 'Data': ["\nA module's content elements are basicall
https://kn	{'Title': 'Streaming video and audio in Publisher', 'Data': ["\nPublisher provides a video streaming ser
https://kn	{'Title': 'Data visualisation - Date groups', 'Data': ["\nData visualisation date grouping allows an iShee
https://kn	{'Title': 'Virtual dataroom quick reference guide', 'Data': ["\nAdding files to your dataroom\nWhen y
https://kn	{'Title': 'Access and edit wiki pages', 'Data': ["\nAny page in the Wiki module can be accessed using t

https://kn(	{'Title': 'View individual blog posts', 'Data': ["\nClick\xa0the title of a blog post from the blog home p
https://kn(	{'Title': 'Create a virtual deal room (VDR)', 'Data': ['\nA virtual deal room (VDR) is an online repository
https://kn(	{'Title': 'Search the Q&A module and the inbox summary', 'Data': ['\nSearching\nThe left pane of the
https://kn(	{'Title': 'Import RSS Content into Publisher', 'Data': ['\nThe RSS content syndication enables the\xa0ir
https://kn(	{'Title': 'View individual events in Events', 'Data': ["\nClicking on the title of an event from the Events
https://kn(	{'Title': 'HighQ Drive for Android', 'Data': ["\n\xa0\nYou can download the HighQ Drive app from the
https://kn(	{'Title': 'Doc Auto - Velocity library', 'Data': ['\nThis article provides examples of Velocity code that yc
https://kn(	{'Title': 'Doc Auto - Velocity manual', 'Data': ['\nPlease find our Doc Auto Velocity manual here. In thi
https://kn(	{'Title': 'Use Doc Auto without the Word plugin', 'Data': ['\n\xa0\n\n\n\n\n\nAutomating templates f
https://kn(	{'Title': 'Doc Auto Word Plugin - Installation', 'Data': ['\n\n\n\n\n\n\nRequirements - the Doc Auto W
https://kn(	{'Title': 'DMS files (document management system)', 'Data': ["\nFiles that have been added to Collab

e a new account and log in to HighQ Collaborate on a regular basis.\n\n\n\xa0\nThomson Reuters or HighQ acc
ɔ improve security when a user accesses their account or certain organisation sites.\nThis article describes the s
tor authentication for some or all accounts that access a Collaborate site. This adds a layer of security by requirir
s the requirement to enter a\xa0passcode in order to access Collaborate.\nAuthentication by a linked app\nWh
adds the requirement to enter a\xa0passcode in order to access Collaborate.\xa0\nAuthentication with a linkec
ng into the HighQ Drive App\n\nTo use and access the HighQ Drive App, you must be using Collaborate v4 or lat
ı't exist\xa0in that folder however it is a set of files that have come from different locations. It is 'Smart' because
track links between two or more files e.g. amendments to documents, or to\xa0see that a file was created from
rresponding Files module, the key content area of most sites.\n\nThe Files administration page includes:\n\nFile
atures for the files added to each site but, not all of these features are available to every user in a given site. Dep
files and folders to a different location\xa0in the\xa0Files\xa0module.\n\nIf you do not have the required permi
les and folders from one site to either (a) another site or (b)\xa0a different location within the same site.\xa0\n
e within your\xa0My Site.\xa0\nComparison with the Files module\nMy files:\n\nSome standard Files module fe
avigation bar. The Files module is displayed only if it has been enabled by a Site Administrator and if the user ha
hey can manage their own files and tasks:\n\n\nWhether users have the ability to add files directly to My Files o
ge where a user can navigate to content areas and get up to speed on recent site activity.\xa0Users with access
\xa0will\xa0allow\xa0system administrators\xa0to create tailored landing pages,\xa0so that\xa0different organi
a0\nOnce you have set up your system dashboard and added permissions (for more information on how to do th
ed, permissioned and configured\xa0your System Dashboards, you can add them to your global navigation bar, f
p of the screen:\n\nThe global navigation bar contain\xa0that links to another area of the system. For example,
d and configured\xa0your System Dashboards and added them to the Global navigation,\xa0you can now safely
ure approval workflows using a combination of\xa0approval templates and the workflow rule builder\xa0to trig
allows site and content administrators\xa0to:\n\nCreate custom approval workflows rather than a fixed predefi
about updates made to sites that the users are members of, through email alerts and online notifications. Each u
et the default notification settings used for new user profiles.\n\nUsers are able to edit notification options\xa0
ery page of Collaborate, on any device.\n\nThe optional\xa0global navigation bar can display links that are visib
rs when creating and managing the navigation element.\nTurn on global navigation\nOpen System admin from
ion options are only available from a desktop computer or a tablet in landscape mode. For all other devices, site
r.\n\nCertain features may be missing if their settings have been disabled within the applicable instance of Colla
w to activate a new Thomson Reuters account and log in to Collaborate.\n\xa0\nThomson Reuters account\nFro
e below screens are custom, and may look slightly different to each user, but the functionality remains the sam
\xa0users associated with Collaborate. Open System Admin from your profile menu, then click\xa0User admin:\
have provided the following features which can be broken down into two key areas:\n\nWe can provide our clie
e, designed to support the specialised needs of enterprises and their corporate legal teams. This role is intended
n window provides settings so that a user (or other members of their team) can only view files they have upload
can trigger the generation of\xa0documents from a Workflow rule.\xa0You may then combine this with other a
which require\xa0both\xa0triggers\xa0and actions.\nOpen Admin, Workflow, Rule builder\xa0and then open the
e Admin module:\n\nIn the Admin module, click Rule builder\xa0in the\xa0Workflow section:\n\nThe Workflo
, along with all the rules it contains,\xa0can be disabled, and later activated, following your needs for workflow
wing the conditions set in the rule, can\xa0Trigger\xa0actions defined in the Actions tab.\nThe rule builder cons
rule (click Add > New rule) or select a rule to edit from the workflow list.\xa0The rule builder is displayed:\n\nTh
ins, if the File Index\xa0view has been enabled in a site) to assign document-review tasks for one or more files.
iles module, allowing users to access a printable tree view of some or all of the folders and files contained in the
figure all aspects of a site and the Admin homepage highlights key information about the site. Other areas that c
user can enable auto numbering which allows a Site Administrator to add automatic numbering to files and fold
\xa0administrators and users with Folder Admin rights)\xa0can control the order of how files and subfolders ap

een replaced with the ability to download or export\xa0a bundle of files.\n\n\n\n\n\xa0\nThis page\xa0describe
\xa0of files if they have\xa0permission to access\xa0the Index feature within the Files module, and also permis
avigate to the iSheets admin page in Module Settings and click Manage Views from the More actions menu.\n\n
ate to the iSheet admin page (Admin >\xa0Module settings >\xa0iSheets) and select Manage views from the iShe
n at a later time. Drafts are available to the user who created them, in the iSheet\xa0Draft items view.\nAuto-sa
fields\nsingle line text fields\nchoice and score columns (drop-down, radio and multi select, however this does r
create forms that show relevant fields based on the business logic of your use case or project.\xa0Columns may
heets may be associated with the files module by creating file and folder metadata iSheets. These iSheets allow a
dmins to group together columns, allowing users to navigate the Add item screen more efficiently.\n\nSite adm
an iSheet (by being a part of a security group granted edit rights), the Add button will be displayed at the top of t
igation bar, giving them the ability to\xa0add links to modules, sites, individual content items or external links in
s to create a blog post in at least one category, you will have access to both Add post buttons:\n\nAnd here:\n\n
iki, Blog and Events module, it can be saved as a Draft instead of\xa0Published:\n\nAdditionally, wiki pages, blog
)by another person which is related to you or content that you have\xa0been associated with. To view your noti
s and enable the approval workflow. You can also view an RSS feed of all posts and add and delete categories.\xa
a0Blogs and\xa0Events\xa0can be configured to require approval before content is uploaded or updated by any
nate legal processes. Whether itâ€™s legal project management, due diligence reporting, AI-powered contract re
o select which modules are to be enabled for a site, what custom name to give to each module and which modul
bles you to automatically use an approval template to send a file\xa0when the selected conditions are met.\n\nT
historical workflow activity and also test workflow rules without searching for the automated outputs.\nAccessi
re actions:\n\nTo create a wiki page you must:\n\n\nGive the wiki page a title\n\n\nEnter content in the main s
orm,\xa0Wikipedia, in the business context it is most useful for a wiki to use a hierarchical structure. That makes
e\xa0Wiki\xa0tab in the navigation bar (although it is possible that the site administrator may have renamed the
d shows the recent activity across every site that the user can access.\n\nIf Recent activity has been disabled for
e activity module and\xa0microblogging, and\xa0allows you to\xa0choose to display a user avatar. All recent act
four separate content areas:\n\nIn the middle, a list of recent site activity shown in reverse chronological order\
you to send a message to a group of users. Typically, that group would include every person\xa0invited to a part
one Collaborate user to\xa0interact\xa0with another Collaborate user. As long as these two rules are not broke
to communicate with\xa0one or more users - only the selected recipients can view\xa0and respond\xa0to the m
ks, Events,\xa0and\xa0Wiki\xa0modules. If enabled for a specific module, if you have\xa0view-only access (or gr
\xa0tab in the navigation bar:\n\nThe Q&A module is displayed only if it has been enabled by a Site Administrato
is an option to make the site a\xa0Bidder site\xa0and to set\xa0advanced Q&A permissions:\n\nThis setting is
ettings that will\xa0apply to the entire site.\n\nWithin the\xa0Admin\xa0screen, navigate to\xa0Site settings > S
ces found within the\xa0Site settings\xa0section:\n\nSplash pages\nAnnouncements\nTerms and conditions\n\
but\xa0this feature can be turned on or off at the system level.\nHow to like\xa0content\nTo like any content c
ional settings.\nConfiguring the Wiki\n\n\nAllow comments - This setting determines whether or not comments
an iSheet for certain user groups.\xa0Custom permissions may be configured for columns if permissions are ena
iewed by all users in the site.\xa0Permissions must be enabled on an iSheet to restrict certain groups of users fr
t item may view its version history and restore previous versions. \xa0To access an item's version history, click M
pecific user groups. Custom permissions may be configured for views if permissions are enabled on the iSheet to
support various use case requirements, for example:\n\nif there is a need to share the iSheet data collected with
anges to an existing iSheet from Excel, or create a new iSheet from an Excel file.\nCreate an iSheet from an Exce
e used to build your iSheet and each of these will have a number of configurable options. While\xa0each data ty
ettings that allow you to tailor the data fields to your use cases. Certain configuration settings apply only to speci
t should be considered:\xa0\n\n\n\nWhat is the purpose of the iSheet?\n\n\nWhat information do you need to tr
ystem Administrator. A template allows site admins to deploy the structure and configuration of an iSheet, witho
to internal users who have been given the Internal Admin role (aka "System Administrator"), which can be grant

cipient of a shared file be a registered user of Collaborate. That can either be a person who has a full system acc
rnative to sharing files via email or\xa0less secure, and often unapproved, file-sharing services. Collaborate secu
ared via email, every recipient of that share will receive a separate email with sufficient information to access th
ctions setting in the Edit iSheet page. This can be done when an iSheet is first created, or at any time by clicking
nns are added to the iSheet as this will save time later, however, existing columns can be added to sections at ar
ted or deleted. Go to the Admin > iSheets page and click the More actions icon for the iSheet you wish to edit. Fr
ons\niSheet permissions applied on the lookup source iSheet will always be respected in lookup columns in prim
et admin > iSheet references, allows you to locate iSheets that reference an iSheet via lookup and/or join colum
choices for a choice or score column, you may save, or export,\xa0these values for use elsewhere or\xa0copy th
d images which may be used in iSheet choice columns. \xa0Choice column images display beside the choice valu
redetermined list of values from which a user can choose from. When building iSheets for your project, you may
o a score column, but please note that score columns are not currently compatible with workflow, document au
ical calculations performed using values contained in one or more date and time, number or calculation columns
can do so by using a Date and Time column. By selecting this column type the system will correctly identify the va
n the value entered into a Date column. This guide is designed to allow you to quickly and easily copy and paste
ues into an iSheet. By using a number column, the system recognises the value entered as a number and will trea
titles, dates, numbers, etc. After configuring and saving a new iSheet, the next step is to add columns for each da
ontained in an iSheet and the status of Tasks.\n\nBy default, you can have a maximum of 8\xa0panels and 12 KPI
nance Indicator) chart performs a calculation (sum, average, count) of a single measure (a column) and creates a
th the iSheets you create, it is also possible to configure email alerts, triggered by new additions or changes to tl
ts to iSheet records that may be accessed by any user that has access to the iSheet records in the iSheets modul
Export to PDF in the More actions drop-down menu for an iSheet view, if you have appropriate permissions.\xa0
he search box in the top right corner of the module (not the search in the top navigation bar).\n\nThe search res
ly the columns from the selected view will be shared. The recipient\xa0either receives\xa0an email or\xa0notific
ors by sharing an iSheet form via a link or in an email. This form is based on an iSheet and will add\xa0a new reco
mation to contributors by sharing an iSheet form via a link or in an email. This form is based on an iSheet and wi
e (or more) users and groups from a list and display their details in an iSheet column. This information is pulled
e\xa0Metadata iSheet, additional fields of information can be added to files in the\xa0Files\xa0module. Folder M
t stores structured data. Each\xa0iSheet\xa0is a powerful spreadsheet-like database\xa0that allows you to share
ment and provides additional options, such as analysis or redaction,\xa0when viewing a file:\n\nMore Actions\x
ewer and restrict sharing so that only the redacted document is available to all users.\n\nOnly users with conten
es with Contract Express templates and questionnaires to power document generation and management.\nWitl
sortment of video training guides.\nThese videos are in the suggested relevant viewing order:\nSetting up a Tem
templates, you can\xa0create a document using the templates you have created.\n\xa0\nCreating a document
ment Automation module powered by Contract Express on your instance or site, you will need to add new temp
it from a linked Contract Express template,\xa0you may select one or more iSheet records, and then save the ge
ments to an iSheet record. Users may upload\xa0files from their computer to the iSheet column.\nAs of version
e Files module\xa0stores files that are:\n\nFiles added to an Attachment column in iSheets\nAttachments sent
o target specific file(s), ensuring quick access. In the upper right-hand corner of the Files module is a search box:
that can find all types of documents, pages and contacts\xa0from sets of hundreds or even thousands of files o
that you have access to, or you can limit the search just to a specific site.\n\nClick here for information about se
ed to entering a simple search term in a search field, the Advanced Search screen enables you to apply\xa0filters
ntent, to categorise that content any way they see\xa0fit and then use those tags to find content within that cat
ns up to three separate content areas:\n\n\nIn the right panel, a list of recent blog posts, sorted in reverse chro
rise the content. These tags or metadata nodes are customisable and therefore anything that you as a business,
r folder metadata iSheet can be viewed in a few ways in the files module:\n\nBeside the file when viewed with t
uggest restrictions on a user's permissions with respect to a file. Typically, when a user can access a file on their

ated and named the groups required by your organisation.\n\nTo edit a group, either\xa0click the name of the g
d\xa0Site groups, navigate to\xa0Admin\xa0>\xa0User management\xa0>\xa0Groups:\n\xa0\n\n\n\n\n\n\n\nAd
, it can be associated with any site and treated like any other security group within that site. A system group is n
the\xa0Admin\xa0module includes all user\xa0and group\xa0related functions.\n\nUser groups should always
)Admin\xa0module includes all user\xa0and group\xa0related functions.\n\nOnly site administrators and memb
can be only\xa0be created and managed\xa0by System Administrators, via the System Admin console.\xa0\nFir
ons to a group which affect all of the users in that group. This in effect means that you can 'bulk set permissions'
at basically determines who can view the module and who can not.\nComparison toolkit permissions\nTo access
bles a user to share files securely with other users accessing Collaborate on iPads and iPhones running iOS 4 or la
Favourite,\xa0including:\xa0files, folders, wiki pages, blog posts, individual tasks and a list of tasks, events and iS
lata iSheets and files stored in attachment columns from both the iSheets module and the Files module.\nFile m
figure which columns and items are displayed in a table format. Each iSheet can have one or more views.\xa0Fo
eets in the iSheets module. This will allow you to view all the files (or folders) independent of their folder structu
utomatically created for each Contract Express template\xa0associated with a site. This captures answers used fo
itter\n\t\t\n\n\n\n\t\t\tLinkedIn\n\t\t\n\n\n\n\t\t\tFacebook\n\t\t\n\n\n\n\n\n\n\n\n\n\n\n Embed\n\t\t\
k below.\n\nAdd columns\nColumn types\nColumn settings\nUse sections to group columns\n\nEnable sectior
et to be associated with an item in another iSheet.\xa0\nFor example, a site admin could create an iSheet that c
ased on the following triggers:\n\nOn Assignment \xa0- When a task is created, all assignees will receive an imm
ates, many helpful features\xa0have been added to HighQ tools and modules that can improve your working pra
ess template, instead of opening the file as a Word document, you can edit the Contract Express questionnaire
ways to manually generate a document from a Contract Express template:\n\nFrom a Doc Auto panel on the H
upload files into the Files module.\n\n\n\n\n\n\nOn most mobile devices the Add button is not available. On iPa
Express integration requires\xa0access to third-party services for system and site administrators.\xa0This allow
ystem designed to create templates and produce documents using your organisation's own work. We have integ
equires\xa0access to third-party services for system and site administrators.\xa0This allows admins to upload te
templates, which\xa0can serve as the basis when creating new sites. When a new site is requested, instead of
te admin screen.\n\nSystem administrators can also use the Full site list.\n\nArchiving a site means that:\n\nArc
tings for the\xa0site.\nConfiguring the general settings\xa0page\n\n\nSite name\xa0- Enter a unique name tha
xpress Integration, you can now create a dashboard panel on a site home page, which lets users on this site\xa0
riendly Forms for their clients with little to no code.\xa0\n\n\n\n\nWe have built a standalone customisable servic
that allows users to design custom forms based on\xa0iSheets. A form can be embedded on your\xa0site, on c
or a HighQ Form, open the\xa0Admin module, then click iSheets under Module settings.\n\nIf you do not have a
is based on an iSheet.\nTo use the HighQ Forms designer, first:\n\nCreate an iSheet that contains columns for tl
ou when creating your forms:\n\nCopy a form style and edit the copy to test and tweak the\xa0design\xa0with
id Content\xa0administrators and also users with Folder Admin rights) can delete files and folders from within tl
files. If you are not a Site Admin, you only see the Version History, and the audit information is not displayed.\n
ure of an existing dataroom\xa0from another dataroom\xa0platform\xa0and recreate the folder and file structu
d for troubleshooting when using the \'Encrypt native files with Seclore plugin\' option, with additional\xa0infor
securely sign documents from the Files module.\n\n\n\n\n\n\nAfter the eSign service has been configured, you
bled, on request, by HighQ support. However, if you want to use your own Client ID (Integrator key), it can be d
ers to securely send a document for signature\xa0from the Files module.\n\nAfter the eSign service has been co
iple AI engines and integrates them seamlessly into the processes built in the HighQ platform, all controlled and
\n\n\n\nEnabling HighQ AI at system-level\nTo use HighQ\xa0AI, a system administrator must first enable it at t
actively train it. Training means that you help\xa0the engine to understand what types of files you are uploadir
lauses, and to re-train standard clauses found in\xa0HighQ AI extracted fields.\nFind the new clause\nOpen a fil
lighQ AI Hub. After extraction they are stored in the AI Hub, and can be called up in two ways:\n\nImport\xa0the
text when training the HighQ\xa0AI to recognise custom clauses. Training with the correct text improves the re

fiers that are useful to identify legal documents. The classifiers\xa0are based\xa0on submissions made by organ
ine and assigning it to a folder:\n\n\n\n\n\n\xa0\n\nKira needs to be enabled at super admin level - please cont
egrated their market-leading data extraction and document management platform into our AI Hub. This allows u
ow\xa0users to automatically push documents from HighQ into the Eigen AI for data extraction, and then store t
art\nThe HighQ AI Hub requires specific API commands to communicate with a\xa0new\xa0third-party\xa0AI er
I Hub metadata into an iSheet:\n\n\n\n\n\n\xa0\nSet up\nYou must switch\xa0on and configure\xa0the\xa0iSh
n iOS or Android device\xa0to quickly scan documents and store them. You may also securely scan and add your
nAfter clicking Reset your password, you will be directed to the Reset password screen:\n\nYou will be asked to:
oid and iOS that integrates with your HighQ instance to provide:\n\nInstant secure messaging between all users
sers to synchronise files stored in\xa0My files or team sites, to a location on their local device (smartphone or cc
heir instance of Collaborate. SSO is a feature that permits a user to be automatically logged in to Collaborate onc
een Microsoft Active Directory Federation Services 2.0 (ADFS 2.0) and HighQ Hub via SAML 2.0 protocol will allo
e refer to the\xa0Thomson Reuters account\xa0article.\n\nWhen you are first invited to a Collaborate site, you a
ction, find the user whose details you want to edit and then navigate to More actions > Edit details:\n\nThe Use
dministrator creates\xa0a new User, they will be assigned to either an existing organisation (from the Users\xa0
nanage\xa0and delete users. Additionally you have access to a host of other actions, such as sending invitations,
anisation whose details you want to edit within the Organisations section and navigate to More actions > Edit de
made it even easier to deliver a seamless end-to-end client journey by unifying Collaborate and Publisher into a
n\nThe navigation can be an individual element that links to another area of the system. e.g. a channel, a modul
managed by yourself, or by a system administrator.\n\nThis section contains your profile image, which is display
e\xa0Blog\xa0tab in the navigation bar\xa0(although it is possible that the site administrator may have renamed
stem language of Collaborate. Choose from these options:\n\nEnglish (UK)\nEnglish (US)\nDutch\nGerman\nFr
n\nTo change the system language of your instance of Publisher, contact your CSM.\xa0\n\nTo change the syste
ur Comparison Toolkit Module you will be ready to create some associated content. To get started, navigate to t
xa0you need to create a module. There are five types of modules:\n\nComparison toolkit (CTK)\nEvents\nMicro
her, which is more conventionally known as a page. There are three main types of dashboard:\n\nGlobal dashbo
adding panels, and it is possible to add any number of panels to the dashboard.\nThere are\xa0two key panel a
tent creation workflows, which include both editor and approver roles, facilitating an approval process for conte
f your\xa0interactions with the system. It allows you to tailor the content you receive in email alerts from the sy
nts module (although it is possible that the Site Administrator may have renamed the module for any particular s
content areas:\n\nIn the right panel is a list of Upcoming events, sorted in chronological order, from all of the ca
default view and change when the week starts in relation to events (this also applies for Tasks). You can also imp
cross your instance. These settings affect a range of key features and should only be changed if required for a spe
Vithin the Tasks module in each site, you can view tasks in List View, Card View,\xa0Timeline View (if enabled) an
st, task\xa0and\xa0sub-task\xa0is represented by one row.\xa0\nThe Hierarchy view provides additional tools t
sks module by connecting it to an iSheet. Using the powerful functionalities of iSheets within the Tasks module,
e users to synchronise files stored in team sites, to a location on their local computer and vice versa. Please con
ls,\xa0attachments and files\xa0directly to your Collaborate\xa0instance, from your inbox or from Microsoft Off
Office plugin has been installed and connected to your Collaborate account, you may configure default settings th
the HighQ Office plugin are Microsoft Office 2010 (including Outlook) and Windows 8.1. There is currently no su
n HighQ option is shown in the HighQ tab on the top right of your Outlook ribbon.\xa0\xa0\n\nClick Attach from
you share files to HighQ and is available on the top right of your Outlook ribbon.\xa0\n\nClick Upload and Attac
with attachments directly to your Collaborate instance from your Outlook inbox. To do this, choose a file from y
n email to file and click on File Email.\n\nRecent folders will be displayed in a list filtered by site. You can change
you should have the following settings enabled.\xa0\n\nBy choosing the first radio button highlighted, all attach
l below are available in Word, Excel and PowerPoint. When you first open one of these\xa0Office applications\x
Transfer feature is enhanced with the\xa0Outlook plugin.\n\nPlease contact your IT department to determine w

er on the left hand side of Outlook, right click on a folder and choose New Folder. The new folder will then displa
an be pushed out to users:\n\nbased on their preferences\nbypassing preferences, but the user must request th
ration has been developed to provide a comprehensive, native and seamless experience, allowing you to add, vi
space (formerly 'G Suite') integration will allow files module users to work collaboratively work using online tools
content administrators and users in groups with folder administration\xa0permissions) can change folder names
lministrators (only) can move files and folders to a different location\xa0in the\xa0Files\xa0module.\nThis articl
d new functionality to the\xa0Files\xa0module:\xa0Document Assembly gives you the ability to add, remove\xa
l manage older versions on the Audit history page.\n\nAs of January 2023, version restoration and deletion are e
with Add File rights (or greater) to a folder can 'check out' sub-folders from that folder.\n\nIf file-level security I
dmin permissions, you can create custom iSheet Views for your own use; this allows you to focus on data specif
inistrators. However, once a site template is created, any user who is a site administration of that template, car
the HighQ document viewer, or Workshare (if Workshare has been enabled on your instance).\n\nClick here to
will be able to proxy log in as another non-administrator user. This means they can view the site as that person,
users and be followed. This allows you to view those in either list and easily contact them via the message butt
ers administrators quick access to tutorials, videos, and support information.\n\nThe HighQ Resources icon is on
a mega menu from one of the existing containers.\nTo do so, navigate to:\xa0System admin > Global\xa0naviga
us modules and other areas to allow site users and Administrators to create highly formatted content,\xa0incluc
been added to a site, grouped by organisation -\xa0along with contact information about each user. The users ca
ticle explains the component parts that make up your full\xa0HighQ URL and the processes required for your ins
different languages for your content and instance:\nPublishing content in another language\nYou can publish co
regated into one area. This enables users to select what content is important from them from various parts of th
a person can log in and, from there, access any instance of Collaborate they have been invited to, provided the p
:\n\nthe full text of files in the Files module,\xa0\nwiki pages,\ntags added to a blog post, etc.\n\nAs with the re
By default, Collaborate runs a wildcard search, meaning that it finds the terms that are entered either as comple
g options available in Collaborate.\xa0Shareable content includes\xa0Wiki\xa0pages, content in the\xa0Files\xa
you are automatically taken to the System preferences screen.\nThe System preferences screen allows you to s
age work. The three main task views - list, card and timeline - are designed to facilitate different project manage
load files and folders for their own personal use, which they can access through a\xa0browser at a later time. It a
sharing contains two extra tabs:\n\nReceived items\nShared items\n\n\nShared items can also be accessed fron
been enabled for your account, you will see a "Send a file..." option in your personal profile menu, accessible fro
two extra tabs:\n\nReceived items\nShared items\n\n\nReceived items can also be accessed from clicking on M
odule allows site users to send emails and attachments to a site, or to a specific folder on a site.\nA site user (eve
tent administrators and users with Folder Admin rights) can upload multiple files or folders using the Zipped Files
encrypt the images stored within the Document library so that users could not get access to images that they sho
or system administrators.\xa0\nAfter Legal Tracker is enabled at the System administration level, you can configu
ure that enables integration between HighQ and Legal Tracker for the purpose of Legal intake and matter manag
oducing advanced capabilities to provide more personalised, preference-driven content with enhanced sophistic
which enables you to display some teaser content to public users on a restricted article with teaser access. This r
view all user reports including all relevant metadata.\nRunning the report\nNavigate to System administration >
es of tools found within other CMS tools such as Wordpress. If a module is public, Publisher will have the ability t
roduced auto-deployment of solution templates. If you want to use a best practice template for a specific type o
ntegrates with Practical Law Matter Maps, allowing you to use the full suite of HighQ project management tools
be able to proxy log in as another non-administrator user. This means they can view the site as that person, and
ced the ability to import and export themes in Publisher. This will enable our customers and users to quickly and
n colours to be applied to categories or series. This functionality is only accessible to users who are site administ
has a list of supports to enable or to stop your users from adding scripts to the site. The HighQ support team has
ntroduced the ability to remove decimals from value axis in fusion charts. This means that if you had a chart with

ıelps us define, limit and\xa0filter different content. This means\xa0it can be a very powerful tool\xa0which can
ty to have custom colour themes for your charts. This means that\xa0system administrators will now have the al
led the Basic user. For more information on this user, click here.\nThe article below details how the Basic user fu
› bulk import users either from an Excel file or via a mapping interface, from other applications.\nThis means tha
able to upload bulk profile\xa0images directly from Active Directory. This means you can quickly and easily uplo
d a new System Reporting Administrator Role which enables you to give users access to run reports, but not full
able to manage and have more control over what details are included on their dashboards. This new functionalit
s of requester\xa0and approver\xa0when using Legal Tracker within HighQ.\nRequester\nA requester is a user v
m administrators and matter managers.\nOnce you have configured the Legal Tracker iSheet and Legal Tracker t
natter managers who can manage templates.\nOnce the iSheet has been configured, you need to now configure
n administrators.\xa0\nAfter Legal Tracker is enabled at the System administration level, you can configure the r
CTK module, navigate to\xa0Content Hub\xa0>\xa0Module\xa0>\xa0Add\xa0Module\xa0and\xa0click\xa0Add
the ability to playback supported media files. When a user uploads a media file, the newly uploaded media file w
are publication pieces via QR Code sharing.\nTo do so, click\xa0Share\xa0within the publication piece you want
ːa0for audits and reporting:\nSystem report and audits - there are over 20 reports and some of the key ones are
)optical character reader\xa0(OCR) is the\xa0electronic\xa0or\xa0mechanical\xa0conversion of\xa0images\xa0
; accessible by system administrators through the Content hub. To access it, navigate to\xa0Admin\xa0>\xa0Cor
ın be created and displayed in multiple languages:\nAs the workflow below describes, the default language will b
\nAn example of the sitemap produced by Publisher, can be viewed on our\xa0Blog\xa0site:\xa0https://blog.hig
t sources. This means that\xa0you can create data visualisation charts using data from multiple iSheets from mu
ublisher, called the Form admin, and Form administrator roles. These roles\xa0gives the new administrator\xa0
To create custom site metadata for matter management, within your profile drop-down menu, click\xa0System
ta for matter management, you can then view the data displayed within matter reports.\xa0\nWithin your site,
formation management. As of version 5.3, we have introduced custom fields for a site,\xa0which can be defined,
to copy sites and their configuration to create repeatable, portable solution templates.\n\n\n\n\n\nWith this po
e to columns in iSheets. When you associate\xa0a template with iSheet columns, the Doc\xa0Auto\xa0plugin\xa
Admin\xa0can easily build dynamic document templates without programming;\xa0dragging and dropping auto
ions\xa0have been set up, you can now click on the Variables tab in the ribbon. The Variables panel on the right-
n\n\n\n\n\n\xa0\nAdd conditions\nOnce the Associations have been set up, you can\xa0click\xa0the Condition
ount of data from many records in an iSheet you can use a loop. The loop will read all the records in the iSheet f
ıeck if the references to iSheet data are still valid. The Validate option will check the Site, iSheets, iSheet Views a
Vord Plugin video:\n\n\n\n\n\nThe Preview option in the Doc Auto Word Plugin\xa0generates a preview of the
cated at the top of the list of Sites:\n\nThis enables you to create a new site using the selected template.\n\nWi
te, within the Manage templates\xa0screen,\xa0navigate to More actions\xa0>\xa0Export template:\n\nWhilst
ck certain users from being able to access your instance of Publisher, even if your instances are unified. This ena
› create and build ready to use solutions, allowing fast and easy dashboard setup. To enable dashboard template
› manage all of your templates, you can add new templates, edit\xa0and export\xa0existing templates, and che
al options\xa0(some options are only available to administrators), detailed below. To access the More actions op
es, within the\xa0Manage\xa0templates screen, click\xa0Export:\n\nThis will automatically download the list of
n the\xa0Manage templates\xa0screen, click\xa0Add\xa0>\xa0Import template:\n\nThe\xa0Import template\x
ate to\xa0Manage templates\xa0within the\xa0site list dropdown:\n\nThe\xa0Manage templates\xa0screen is
hare Link\xa0(Available for\xa0My files\xa0only) - By default, this will generate a link and add it to your clipboar
ıistrator, follow these steps to change the email address of the workflow\xa0'Automation engine':\n\nYou must
ɔtice, for new users visiting your site:\n\nTo access the Cookie notice section, navigate to your profile dropdown
SS, JS or font files that are included in all headers or footers. This includes the login page, form pages, and all oth
request report from the system admin section. The subject access request report enables you to view every inst
em to your instance of Publisher. To do so, either select the check box next to the user and click More > Send inv

admin > Users, organisations & groups > Users\nThe following screen is displayed:\n\xa0\n\nClick Bulk upload:\
pted, either HighQ or the System administrator can control access to the encryption keys. For Encryption Key Ma
ite in a location that is not the location of the hosted Collaborate instance.\nBenefits of Hybrid storage\nThere a
eir account password, admins\xa0can send them a reset password link. To do so, find the user\xa0within the use
om System admin > iSheet admin:\n\nIn iSheet admin, system administrators can update, delete and change th
ninistrator by navigating to the iSheet configuration page for that iSheet (Site Admin > iSheets, then select the iS
inclusion\xa0in a site. However, some\xa0users only require access to the secure file transfer features. Instead
tegration are two related features.\nSystem Groups\nA System Group is a collection of Collaborate users create
user. The\xa0Add new user\xa0screen is displayed:\n\nEnter the first name, last name and email address of the
n\xa0in your Profile drop-down) includes a number of fields related to a\xa0user\'s right to add files to, and shar
our instance of Publisher. To do so, either\xa0select the check box next to the user and click\xa0More\xa0>\xa0
of their local documents whilst storing the contents in the cloud. Users can choose to download the documents
Select System reports to open the Site Summary report.\xa0There are several reports available to System Admi
ame used for generating documents with both single record and site-wide templates is 'Generate document'.\n
at make up the full client email configuration, for the HighQ Publisher platform.\nEmail addresses and alert frequ
users who do not have an account, view (and search) access to an instance,\xa0based on an organisation's setu
s can be managed by a system administrator at the following levels:\nAn organisation group\nThere is a default
u can use to create user and organisation records in HighQ Publisher:\n1. Single user upload\nThis is used when
of your screen, in your Publisher instance:\n\nCustomising the system bar\nAnd it can be customised, by a syste
of its users can be granted access to more content and modules by increasing\xa0their particular organisation p
in name in their email address. The exception domain feature exempts general domains (like @gmail and @hot
all of the organisations associated with users in Collaborate. Simply click on your profile > System admin.\n\nClic
select\xa0the checkbox next to each user that you want to interact with\xa0and click\xa0Actions:\n\n\nTo selec
ces. To navigate the\xa0System notices\xa0screen, click your profile drop-down menu and click\xa0System adm
ollaborate, whether it has been archived or not.\n\nWithin this screen, you can view all sites and templates, and
a0Create Site\xa0privileges are able to create new sites,\xa0but existing site administrators are unable to.\n\nF
ly files sharing\xa0separately from\xa0My files\xa0via\xa0System admin\xa0>\xa0System settings\xa0>\xa0My
ne ability to report on all content within the instance.\nRunning the report\nNavigate to\xa0System administrat
user to view a report on the whole organisation,\xa0including all metadata.\nRunning the report\nNavigate to
s the user the ability to generate\xa0a report of users' system and email\xa0preferences,\xa0which displays\xa0
he ability to view the\xa0module access audit which can be\xa0broken down by user, organisation or specific ro
rt on users who have logged in and out of the instance.\nRunning the\xa0report\nNavigate to System\xa0admir
ability\xa0to report against content items that have been accessed by a specific organisation or user, or who has
bility to report on any instances of\xa0access to multiple dashboards within your instance.\nRunning the report
audits and reports based on site access and user activity. Click a link below\xa0for more information on creating
he ability to report on users who have unsubscribed from the daily alerter email lists.\nRunning the report\nNav
ives the user the ability to report on daily, weekly, monthly, yearly etc. alerter emails that are sent from the inst
the ability to report whether content that has been shared via the\xa0Share via email\xa0option has been oper
ty to report on specific pieces of content including,\xa0Publications,\xa0Events,\xa0Videos\xa0and\xa0Compari
e ability to report against comparison toolkits.\nRunning the report\nNavigate to\xa0System\xa0administration
a0ability to report against published content that are specifically documents.\nRunning the report\nNavigate to
ability to\xa0report specific\xa0microsite and page content.\nRunning the report\nNavigate to\xa0System admi
ility to report specific\xa0event and workshop content, using\xa0various metadata.\nRunning the report\nNavi
ility to report on search terms used by organisations, users or both.\nRunning the report\nNavigate to\xa0Syste
user the ability to run reports against actions such as organisation and user creation. There are currently over 20
nerate\xa0a report of users that have been logged in as a\xa0proxy user.\nRunning the report\nNavigate to Syst
ability\xa0to report against content items that have been accessed by a specific organisation or user, or who has

rt on links for products and specific users or organisations\nRunning the report\nNavigate to System\xa0adminis
nent Intelligence (formerly ThoughtTrace) is integrated with HighQ in the\xa0AI Hub. After it is enabled and con
gration provides two tools, Matter management and Matter intake.\n\nAs of August 2022, we expanded the Le
ake iSheets in HighQ to the matter data pulled from Legal Tracker and then work on that joined data in HighQ, s
he Legal tracker integration\nHighQ is the ideal platform to manage Legal intake and with our new integration v
heet based upon one or more matching values, as configured in the join column settings.\nFor example,\n\nAn i
to link directly to content in the Files module. Depending on the content you need to link to, you would create a
orate.\xa0\nThe Elite 3E integration\xa0syncs with the Elite 3E Data Insights database,\xa0providing thirteen m
tors) may deploy iSheet templates to sites.\nTo create a new iSheet from a template, navigate to the iSheet Adr
es may be used in a few ways, and your specific use case will determine whether or not linking is appropriate. \
ed an integration between Microsoft Teams and HighQ. This new integration, once enabled,\xa0will give you th
hed on at the System Level.\n\nThis needs a user with a System Admin role. From your profile image\xa0go to S
), LDAP and similar services. AD integration requires the installation of the\xa0HighQ Appliance\xa0and then co
ances between Collaborate and Publisher:\n1) Fully unified and\n2)\xa0API connected\xa0\nAn API connected i
sive practice that removes barriers so that people of all abilities can access online content and\xa0information.
a template is exported or imported that check supported features and provide advice for dealing with possible is
plate, you will have a site with configuration and some content. You may need to copy content from existing sit
that can avoid duplicated effort and allow you to:\n\nShare an efficient and effective site configuration with you
lule option will only be displayed when a minimum of one iSheet has been created on the site.\nTest email alert
ve Acrobat Reader and the free FileOpen plugin installed. You must also have an active internet connection in o
ning encrypted PDF files using Google's Chrome browser, please follow the following steps to turn off the built-i
e ways to use the\xa0Q&A\xa0module. \xa0One recommended approach is provided below, along with some Q
, you may add an icon\xa0to the home screen of a mobile device.\nPlease see the help pages for your device:\n
tle choreography between three players: \xa0the Site Administrator, who configures the iSheet and alerter conc
eating columns:\n\nIf possible, keep the number of columns in an iSheet to 50 or less.\nThe column name acts
\nIdentify your project or use case. Consider the types of data you need to capture, the users who need to view
pieces of content in your instance. In order to search, navigate and click the\xa0Search\xa0icon, to display the s
ite. The best way to ensure that no changes are made to a site in that case is to do the following:\nThis process\
o are given read-only access to a site. Often, it is necessary to give these users a limited right to add files, but no
cts that deviate, and by how much, from your standard contract templates.\nDeviation\xa0score\nA Deviation
em Administrator to customise the look and feel of the entire instance of Collaborate, using various settings, acc
may use other web applications, applications they have developed and/or host themselves, or applications host
es\xa0to embedding links in a page;\xa0add a link, remove a link and add an anchor (also known as a bookmark
vsers and mobile devices, as described below. \xa0There may be slight variations in the user interface and capab
necessary to make adjustments to the security settings in the browser to ensure that Collaborate works as inter
l be added to a Collaborate site but will not receive their email invitation. This can happen for many reasons, the
o Collaborate. \xa0\n\nThis is different from the situation where a user is able to log in, but does not see or oth
n\n\n\n\t\t\tLinkedIn\n\t\t\n\n\n\n\t\t\tFacebook\n\t\t\n\n\n\n\n\n\n\n\n\n\n\n\n Embed\n\t\t\t\t\t\t\t\t\
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xa0Tasks module, including available views, the default appearance, lists and statuses.\nSelect Admin, then Task
introduced the ability for users to drag and drop folders, their structures and contents into HighQ.\xa0\n\nPlea
llows administrators to manage bounceback emails within Publisher, with more meaningful data.\xa0\nThis will
building workflows using a task metadata iSheet to:\xa0 \xa0\n\nAutomatically reassign a task or change the da
utomate the creation of lists, tasks and sub-tasks for quick work allocation. This is useful for those who want to a

are a few settings that can be applied to the entire module. From within the Admin tab, navigate to Module sett
nts to be generated by combining the information from one or more\xa0iSheet records with a stored template.
able the iSheets module for a particular site.\n\nAdministrators are the only users who can create new iSheets a
d to publications, events and video content.\xa0\nAdding a navigation content element\nIn order to add a navig
or site and dashboards. To do this, navigate to:\nSite translations\nNavigate to the site and click Admin:\n\nThe
a0Admin\xa0>\xa0Site settings\xa0>\xa0Modules:\n\n\nSelect the\xa0Home\xa0checkbox and click\xa0Save. T
e allows you to build a home page for users to be directed to. This home page can then be customised using the
l over everything relating to a specific module. For example, a module administrator can:\n\nEdit the details of a
earch module, available to System Administrators.\nTo access the Billing page, navigate to Admin > Site settings
y for Site Administrators and Report Administrators, in two broad categories: Reports and Audits. These are acce
tion with a site that has been set up as a Bidder site. It allows interested parties to submit questions to the selling
dard Q&A module and allow\xa0for more sophisticated permissions and workflow. The additional features inclu
odule and its additional settings. Here you can choose which organisations and people to display based on user g
e file attachment metadata\xa0to update the site-wide file metadata iSheet when\xa0an attachment column co
ce,\xa0dates, number,\xa0user lookup, single-line text\xa0and multi-line text\xa0columns in iSheets.\n\nAdd a
l multiple lines of text to an iSheet record without any character limits. This column type is typically used for add
user to enter a single line of plain text.\n\n\nMaximum characters - The maximum number of characters that m
ords in an iSheet. Most actions are found in the More actions menu for each record in an iSheet view.\nEdit a re
, then every user has the ability to view every item.\xa0\nEvery item within that iSheet will have a View button l
t items by clicking More actions and selecting Audit history.\xa0This feature is only available to Site Admins and S
hQ's integration\xa0with Contract Express\xa0to:\n\nSend questionnaires to any recipient\xa0that can automat
Contract Express templates,\xa0 an admin can use links provided in the Profile menu.\nOpen Contract Express
panded workflow to use file metadata to attach files to email and tasks. This feature supports enhanced docume
bility to auto-generate documents using workflow via Contract Express,\xa0when the trigger of the rule is an iShe
t record to help with logging, compiling or auditing information.\xa0 It is possible to dynamically pull values fron
at one of the metadata nodes\xa0which is based on the Pivot Node (usually jurisdiction),\xa0you can add speci
a node,\xa0e.g. per country,\xa0or for an entire report: "cross-report glossary". To do so, select a specific node c
olkit (that can be added to the navigation for the comparison toolkit module):\n\nClick Add page\xa0to add a ne
her, first, you need to navigate to the Content Hub (if\xa0you do not have the appropriate permissions to do so,
easier way to set up and manage the AI settings for a\xa0site, and be able to\xa0report on the analysis status an
port, Import and use a Site template that contains\xa0HighQ AI settings. As of 5.4 we have added the ability to r
on\xa0automatically creates and names a folder\xa0when the selected trigger conditions are met. As of version
Copy file or Delete file\xa0actions automatically manage the\xa0file that triggered\xa0the rule.\n\nFile manager
heet column can be moved between sections in iSheets admin settings.\nClick Admin in the top navigation bar, t
Sheets administration page will be displayed. Click More actions for the iSheet that you want to either edit or del
ted from the AI engines. Click\xa0here\xa0to read how to use the data in a file metadata iSheet.\n\nYou will ne
if you have draft records either auto-saved by the system or manually saved using Save as draft:\n\nIf an iSheet
tory of an iSheet to view a list of actions taken on the iSheet as a whole. \xa0The audit history includes informati
e an Excel file copy of an iSheet as is at a certain point in time. The archive stores these iSheet Excel snapshots s
e users will be making frequent, concurrent edits to items, it is possible that two or more users will try to edit th
new items are added or existing items are updated.\n\niSheets must be configured to send alerts. They do not s
ts enabled and want to subscribe, navigate to More actions > Email preferences:\n\nThe Email preferences scree
olders by enabling the File metadata template or Folder metadata template setting from the iSheet configuration
, the views for that iSheet are listed in a drop-down menu, with the Default view selected:\n\nTo change the orc
as part of a workflow rule.\n\nYou can either add a new rule to a workflow, or update an existing rule.\n\nAdd
add events with dynamically calculated dates when the trigger\xa0conditions are met. If you select\xa0Add even
ally allocate tasks when the selected conditions are met. Once you have selected Add task as your action, the fol

a customised email when the selected conditions are met.\nSelect\xa0Send email in the Action tab:\n\nEach fiel
who can view your channel. After creating the channel\xa0and adding the related\xa0metadata, the Permission
o display a drop-down menu and then click Content hub:\n\nThe Content hub is displayed. Navigate to Channels
he content list on the channel and set the\xa0default. This does not restrict the content users have access to bu
for your channel.\n\nAdministrators will have access to the Details, Content Metadata and Edit Dashboard tabs
er the layout and visual design of the channel web page.\xa0\nFrom the Admin tab, click Next to display the Edit
nd reduce risk, multiple\xa0system and site\xa0admin roles are available.\xa0\nSee User administration\xa0to
e, designed to support the specialised needs of enterprises and their corporate legal teams. This role is intended
how your site is set,\xa0Permissions\xa0can be based on either group permissions\xa0or individual user permiss
ager for legal matters; it's unusual\xa0for a dedicated legal project manager to be deployed to a matter - other
delivered on time and on budget by applying the principles and practices of project management. The HighQ pla
Reuters marketplace) address the most common needs for a new site. Solution templates are available for a varie
a monthly schedule. Customer updates are currently planned for these dates:\n\n5th of August\n9th of Septem
t\t\tTwitter\n\t\t\n\n\n\n\t\t\tLinkedIn\n\t\t\n\n\n\n\t\t\tFacebook\n\t\t\n\n\n\n\n\n\n\n\n\n\n\n Embed
work with others in your team to achieve a common goal. The main tasks interface is the task window, which sho
dule and reuse them across sites saving hours of set up time. Task templates are saved and managed at the syste
through selected HighQ feature release highlights from Q2 2023\xa0\n\n\n\nUpcoming updates\nUpdates are r
ter\n\t\t\n\n\n\n\t\t\tLinkedIn\n\t\t\n\n\n\n\t\t\tFacebook\n\t\t\n\n\n\n\n\n\n\n\n\n\n\n Embed\n\t\t\t\
les you to unite your Workspace apps and the HighQ platform:\n\nSave emails and attachments from your Gma
l Collaborate users to synchronise files stored in My files or team sites, to a location on their local computer and
ch 2023 Collaborate updates will be applied to customer facing sandbox/UAT instances over the weekend of the
ese tags can help you find changes that are relevant to your user type:\n\n\n\nUSERS\nSITE ADMIN\nSYSTEM A
roups and Organisational Units\xa0from Microsoft Active Directory or OpenDS\xa0to\xa0Collaborate and Publis
Q Professional Services. Talk to your\xa0HighQ account manager if you have specific deployment requirements.\
on that can be installed on a virtual machine or server, either inside a firewall or in the DMZ.\nHighQ\xa0Applian
tors that communicate with key systems, for example, Microsoft SharePoint, Active Directory, SQL Server.\n\nPl
y for your data in your HighQ instance, the HighQ Appliance can be\xa0installed and controlled on your server\xa
between HighQ and your network. Check the requirements for each of the features you will use,\xa0install any
ese tags can help you find changes that are relevant to your user type:\n\n\nUsers\xa0- Changes that are visible
w customise the\xa0Archived Content\xa0error message, enabling you to properly inform end users of the reas
ese tags can help you find changes that are relevant to your user type:\n\n\nUsers\xa0- Changes that are visible
n Collaborate that are then shown in the Publisher dashboard.\nTo add the Collaborate Files panel to the dashbo
OS that integrates with your HighQ instance to provide:\n\nInstant secure messaging between all users of an inst
panels, and it is possible to add any number of panels to the dashboard.\nFeatures - The Features panel allows
publish your blog posts, publications, thought leadership\xa0and current awareness. Create elegant\xa0online c
ustom list of users as a People directory. Since Publisher is so customisable, the way to view this list will look diffe
events including conferences, seminars and training programmes.\nAdditionally, you can customise and permis
\nYou can set the HighQ Office plugin to automatically file an email as it is sent, with all attached documents,\xa
ese tags can help you find changes that are relevant to your user type:\n\n\nUsers\xa0- Changes that are visible
news that, starting mid-February, Thomson Reuters HighQ will be able to use Pendo, a third-party industry-lead
ving to more frequent release updates, starting monthly, to quickly deliver product improvements and enhancen
ease notes for Collaborate and Publisher and be sure to test out the new features in the\xa0sandbox environmen
ebinar to show an in-depth and detailed coverage of each of the features contained in the release.\xa0You can a
soft Teams allows HighQ Collaborate users\xa0to share files, folders and sites with other users in a Microsoft Tea
fields in a file and folder metadata iSheet are populated differently to other iSheets:\n\n\nCreated by and Creat
ease notes for Collaborate and Publisher and be sure to test out the new features in the\xa0sandbox environmen
ar to show an in-depth and detailed coverage of each of the features contained in the release.\xa0You can also

act content within a file, there is now the capability to\xa0bulk redact multiple documents in one go based on a p
n be managed\xa0from within a site in a number of ways. A System admin can enable and set up how large file s
ate a new event in at least one category, an Add button will be displayed in the Events module:\n\nClick Add an
this content can be pre-filtered on metadata. To syndicate the content you will need to create an RSS user (and
omson ReutersÂ®\xa0HighQ\xa0includes many enhancements in document automation, project management w
ence: System administrators.\n\n\n\n\n\nCalculate the number of days in an iSheet\nRecommended audience:
ase notes for Collaborate and Publisher and be sure to test out the new features in the\xa0sandbox environment
ile management section which will allow you to set user preferences, in bulk, without the use of a script. This me
nilar documents. This feature allows you to identify contracts that are, for example, part\xa0of a series of revisio
nd supports many\xa0standard file features, such as tags, versioning and tasks.\nFor example, you can organise
ounced enhancements to the configuration of\xa0iSheet attachment columns - so that all iSheet\u202fattachme
omson Reuters' integrated work and engagement platform. Weâ€™ve introduced many enhancements that help
ase notes for Collaborate and Publisher and be sure to test out the new features in the\xa0sandbox environmen
Site administrators.\n\n\n\n\n\nAutomatically delete a file with Workflow\nRecommended audience: Site admi
ration with access to the cloud and local device storage is now available for iOS.\nThis means that on an Apple d
anels, and it is possible to add any number of panels to the dashboard.\nNavigation - The navigation panel adds a
s in groups with Folder Admin permissions\xa0can create folders in the Files module.\n\n\n\n\n\n\nWhen using
nd or restart a bulk download in the case of a connection issue or failure. \xa0\nIn the Files module select the file
nts to a document to be able to edit it in Office Online.\xa0\n\n\n\n\n\n\nEditing office online documents\nOnc
ave been enabled within a site, additional options may be displayed for every file in the Files module.\nAdd task
module, it can be associated with one or more files found in the Files module. This also means that when a file is
list of questions along with further information on when the questions were asked, ID, priority, status and the re
mits the length of file paths to approximately 250 characters and\xa0the file path length in Collaborate is theore
(Word, Excel or PowerPoint) directly from the Files module, without manually downloading the file to your\xa0c
.\n\nSee also:\xa0Recent Activity.\n\nRecent file activity\nRecent file activity provides\xa0a\xa0chronological vi
osts, events, tasks or the home module, as well as from anywhere you see the Link icon, such as in multiple line
able to do some or all the following iSheet actions, depending on the userâ€™s permissions to the iSheet:\n\nAl
of iSheets items using the Import feature results in more than one iSheet item being updated, this will trigger or
ta from several locations if you have the appropriate permissions to do so:\nFrom the iSheets module\n\nWhen
em generated fields, which are automatically populated columns which cannot be manually updated. There is\xa
ons, the end-user will see sections on the Add record and Edit record pages and on the View (or Details) page. \x
y adding panels, and it is possible to add any number of panels to the dashboard.\nCollaborate sites\xa0- The Co
readers\xa0are not required to sign in) there will be CAPTCHA included for security reasons, in order\xa0to prev
aterials inside publications by dragging and dropping:\n\nTo do this, navigate to the Content hub in your profile c
you to automatically add tag suggestions to a wiki page\xa0rather than tagging each wiki page manually.\xa0\n
this, navigate to the wiki in a site:\n\nThe Wiki will be displayed. In\xa0the Wiki, click Edit in the top-right corne
such as the Home module, wiki pages, blog posts and events, use a rich\xa0text WYSIWYG editor. As described\
different kinds of content to be embedded within a page, which allows for the creation of pages with dynamic a
sing the rich text editor. Detailed instructions to embed content can be found in\xa0Lists: Embedding site conte
ow content from a module on the current site or a different site;\xa0not just a link to the content, but the actua
0Source:\n\nThe\xa0Source\xa0screen is displayed:\n\nIn order to achieve the WYSIWYG output, the rich text e
e types of data, including statistical information. It can also be used to create multi-column layouts on the Home
y the different pieces of a page that is displayed to users. Administrators can add and remove different content e
vice that can be used across your digital platforms. This can be used to host either video or audio (podcast) conte
t column of 'date' type (which holds individual date records) to be grouped together by Month, Quarter and Yea
ou gain access to the Dataroom your next step is to upload documents into it. The documents can be a variety of
e tree-view navigation on the left.\n\nIf the left panel has been hidden by the site administrator, the author of a

age to display the full contents of the blog post in view mode.\n\nBelow is\xa0more information on\xa0the feat
y of shared files typically used to support the due diligence phase of a corporate transaction, such as a financing,
Q&A module contains the search form. \xa0\n\nThis form allows a user to filter the questions shown in the list
nport of\xa0content from external sources, into Publisher.\xa0\nThere are currently two ways that Publisher ca
home page will display the full contents of the selected event in view mode:\n\nWithin this screen, all details o
Google Play store on your device.\nLogging into the HighQ Drive app\nAfter you download\xa0and open\xa0th
u can use with\xa0Document Automation\xa0(\'Doc Auto\') templates.\xa0\nDoc Auto template syntax\nTo cr
s manual, you can find information about how a Site Admin can configure document automation and create tem
for legal and other business documents increases efficiency and ensures accuracy and consistency.\nThe HighQ I
/ord Plugin can only be installed on Windows and for Microsoft Word 2013 and onwards. However, it is possible
orate directly from a document management system can be managed via the\xa0DMS files\xa0section in Syster

ount\nAs of March 2023, all new instances use a Thomson Reuters account to provide enhanced account securit
ettings and options for administrators when 2FA is active.\xa0Activate a Collaborate account and log in\xa0and\
ng a passcode that changes for each access attempt.\nTwo factor authentication\nTwo factor authentication (2F
en you log in and 2FA by linked app has been enabled, you can use HighQ Drive or HighQ Stream on a mobile dev
d app\nWhen you log in and 2FA by linked app has been enabled, you can use an authenticator app on a mobile
er.\n\nAfter you download\xa0and open\xa0the HighQ Drive app, the login screen is displayed:\n\nEnter your i
e there is no physical folder present with actual physical files in it but the contents of the Smart folder are dynam
a certain contract template.\n\n\n\n\n\n\n\nHighQ provides system-defined document relationships, and you
e and Folder permissions\nMetadata to display\nAdvanced settings\nDefault file and folder settings\nDigital righ
pending on how a site is configured, unique access rights can be given to different groups of users for designated
ssions, please contact your admistrator.\n\nSelect files or a folder to be moved\n\nTo move one or more files o
\nThis includes, for an internal user, the option to move or copy\xa0files to and from\xa0My files.\n\nThe Copy
eatures are not available\xa0in My files:\n\nThere is no Inbox feature\nOnly the List View is shown\nThere is no
s permission to access the module.\n\nThe Files module is a sophisticated file management tool where all of the
r add personal tasks to My Tasks is based on other system configuration settings as well as whether ther user is
to more than one site will see the Dashboard when they login, whereas a\xa0user with access to only one site w
isations or groups\xa0entering the platform will see different content that is applicable to them.\xa0\nCreating
hat, click here), you can start configuring default landing pages for your organisations and system groups.\n\nPle
or easy access.\nFor more information on the global navigation bar, click here.\nAdding System dashboards to y
Channel, Module dashboard publication or videos etc.:\n\nThere is also a\xa0menu option, which includes prim
Edit\xa0your new System dashboard.\n\xa0\nNavigate to your newly created system dashboard.\n\n\n\nThe e
ger a single or multiple approvals driven off a number of triggers.\xa0This includes\xa0any relevant contract/file
ned approval process\nAllocate approvals to one or more users or a group\nSet due dates and reminders\nCrea
ser controls whether they wish to and when to receive these alerts and notifications.\n\nA System admin can pr
and change the defaults in their profile settings.\xa0\n\nOpen System admin from your profile menu, then selec
le\xa0across sites on your instance. A system admin\xa0can add and edit links.\n\n\nTop navigation bar feature
your profile icon:\n\nClick the Global navigation drop-down menu and select On:\n\nClick Save to save your cha
navigation can only be accomplished from the Top Navigation Bar.\n\n\xa0\nList of Sites\n\n\nThe lefthand sic
borate.\n\nMany profile sections can be accessed directly from the profile Menu or from links elsewhere in Coll
om March 2023, users on a new Collaborate instance benefit from a Thomson Reuters account. For more inform
e.\n\nWhen you are invited to an instance of Publisher, you need to activate your account. To do this, open the
n\nThe User administration section provides several tools for managing existing users. By default, the User admi
nts with a report which highlights the content in which the user is mentioned. Each piece of content can then be
l to be a part of the internal organisation but with limited permissions, compared to an internal user.\n\nThe Ba
ed themselves and not everything in the folder.\xa0\nThis allows simplified folder structures and permission righ
ctions to create linked tasks and notifications.\xa0\nThis summary shows the selections required to automaticall
e appropriate workflow (add\xa0a new workflow if needed: Add > New workflow).\n\nTo add a new rule to a wo
ws screen\nThis displays the Rule builder\xa0screen:\n\nThis screen lists\xa0existing workflows (if any have bee
control during special projects, or to test and adjust new workflows.\n\nFor example, you can set up different w
sists of three\xa0tabs, Details, Triggers\xa0and Actions.\n\nThis article describes how to add conditions in the la
he rule builder consists of three\xa0tabs, Details, Triggers\xa0and Actions.\nAdding actions\n\n\n\n\n\n\xa0\nT
This allows Admins to track the status of all previously assigned document-review tasks and provides a visual rep
Files library.\n\nThe Index view is enabled\xa0in the Files section of the Admin module.\n\nAccessing the Index
can be accessed from the Admin module are General settings which contains all the site settings, settings relevan
ers. When this setting is enabled, the name of every files and folder in the Files module will appear pre-pended
pear within the\xa0Files\xa0module.\n\n\n\n\n\n\xa0\nTo sort the files and subfolders within a specific folder,

:s how to download more than one file or folder at a time via the Files module. The files and folders selected for
sion to\xa0Create bundles.\nA bundle\xa0allows you to package a selection of files from the Files module enabli
In the Manage Views screen, click Add View.\n\nCloning a View\nAs of March 2023, you can copy an existing vie
:et\xa0More actions menu:\n\nAll views created for the iSheet appear on the Manage views page:\n\nSearch fc
ve\nWhen a user creates an iSheet item and enters information, the system auto-saves the record as a draft. Ac
not include user lookup) and\nmulti line text\n\n\nYou should switch this on at column level and then also decic
/ be displayed or hidden based on values entered in other columns in the item.\nThe Column condition settings :
idditional custom fields to be added to files and folders.\n\nIn the example above, the file metadata iSheet cont
ins may also add descriptions to sections.\xa0Descriptions appear beneath the section title in smaller text:\n\nC
:he page.\n\nIf permissions have not been enabled on an iSheet, non-admin users can only view and export iShe
any order or combination.\n\n\n\n\n\nTo access the custom navigation settings, navigate to\xa0Admin\xa0>\x
nClick either Add post to display the Add post screen:\n\n\nBlog permissions are based on the categories\xa0as:
g posts and events auto-save\xa0content whilst\xa0they are being edited.\nTo access all content that has been :
fications, click Notifications\xa0on the right side of the Top Navigation Bar:\n\nTo reveal the user's most recent
a0\nConfiguring the blog\n\n\nAllow comments - This setting determines whether or not comments are allowec
user, except an administrator; while the types of content may differ, the approval process remains the same. If\
eview or transaction and litigation management, workflow brings people, content, and process together.\n\nWc
le will be shown by default when you\xa0access the site.\nTo access the page, click\xa0Admin\xa0within a site:\
The trigger\xa0for this action can be either a file in the Files module, a file metadata iSheet or an iSheet with atta
ing the workflow audit history\nTo access the workflow audit history, navigate to\xa0Site admin\xa0>\xa0Work
section (this can be left blank, but is not recommended)\n\n\n\nClick Save to save the new wiki page.\nIn additi
s it easy to show the relationship between various pages.\nOn the left panel of every wiki page (unless the site a
module for any particular site). The\xa0Wiki\xa0module is displayed only if it has been enabled by a site admin
a particular site, then the activity shown for that site within the Recent activity section will be limited to microb
:ivity within\xa0the site is displayed in the activity stream, alongside\xa0Blogs, Tasks and Events.\n\n\nConfiguri
\nOn the left, a list of recent blog posts (if the\xa0Blog\xa0module has been enabled for that site) and the numb
icular site where you are also a member.\nAlternatively, if you are an 'internal' user, you can send a microblog p
n\xa0for both users, then those users will be able to interact with each other.\nInteract\xa0basically means beir
nessage.\nIf the feature has been enabled on your instance of Collaborate, the Private Message option\xa0is fou
reater) you can use the comment\xa0feature to provide feedback or discuss content. Adding comments may trig
or and if the user has been given permission to access the module.\nAlthough the Q&A module can be used in ar
to be used\xa0for any matter in which there are multiple parties who all need to\xa0have access to the site but
Security:\n\n\nThe\xa0Security\xa0screen will be displayed.\nConfiguring security settings\n\n\n\nBelow is mor
n\nNavigate to the appropriate administrative page to configure the notice that is required.\nAnnouncements\r
or activity, click the\xa0Like\xa0button associated with that content:\n\xa0\n\nThis can be done either from the
; may be allowed on a wiki page. If allowed, a wiki page author can still determine whether to allow comments c
ibled on the iSheet to which they belong. Once permissions are enabled and configured on the iSheet (see iSheet
om accessing the iSheet, its views or columns.\nCheck and edit permissions\nTo check the permission status of a
Nore actions and select Version history.\n\nSite and System Administrators can access version history by clicking
which they belong. Once permissions are enabled and configured on the iSheet (see iSheet permissions), permi
h people who do not have access to the site,\nif the iSheet information needs to be formatted, transformed or p
l file\nAs of June 2022, you can create an iSheet from an Excel file.\nThis allows you to:\n\nAutomatically create
ype will generate data specific options, there are some common functions across all column types.\n\nColumn t
ific column types are noted below.\nDescription\nApplicable column types -\xa0Configurable for all iSheet colur
ack?\n\n\nWhat is the format of the data?\n\n\nWho will need to access the iSheet and to what level?\n\n\nIs
out any records. This allows site admins to avoid repetition and save time when building iSheets, as well as create
ted as described\xa0here. An internal user is a user with an email address whose domain is associated with the i

ount, or a user who has registered merely to receive shared files.\xa0Users without a full system account are ref
re file transfer differs from the typical way that files are shared in Collaborate in a few key respects:\n\nFiles car
e file or folder. \xa0\xa0\nContents of the Email\nHere is what a typical email looks like (the branding of the em
on the iSheet title from the List of iSheets page within the Admin module.\n\nNow when the Manage columns p
ny point. \xa0To add a new section, click on the Add new section button in the Manage columns page.\n\nYou w
rom the drop-down menu, select Manage columns.\nSearch for a column\nAs of March 2023, if your iSheet has
ary iSheets. If group-based permissions are applied for a regular lookup source iSheet, such as an "External User
ins. The iSheet references tool requires you to select the site location of an iSheet, and then optionally enter the
he saved values directly from another iSheet. This includes the choice text, text colour\xa0and any image.\n\nEx
ie selected when viewing the iSheet, as in the below example:\n\nAdding Images\nTo add images to the iSheet i
wish to trigger actions based on the values entered in specific columns. These actions could include making ano
itomation templates and data visualisation.\n\nA score column adds numerical values to a choice column. These
s. A calculation column may use Today's date, columns, numbers and mathematical operators to generate a valu
alue as a date and will, therefore, apply proper chronological sorting and filtering when required. Date and Time
the alert conditions into your own iSheet properties page and then change the corresponding values as appropr
at it as such when sorting and/or filtering rules are applied.\nThere are a number of options which can be config
ata point you need to capture for your use case.\nTo add columns, go to Admin and then choose iSheets, click or
l cards. To increase this, please contact HighQ support for more information.\xa0\n\nThis panel allows you to se
ı chart for the result of the calculation. In the example below, the average billed chart is a simple average of a sir
he data.\nIn order to have a successful working alert, you will need to ensure the following are in place:\n\nEnal
e.\nTo add a comment to an iSheet record, select\xa0More actions > Add comment:\n\nThe Details screen oper
)\n\nUse an iSheet view to select specific columns to print or export.\n\n\nPrint all records from an iSheet\nOpe
sults respect\xa0permissions\xa0applied to the iSheet and any filters used in the active\xa0View. The search res
cation with a link to the shared records, or you can copy a link and share it from another application.\xa0\n\nThe
ord to the iSheet when it is submitted.\nFollow the steps described below to enable iSheet form sharing.\xa0\n\n
ill add\xa0a new record to the iSheet when it is submitted.\n\nHighQ offers multiple features for the creation ar
directly from the group information or the user's account profile. This column type is useful if you have built a ta
Metadata\xa0iSheets permit additional fields of information to be added to folders in the\xa0Files\xa0module.\n
e, collaborate on and track dynamic data. It can integrate with existing processes with\xa0quick and easy\xa0im
xa0\nClick\xa0More actions\xa0to display additional actions:\n\n\nDownload - Download\xa0the chosen file to
t or site admin permissions\xa0may redact documents and access the original file. Other users will only to able t
h HighQ Doc Auto powered by Contract Express, Contract Express templates and questionnaires\xa0are fully inte
nplate\n\n\n\nInserting Fields\n\n\n\nText Selection Variables\n\n\n\nInserting Spans\n\n\n\nCustom Function
using a Contract Express template\nUsing the site that you have set up Contract Express in, navigate\xa0to\xa0
plates to produce documents using your organisation's data.\n\nA site admin can add new templates so\xa0that
nerated documents to either a folder in the Files module, or as an attachment in the linked iSheet.\n\nPlease vis
5.5, uploaded files can be accessed in the Attachments section of the\xa0Files module, unless permissions are u
through the Q&A\xa0module\n\n\nOnly external attachments not already in the platform are added to the Q&
\n\n\nThis searches file and folder names\xa0in the folder that is open; however if\xa0you press Enter\xa0it wil
r entries.\nThe flexibility of search means that it is important to consider some\xa0techniques to allow you to fi
arching the Files module, or here for information about searching\xa0iSheets.\n\nIn January 2023, a new defaul
to locate the right content.\nAccessing advanced search\nThe Advanced Search screen can be accessed in one
tegory later;\xa0through either search or navigation techniques.\nAdding tags to content\nTags can be added to
nological order.\xa0These posts are from all categories available to the user.\nIn the left panel:\n\t\nAt the top
use to categorise your content.\xa0\nExamples of metadata\nCountries / Jurisdictions\n\nUK\nFrance\nSwitze
he online viewer,\nBy clicking the More actions button for a file or folder, and selecting Edit details > Metadata,
own computer they have full rights to that file. For example, they can view, print, download and share the file w

group within the Groups screen, or navigate to the More actions button for the group you want to edit. Refer to
ding groups\n\nTo add a new site or system group, click\xa0Add\xa0in the\xa0Groups\xa0screen:\n\xa0\n\n\n
o different from any other site security group regarding how permissions are set and how its members are hand
be created before adding users, as users may then be assigned pre-defined permissions as they are created.\nSy
er administrators can access this module.\n\nSite administrators can access\xa0all actions in this section, includ
stly, navigate to the System Admin console and select\xa0Group admin\xa0on the left:\n\nThe System group lis
on as many users as you want.\nAdding a user group\nTo add a new user group, navigate to\xa0System admin
a comparison toolkit's permissions, click More actions:\n\nAnd then click Edit permission. The Permission tab i
ater.\xa0It also\xa0provides the same set of access controls such as instant revocation, expiration\xa0and water
Sheet views.\xa0Your favourites can be accessed from the\xa0Favourites\xa0menu in the\xa0righthand side of t
etadata iSheet fields are displayed for search alongside system-generated default search fields. Any sections con
r each view created, a Site admin determines which subset of columns to include and which rows of data to incl
re and to use the Advanced search to interrogate the data further based on their metadata.\n\nFrom the iSheet
or all generated documents. You can then use these answers to visualise this data or create reports with the too
t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nCreate KPI cards in the Dashboard\n\n\nVolume 100%Rewind 10 SecondsNex
ns\nAdd and configure sections\nSection features for end users\n\n\nSort columns\nEdit and delete columns\n
contains a list of the firm\'s clients (the "lookup source iSheet"), and another iSheet to track firm events (the "pri
nediate email notification indicating the task title, who created the task, when the task is due and a link to view t
ctices and tasks.\n\nPlease visit the Contract Express video gallery for additional information.\n\n\nInformation
from the Files module.\nOpen the file location in the Files module, then select\xa0More actions menu for the ge
ome page\nFrom the Files module\nFrom the Linked iSheet\n\nEach process accesses the Contract Express que
ads, the Add button is displayed, but only files stored in a user\'s photo library can be added through this method
s admins to upload templates, set up access to the service for users, and allows users to access templates for do
grated Contract Express with the HighQ platform and with its intuitive markup, compliance\xa0and relevancy too
mplates, set up access to the service for users, and allows users to access templates for document automation.\
creating it from scratch, a site creator can use one of these templates as a starting point.\xa0\nSite templates m
hived sites are not visible to any user. An archived site will not appear in the list of sites on the Dashboard nor in
t will be used in site lists and elsewhere to refer to the site. This is the only field that is always required when co
quickly access Contract Express templates that you have selected.\nCreating a Contract Express Dashboard pane
e that enables you to transform your iSheet form into a user-friendly branded experience.\xa0\nHighQ Forms a
other sites or in Microsoft Teams.\n\n\n\nHighQ Forms must be enabled at the system level, then Site admins ca
an\xa0iSheet, or need to create a new iSheet for the HighQ Form, see how to\xa0Create an iSheet.\n\n\nClick th
he data you need to collect.\nEnable HighQ Forms at the System and Site level (in iSheet module settings).\n\nW
out affecting the original version\nGive each style a specific, descriptive name so that you can quickly see where
ne\xa0Files\xa0module.\nBulk deleting files and folders\nSelect the checkbox next to the files\xa0and/or folder
\n\nAccessing the Audit history page\nOpen to\xa0More Actions\xa0>\xa0Audit History\xa0for the file.\n\n\nA
re in a Collaborate site.\xa0When files are created in\xa0Collaborate through this method, they are empty plac
mation regarding the error message from opening a protected file. \xa0\xa0\nTo find out more about how to en
must authorise the service using your own eSign account credentials.\xa0\n\n\nThe\xa0Adobe Acrobat Sign\xa0
one by following these instructions.\n\nAuthorising an eSign\xa0service\n\nWhen HighQ support have\xa0conf
nfigured, you must authorise the service using your own eSign account credentials.\xa0\n\n\nThe Adobe Acrob
configured in Collaborate. The AI Hub sits between Collaborate and\xa0leading AI engines, including HighQ\'s ov
the system level. Navigate to your Profile > System admin > System settings:\n\nThe System settings screen is di
g\xa0(i.e. helping it understand and recognise a type of document).\nWhen you enable AI training and assign a
e that contains a clause you want to use for clause training from the Files module.\n\nFind the clause that you w
fields into an iSheet\n\t\nYou can import a subset of the fields; if you wish to add extra fields from the AI Hub t
sults from the model.\nExamples of good AI training practice\n\nImprove results from the model by selecting e

isations required\xa0to file forms with the SEC. \n\nYou can use your own documents to create new classifiers, |
act HighQ Support to request this. Once this has been done, the option is visible in AI Hub at System Level and ca
users to automatically push documents from HighQ into Leverton for data extraction, and then store the enriche
he enriched data in AI Hub for use in the iSheets modules.\n\nEigen needs to be enabled at ASP level - please cc
gine. Requirements can be found on the HighQ developer\xa0community.\xa0\nAccess to these types of AI serv
heets\xa0module to import (or insert) AI data into a file metadata iSheet.\nClick on Admin and then choose iShe
signature and electronically return\xa0a signed document.\n\nImages and instructions for both the iOS and An
\n\nEnter your email address\nProve you are not a robot\n\nOnce the details have been entered, click Reset pa
of an instance\nView the activity feed to see ongoing activity from all users\nReceive push notifications for mes
omputer) and vice versa. Please contact your IT department to determine whether your firm will permit HighQ D
e they have logged in to their corporate network, without the need to enter a password or save their password
w any user with a valid corporate Active Directory account to seamlessly access not only their own firmâ€™s but
are invited with your email address and your email address becomes your username for logging in. Sometimes, t
r details screen is displayed:\n\nEmail address\xa0-\xa0Edit the email address of the user.\nOrganisation\xa0-\x
email address) or a new Organisation can be created. See the\xa0Users\xa0article\xa0for more information abc
resetting passwords and changing domains.\xa0\nSystem admins can access Users via the\xa0Users\xa0section
tails:\n\nThe Organisation details screen is displayed:\n\nAdditionally, you can access the Organisation details s
single platform.\n\n\n\n\n\n\n\nThis is subject to a new installation/deployment of Publisher\n\nDelivering an ir
e dashboard, a publication or a\xa0video etc.\n\nThere is also a mega menu option which includes primary head
ed throughout the system (on the system bar, contacts panels, author/publishing content and various other are
the module for any particular site).\nThe\xa0Blog\xa0module is displayed only if it has been enabled by a site a
ench\nSpanish\nJapanese\nFrench Canadian\nSimplified Chinese\nBrazilian Portuguese\n\nTo change the syste
em language that just you see, navigate to your preferences via your\xa0Profile\xa0>\xa0My preferences:\xa0 \
he Content hub > Content manager > Comparison toolkits:\n\nSearch for the toolkit that you have just created
osite\nPublications\nVideo\n\nTo create a module, navigate to your\xa0My profile drop-down > Content Hub >
oard\nModule dashboard\nChannel dashboard\n\nThe dashboard is a user's first interaction with Publisher and
ttributes:\n\nDisplay in - This setting allows an admin to select whether the content will be displayed on all devi
nt before it goes live:\n\nPublications\nEvents\nVideo\n\nThere are two different editorial environments to se
ystem and\xa0you can also specify alerts based on the certain area of the system at your chosen frequency. The
ite). The Events module is displayed only if it has been enabled by a Site Administrator and if the user has been g
tegories available to the user\nIn the left panel, a list of event categories available to the user and the number c
ort and subscribe to other users calendars.\nConfiguring events\n\nThe\xa0Events\xa0module is for maintaining
ecific configuration.\nClick your profile icon and then select\xa0System Admin\xa0then\xa0System settings from
d Hierarchy View.\xa0Select between views by clicking the View button in the Tasks module.\n\nYou can get a s
o help organise tasks:\n\nAs of August 2023, you can customise the columns\xa0displayed in the Hierarchy view
you can:\n\nadd additional columns of data to your tasks to track key metrics and capture specific information\
tact your IT department to determine whether your firm will permit HighQ Drive to be installed.\n\nAdministrat
ice. Once the plugin has been installed a HighQ tab is displayed in your Outlook or Office ribbon with further opt
hat are used\xa0each time you send an attachment.\n\nSome of these options may not be available, depending
upport for Microsoft 365 OWA (Outlook Web App) or macOS.\n\nPlease note that Windows 8.1\xa0or earlier rel
HighQ to select a document to attach that is already in your Collaborate instance. This document will\xa0have t
h. Browse to the document(s) to be shared.\n\nYou can select more than one file by holding down\xa0the Ctrl\
your inbox and drag\xa0it into your HighQ folder tree,\xa0situated in the left panel of your inbox.\n\nOpen the I
site or browse folders within the particular site and more than one folder can be selected.\n\nWhen selecting s
nments sent by email will be uploaded to HighQ.\nIf the second radio option is chosen you can set a file size limit
a0you will see the Share and Upload\xa0options\xa0in the Office ribbon\xa0on the top right.\n\nUpload\nUse t
whether your company will permit the plugin to be installed. Administrative access to your computer may be req

ay in the listing and will also display in Collaborate.\xa0\n\n\nRename folders\xa0\nIn the HighQ folder on the le
ie information\nOR forced out to all users\n\nDefault email branding\nBelow is an example of the default email
ew and collaboratively edit Microsoft Office documents online.\n\nYou need a valid Microsoft Office Online acco
;. There are multiple ways to return online documents\xa0to\xa0document storage.\n\nGoogle Workspace integ
and other folder properties.\nAccessing the edit folder page\nTo access the\xa0Edit folder\xa0page, navigate to
e describes how permissions are applied to files that have been moved.\n\nIf you do not have the required perm
0and export pages\xa0to or from\xa0a PDF document.\xa0\nThis tool\xa0also enables you to insert signature p
enabled by default in system and site settings. An admin can turn these off at the site or system level.\n\nAdd a
has been enabled and a file has\xa0more restricted permissions, the user may not be able to check out that file.
ic to your own needs and tasks.\xa0\nYou can create up to five custom views; your own custom views may not b
fully configure the template's features.\xa0\nCreating a site template from scratch\nNavigate to\xa0Manage si
see the differences between the two comparison engines.\n\nCompare documents with Workshare\n\nThis is
and they will be able to navigate as if they are logged in as that user.\n\nPlease note that another article has be
on.\nHow to follow another user\nThe ability to follow another user is subject to the user interaction rules discu
ly displayed on system admin pages.\n\n\xa0\nClick the 'question mark' in the bottom-right corner of the screen
ation. Then click Add Menu\xa0and select a Container:\n\nClick\xa0Add menu\xa0then select Custom and choos
ding\xa0tables, images, video and embedded site content.\nFor site users, the Rich Text Editor is the main interf
an be filtered by their names using the\xa0Search\xa0people\xa0search field, filtered\xa0by their organisation u
tance of the\xa0platform to be accessible.\nGlossary\nThe items highlighted in blue denote the\xa0part of the
ontent that is labelled as a\xa0language other than English. This allows you to select the language that will be dis
ie system, and makes it accessible in one easy to view section.\xa0\nAdditionally, you can apply a permission str
erson's email address is the same in each instance.\nRegistering for HighQ Hub\nTo take advantage of this featu
est of the platform, you can only find content that you also have permission to view.\n\nPlease check Get\xa0th
te words\xa0or inside other words. For example, the term merge is found in the\xa0word merger. If more than
0module,\xa0Blog\xa0posts,\xa0Events\xa0and\xa0Tasks.\xa0\nShareable content\nTo share content navigate
elect the most relevant content for your circumstances, using the metadata found in the system. This screen als
ement methods and working styles. The Tasks module integrates seamlessly with the iSheets, Workflow and Dat
also allows the user to share large files and folders ,easily and securely, which have been added into My files\xa0
n clicking on My files on the Dashboard and then using the options on the left:\n\nThe Shared items tab permits
m the top navigation bar:\n\nWhen using a tablet or iPad click the hamburger icon on the top right of the dashb
ly files on the Dashboard and then using the options on the left:\n\nThe Received items tab lists every file and fo
en bidder users or users without specific permissions) can send emails and attachments to the main Inbox\xa0wl
upload feature within the Files module.\n\n\n\n\n\n\nOn mobile phones the Add button is not displayed. On i
ould not have been able to. This means that currently any image added to the document library is only available
ure the matter management iSheet that is automatically created.\nThe iSheet can then use views to control acce
ement.\n\nThe legal intake process begins when a user fills out the intake form; once approved, the intake requ
ated logic, for targeted marketing campaigns.\n\n\n\nFirst, navigate to your profile drop down menu and click\
means that you can give the user a snippet of information and then request that they sign up to access the rest c
Audits and reporting >\xa0User report\xa0to display the\xa0User report\xa0screen:\n\nPlease note, that as of
o affect SEO when and\xa0if elements of the system are set up to be public and indexed by Google (and other s
f solution, you can benefit from work done by an expert in that specific field.\nSelect from pre-approved, pre-se
to customise, assign and execute tasks set out in a Practical Law Matter Map template, while being able to acces
they will be able to navigate as if they are logged in as that user.\n\nPlease note that another article has been v
efficiently import and export themes created by our partners and our professional services team.\n\nPlease not
rators.\xa0\n\nPlease note that custom colours will be included in a solution template when they are applied to
an option to switch off all access to all users, to completely stop any user from adding scripts to the site, please
small numbers, such as 1 or 2, fusion charts will no longer put decimals into the axes.\nThis new configuration

enable administrators to build out complex solutions using our â€œdashboardâ€�page builders.\nWhen you adc
bility to edit existing themes in an instance.\n\nPlease note that editing themes will apply to all charts using that
ınctions within Publisher.\n\nPlease note that the Basic user will only affect your Publisher instance if your two
ıt you can\xa0bulk import up to 50,000 users into an instance. To do this as a:\nSystem administrator\nWhen lo
ad multiple profile images at once to be used as contacts or profile images for users within the people directory,
system administrator access.\nTo access this new report, within your profile drop down, click\xa0System admir
:y will be available within the Metadata System Rules section.\nTo access the\xa0Metadata System Rules\xa0sec
who\xa0needs legal help and can use a form to create\xa0a legal intake request. A requester has to be invited tc
emplate, you need to configure the Legal Tracker workflow.\nBelow is a sequence diagram detailing an example
: the template.\nWithin your site, navigate to the site dropdown and click\xa0Manage templates:\n\nThe\xa0M
natter intake iSheet that is automatically created.\n\nIf you need to enable Legal Tracker at System Admin level
Module.\nFirst, you will need to give the module a title by editing the name (clicking the pencil). Once you have
vill be added to a transcoding (conversion) queue, and the following options will be available to the user:\n\nThe
to share:\n\nWithin this menu, click Get QR Code. A QR code will be displayed:\n\nYou can then scan the QR co
listed below:\n\nGoogle analytics or Web trends\n\nPeople & organisations\n\nOrganisations & users - Run re|
of typed, handwritten or printed text into machine-encoded text, whether from a scanned document, a photo of
ntent hub:\n\nThe\xa0Content hub\xa0is displayed. Within the\xa0Content hub, navigate to\xa0Resources\xa0:
ɔe displayed unless there is an associated version of that title in the user selected language:\n\nNavigation\nWh
;hq.com/sitemap_index.xml\nThe sitemap can be turned on/off by request\xa0and will only list public or teaser
ltiple sites.\nMulti-iSheet source setup - video\n\n\n\n\n\nCreating a Multi-iSheet source\nTo create a multi-iSl
ısers the ability to administrate\xa0the form functionality (working similarly to the Campaigns Admin Role). This
admin:\n\nThe\xa0System admin\xa0screen is displayed. Within the\xa0System admin\xa0screen, click iSheet a
click\xa0Admin:\n\nNavigate to\xa0Site settings\xa0>\xa0General:\n\nTo display the general information abou
, by a system administrator,\xa0at the system level to be visible across the list of sites. This\xa0is done using a sy:
ɔwerful feature, you can copy sites and their configuration, including:\n\niSheets and iSheet Views, including Doc
ı0generates the automation code, with which the user can\xa0automate their template.\n\n\n\n\nOnce you ha
-generated code into existing legal documents.\nSite Admins and Content Admins across your organisation can
hand side is a mirror of the previously created Associations panel. You can use the Variables panel to place varia
s tab\xa0to build conditional rules. Click Add in the panel on the right. The Conditions builder window opens.\xa
rom top to bottom.\nYou can also use a loop to build each row of a dynamic table.\nInsert a loop\nTo insert a lc
nd Columns you have in your template associations and\xa0template automation and:\n\nif any of the above ha
automated template using iSheet data, but does not upload\xa0the automated template to Collaborate.\nHow
thin the\xa0Create site from template\xa0screen, you will have access to the following fields:\nConsider adding
the compatibility report is being generated, the\xa0Export template - <Template name>\xa0screen will be displ
bles you to have varying levels of security and to restrict access to potentially sensitive documents or informatio
:s on your instance, please contact HighQ support.\nTo access the new publisher dashboard templates section, r
ck the configuration of each template.\nTo access Manage Templates, select the\xa0site drop-down in the top r
ɔtion, click\xa0More actions\xa0in the\xa0Manage templates\xa0screen:\n\nIn this menu, you have access to tl
site templates in a .xlsx format.\n\xa0\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Export the list c
ca0screen will be displayed:\n\nEither drag and drop a template, or browse for one. (You can also rename the te
displayed:\n\nWithin the\xa0Manage templates\xa0screen, you are able to:\n\nAdd brand new site templates\
d, allowing you to paste it into a message and send it to another user or contact.\nBy de-selecting\xa0the\xa0D
: contact your IT department\xa0before making any changes to ensure emails from the new address are not bloc
> System customisation > Customisation:\n\nIn the Customisation section, scroll down to the Cookie notice sec
er system pages. This allows you to further customise the design and behaviour of Publisher to suit your needs.\
ance that a user's name, email address or both exists in Publisher, in order to meet your GDPR requirements.\nI
vitation:\n\nOr, click More actions > Send invitation:\n\nPlease note, for the following actions, you can either cli

n\nThe Bulk upload screen is displayed:\n\nClick Download Sample Format to download a sample xls and follow
ınagement requirements please click here.\n\nClient encryption key management is a premium feature, so pleas
ıre two key advantages of Hybrid storage:\n\nHybrid storage gives you the option to host and control the files, a
er section and\xa0navigate to\xa0More actions\xa0>\xa0Reset password:\n\nThe reset password email will be s
e status of existing iSheet templates, as well as create new iSheet templates.\nSystem administrators may also s
heet name) and clicking the Save as template button at the top of the page:\n\nThis brings up the Save as templ
of\xa0adding those users to a site, there is another way to create\xa0accounts for those users.\nActive Director
ed at the system level. Once created, a system group (and the users within it) can be added to any site and treate
the new user. Once the email address is entered, either an existing domain will be displayed (if the email addres
re files from, Collaborate:\n\n\nThe ON for all system users option in Enable My files sharing is\xa0not available
)Send invitation:\n\nOr, click\xa0More actions\xa0>\xa0Send invitation:\n\n\nFor the following actions, you car
for offline access, as and when required.\n\nOn-demand sync is only available on Windows.\n\nThe value of On
n users:\n\nMy files report - this report shows how much of your licensed storage quota is being used by each u
\nThis option was previously known as\xa0'DD Report'.\xa0\n\nSingle record option\nClick on More Actions fror
ɹency\nA Publisher instance has several email configuration properties that need to be defined:\nSupport email
ıp. This works by enabling auto login users in an organisation and then sharing the newly created link with the us
organisation group called 'All Organisations', which is used as\xa0the base level of access provided to all organis
you want to create a:\n\nNew user with a domain that is in the system\nNew user with a domain that is not in
m administrator, at the instance level. To do so, navigate to your\xa0Profile\xa0>\xa0System admin:\n\nThe\xa
ermission structure. In order to add a new organisation, navigate to\xa0Your profile\xa0>\xa0System admin:\n\
nail) from being automatically allocated to an organisation. However, a user with an exception domain email ad
:k on the Org admin tab:\n\nto access the Organisation administration section:\n\nThe section provides two prir
:t all users in a given organisation, select the checkbox next to the name of the organisation.\n\n\nReset passwo
ıin:\n\nIn the\xa0System admin\xa0screen, click\xa0System notices:\n\nThe\xa0System notices\xa0screen will
d also view their\xa0Status,\xa0Size,\xa0User\xa0count, when it was\xa0Created, when it was\xa0Last modified
or information on how to create a new site from a template, click here.\n\nTo create a new site, click the Home
files settings:\n\n\n\nThis allows users to use\xa0the\xa0Send a file\xa0feature from the Dashboard and Outlo
ion\xa0>\xa0Audits and Reporting\xa0>\xa0Content\xa0>\xa0Content report\xa0to display the\xa0Content rep
\xa0System administration > Audits and Reporting >\xa0Organisation report\xa0to view the\xa0Organisation rep
)changes based on date ranges or current settings.\nRunning the report\nNavigate to System admin > Audits and
le.\nRunning the report\nNavigate to System administration > Audits and reporting >\xa0Module access audit\x
ıistration > Audits and reporting >\xa0Login audit\xa0to display the\xa0Login audit\xa0screen:\n\nWithin the\xa
accessed a specific content item.\nRunning the report\nNavigate to System administration > Audits and report
\nNavigate to\xa0System administration\xa0>\xa0Audits and reporting\xa0>\xa0Content\xa0> Dashboard acces
these reports:\nPeople and organisations\n\nOrganisations/Users audit report -\xa0reports against actions suc
rigate to\xa0System administration\xa0>\xa0Audits and Reporting\xa0>\xa0Email\xa0>\xa0Daily mail unsubscri
ance.\nRunning the report\nNavigate to\xa0System\xa0Administration\xa0>\xa0Audits and Reporting\xa0>\xa0
ned by its recipients.\nRunning the report\nNavigate to\xa0System administration\xa0>\xa0Audits and Reportir
ison Toolkits, and who has shared them via email to a colleague.\nRunning the report\nNavigate to\xa0System a
\xa0>\xa0Audits and reporting\xa0> Content\xa0>\xa0CTK Comparisons reports\xa0to display the\xa0CTK com
\xa0Systemin administration\xa0>\xa0Audits and Reporting\xa0>\xa0Content\xa0>\xa0Document library audit\
inistration\xa0>\xa0Audits and Reporting\xa0> Content\xa0>\xa0Microsite and page audit\xa0to display the\xa
gate to\xa0System administration\xa0>\xa0Audits and Reporting\xa0>\xa0Content\xa0>\xa0Event/Workshop a
em administration\xa0>\xa0Audits and reports\xa0>\xa0Content\xa0>\xa0Search terms audit\xa0to display the\
different system actions which can be used to create reports.\nRunning the report\nNavigate to System adminis
tem administration > Audits and reporting > User search proxy audit\xa0to display the\xa0User search\xa0proxy
accessed a specific content item.\nRunning the report\nNavigate to System administration > Audits and report

stration > Audits and Reporting >\xa0Links audit\xa0to display the\xa0Links audit\xa0screen:\n\nWithin the\xa0
figured, you can send files or assign folders to be processed by Document Intelligence. Files are sent to Documer
gal Tracker integration to include flexible matter and spend management, and included HighQ Forms support fo
› that both HighQ and Legal Tracker are updated with information generated and managed in HighQ. \u200b\n\
vith Legal tracker, it offers a one-stop-shop for all of your legal intake needs from requesting a legal intake to the
Sheet is created to track matter information and includes columns for matter name, matter number, key contac
File link or Folder link column. Multiple file\xa0links and folder\xa0links can be added using these column types.
atter based metrics for analyzing the high-level financial health of a matter. Metrics are stored in\xa0a system-le
min page (Site Admin > iSheets), click Add and select Template:\n\xa0\n\n\xa0\nThe Import from Template winc
xa0Linking iSheets to a template are useful if you need to:\n\nensure the exact same iSheet structure is deploye
e ability\xa0to interact with MS teams from within your HighQ instance.\nThis will allow the user to:\n\nView a
ystem Admin and then choose System Settings.\xa0\n\n\nIn\xa0System Settings, scroll down to the AI Hub serv
nfiguration of the Active Directory connector. Below is a FAQ detailing the implications of integrating active dire
nstance\xa0allows\xa0you to have benefits such as the Collaborate panels, without having the full unification.\n
\nThomson Reuters aims to lead the way in providing greater access to justice for all â€“ and accessibility for all
ssues.\nA Dependency report is created before a site template is exported by a system administrator, and a Com
es to quickly prepare the site for use.\nIn 5.2, site templates do\xa0not include some types of content.\xa0If you
ır department as part of a 'Solutions library'\nReuse configuration created for similar projects\nCreate a core co
s incrementally\nWhen building a complex alert condition with multiple components, add each new condition st
rder to verify your authorisation to view the protected files. FileOpen DRM checks every time to make sure a use
n PDF viewer:\n\nOpen a new tab in Chrome.\nEnter\xa0chrome://settings/content\xa0into the address bar\n
&A best practices.\nCommon Workflow\nIn a situation where there is a\xa0Bidder site\xa0with two (or more) b
\nAdd a website icon to your iPhone Home screen for iOS devices, or\xa0\nAdd, delete and view bookmarked w
dition(s); the recipient of the alerts, who must configure their Email Preferences appropriately; and the user addi
as a label for the column. Although column names can be virtually any length, if they are too long you will need t
and/or maintain the data, and any additional features needed, such as record locking or email alerts. It is best to
search field:\n\nQuick search results only show results based on content titles and not the content body. For mo
xa0requires that two people with different roles are involved: \xa0\n\nA Collaborate System Admin and\nA nor
ıt allow them to delete or alter any other content in the system. \xa0There are two ways to accomplish this:\nCr
score is assigned that indicates how similar a revised contract\xa0is to the originating template. A\xa0score of 0
cessed by selecting the Customize\xa0tab:\n\nThese settings relate to the colours and logos that will be used for
ed by third parties. Often, the client will give the same users, especially external users, access to both Collaborat
):\n\nTo add a link, highlight the text you want to make a link and click the link button. The\xa0Insert\xa0link\xa
ilities on different devices and browsers.\nBrowser Support\nHighQ supports the latest versions of most major
nded. Below is one situation where a change may be required.\n\nThese changes may need to be implemented a
e most common of which are:\n\n\nThe email address for the user was entered incorrectly by the person who ir
erwise have access to a specific site.\n\nA System Administrator should follow these steps to determine the caus
t\n\n\n\n\n\n\n\n\n\nAccess from anywhere\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:
n\n\n\n\n\n\n\n\n\nAdd users to a site\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:00Chron
t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nAdd, visualise and edit iSheet data\n\n\nVolume 100%Rewind 10 SecondsNe
\t\t\n\n\n\n\n\n\n\n\n\nAI Hub management area\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000
\t\t\n\n\n\n\n\n\n\n\n\nArchive emails in Outlook\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000
n Embed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nAssociate a site with a Contract Express template\n\n\nVolum
Embed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nAssociate your word template with iSheet data\n\n\nVolume 10
t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nAuto-create iSheets from Excel Files\n\n\nVolume 100%Rewind 10 Seconds
mbed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nAuto-create iSheets from Excel Files Overview\n\n\nVolume 100%
d\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nAutomatically delete a file with Workflow\n\n\nVolume 100%Rewind

\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nCommunicate with your team \n\n\nVolume 100%Rewind 10 SecondsNext UpLiv
\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nConfigure notifications and alerts\n\n\nVolume 100%Rewind 10 SecondsNext
\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nConfigure the Doc Auto Word Plugin\n\n\nVolume 100%Rewind 10 Second
\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nContract Express - Edit Questionnaires\n\n\nVolume 100%Rewind 10 Sec
nbed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nContract Express - Remove Empty Categories\n\n\nVolume 100%R
\n\n Embed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nCopy emails into the platform using the Office plugin\n\n\n
\t\n\n\n\n\n\n\n\n\n\nCreate a bundle of files\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000
n\n\n\n\n\n\n\n\nCreate a site group\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:00Chro
\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nCreate a task with a date dependency\n\n\nVolume 100%Rewind 10 Seco
n Embed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nCreate conditions with the Doc Auto Word Plugin\n\n\nVolum
\t\t\t\t\n\n\n\n\n\n\n\n\n\nCreate custom site metadata\n\n\nVolume 100%Rewind 10 SecondsNext UpLive0
\n\n\n\n\n\n\n\n\n\nCreate folders in Files\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:0
t\t\t\t\n\n\n\n\n\n\n\n\n\nCreate multiple home pages\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:
n\n\n\n\n\n\n\nCreate sub-tasks\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:00Chromeca
\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nCreating a site from a template\n\n\nVolume 100%Rewind 10 SecondsNext UpL
t\t\n\n\n\n\n\n\n\n\n\nCreating Workflow Rules\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0
t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nCustomise the site navigation bar\n\n\nVolume 100%Rewind 10 SecondsNext
\t\t\t\t\n\n\n\n\n\n\n\n\n\nCustomise the Tasks module\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00
\t\n\n\n\n\n\n\n\n\n\nDate calculation column\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:00
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t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nDocuSign multiple documents\n\n\nVolume 100%Rewind 10 SecondsNext UpLive
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\t\t\n\n\n\n\n\n\n\n\n\nEdit documents in G Suite\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000
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\t\n\n\n\n\n\n\n\n\n\nEnable HighQ AI engine\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:000
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Embed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nEnable or disable HighQ Forms - System Admin\n\n\nVolume 10
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\t\t\t\t\n\n\n\n\n\n\n\n\n\neSignature Tracking Statuses\n\n\nVolume 100%Rewind 10 SecondsNext UpLive0
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\t\t\n\n\n\n\n\n\n\n\n\nExporting a site template\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000
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:\t\t\n\n\n\n\n\n\n\n\n\nHow to create a workflow\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:000(
t\t\t\n\n\n\n\n\n\n\n\n\nHow to use the Files inbox\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:000
\t\t\n\n\n\n\n\n\n\n\n\nImporting a site template\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:
bed\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nIntroduction to the HighQ Drive mobile app\n\n\nVolume 100%Rev
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1\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nPermission content in the Files module\n\n\nVolume 100%Rewind 10 Se
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\n\n\n\n\n\n\n\nRedaction in Files\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:00Chrome
t\t\t\n\n\n\n\n\n\n\n\n\nSaving a site as a template\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:000
‹s from Module settings.\n\nThe Tasks administration page includes:\n\nEnable Timeline view, comments and P
se note that in order for a user to be able to do this, they must have Add file rights for the site they are wanting
provide scalability for large volumes of data to be managed in bulk, including errors for reasons such as the orga
ıtes once a rule is triggered or an action is performed\nAutomatically change the status of the task\xa0once a ru
automate task assignments for repeatable processes.\xa0\nConditions in an iSheet form, dates or files can trigge

:ings > iSheets.\xa0Once selected, this page will list all of the existing iSheets (if any) for the current site:\n\n\nIf
After\xa0automating\xa0a document template, upload it to the HighQ platform to use for document generatior
and modify existing iSheet configurations.\n\nTo enable the iSheets module, navigate to the Admin tab > Modul
;ation content element, navigate to the Modules admin in the Content hub:\n\nClick the module you want to ad
Admin screen will be displayed. In Site settings, click General:\n\nThe General screen is displayed:\n\nIn the Ge
he\xa0Home\xa0module will now be enabled.\n\nThe\xa0Home\xa0module can then be configured via\xa0Adı
dashboard builder, to build a responsive home page layout with a simple point and click interface.\nWith the da
a module\nEdit the module metadata\nEdit the module permissions\nEdit the module contacts (for comparison
; > Billing information. The following screen will be displayed:\n\nThe Next invoice date is automatically populat
essed by navigating to Admin > Audits and reports > Reports\xa0or\xa0Audits.\n\n\nIf document review workflc
g party in a controlled and secure manner, and to permit the selling party to respond to those questions in an or
ıde:\n\n\nThe ability to create bidder groups that address more than one organisation, e.g., a bidder firm, their l
groups.\xa0\nConfiguring the People module\nAccess the people module settings by navigating to Admin > Mod
ontains a\xa0file; typically in an intake iSheet or Contract Express Output iSheet.\nThe\xa0Update file attachmer
new rule\nNavigate to Admin > Workflow management > Workflows:\n\nThe Workflows screen is displayed:\n\
resses, explanations, cumulative notes, etc. and is similar to a single line text column, but with some minor diffe
ay be entered in a single line text column is 255. \xa0However, you may decrease this value to limit the number
cord\nIf you have access, you can change or change any of the values in a single\xa0record. To edit an iSheet re
ocated in More actions > View:\n\nClicking View will display the Details screen:\n\nWhich is similar to the Add i
System Admins.\n\nThe Audit history of an item displays a list of actions taken on an item, and includes the user
tically generate documents; recipients do not need to register\xa0to fill a questionnaire or receive a generated\
from the Profile menu\nA system admin who is a member of the Contract express admins and authors group ca
ent management, and gives greater control over who accesses the documents, and how.\nIn the example below,
eet.\nBuilding your rule\nThe following information assumes a basic knowledge of workflow and rule building. T
n a triggering iSheet into a new record in another iSheet within the same site.\xa0This is compatible if iSheet or l
fic details on that page, such as headers, footers, a summary or hero images.\xa0\n\nThese details must\xa0be
or the entire report within the\xa0Select countries to manage\xa0glossary terms\xa0drop down:\n\nThen click\
ew page to the comparison toolkit.\xa0Once you have\xa0added the page(s), you will need to add\xa0a few pag
, please contact HighQ Support). Click either your profile dropdown menu, or\xa0Admin\xa0>\xa0Content Hub:\
d results.\n\n\n\n\n\nConfiguring the\xa0HighQ AI engine within the admin settings\nSite administrators will nc
etain these settings for the Kira AI engine.\nSaving the site as a template with\xa0AI enabled\nWhen saving a sit
5.6, an additional option can create up to twenty subfolders in the same action.\n\nThe Add folder action is ava
nent\xa0actions are\xa0available for File and\xa0File metadata iSheet\xa0triggers.\n\n\xa0\n\n\n\n\n\nMove 1
hen select iSheets under Module settings.\n\nIn the iSheets administration page, click More actions for the iShe
ete:\n\nFrom this menu, you will be able to manage the various elements of an iSheet as follows:\n\nManage c
ed to have configured the AI engines initially.\xa0\n\nAnother way to use the imported data is in Data Visualisat
t has only one view, the view drop down will not appear until a user has at least one draft item saved. When a us
on about when iSheet records are created, modified and deleted.\nTo view the audit history of an iSheet, a Site
o that may be downloaded at a later time. Archives must be manually saved by Site Administrators.\nTo enable
e same item at the same time. To prevent an editing conflict, you can turn on Record locking for the iSheet. Recc
end alerts by default.\xa0\n\niSheet alerts are separate from site-wide alerts that users can configure from theiı
en will appear:\n\nSetting email preferences\nFirst, select how often you would like to receive alerts: immediate
n page (Admin\xa0> Module settings > iSheets > click the desired iSheet name). These settings may be enabled v
der in which the views appear in the drop-down menu, navigate to the iSheet admin page, and select Manage vie
a new rule\nNavigate to Admin > Workflow management > Workflows:\n\nThe Workflow screen is displayed:\n
t as your action, then the following fields are displayed:\n\nEach field is described below:\n\nTitle\xa0- the nar
llowing fields are displayed:\n\nEach field is described below:\n\nTitle - This is the title of the task.\nDescription

ld is described below:\n\nSubject - This is the subject of the email\nTo, Cc and Bcc -\xa0These are lists of all of tl
s tab is displayed:\n\nIn this screen,\xa0select the permissions of the channel. You can choose whether the char
\xa0in the Dashboards section (in the left-hand pane):\n\nTo display the Channels screen:\n\nFrom this screen,
t instead shows content based on the metadata selected here.\nWhen the content list panel is added to the das
that are displayed during the create a channel process, and will be able to change everything that is accessible o
: Dashboard tab:\n\nSections\nClick Add section to add a new section to your dashboard:\n\nIn\xa0a\xa0sectio
learn how roles are defined for each user, or group of users.\n\nAs of September 2022, to aid confidentiality on
l to be a part of the internal organisation but with limited permissions, compared to an internal user.\n\nThe Ba
ions.\nNavigate to\xa0Admin\xa0>\xa0Site settings\xa0>\xa0Security.\nThe\xa0Security\xa0screen will be disp
than the largest and most complex. While many lawyers possess excellent project management skills, it is often
tform enables teams to use LPM tools and frameworks to work effectively and collaboratively.\nBelow are some
ety of site purposes and requirements and can be imported and configured quickly, avoiding lengthy consultatio
ber\n7th of October\n4th of November\n9th of December\n\n\xa0\n\nAugust 2023 updates\n\xa0\nOverview
d\n\t\t\t\t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nTasks Hierarchy View - Manage Columns \n\n\nVolume 100%Rewind 1
ows all the information about a task. Users with edit rights may edit a task from the task window.\n\nListed belo
em level and can be added for use in each site. You can template all the lists, sub-lists, tasks and sub-tasks in a sit
released on a monthly schedule. Future releases are currently planned for these dates:\n\nJuly 2023 -\xa0Custor
,t\t\t\t\t\t\n\n\n\n\n\n\n\n\n\nSystem Dashboards - Files Panel\n\n\nVolume 100%Rewind 10 SecondsNext Up
il inbox to HighQ,\nAttach links to HighQ documents to your outgoing messages, with the option of applying adv
vice versa. Please contact your IT department to determine whether your firm will permit HighQ Drive to be ins
25th/26th February, with production deployments taking place from the weekend of the 4th/5th March onward
DMIN\nINTEGRATION\nON REQUEST\n\n\n\n\nUsers\xa0- Changes that are visible and affect users\xa0\nSite a
her.\xa0This is part of the HighQ Appliance.\nThe AD Connector allows you to integrate with your current AD se
\n\nConfiguring Appliance after deployment\nHighQ Appliance is first configured and deployed by HighQ suppor
nce\xa0now has an easy to use upgrade function. Please refer to the step by step guide below on how to upgrad
ease check the hardware and software requirements for HighQ Appliance, please note there are additional requ
a0environment.\xa0It securely\xa0synchronises and filters data from your internal databases,\xa0such as Active
necessary software packages and apply the required configuration.\n\nThis article provides\xa0an overview of r
: and will affect users\xa0\nSite admin\xa0- Changes that affect the configuration of sites\nSystem admin\xa0- C
ons why content has been archived (if they are trying to access the content\xa0from an old alert email)\xa0and
: and will affect users\xa0\nSite admin\xa0- Changes that affect the configuration of sites\nSystem admin\xa0- C
oard, click Add panel:\n\nIn the Add files screen, select Collaborate files from the Panel dropdown:\n\nIn the Ad
ance\nView the activity feed to see ongoing activity from all users\nReceive push notifications for messages anc
you to create certain features, such as plain text or logos.\nAdditionally, you can set permissions on Features. Fc
ontent or upload your own documents.\xa0Extend the content reach by tagging it against the customisable met
erent on almost all instances, but for example, you can view the people directory via 'Our People':\n\nThis will d
sion your content to deliver both employee and client event requirements, manage capacities, attendees and wa
i0to a selected Collaborate folder. If you do not file an email automatically, you can save attachments to your co
: and will affect users\xa0\nSite admin\xa0- Changes that affect the configuration of sites\nSystem admin\xa0- C
ing tool, for collecting analytics about how our clients interact with HighQ. We will use this information to unde
nents to you! Changing to this new approach allows us to release a smaller number of enhancements in each up
nt, when it's made available in the next few weeks.\xa0You're also invited to watch the on-demand webinar,\xa
ilso see some of our many features\xa0detailed\xa0here\xa0on our Thomson ReutersÂ®\xa0HighQ web page ar
ams personal chat, group chat or Teams channel, as well as upload files to a HighQ site directly from the Microso
ted date - The date the File or Folder is created or the file is added will be the Creation date. The original author
nt, when it's made available in the next few weeks.\xa0You're also invited to watch the on-demand webinar,\xa
see some of our many features\xa0detailed\xa0here\xa0on our Thomson ReutersÂ®\xa0HighQ web page and la

pre-defined term bank.\xa0\nEnabling auto redaction\nSystem admin users can enable redaction in System adm
haring should work.\xa0\nEnable site file sharing\xa0\nTo enable this, go to System Admin>System settings and
d the Add event screen will be displayed:\n\nTo create an event, there are four required fields. Although there a
if you want to filter the content, then you would need to select the user\'s preferences in order to do this.) If you
vorkflow, litigation management,\xa0contract management\xa0and more.\xa0\nPlease read through the\xa0re
Site administrators.\n\n\n\n\n\nAssociate a site with a Contract Express template\nRecommended audience: S
t, when it\'s made available in the next few weeks.\xa0You\'re also invited to watch the on-demand webinar,\xa
eans that when you add new content with metadata that didn\'t already exist, we can include this\xa0within the
ns or branches of the same original contract,\xa0and helps to\xa0clarify the history\xa0of the signed and execut
files into groups and use a placeholder file as a title for the group, or add a placeholder file as a reminder to add
nts can be stored in the Files module. This enhancement included an automatic migration of iSheet attachments
our clients develop solution templates; manage projects, matters, transactions and documents; create client p
t, when it's made available in the next few weeks.\xa0You're also invited to watch the on-demand webinar,\xa0
nistrators.\n\n\n\n\n\nCustom site metadata\nRecommended audience: System administrators.\n\n\n\n\n\nR
levice you can now use the\xa0Files\xa0app enabling you to see the HighQ Drive, alongside all of your other clou
an extra layer of Navigation to the site which could be necessary if you want to highlight specific internal or exte
a smartphone, the Add button is not displayed and therefore folders cannot be created from smartphones.\n\n
es or folders that you need to download. Choose Action and then choose Download.\n\nThe file\xa0download s
ce Open in Office Online is enabled in your site, you will be able to create and edit Microsoft Office documents d
:\nWhen the Tasks module is enabled for a site, any user with access to that module will have access to the\xa0A
added to the Files module, tasks can be associated with that file if the Tasks module has been enabled on that s
elated site.\xa0\n\nFor a user who can respond to questions, the organisation of the user who asked the questio
etically unlimited. How can the files and folders in a site be downloaded in a zip file\xa0when the file path length
omputer, opening it in Office, editing and saving\xa0the file, and then uploading the edited file\xa0as a new vers
iew of files in the Files module, instead of displaying files in a folder tree.\nHow to access recent file activity\nCli
text iSheet columns which have enabled rich text.\n\nAn iSheet Link can open a view of an iSheet or an individua
l users can click on the back button in their browser to view the previous page, with the same filtering applied.\n
nly a single iSheet alert, not a separate email for each item that was added or updated, assuming a user has subs
in the iSheets module, click More actions and select Edit:\n\n\nYou can make changes from the Edit record\xa0
0one exception detailed below.\xa0System generated columns are listed at the bottom of the Manage columns
a0For example, the Details page might look like this:\n\nUse the Jump to drop-down menu to quickly select and
llaborate sites panel allows you to easily view and access other collaborate sites within your dashboard.\n\n\nP
vent bots from submitting many forms, or trying to maliciously add code\n\nIn order to add a form to the syster
dropdown:\n\nIn the Content hub, create a new publication or edit an existing one, and scroll down to the Relat
\nThis must be enabled at a System Admin level.\xa0Add the Instance\xa0URL and API key. \xa0\n\nClick Test t
r:\n\nYou will now be able to edit the wiki page:\n\nWhile\xa0editing the wiki page, navigate to and click Data v
xa0here\xa0and\xa0here, external content can easily be displayed from within these pages, such as RSS feeds a
nd highly styled content.\nEmbed videos, web sites and other media\nTo embed videos and other media (like p
nt.\nTo access the\xa0RSS\xa0type, navigate to\xa0List\xa0and select the type of\xa0RSS\xa0within the\xa0Ins
l content itself will be embedded within the page. This will make the page dynamic;\xa0as the embedded conter
editor saves all of the content as HTML. Not only can this HTML be viewed, but it can be edited as well. This perm
e page without using HTML code or requiring advanced knowledge of web page layout.\xa0This page will describ
elements, enabling them to customise pages. For example, if you do not want to display a summary\xa0for a pie
ent, and share this with your audience.\nThe benefits of sharing video and audio (podcast) content include:\n\n
r as part of the chart creation process.\n\nThe quarter is defined as the calendar quarters (January to March, Ap
f file formats, such as PDF, excel, word and JPEG, etc.\nYou may have already created a document structure offli
a page will typically need to send a link to other users in order for them to find the page.\n\nYou may only have

:ures:\n\n\nRich Text - Because blog posts are created using a rich text editor, the main content of the blog post
merger or loan syndication. Collaborate includes\xa0key VDR features using the\xa0common platform.\nTo use
of questions using a variety of criteria. \xa0Regardless of what search criteria are used, only the questions that a
n import this data:\n\nA live feed -\xa0Publisher can pull the\xa0data from a public\xa0xml feed. For example,\
f an event will be displayed, including:\n\nRich Text\xa0- Because events are created using a rich text editor, the
e HighQ Drive app, the login screen is displayed:\n\nEnter your instance URL into the Enter your instance URL fie
eate the template needed for Document Automation, open the template in Microsoft Word. You should already
nplates and how end users can generate documents.\xa0\nHighQ consultants are also available to help design ar
Document Automation product consists of three components:\xa0\n\nData collection in iSheets\nDocument Au
to\xa0use Doc Auto without the Doc Auto Word plugin.\n\nEnd of support for HighQ Plugins running in Office 2
n admin. Navigate to System admin\xa0in your profile dropdown and click DMS files:\n\nThe display the\xa0Up

y and access to a range of Thomson Reuters tools; these accounts provide Customer Identity and Access Manag
xa0Log in with two factor authentication\xa0describe\xa0how end-users experience 2FA.\nOverview of 2FA\n2
A) adds the requirement to enter a\xa0passcode in order to access Collaborate.\xa0\nThe 2FA process\nWhen
vice to authenticate access to your site or\xa0instance.\n\nYou can also use third-party authentication apps, suc
device to authenticate access to your site or\xa0instance.\nThe\xa0app\xa0can be paired\xa0and used for two-
nstance URL into the Enter your instance URL field and tap Next. If you are unsure how to find your instance URL
ically aggregated based on the query criteria. This can help users who perform contract reviews of documents f
can also create custom document relationships, such as heads of terms and supporting schedules.\nA file can h
ts management (DRM)\nThird-party services\nAI Hub services configuration\nHybrid and EKM configuration\n
folders and files.\xa0\nPage layout\nOn most devices, the Files module is laid out with two panels:\n\nA folder
r folders, select the items you wish to move using the related\xa0checkboxes, then navigate to\xa0Action\xa0>
\xa0feature only\xa0keeps basic file or folder information:\n\nAny metadata associated with the original file\xa
way to configure My files\nIt is not possible to Like files\n\nIn addition, some file and folder actions are not ava
files for a site are stored. Any type of file can be added to Collaborate but certain types of files cannot be previe
an internal or external user.\n\nHow to access My Site\nMy Site will now be displayed in various places through
ill automatically be taken to that site's landing page when they login, unless a System Notice has been added to
a System Dashboard\nTo create a System Dashboard, as a System administrator, navigate to the profile dropdo
ase note that you cannot set a dashboard as your default, if you have not already set up the permissions of that
our global navigation will enable you to quickly access multiple dashboards that you have access to.\nAdding a
ary headers and sub-headers\n\n'], 'Breadcrumb_path': ['', '', 'Getting started', '', 'Global navigation'], 'Related_
dit dashboard has been made more visible for editors to make changes once content has been added to the scre
metadata, whilst providing you with a full audit trail.\xa0\nThis article assumes some prior level of knowledge
te multiple steps in the approval process\nSet approvals for a Site\nAllocate selected files to an approval proces
e-define the default selection of notifications used when a new user is created.\n\n\n\n\n\n\n\n\nWhere to co
t Default for User notifications.\nSelect the default options to use for new users in the Notify by columns (Email
s\nThe Top Navigation Bar acts as a central hub where you can perform various actions, without needing to retu
nges.\nAdd\xa0menu items and links\nNavigate to your profile >\xa0System admin:\n\xa0\n\nThe\xa0System
le of the Dashboard contains a list of all of the sites that a user has access to, with their most recently accessed
aborate.\n\nIf you are using a Thomson Reuters account, some options are only available in the Thomson Reute
ation, please contact your HighQ representative.\n\nUsers on instances created before March 2023 use a High
invitation email that was sent to you:\n\nIn your invitation email, you will see a link to complete your registratic
nistration section displays a search form:\n\n\n\n\n\nSelect filters then click Search.\n\n\xa0\n\nDisplay Name\x
accessed individually and any changes should be made. \xa0\nAnonymise the user account. This feature is impl
sic user role is\xa0an option for corporate legal and government clients only\xa0- this user role is not available f
ts to support the following needs:\nEthical walls for large teams working on a case\nThese permissions allow d
ly generate a document when a new record is added to an iSheet.\n\nContract Express templates are treated ex
rkflow, click on the particular workflow to open it and then click\xa0Add > New rule.\n\n\nYou can also\xa0cop
n built) and allows you to add new ones.\n\nSee\xa0Manage workflows to automate tasks for best practices w
vorkflows for different project groups, and activate the\xa0appropriate rules for the active project with just a fe
test version, which includes\xa0multi-level\xa0nested conditions\xa0(for iSheet records only). If the Trigger tab
he Action tab\nThe Actions tab is the last step to define when creating a rule.\n\nUse the drop-down menu to s
presentation of those tasks.\n\nThe document review feature must be enabled within the Files Admin page. Als
View\nThe Index\xa0view is available from any page in the Files module. Click Index:\xa0\n\nTo display the In
t to modules are in the Modules section and security related settings are stored in the Security section.\xa0\nSi
with numbers in a sequence:\n\xa0 \xa0 \xa0 \xa0 \xa0\xa0\nThe numbering schema is 1, 1.1, 1.2, 1.2.1.\xa0\n
click on the folder actions menu and navigate to\xa0More Actions\xa0>\xa0Edit Details:\n\nThe\xa0Edit folder

a bulk download will be compressed together into a single ZIP file and saved to a user\'s local computer. (To dov
ing them to\xa0be exported, archived and later imported on your own or another site. Files are archived in a ZIP
:w In the Manage Views screen. Click More actions for the view to copy and select Clone view.\n\nEnter a name
or an view\nAs of March 2023, if your iSheet has many views, you can use the Search View names and descriptio
dditionally, the system periodically auto-saves the record and will indicate the last auto-save time:\n\nIf the syst
le if you want the particular view to be one that you want users to inline edit. \xa0\n\nTo enable inline editing d
section allows you to define the rules that will trigger this conditional behaviour when a user is entering data int
ains a number of columns, including:\n\n"Document type" - a mandatory choice column with an image associat
Columns organised into sections may be viewed on the following pages:\n\nAdd and Edit item pages, including fi
ets and iSheet records.\nHighQ offers multiple features for the creation and publication of forms. Choose the fe
xa0Site settings\xa0>\xa0Site navigation:\nThere will be two options listed,\xa0Automatic site navigation\xa0an
sociated with a blog post. If the blogs listed on the home page are filtered by a single category and the user does
saved as a draft, including any auto-saved content, navigate to your\xa0User profile\xa0>\xa0My drafts:\n\nThe
notifications:\n\n\nNotifications that are listed here all fall into the categories of notifications that the user has
d on blog posts within this site. If allowed, the owner of a blog post can still determine whether to allow commen
xa0a file needs approval, the designated administrator will receive a notification.\nBelow is an example using th
orkflow is a premium feature of the HighQ platform - if you do not have it enabled and want to evaluate it please
\n\n\nThe\xa0Modules\xa0screen will be displayed.\nConfiguring the Modules\xa0\nThe default\xa0Modules\x
achments.\n\nOnce you have selected Send for approval\xa0as your action, the following fields are displayed:\n
flow >\xa0Audit History:\n\nThe\xa0Audit history\xa0screen is displayed:\n\nRunning the report\nThe\xa0Audi
on to the above steps, other options are available:\n\n\nStatus - A user can save the wiki page as a draft or as a
administrator\xa0has chosen to disable this feature for a site) there is a tree view of the wiki hierarchy. By defaul
istrator\xa0and if the user has been given permission to access the module.\xa0\nThe\xa0Wiki\xa0module can
log posts.\n\nUsers have the ability to view the Activity Stream via All, Posts and Activity and they also have the
ing the Activity module\nActivity module settings include:\n\n\n\nEnable site activity\xa0- Choose whether all u
er of comments for each\nOn the upper right, a list of open tasks that you have access to (if the\xa0Tasks\xa0m
post to all of the users of your organisation. A microblog post does not necessarily relate to a particular piece of
ng able to search for, view the profile of and/or communicate directly with another user, including the following
und in the top navigation bar, which reveals how many unread messages (if any) you have received:\n\n\nThe nu
gger email alerts depending on the site user's\xa0preferences.\n\nBidder users cannot view or add comments, b
ny type of site, typically it will be used in a transaction involving two sides, like a buyer and a seller, and the law f
are\xa0not to be aware of each others' existence or identity. For example,\xa0where there are multiple bidders
re information on what each option within the Security\xa0screen\xa0does:\n\n\nMake bidder site -\xa0Use thi
nIf there is a need to alert all site users about an important event or circumstance relating to the site or the matt
Recent activity pane on the Dashboard, from the Activity module on a site, or on the\xa0View\xa0page for an i
on a particular wiki page. If comments already exist on a wiki page and this setting is deselected, the existing com
t permissions), permissions may be configured on columns by navigating to the iSheet admin page (Admin > Mod
an iSheet, or to enable permissions, navigate to the iSheet admin page in the site (Admin > Module settings > iSh
More actions, selecting Audit history and clicking the Versions tab.\n\n\nItem versions are listed in reverse chr
issions may be configured on views by navigating to the iSheet admin page (Admin > Module settings > iSheets),
presented outside of the iSheet in a more attractive way, or\nif the iSheet data needs to be consumed by other s
iSheets columns for each Excel column\nAssign content types for each column\nAdd new data in bulk (this is o
ypes\nTo learn about each data type and its column-specific options, click a link below.\n\nSingle line text\nMul
nn types except Auto-increment\nSite Admins may add a description that, depending upon the iSheet configura
the data stored in the iSheet open to everyone?\n\n\nThe more planning you can do in advance the less likely y
e a consistency in the solutions built in your Collaborate instance. Additionally, template deployed iSheets can b
nternal domain. This would typically be the domain of the law firm or organisation that has licensed the instanc

ferred to as "self-registered" users.\nIf the Recipients must be registered to access link\xa0option is selected wh
ı be shared with anyone, not just other Collaborate users.\n\n\nHowever, if external users are granted the right
ail will be different in each instance of Collaborate). The email will appear to come from the user who shared the
age is accessed for that iSheet, there will be two new options, Add new section and Sort sections.\n\nThe syster
vill then need to provide a section name, which must be unique within that iSheet, and an optional description:\r
many columns, you can use the Search Column names and description field to quickly locate a column with eithe
s" group can only view and edit items created by their group, that will be respected when those users browse th
Sheet name, Column name and View name.\nThe iSheet references tool allows you to locate relationships betv
ample:\xa0You have created Yes/No/Unknown definitions, including colours and images. You can save these sta
image library, navigate to System admin > iSheet admin > Image library. \xa0The image library will display any pr
other column appear or disappear, or sending an email alert, based on a particular value being entered. In order t
values may be manipulated and displayed in calculation columns.\nYou can either add a new Choice column or
ie.\n\nNumber and calculation columns included via a lookup column may not be used for calculation columns.\
columns can also be used to trigger date-based alerts.\xa0\nFormat\nThere are two options for formatting the
iate.\nAs with all other iSheets alerts, you will need to ensure that certain steps have been taken in order to pre
ured in order to control the way in which values are entered and displayed.\nMinimum/Maximum range\n\nThi
n the More actions button for the iSheet and select Manage columns.\n\nCreating a new column\nTo add a new
lect an\xa0iSheet or Tasks from any site in your instance and display the data in a\xa0chart or card. Choose from
ngle column, the 'billed amount'.\xa0\nOptionally adding a series column will create a KPI chart for each distinct
ble sheet alerter needs to be checked in the iSheet properties page\nOne of the iSheet views must be designate
ns with\xa0the Comment section selected:\n\nEnter a comment in the comment box. You may add basic text fo
en an iSheet view then select More actions. Select\xa0Print Preview\xa0(or Export to PDF) to display\xa0all\xa0r
ults also conform to the format of the View, showing only the columns that are configured to appear.\nQuick se
e link opens a filtered view in the iSheets module. Further access is limited by the user's permissions.\nYou must
nYou cannot share a\xa0metadata iSheet. \n\n\n\nContact HighQ support\niSheet form sharing\xa0must be ena
nd publication of forms. Choose the feature best suited to your needs:\n\nAdd records directly to an iSheet - Sha
sk submission and tracking form in iSheets, and want to display the current owner of each task.\n\nThere are tw
\nSee\xa0What are iSheets?\xa0for more information about iSheets.\xa0\n\nEnhancing files or folders with me
port and export to Excel.\nThe iSheets module provides tools to handle many common tasks, such as\xa0advanc
your computer\nShare - Displays the\xa0Share\xa0screen, where you can share the file by Email, Link, Message
o access the redacted version.\xa0\n\n\nIf the document is replaced with a revised version, any previous redact
egrated into the HighQ experience, offering a seamless user experience.\nBeyond\xa0automatically generating c
ns\n\n\n\nIf Then Else Guidance\n\n\n\nOrganising the Questionnaire\n\n\n\nComputable Variables\n\n\n\nQ
Files:\n\nWithin\xa0Files, click New\xa0>\xa0Document from Template:\n\nThe\xa0New document from temp
site users can\xa0generate documents based on information added to\xa0the site.\nSite admins must be a mer
sit the Contract Express video gallery for additional information.\n\nYou must 'map' iSheet columns in an 'input
used to restrict access.\n\nAn Attachment column\xa0cannot be made mandatory; column width\xa0is the only
A attachments folder.\n\nThe Attachments section can be found\xa0in the left pane. \xa0\n\nClick\xa0the Q&A
l search the entire site, including all parent\xa0and subfolders.\n\n\'Type ahead\' file name matching\nIf you ty
nd items more efficiently.\nWhen to use the different search functions\nThis article focuses on search options ir
t search interface was introduced; this improves search performance and allows you to perform bulk actions on
of three ways.\n\nClick the Search icon in the top bar:\n\n\nThen click the down arrow and select\xa0Advanced
content in the following modules:\n\nFiles\nWiki\nBlog\nEvents\n\n\nThe same tags apply to\xa0every\xa0ve
is the\xa0list of blog categories available to the user and the number of blog posts in each of those categories. (
rland\n\nPractice Areas, Topics, Sectors, Services or Industries of Business\n\nCorporate\nEmployment\xa0\nB
or\nIf configured, in the files module column view itself.\n\n\nThe first two view options also allow a user to ec
ith others and edit the file if the file is in an editable format (i.e. Word files, but not Adobe Acrobat files). When

\xa0Manage site groups in Collaborate for more information.\n\nChanging a group's permissions\nTo view and
\nIf you select System group, you are asked\xa0which System Group you want to add.\n\nClick\xa0New site gro
led etc...\nAssociating a system group with a site\nClick the to\xa0Admin\xa0module, then select Groups under
stem groups may be used for admin roles that are available across all sites on your instance.\n\n\n\n\n\n\n\xa0
ling managing\xa0all\xa0site users. Member administrators can add new users and manage only those users the
t page will be displayed:\n\n\nOnly a single system group is included by default (in addition to the HighQ system
\xa0in your profile dropdown:\n\nAnd in the\xa0System admin\xa0screen, navigate to\xa0User groups:\n\nThe
n the comparison toolkit will be displayed:\n\nIn this tab, you can search for and add organisations, groups or o
marking.\nThe FileOpen app operates in essentially the same way as the\xa0FileOpen plug-in for Acrobat/Read
he\xa0Top Navigation Bar.\nAdding and Removing Favourites\nHere is an example of how to create a favourite
figured are included in the search display, allowing you to target specific metadata fields, as below:\n\nAdvance
ude by defining conditional filters. Views can be controlled with permissions\xa0to restrict access to defined gro
ts module, select the relevant file or folder metadata iSheet. You may select any of the configured views, sort th
ls provided in HighQ.\n\nA\xa0record\xa0is added to the linked Output iSheet every time a\xa0questionnaire is
t UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to create KPI cards in
System generated columns\niSheet column tips\nConfigure column conditions\n\n'], 'Breadcrumb_path': ['', '', '
imary iSheet"). In the primary iSheet, a site admin creates a lookup column where users can select one or more
he full task. If a user is assigned to a task after the task is created, they will also receive a notification.\nUpdates
about Output iSheets\xa0has now moved to a separate article.\n\n\xa0\nTips for Contract Express settings\nA
enerated file.\n\nSelect Edit questionnaire to open the file metadata in the Contact Express environment.\nRevi
stionnaire and gives an opportunity to review and revise any text or selection before the document is generated
l.\n\nAdd file\nTo add a new file, navigate to Add > Files, which displays the Add files page.\n\nUsers can either
ocument automation.\n\nAs described in the overview, first check you have purchased\xa0the HighQ Document
ols Contract Express automates and simplifies the drafting process; providing more time to focus on higher-value
n\nAs described in the overview, first check you have purchased\xa0the HighQ Document Automation powered
ake it easy to reuse common site structures and can\xa0vastly increase the productivity of using Collaborate thr
any other place where a list of sites might be shown (searching, notifications setting page, etc.)\nAn archived s
nfiguring a site, although each instance of Collaborate can be configured to make any of the other fields below (
l\nWithin your site, navigate to the dashboard and click\xa0Edit dashboard:\n\nThe dashboard will now be in\x
re enabled by default at the system level, but must be enabled for each iSheet that will be the basis for a form.\
n enable HighQ Forms for individual iSheets.\n\nBy default, the HighQ Forms are\xa0Enabled.\n\nEnabling or d
e name of the iSheet that contains the columns that will be used to design the form\xa0and collect the submitt
Vhen HighQ Forms is enabled for an iSheet, a default form is automatically created, using default options.\n\nFo
it is used\nGive each form a specific, descriptive name if you want to use it on multiple sites (names must be un
s\xa0that you wish to delete and then click\xa0Action\xa0>\xa0Delete:\n\n\n\nConfirming deletion of files\nIf
lternatively, the site in which the file has been saved may be\xa0configured\xa0to open the audit history\xa0pa
eholder files\xa0that just represent the files that are actually stored in the other dataroom platform. If a filenam
crypt files with the Seclore plugin please click here.\xa0\nTroubleshooting\nWhen first opening a file please wa
service is also available to electronically\xa0sign documents.\n\nSend one or more documents, or a folder, for
igured the eSign service you must then authorise the service using your own eSign account credentials.\xa0\n\n
at Sign integration provides a simplified eSign service. Alternatively, it is also possible to use the Docusign\xa0se
vn AI.\nThe native HighQ AI engine has been developed for document classification by type, or by language, or t
splayed:\n\nScroll down to AI Hub services configuration:\n\nClick the HighQ drop-down\xa0and select Enable
classifier to files, the files in the selected folder are mapped to the selected classifier name\xa0in the AI hub. Th
ant to use for training, then click the Select text button.\n\nSelect the paragraph that contains\xa0the clause th
these can be added at a later date, as the data has already been extracted\n\n\nCreate\xa0charts/graphs in the
ntire\xa0paragraphs, as shown below.\n\n\n\nIf the clause contains multiple paragraphs, divide the clause\xa0i

please see Train HighQ AI classifiers.\n\n\xa0\nThe following classifiers (sometimes called 'document classes') ca
an be set up.\xa0\n\nConfiguration notes\nAs Kira projects are assigned at the\xa0folder level, multiple Kira pro
d data in AI Hub for use in the iSheets modules.\n\nLeverton needs to be enabled at ASP level - please contact H
ontact HighQ Support to request this. Once this has been done, the option is visible in AI Hub at System Level and
vices must also be enabled at ASP level - please contact HighQ Support to request this. Once this has been done,
ets.\n\nYou must use a file metadata iSheet because the AI metadata must be linked back to a file.\n\n\nClick o
droid apps are included below.\n\nScanning a document\nOpen HighQ drive on your device.\nTo scan a docume
assword. The following confirmation screen will be displayed:\n\nClick Back to login page to return to the login p
sages and activity\nSearch user profiles and contact information\nUpdate your profile\n\n\nProduct Update for
rive to be installed.\nVersions\n\nHighQ Drive for Android\nHighQ Drive for iOS\nHighQ Drive for macOS\nHigh
using the "Remember me" option. Currently, SSO is based on the client providing HighQ with a list of all of its co
: any other firmâ€™s HighQ Collaborate or HighQ Publisher instances where they have a been invited.\nAll that i
he email address that was selected\xa0may not be your preferred email address. This happens in many situation
xa0You can view the organisation that the user belongs to. This is a non-editable field.\nGroup profile\xa0-\xa0G
out creating a User.\nTo manage organisations, navigate to\xa0Your profile\xa0>\xa0System admin:\n\nClick\xa
. Navigate to your profile >\xa0System admin:\n\nWithin the\xa0System admin\xa0screen, navigate to\xa0Use
creen by clicking Details within the organisation screen:\n\n\nOrganisation Name - The name of your organisati
ntegrated client experience incorporating personalised content, knowledge and added-value services alongside r
ders and sub-headers, which\xa0direct you to specific areas of the system:\n\nSystem\xa0administrator\xa0gui
as).\n\nTo access your profile view, click the profile icon in the top right hand of the screen, and click My profile
dministrator\xa0and if the user has been given permission to access the module.\nThe\xa0Blog\xa0module can
em language, click your user picture in the top right hand of the screen and click\xa0Settings:\n\nThe\xa0Setting
xa0\n\nThe\xa0System preferences\xa0screen is displayed:\n\nClick the\xa0Language\xa0dropdown:\n\nSelec
and click More actions > Edit questions:\n\nThe Questions tab will be displayed within the toolkit.\nQuestion gr
Modules:\n\nThe Modules screen is displayed:\n\nYou can edit existing modules by clicking More actions:\n\nA
needs to be dynamic and to keep up with trends and themes.\xa0\nAn example of what the dashboard can look
ices and screen sizes. It is used to prioritise key content on mobile devices.\nPanel class - This setting allows the
lect from, which are:\n\nOpen\nClosed\n\nOpen editorial environments allow a user with sufficient permission
preferences screen are displayed the first time you log\xa0into the platform.\xa0\nSystem alerts\nTo access sys
given permission to access the module.\n\nThe Events module can be used to manage project milestones, meet
of upcoming events in each category. Click on a category to filter the list of events shown in the middle to just on
g a calendar of important deadlines, meetings and other milestones relating to any matter. Below are descriptio
\xa0the list on the\xa0left.\n\nNot all settings are available on every instance. Some features must be requeste
napshot of your Tasks from the dashboard. In addition, you can view all of your personal tasks, as well as tasks a
v so they are more relevant to your tasks\nYou can reorder tasks and sub-tasks by dragging an item within a par
xa0\nshow, hide and re-order default and custom columns in the Tasks module to customise the view for differe
tive access to your computer may be required in order to install HighQ Drive. \xa0\n\nRequirements\nCurrently,
tions for saving and filing emails and documents in your My files area of Collaborate.\nClick on the links below to
; on certain system-level configuration settings.\n\nEither during the initial installation and setup, or at any point
leases are no longer supported.\n\nFor Windows machines, the plugin requires Microsoft .NET 4.7.5 Framework
the secure settings feature.\xa0\n\nThe options displayed in Files and Folders are the same as your My Files\xa0
xa0key. Click on Open once you have selected all files.\n\nThe Files tab shows the selected documents. The num
branches of folders in the HighQ tree, select the required folder, and release to drop the file.\xa0\nThe folder no
sites you may need to wait a short while for folder choices to display.\xa0\n\n\nOnce you have selected a folder
t where files smaller than the chosen limit are sent as a regular email and not uploaded to\xa0HighQ. If the file s
he Upload option to upload the file to Collaborate. Select your folder location or choose a new folder to upload
uired in order to install the plugin.\n\nThe Outlook plugin provides several benefits regarding the sharing of atta

eft-hand side of Outlook, right-click on a folder\xa0and choose Rename folder.\xa0Change the name of the folde
branding:\n\nWhat variables are available\n\nBackground colours, logo,\xa0font colour and font size (via Syste
ount\xa0to enable and use this feature, and HighQ must activate Office Online support at the instance level; plea
grations uses Google Drive as a\xa0temporary storage location.\xa0\n\nA user can start editing a document usir
o\xa0More\xa0>\xa0Edit details.\n\nThe\xa0Edit Folder\xa0screen is displayed:\n\nThe default tab that display
nissions, please contact your admistrator.\n\nPermissions and inheritance\nWhen a folder or file is moved, the
ages into a PDF document, or extract signature pages\xa0to create a signature bundle.\xa0\nEnabling documen
new version\n\nAny user with Update file permissions for a folder can add a new version to a file in that folder.\
\n\nWhile checked out, the file is locked and no one else can edit or add a new version of that file;\xa0the Add v
be shared with or accessed by another user.\nCustom views are based on existing site-level views and user perm
ites\xa0below\xa0the list of all current\xa0sites:\n\nWithin the\xa0All sites\xa0and templates\xa0screen, click\
an advanced\xa0feature and will only be enabled if you have a Workshare Compare Everywhere licence. Please
en written detailing how to proxy log in as another non-admin user, found here\n\nImpersonation must be turn
ussed\xa0here. This is\xa0due to the fact that\xa0access to user's profile can be restricted.\xa0Generally, users c
n.\n\nThe Resources menu opens:\n\n\nA number in a blue circle indicates that a new or unread announcemen
se the container that you just created:\n\nAdd the title of the section of the megamenu and\xa0add a title of th
face for creating wiki pages, blog posts and events.\xa0\nOther content areas, such as the\xa0Tasks\xa0module
using the drop down menu next to the search box, and exported via\xa0Export. If following has been enabled on
URL that matches the definition. The domain name, resource name, and context name will be different for each\
splayed if\xa0users are searching in that language\xa0or their instance is set up in that language.\nTo select the
ructure to the channel, allowing you to dictate what users can see.\nChannels can be categorised by metadata a
ure, first register for HighQ Hub by selecting HighQ Hub\xa0from the user-profile menu after logging in to any Co
e most from search and Search terms, operators, tags and results\xa0for\xa0an introduction to using search.\nT
one term is entered, the system will return content that matches any\xa0of the terms (meaning term1 OR term
to\xa0More actions\xa0>\xa0Share:\n\nClicking\xa0Share\xa0will display the\xa0Share\xa0screen:\n\nHere yo
o enables you to select your preferred language as long as that language pack is installed.\nUsers are able to mu
a Visualisation modules, giving you the ability to manage all types of matters and client requirements.\xa0\nWe
0in order to share them with other people, whether Collaborate users or not, as described below.\xa0Moreover,
a user to view the files and folders that they are\xa0currently\xa0sharing, and to manage those shared items. \
oard:\n\nThis\xa0opens the slideout menu:\n\nClick the Send a file... button in the top right of the Dashboard (
older that is currently being\xa0shared through Collaborate\xa0with the user, whether\xa0via the email, private
here they can be checked by a site and content admin before being published,\xa0or used for Legal Intake.\nUse
Pads, although the Add button is displayed, only files stored in a user's photo library can be added through this r
to logged in users. These images can be used within CSS to provide background images. As of November 2022, y
ess, and must be imported to a site so that it can be used.\n\nIf you need to enable Legal Tracker at System Adm
uest is created in Legal Tracker via the integration.\nMatter management links\xa0Legal Tracker matters with an
xa0Content hub:\n\nThe\xa0Content hub\xa0is now displayed.\xa0Within the\xa0Content\xa0hub, navigate to\
of the content.\nYou can access this teaser content via your profile drop down menu >\xa0Content hub\xa0>\xa
f our June 2023 release, we have introduced new filters to the user report, reducing the time taken to download
earch engines),\xa0and the system is\xa0not behind a login and password. Publisher can be configured to be en
elected system templates that can be used as a starting point for a specific solution.\nWhen you log in to your in
ss relevant and up-to-date Practical Law content at the point of need.\n\nPlease note that the Practical Law Mat
written detailing what you can do when impersonating another user, found here\n\nWithin your site, navigate to
te that in order to export and import themes, the HighQ support team must enable this feature\n\nExporting Th
a chart that uses an iSheet that is in the same site and where the colours are mapped to iSheet choices.\nWher
contact them for more information on this.\nAs of 5.4.8 we have introduced an option to enable system admin
works for Standard, Multi-Series, Stacked Column and Bar charts and can be accessed via Advanced Customisati

d an article, video or event, you can tag it with these metadata custom labels. For example;\xa0you write an artic
t theme within your instance\n\nEdit themes\nTo access the themes within the system administration, navigate
instances are linked, and you have the unified user directory. Collaborate basic users will still be able to maintair
gged in as a system administrator, navigate to\xa0your profile drop down menu and click\xa0System admin:\n\
, without having to manually add each profile.\nSyncing profiles\nThere are two different methods\xa0of syncin
n:\n\nThe\xa0System admin\xa0screen will be displayed. Within the\xa0System admin\xa0screen, navigate to\x
ction, within your drop down menu, click\xa0System admin:\n\nThe\xa0System admin\xa0page will be displaye
HighQ Instance in order to create a Legal intake request.\xa0\nAdding a new request\nWithin the dedicated sit
e of a workflow:\n\xa0\n\nAnd the information detailed below is how to set up this workflow.\nWithin the site a
lanage templates\xa0screen is displayed. Within the\xa0Manage templates\xa0screen, navigate to the template
, please click\xa0here.\n\niSheet configuration\nNow the iSheet has been automatically created, you can add fi
added a name, click\xa0the tick to save it:\n\nDetails\nNext you will see the following fields within the\xa0Deta
e original quality/size\n1080p\n720p\n480p\n240p\n\nAnd all video types supported by HTML5 and\xa0MP4 w
de\xa0and copy\xa0it within the chat application to send to other users\n'], 'Breadcrumb_path': ['', '', 'System a
ports against actions, such as organisation and user creation. There are over 20 different system actions which ca
f a document or from subtitle text superimposed on an image.\nHighQ has partnered\xa0with ABBYY to provide
>\xa0Images:\n\nThe\xa0Images library\xa0screen is displayed.\nAdding images to the image library\nThere are
en editing a navigation item, users can translate each navigation label\xa0by clicking on the label and then clicki
content\nBoth sitemap priority and change frequency can be controlled via a DB script, per module. The default
heet source, click\xa0Admin:\n\nWithin admin, navigate to\xa0Data visualisation\xa0>\xa0Multi-iSheet sources
includes being able to:\n\nAccess to edit the form\nAccess to add and amend stylesheets\nAccess to add or am
admin:\n\nThe\xa0List of iSheet templates\xa0screen is displayed. Within this screen, there is a new iSheet calle
t the\xa0site:\n\nWithin this section, new fields will now be displayed:\n\nWhere you can add in extra informat
stem-level pre-defined iSheet called â€˜Site metadata iSheetâ€™.\xa0\nWhen creating or updating each site in 5
cument Automation configuration\nHome page and site navigation configuration\nRe-pointing of data visualisat
ve created the template associations with the Doc Auto Word Plugin, you should only open the templates with M
quickly generate standardised, error-free legal documents using automated Word templates, dramatically reduc
bles in the template.\xa0\nTo place a variable in the template you can drag and drop it into the template or dou
0\n\nEnter a Name for the Condition. In the iSheet View dropdown, choose a view that has the columns you wa
oop in a document, click on Loop.\xa0\n\nHighlight the part of the document that you want to repeat for each iS
ave been renamed\xa0then it will update the template automation to mirror that\nif any of the above have bee
to Preview\nAt any point during the automation of the template, you can generate a preview. To enable the Pre
the templates to a category to enable you to find and organise your templates. Click\xa0Add\xa0to add a new c
ayed:\n\n\xa0The dependency report:\n\nDetailing that the dependencies have been checked and giving you a
n.\nTo add users to the Users blocked from Publisher system group\xa0in your instance, navigate to System\xa0
navigate to your profile dropdown and click\xa0Content hub:\n\nThe content hub will be displayed. Within the c
navigation bar, and click\xa0Manage templates:\n\nThe Manage templates\xa0screen is displayed:\n\nIn this sc
ne following options:\nCreate site\nThe\xa0Create site\xa0option enables you to create a new site using the ter

mplate during the import process via the\xa0Rename\xa0option)\n\nThe template document type must be .hq
\nImport existing site\xa0templates\xa0\nExport\xa0existing site templates\nSet the\xa0Status\xa0of a site\xa0
o\xa0not display a dialog when sharing\xa0option via the \xa0Settings > Default Share Settings\xa0menu, an ad
cked by your email service.\n\nFind the 'Automation engine' profile\nClick on your Profile image, then navigate
tion:\n\nSelect the Show cookie notice to ensure your cookie notice will be displayed, and then enter your cook
nAs of version 5.4, you will find these options stored within\xa0Themes:\nNavigate to your profile dropdown > S
n order to access the Subject access request report, navigate to your profile drop-down and click System admin:
ck More or More actions:\n\nReset password\nChange domain\nAdd to group\nActivate\nDisable\nArchive\n\

the instructions for the fields described below.\nBulk uploading fields\nYou will need to configure your bulk upl
se contact your Account Manager for licensing information and configuration settings. \xa0\n\nSummary\nThe c
nd to ultimately remove access to those files, if necessary\nYou have\xa0more flexibility on where the files are
sent to the user.\nA\xa0confirmation message that the reset password link was sent successfully will be displaye
ort the list of iSheet templates to define the order in which the iSheet templates appear in the drop-down list fo
late form which allows you to make edits to the iSheet configuration prior to saving it as a template:\n\nYou mu
y Integration\nInternal users can be added via HighQ's Active Directory integration. \xa0Contact an Account Ma
ed like any other site group. The primary advantages of a system group are that in a single step:\xa0\n\nMultiple
ss matches it) or the following new field will be displayed:\n\nFrom here, you can either associate the new emai
by default. If you need to share file with external users please contact HighQ Support.\n\nMy files\nExternal att
either click\xa0More\xa0or\xa0More actions:\n\n\nReset password\nChange domain\nAdd to group\nActivat
demand sync\nOn-demand sync allows users to:\n\nSave space on their hard drives\nAccess every file and fold
ser. This is essential for finding out which users are using the most quota.\xa0When nearing this limit it is a good
m the row of an iSheet to see the Generate Document option.\n\nSite wide option\nClick on More Actions in th
address\nThe support email address is a generic email address that enables users to get in touch with a client\'s
sers you want to have view access.\nTo create the auto login link, navigate to your\xa0Profile\xa0>\xa0System a
sations and their users.\xa0This provides the minimum level of access that you are happy for all of your clients to
the system\nNew user with an exception domain\n\n2. Bulk user upload\nThis is used when you want to:\n\nA
0System admin\xa0screen is displayed. Navigate to\xa0System bar, under\xa0System customisation:\n\nThe\xa
nClick\xa0Organisations\xa0under\xa0Users, organisations & groups\xa0to display the\xa0Organisations\xa0scr
dress may be added manually to any organisation. \xa0Many popular exception domains are prepopulated into
mary features:\n\nNew organisations can be added. Typically, when a new user is added to a site and the user's
rd\xa0- The\xa0Reset password?\xa0screen\xa0displays, asking you to confirm this action:\n\t\xa0\n\n\nInitiat
be displayed:\nThe System notices screen is composed of five different sections:\n\nSystem announcement\xa0
\xa0and the date it was last\xa0Accessed.\nAdditionally, you can filter this list via\xa0Filter\xa0>\xa0Advanced
icon at the top of the screen to open the HighQ Home dashboard.\nClick\xa0Add site\xa0in the\xa0Sites\xa0list
ok plugin, without the full My files and HighQ Drive capabilities.\nWithin the\xa0My files\xa0drop down menu, c
ort\xa0screen:\n\nWithin the Content report\xa0screen, you have access to two options:\n\nPublished betwee
port\xa0screen:\n\nWithin the\xa0Organisation report\xa0screen, there are no fields to enter data in or choose
d Reporting > User email/site preference setup\xa0to display the\xa0User email/site preference setup\xa0scree
xa0to view the\xa0Module access audit\xa0screen:\n\nWithin the\xa0Module access audit\xa0screen, you have
a0Login audit\xa0screen, you have access to the following fields:\n\nPerformed between: This field enables you
ing >\xa0Content access audit\xa0to display the\xa0Content access audit\xa0screen:\n\nWithin the\xa0Content
ss audit\xa0to display the\xa0Dashboard access audit\xa0screen:\n\nWithin the\xa0Dashboard access audit\xa0
h as organisation and user creation\nOrganisation report -\xa0view a report on the whole organisation,\xa0inclu
be audit\xa0to display the\xa0Daily mail unsubscribe audit\xa0screen:\n\nIn the\xa0Daily mail\xa0unsubscribe
0Emails\xa0>\xa0Mail generation records audit\xa0to display the\xa0Mail generation records audit\xa0screen:\
g\xa0> Email\xa0>\xa0Email to friend view hits audit\xa0to display the\xa0Email to view hits audit\xa0screen:\
administration\xa0>\xa0Audits and reporting\xa0>\xa0Email\xa0>\xa0Email to friend audit\xa0to display the\xa
parison reports\xa0screen:\n\nIn the\xa0Event/Workshop audit\xa0screen, you have access to the following fie
xa0to display the\xa0Document\xa0library audit\xa0screen:\n\nWithin the\xa0Document library audit\xa0scre
0Microsite and page audit\xa0screen:\n\nWithin the Microsite and page audit\xa0screen, you have access to th
udit\xa0to display the\xa0Event/Workshop audit\xa0screen:\n\nIn the Event/Workshop audit\xa0screen, you h
\xa0Search terms audit\xa0screen:\n\nWithin the Search terms audit\xa0screen, you have access to the followin
stration\xa0> Audits and Reporting > Organisations/Users audit\xa0to display the\xa0Organisation/Users audit\
\xa0audit\xa0screen:\n\nIn\xa0the\xa0User search proxy audit\xa0screen, you have access to the following fiel
ing >\xa0Content import audit\xa0to display the Content import audit screen:\n\nIn the\xa0Content import auc

)Links\xa0audit\xa0screen, you have access to the following fields:\n\nActing organisation: Within this field,\xa0
nt Intelligence, processed, and any resulting Thoughts (extracted provisions and sub-provisions) and Facts (user-a
r Matter intake .\xa0\nAnd as of February 2023, you can associate the Matter intake and Matter management iS
n\n\nAs of February 2023, you can link sites to matters in Legal Tracker; a view is automatically created for each
e creation of a Matter.\nThe Legal Tracker integration manages Legal matter Intake; this handles all steps from r
ts, etc.\nAnother iSheet is created to track invoices for each matter and includes columns for matter number, in
.\nThese columns have no configurable options outside of the common column settings. To create the column, s
evel iSheet which can be used to monitor matter financials. The sync occurs once every 24 hours for both the Da
dow opens:\n\nClick the Select template drop-down to see a list of available iSheet templates:\n\nSelect a temp
d across multiple sites, and\nupdate multiple iSheets in the same way from a central location.\n\nHowever, in m
presence indicator in a user's profile card\nInitiate a call with another user\nInitiate a chat with another user\xa
ices configuration section. At the bottom of this section, ensure that the Enable AI translation with Azure option
ctory with Collaborate.\nIndividual user accounts\nQ:\xa0How can my firm create users in Collaborate after the
In order to add Collaborate panels to a dashboard, there must be a Collaborate instance linked to a Publisher ins
our customers is a key component in providing this access.\xa0\nW3C & WCAG Process\xa0\nWe are proud to l
patibility report is created before\xa0a template is imported.\nThe reports can be saved as\xa0a PDF and used
u need to add content that is the same as on another site\xa0you may import or copy content to the newly-crea
nfiguration that contains users and groups for rapid setup and repeated use\nTransfer a site configuration to a c
tatement one at a time and test before adding the next condition statement.\xa0This will allow you to easily iden
er can access a FileOpen protected file.\nRecommended environments\nTo ensure the best possible user experi
Scroll down to\xa0PDF Documents\n\n\nWithin\xa0PDF documents\xa0you can disable the built-in pdf viewer.\
bidder organisations and a seller organisation, here is a recommended way to configure Q&A roles:\n\nEach bidd
ebpages in Firefox for Android.\nIf you are using Chrome on a mobile device, open the webpage and tap the thr
ing or updating iSheet items, who may choose to suppress an email alert, and must enter a value in the appropri
to:\xa0\n\t\nvary the column width to accommodate the length of the column name, or\nbe aware that part of
o capture as much information as possible about how the iSheet will be used and build the iSheet to meet those
ore in-depth search\xa0results, you will need to press enter and then navigate to the advanced search function, s
n\xa0System Admin who is involved in the matter\n\nTake the following\xa0steps:\n\nMake the non\xa0System
reate a Folder with Write Access\nThe first method is to create a separate folder for these users where they have
would mean that the file is entirely different from the template and a score of 1 would indicate that the file is n
r various common components of the Collaborate instance. Most changes that are made can be previewed befor
e and one or more of these other applications. Ideally, such a user would need only a single login to access all of
a0screen will be displayed:\n\nFrom within the\xa0Insert link\xa0screen, you can link to a(n):\n\nRecent docum
browsers including the latest version of Edge on Windows, the latest two versions of Chrome and Firefox on Wir
and/or approved by your IT department.\n\nBulk downloads with HTML navigation\nAfter performing a bulk do
nvited them\n\n\nThe email invitation was caught in the user\'s spam filter\n\n\nThe user received the email inv
se of the problem and the appropriate solution.\n\nWhile a System Administrator has many more tools at their
:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHighQ remote working tips\nHighQ Drive is a way
mecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\n\n\n\n\nHow to add users to a site and send users an invit
xt UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to add an iSheet reco
:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\n\n\n\nHow to manage and configure the AI
:0001:22ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to archive emails and attachments in C
e 100%Rewind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\
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e00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHighQ remote working tips\nEnco
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ondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nPrevent repetition
ewind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nExpe
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:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to create a bundle of files and include the fi
mecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\n\n\nLearn about the predefined security groups and crea
ndsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to create a tas
e 100%Rewind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\
0:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to create custom site metadata
ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nThis video covers creating a folder and various\xa0f
0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\n\n\n\n\n\n\n\n\nHow to permission a
astClosed CaptionsSettingsFullscreen\xa0\n\n\n\nLearn about sub-tasks and the parent-child relationship betwe
ive00:0000:0001:20ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to create a site from a site t
000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nUsing Workflow rules you can automatically c
UpLive00:0000:0001:17ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to customise the site n
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pLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to design a bespoke form
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stClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHighQ remote working tips\nUse HighQâ€™s My Files feature
:0001:16ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to add, view\xa0and collaboratively e
romecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nAdd, view\xa0and collaboratively edit Microsoft Office
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castClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to enable AI training and assign a classifier to a folder.\
0:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to switch on the HighQ AI engine and assig
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econdsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\n\n\n\n\nHow t
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ondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nImprove data inte
xt UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nEffortlessly share and sav
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econdsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nExperience sean
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ndsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nEasily track and cal

econdsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nKeep on top of y
ive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nAutomatically pause sending ema
):0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nUsing campaigns in HighQ Publisher\n
.ive00:0000:0001:05ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nClient portals in HighQ Publisher
condsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nComparison toolki
pLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nCustomisable options within H
eature\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsF
econdsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nCustomising ther
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sNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nImprove efficiency whe
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nd 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nA look at
) SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nQuickly and ea
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ext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nA look at the people direc
UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nAdding personalisation in Hi
e00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nPublications within HighQ Publishe
ewind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nImpro
)000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nUse cases within HighQ Publisher\nIf yo
UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nA look at the HighQ Publishe
chments\n\n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSetting
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0:0006:08ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nIf you experience video playback issues, pl
:0001:20ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to import a site template.\nRecommen
vind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHighQ D
omecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to\xa0login\xa0as a new user and\xa0set\xa0up yo
SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to create
0:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to create data visualisation charts usi
):0001:46ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to set up a multi-iSheet source for use
romecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nRemove administrative burden and improve efficiency
hromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHighQ remote working tips\nGoogle Suite: Connect yo
condsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nWatch a demo or
econdsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\n\n\nHow to perm
osed CaptionsSettingsFullscreen\xa0\n\n\n\nHighQ remote working tips\nUse our Tasks module to organise you
wind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to
Next UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nAn overview of permiss
ndsNext UpLive00:0000:0001:40ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nAn overview of the c
econdsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nAn overview of t
ndsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nSet highly granular p
n\nVolume 100%Rewind 10 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen
ecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to use redaction in the Files module.\nRecommended a
0:0001:16ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nHow to save as a site as a template.\nReco
DF export\nSet the default appearance of the Tasks page\nRestrict assignees\' ability to edit tasks\nDelete com
to add these folders to\n\nThis functionality is compatible with the latest version of Google Chrome, Microsoft
anisation, domain or user does not exist.\xa0\n\nPlease note that this is currently for the preference emails only
le is triggered or an action is performed\nAutomatically update the list column once a rule is triggered or an acti
er the creation of a list containing multiple tasks and sub-tasks.\xa0\nConfiguring the\xa0rules\nBelow, we have

the iSheets module has been renamed, the iSheets admin link will also be renamed.\n\nFrom this screen, you c
ı.\xa0\nManaging document templates\nTo manage document templates navigate to Admin, then in the\xa0Dc
es:\n\nSelect the iSheets checkbox and then click Save.\n\nThe iSheets module option will only be displayed wh
d the content element to and navigate to the Content elements tab:\n\nClick Add content element to display th
neral screen, next to Site name there is a globe:\n\nClick the globe to display the Translate - <Site name> screen
min\xa0>\xa0Module settings\xa0>\xa0Home:\n\nSet if\xa0the page title is displayed. Click\xa0Save\xa0to save
shboard builder, you can quickly and easily build page layouts with multiple rows and columns without the need
ı toolkits)\nEdit the module navigation (for comparison toolkits)\nEdit the module content elements (for videos,
ed with a date which is the Site start date + 1 month.\nOnce the Next invoice date has been decided, the system
ɔw\xa0is enabled in site admin the site audit and reports functionality is displayed as a Reporting\xa0module in t
ganised fashion.\nThe Q&A admin page is only displayed when the Q&A module has been enabled:\n\nConfigur
lawyers and their corporate advisors\n\n\nThe ability to create a seller group that address more than one organ
lule settings > People. The following screen is displayed:\n\nThe People module lists every user who has been ac
ıt metadata action allows you to add\xa0information about the attached files\xa0for reference, search and visu
\nClick the workflow that\xa0will contain the\xa0new rule, and click Add > New Rule:\n\nThe New rule screen is
rences.\nNumber of lines displayed and width\n\nThe number of lines and width attributes govern how large th
· of characters entered. \xa0By default, the maximum character limit is set to 255.\nDefault value - Any text ente
cord, select the\xa0More actions\xa0icon then\xa0Edit:\n\n\nIf inline edits\xa0are\xa0enabled, then you can do
tem screen, but all of the fields are read-only. From the Details screen, you can choose to edit or delete the item
·name, the type of action taken on the item, the date and time of the action (based on the instance timezone) ar
ka0document.\nCreate\xa0public access\xa0links to questionnaires that can be shared or published on a website
n access the Contract Express environment from the Profile menu.\n\nClick on your profile image, then select G
, we will be using a file metadata iSheet with associated custom metadata, to be used to determine whether a fil
o learn more about workflows, click here\xa0and to learn more about rule building, click here.\n\nPlease note t
Date is selected as the trigger in Workflow. \xa0\nTo do this you will need to add a new rule.\xa0Navigate to\xa
edited for every single report. So,\xa0if you are using countries, then this needs to be done for every country us
xa0Add term.\nWithin the\xa0Add term\xa0screen,\xa0you can add the term name, the description and wheth
̧e items,\xa0as shown below:\xa0\n\nTitle\xa0- This is the title of the page\nStatus\xa0- The status can either\x
,n\nThe\xa0Content Hub\xa0will be displayed:\n\n\nWithin the Content Hub, the\xa0Quick search items search
ɔw have access to the Configure\xa0tab within the\xa0AI Hub section, which displays a list\xa0of AI engines that
te that has AI enabled, as a template, the AI configuration, folder settings and the iSheet column import mapping
ailable for all triggers.\n\nOnce you have selected Add folder as your action, the following fields are displayed:\n
file\nIf you select\xa0Move file\xa0as your action, the following fields are displayed:\n\nEach field is described b
et that contains the column you want to move to a section.\n\nSelect Manage columns then click the name of t
olumns - Add, sort,\xa0move,\xa0edit and delete columns in the iSheet. Add a section\xa0to simplify column\xa
tion. On the Home page, whilst in Edit mode,\xa0\n\nclick the plus icon to add a new section.\n\nThe\xa0Add pa
ser has drafts, the default view will appear along with the Draft items view.\nDraft items view\nThe Draft items
Administrator can navigate to the iSheet, click More actions and select Audit history:\n\nThe audit history wind
this feature, check the box to Enable archiving in the iSheet configuration settings, as per below:\n\nSave an arc
ɔrd locking prevents users from editing an item that another user is in the process of updating.\nFirstly, you mus
r Notifications > Settings page (via the bell icon), which cover new files additions, changes to wiki pages, etc. See
ely upon a triggering event, as a daily digest and/or as a weekly digest. By default, no\xa0checkboxes are selecte
when creating a new iSheet or after an iSheet has been created.\n\nEnabling either the file or folder metadata te
ews in the More actions menu the iSheet:\n\nClick the Sort views button:\n\nThe sort views window appears lis
\nClick the workflow that you want to add the new rule to, and click Add > New Rule:\n\nThe New rule screen is
ne of the created event\nLocation\xa0- the location of the event\nStart date\xa0- the start date and time of the
ı - This is the description of the task\nDue date - This is the due date of the task\nAssignee - This is who the task

ne recipients of the emails\n\n\nFor example, use Cc or Bcc to send a copy to an admin email address that keeps
nnel is Restricted, or Public:\n\nThis determines whether the channel can be viewed by just a restricted group of
you can add a new by clicking New channel. The New channel screen is displayed:\n\nIn this screen, you can ed
hboard, the Respect channel settings option must be ticked at panel level for it to work:\n\nNavigate to the Cor
n those tabs.\n\nDuring the channel creation process, you will have started to create your channel and added in
n, you have access to the following options:\n\nMove section - This option enables you to move your sections ar
certain sites, HighQ has added the System user admin and System config admin roles.\nNote that the System us
sic user role is\xa0an option for corporate legal and government clients only\xa0- this user role is not available f
layed:\n\nTo use groups for permissioning select the\xa0Use groups for permissioning\xa0check box and click\x
not their main focus.\xa0Some firms have built, or are building, dedicated legal project management (LPM) func
e examples of how the platform can help.\xa0\nTeam collaboration and communication\n\nProvide a central or
ns or trial and error when configuring modules and creating site tools.\nOverview\nThe Thomson Reuters Soluti
\nUAT updates start the weekend of the 29th of July 2023,\xa0production deployments take place from the wee
.0 SecondsNext UpLive00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nBring order to
w are the key task fields:\n\nTitle - a free text field which is used to identify tasks in different views and notifica
e, therefore enabling you to standardise and capture the key phases of work and core tasks associated with a le
ner updates start from the 8th of July.\n\nJune 2023 updates\nOverview\nHighQ June 2023 Collaborate update
Live00:0000:0000:00ChromecastClosed CaptionsSettingsFullscreen\xa0\n\n\n\nThe files panel provides admini
vanced sharing restrictions for added security.\nSave documents authored in Docs, Sheets and Slides directly to I
talled.\n\nAdministrative access to your computer may be required in order to install HighQ Drive. \xa0\n\nReq
ds. \xa0\nHighQ Publisher customers will have access to the latest March feature release on their UAT instances
admin\xa0- Changes that affect the configuration of sites\nSystem admin\xa0- Changes that affect the configura
tup which then allows you to manage user\xa0access via your domain rather than through Collaborate.\xa0If yo
t. However, for the security of your data, once Appliance is deployed\xa0HighQ has no access to the\xa0applica
e the appliance, using\xa0the executable installer GUI.\nUpgrading the Appliance\n\nThis requires access to you
irements for certain connectors.\n\nManaging connectors\nEach type of connection is governed by a separate c
Directory user data, with your HighQ sites, without giving HighQ direct access to your system.\n\nHighQ Applia
equirements. As specific requirements for each installation vary, please talk to your HighQ representative for mo
Changes that affect the configuration of the system\nIntegration\xa0- Changes to the system due to an integratio
if it'll be available again in the future.\xa0\nTo customise this message, navigate to your profile drop-down and
Changes that affect the configuration of the system\nIntegration\xa0- Changes to the system due to an integratio
ld panel screen, you will have access to the following fields:\n\nPanel - You can select a different panel from this
d activity\nSearch user profiles and contact information\nUpdate your profile\n\n\nProduct Update for HighQ St
or example, public viewing or viewing based on organisations. One way you can utilise this would be to show diff
adata\xa0and allow your clients to pull the relevant content via their daily or weekly digest emails. Create engag
isplay a screen, which contains the list of people, and additional customisable filter options:\n\nHere, you can se
aiting lists using the one-click registration process meaning you can manage attendees for all events from one pl
mputer, or drag and\xa0drop emails and attachments directly to your sites.\n\nAs of June 2022, if you upload a
Changes that affect the configuration of the system\nIntegration\xa0- Changes to the system due to an integratio
rstand user behaviour so we can provide clients with a better user experience.\xa0\nHow will clients benefit?\xa
date, so that you can start using and benefitting from new features and capabilities, sooner than before.\nFrequ
0What's new in HighQ\xa05.6, to see a live demonstration of the new features and capabilities.\nHighQ's Suppo
nd lastly, please check our Release notes page by clicking on the What's new section in\xa0the Knowledge Centre
oft Teams app (desktop or mobile).\xa0\n\nA HighQ Collaborate account is required in order to use this applicati
of the File or Folder populates the Created by field.\n\n\nModified by and Modified date - The Modified by and
0What's new in HighQ\xa05.5, to see a live demonstration of the new features and capabilities.\nHighQ's Suppo
stly, please check our Release notes page by clicking on the What's new section in\xa0the Knowledge Centre.\n\

ıin>System vocabulary>Redaction vocabulary.\xa0\n\nUse Add to add new terms into the vocabulary listing.\xa(
then scroll down to Site file sharing settings.\n\nThese settings follow exactly the same methodology and same
ıre additional fields that we recommend you also fill:\n\nTitle - Enter a title for the event\nStart date - This is th
u want\xa0to have a number of different feeds, you will need to have a number of different RSS users.\xa0\n\nF
lease notes\xa0carefully and be sure to test out the new features in the\xa0sandbox environment\xa0which wil
ite administrators.\n\n\n\n\n\nCreate sub-tasks\nRecommended audience: End users.\n\n\n\n\n\nMap iSheet
ı0What\'s new in HighQ\xa05.4, to see a live demonstration of the new features and capabilities.\n\nWe\'ve bee
users settings.\nPreference management\nThe Preference Management section is found within the\xa0System
ted contract.\nSimilar to contract deviation analysis, HighQ AI bases\xa0clustering on a deviation score. You can
l a file or complete a task.\xa0\n\nIn Files, click New, then select Placeholder file.\n\n\nYou may also add a placeh
to the Attachments folder in the Files module.\nDue to some unexpected behaviour with the feature after rele
ortals and intranets; leverage our desktop and mobile applications; and much more.\nPlease read through the r
What's new in HighQ\xa05.3, to see a live demonstration of the new features and capabilities.\nDetailed release
edaction in Files\nRecommended audience: Content administrators.\n\n\n\n\n\nCreate a multi-iSheet source\r
ıd providers, including:\xa0OneDrive, Dropbox, Google Drive and any other file sync and share apps you are usir
rnal pages.\n\nThis navigation is a secondary navigation that sits below the entire site navigation. An example o
Add a new folder\nTo add a new folder, navigate to Add > New Folder:\n\nThe Add Folder page is displayed.\n\
tarts. To see the progress, view the downloads option in your browser. If you see that the download is not progr
irectly within the Files module. To edit office online documents, navigate to the Files module, and select your W
Add task\xa0option:\n\nSimilarly, in the Add file and Edit file screens, an\xa0Add new task\xa0option is displaye
ite.\nTo add a task via the files module, navigate to the Add Files screen via Files module > Add > Files > Tasks:\r
n and the group(s) they belong to will also be revealed. Any questions or answers that a user has not looked at v
in Collaborate is beyond the Windows limit?\nHTML index download\nOne method is the HTML navigation dov
sion.\xa0\n\nYou need to be a content admin to be able to use this feature.\n\nThis feature requires a Windows
ick Recent\xa0in the left pane of the File module, below the list of folders.\xa0\n\nOn a tablet device in landscap
al iSheet item, in either grid or form (modal window) formats:\n\nIf you are creating a link to a view, the followi
ı\n\n\nThe system does not remember the \'Load More\' position if this has been used.\xa0\n\n\nAdd a new it
cribed to receive immediate notifications:\n\nWhen adding iSheet items in bulk through the import process, sel
)window and click Save to commit those changes.\n\n\nFor file metadata iSheets, when in the iSheets module, y
page:\n\nThese system-generated fields include the following:\n\nCreated by - The name of the user who crea
l navigate to particular sections within the iSheet record.\n\nIf a section does not contain any columns, it will no
anel\xa0- You can select a different panel from this drop-down menu.\nTitle\xa0- Enter the title of the panel. Yo
ı, navigate to the My profile drop-down menu > Content Hub > Resources > Forms:\n\nClick Add Form to displa
ed material section. In this section you can move the related material by dragging and dropping:\n\nClick Save t
o verify the criteria entered and then click Next. Choose an Application or create and train a new one. Choose ho
visualisation:\n\nThe Insert data visualisation screen is displayed:\n\nIn this screen, you need to select the Site t
nd embedded media, like a YouTube video.\xa0Also, information from other site modules can also be\xa0embe
resentations hosted by\xa0Slideshare\xa0and iPaper documents on\xa0Scribd)\xa0on a page, click\xa0Embed r
ert list\xa0screen:\n\n\nEnter the\xa0Feed\xa0URL\xa0of the RSS feed. This can be obtained in different ways,
ıt is updated, the page will automatically be kept up to date as tasks are completed, contacts are updated or file
nits custom formatting and styles to be added to a page, by a user with the appropriate skills.\xa0This HTML can
e how to create a two-column page with embedded images, descriptive text, and\xa0Lists\xa0of recently updat
ce of content, you can choose to remove the summary content element completely, meaning it is not displayed
Engage with a wide range of audiences (prospect, client and key account) across multiple platforms\nConvey em
ril to June, July to September, October to December).\n\nThis is useful for time-series information, to show hov
ne in the build-up to the Dataroom go-live. HighQ DataRoom has a simple function that allows you to transfer th
access to certain pages, based on how permissions have been configured.\nRead-Only Page View\n\nAs long as

can include links, images, tables and similar features\n\n\nMetadata - The metadata includes who created the
Collaborate as a VDR, follow these steps to create and configure the site:\n\n\nThe System Administrator will
user has access to will be displayed. \xa0The search criteria include:\n\nTopic\nFolder\xa0- any folder that was
xa0http://feeds.bbci.co.uk/news/world/rss.xml\nA static xml file -\xa0Publisher would import the\xa0data fro
main content of the blog post can include links, images, tables and similar features\nMetadata\xa0- The meta
eld and tap Next. If you are unsure how to find your instance URL, you can tap How do I find my instance URL? w
have syntax similar to the image below.\n\n\xa0\nTo edit the fields go to the left of each line and right-click, as
d build document automation templates.\n'], 'Breadcrumb_path': ['', '', 'Apps, plugins and connectors', '', 'Doc
tomation in Word\nDocument Generation from iSheets within Collaborate\n\nIt is easy to automate a templat
010\nAs of Oct 13 2020, Microsoft stopped Office 2010 support and\xa0as a result,\xa0it is probable that syste
date\xa0file\xa0screen:\nFrom this screen, you can obtain a list of all DMS files or you\xa0can delete specific fil

ement. Instances created before this date require a HighQ account, as described below.\n\xa0\n\nResponding t
FA provides extra security\xa0beyond the requirement to enter a password. If 2FA is enabled, account access re
you attempt\xa0to access Collaborate, Collaborate will create a new session. This happens in one of three ways:
h a Google Authenticator, Microsoft Authenticator, or Twilio Authy.\n\nThe HighQ apps can be paired\xa0and u
factor authentication;\xa0and can generate a\xa0passcode\xa0to allow\xa0access.\xa0\xa0\nPairing\xa0with a
., you can tap How do I find my instance URL? which displays information on how to find it:\n\nYou can also lear
or individual teams, users who group content and users who manage approval workflow.\xa0\nEnabling Smart F
ave multiple types of relationships defined, each related to a different file (e.g. as both a parent-child relationshi
\nOnce a change has been made to this page, make sure to hit Save or any changes that were made will not be s
navigation panel on the left. You can also change the size of the left navigation panel by using the icon displayed
\xa0Move/Copy.\xa0Any number of files and subfolders within the same folder can be moved at the same time.
0will not be associated with the copy (except for the filename).\xa0\nAny custom sorting that was applied to the
ilable in My files, including:\n\nCheck In/Check Out\nAdd comments\nCopy links\nShare via email\nAdd tasks\
ewed, converted to PDF, made subject to digital rights management or full-text indexed.\nThe Files module has t
out Collaborate, including:\n\nIn the list of sites available from the top navigation bar:\n\n\n\nIn the user profil
the instance. In addition, based on how that instance of Collaborate has been configured, the user may not be g
wn menu and click\xa0System admin:\n\nThe\xa0System admin\xa0screen will be displayed. Within the\xa0Sys
dashboard\n\nConfiguring default landing pages\nTo configure your default landing pages for your organisation
System Dashboard to your global navigation\nTo add the system dashboard to your global navigation, click on yo

een:\n\n\nPlease note that on smaller screens it will overlay at the top and move down when scrolling\n\nTo ac
of the HighQ system.\n\nApproval templates are available at no additional cost but the premium module, Workf
s\n\nAs of June 2022, you can create an approval workflow that uses\xa0the File Status as a trigger, and does n
nfigure notifications\nIn the Top Navigation Bar there is a profile menu that provides access to various features.
, Online and Push), then click Save.\n\n\nThese defaults apply only to new users; they are not applied to existing
urn to the Dashboard. The Top Navigation Bar has the following features:\n\nA button back to the Dashboard, fr
admin\xa0screen is displayed:\n\nClick\xa0Navigation. The\xa0Navigation\xa0screen is displayed:\n\nWithin th
sites listed first. Sites that have been archived or that are in preparation mode will not be shown.\nTo access a si
rs account.\n\nAccessing the user profile\nYou can access your own profile from the profile Menu on the Top n
Collaborate account..\nUsers requiring a Publisher account can find out how to register and log in\xa0here.\n\
on process. Select\xa0Click here\xa0to display the\xa0Choose a password\xa0screen:\n\nEnter a password for y
a0- Enter the display name of the user here.\nDomain\xa0- Type all or part of a domain name, then select from
emented in the system admin interface. Please click here to find out more.\xa0\n\nThe two key areas are cover
or our law firm clients.\nPlease note that Basic users cannot belong to an external organisation.\n\nThis article
ocuments related to a specific litigation case to be uploaded to a folder, ensuring the user can only see the docum
actly the same as HighQ templates in Workflow.\xa0\xa0For more information please check the main section or
y an existing rule.\n\nThe New rule builder will be displayed:\n\nThe rule builder consists of three\xa0tabs, Det
hen adding workflows.\n\nAdd a new workflow\nTo add a new workflow, click Add > New workflow:\n\nThe Ne
v clicks.\n\nYou can populate a workflow with a set of rules that perform a single required action, or chain toget
\xa0is not as described in this section, please ask your administrator or HighQ representitive about updating you
elect the actions that are triggered once the defined conditions are met. You can define up to ten actions per rul
, both the Files and Tasks modules must be enabled.\nFile status metadata must also be selected in Admin > Fil
dex view:\n\nThe Index view displays a full hierarchical tree of all\xa0files and folders that\xa0you have permissi
te Admin is mobile responsive and can be accessed on smartphones, tablets and desktops.\nAccessing the\xa0A
\nA\xa0dot is used to separate each level in the file and folder tree.\nFolders and files at the same level are inclu
\xa0screen is displayed.\nNavigate to the\xa0Settings\xa0tab and click\xa0Edit custom sort:\n\nThe\xa0Custom

wnload an individual file, simply click on the file title -- if the site has been configured to download files that way
' file.\n\n\n\n\n\nCreating\xa0the bundle\nClick on Index in the menu on the left.\n\nSelect which files you war
 for the new view and click Save:\n\nA copy of the view is added to the Manage views screen.\n\nThe configura
n field to quickly locate a view with either the name or description.\n\n\xa0\nMandatory/required columns\nA
em has auto-saved your record and then you click the x icon to close the current window, the following message
ouble-click in a cell within your iSheet.\xa0\n\nWhen you make your changes any validation you have set up for
o an iSheet item.\n\nFor example, an iSheet might have a Country choice column. If a user selects "United Kingd
ed with each choice option,\n"Matter ID" - a single line text column, and\n"Date" - a date and time column.\n\n
le and folder metadata iSheet edit pages\nView item pages\nFile metadata iSheet document view review panels
ature best suited to your needs:\n\nAdd records directly to an iSheet\xa0(this article) - Share forms to registere
d\xa0Custom site navigation:\n\nAutomatic site navigation is where the modules can be renamed but not move
; not have the right to create blog posts in this\xa0category, the Add post button\xa0will not be displayed.\n\nT
:\xa0My drafts\xa0screen will be displayed:\n\nThis page displays all draft content and includes the following in
 chosen to receive online. (A user can also choose to receive notifications via email).\xa0\n\nWhen new notificat
nts on a particular post. If comments already exist on any blog posts and this checkbox is deselected, the existing
ie Files module:\nWhen you upload a file\xa0that requires approval, the following message will be displayed at t
: speak to your account manager.\n\nWatch our introduction video on workflows:\n\xa0\n\n\n\n\n\n\xa0\n\nA
xa0admin page looks like this:\n\n\nChoose the module(s) that should be enabled on the site. By default, on new
\nSelect up to 10 columns that contain\xa0items relevant to the approval process:\n\nSelect an active approval
it history report\xa0enables you to run a report between a set date range, on all or a specific workflow and rules
 published wiki page.\n\n\nAttachments - Click the Attachments tab to access attachments:\n\n\n\nEither Brow
lt, only the Home wiki page, every top-level page below the Home page, and the full path to the currently viewe
 be used to create content directly in the browser. Besides using the browser as the tool for creating and publishi
 ability to filter by Sites, Content Type and People.\n\nFiltering activity\nActivity can be filtered by\xa0Sites,\xa0
users will have view access to the\xa0Activity\xa0module. This is selected by default.\xa0\xa0\nMicroblogging\x
nodule has been enabled for that site)\nOn the lower right, a list of upcoming events (if the\xa0Events\xa0modu
content in a site, but can relate broadly to the entire site and all of its members.\n\nMicroblogging must be enal
 actions:\n\n\nSending an email concerning site content (and matching the other user's name in the autosugges
umber of private messages shown in the top navigation bar\xa0is only updated when the page is refreshed.\xa0\
out typically have access to the\xa0Q&A module\xa0to ask questions about files\n\nThe\xa0Files\xa0module pro
firm representing the seller or its investment bank is hosting the Collaborate site. The Q&A module allows the bu
 in an auction. Once selected, a site administrator can tag certain organisations as bidders\xa0and manage these
is setting for any scenario where multiple parties need access but should not be aware of each others' existence,
ter the site was created for, that can be done through an announcement. For example, there may be an announc
ndividual piece of content.\xa0\nNotifications\nLiking content triggers\xa0notifications and\xa0you\xa0may ch
nments will be hidden but not deleted.\nAllow PDF export - This setting determines whether or not any of the pa
dule settings > iSheets), and selecting More actions > Manage columns.\xa0\nEdit permissions on a column by cl
heets) and click More actions for the iSheet. \xa0Select Manage permissions:\n\nBy default, Enable permissions
onological order and display each version number, the date and time the version was saved (based on the instan
 and selecting More actions > Manage views.\xa0\nTo edit permissions on a view, click More actions and select I
systems in your organisation using the XML export.\n\n\nFile and folder metadata iSheets may also be exported.
ptional)\n\n\n\n\nCheck your Excel file\nIt is recommended that you check the Excel file to confirm the format
ltiple line text\nChoice\nScore\nNumber\nDate and time\nUser lookup\nHyperlink\nImage\nAttachment\nFile
tion, will either display in a smaller font beneath the column name, or appear in a right slide-in view upon clickin
you are to have to make modifications to your iSheet later, when it may not be so easy to do so.\nAdd a new iSh
e linked to the template, allowing for centralized management of their configuration.\nSaving an iSheet as a ter
e of Collaborate. External users cannot be given the role of System Administrator.\nThe System Admin page can

en a file is shared, then any recipient who does not have a Collaborate account (either a full system account or s
to share files, they can only share files with other Collaborate users.\n\n\nFiles can be shared ad hoc, at any tim
e file and any reply that is sent will go back to that user.\n\nNotice the key features of the email:\n\nThe subject
n adds a General section by default.\xa0If sections are enabled after columns have been added to the iSheet, th
\nThe description will appear on the Add/Edit item and View item screens.\n\nThe new section now appears in
er the name or description.\n\n\xa0\nThis page will display a list of all of the columns for that iSheet.\xa0From h
e available items for selection in the primary iSheet lookup column. If a file or folder metadata iSheet is the look
veen iSheets from a lookup source iSheet. One reason a system admin may need to use this tool is if an end-user
ndard options for use in future iSheet choice columns.\n\n\nA System or Site Admins must enable this feature i
eviously uploaded images.\n\nTo add an image, click Add and Browse to select the desired image file from your
to successfully implement such behaviours, you should use a Choice column to ensure consistent data entry.\n\
\'upgrade\' a current Choice column. Click on Manage Columns in the iSheet and then click on the Choice colum
n\nCalculation columns require no user input; they are automatically populated with the result of the equation
date entered into this column: Date Only and Date & Time. Which format you choose will depend upon the requ
pare the iSheet for alerting. It is advised that you familiarise yourself with these concepts first, before attemptin
is setting allows you to enter the minimum and maximum values that can be entered into the column. Populate
column, click the Add column button at the top of the page:\n\nThis will take you to the Add column page, as s
pie charts, column/bar charts, line, area\xa0and KPI cards to find the best way to visualise your data.\n\n\nDat
value in that column within the iSheet. For example, the 'Billings per matter' charts below are automatically crea
d the Alerter view in order to tell the system which column details should be sent in the alert\nAny choice colum
rmatting, such as bold, italic, and underlined text, as well as create lists and control indentation. You can also ad
records in the iSheet view\xa0in a printer-friendly format.\n\nExport to PDF immediately creates a PDF of the se
arch\nTo run a quick search, enter your search terms in the box and press Enter. If you enter more than one sea
have View permissions to\xa0share iSheet records.\n\nShare one or more records\nShare a single record\nTo
abled for your instance by HighQ support. It can be enabled for all system admins, internal admins,\xa0or restric
re forms to registered users with permission to add records to an internal iSheet.\niSheet form sharing\xa0(this
o configuration options available for this column type, which are explained below.\nSelect lookup\nSelect looku
etadata is useful for tracking additional information about the files in the site. Also, as the number of files in a sit
ced transaction management, real estate portfolio management, monitoring trading positions, employment hub
or Microblog\nSend to... - Display\xa0the\xa0Send to\xa0screen, where you can select a service to send the file
tion will not be applied.\n\n\n\n\n\n\n\n\xa0\nEnabling\xa0document redaction\nA Site administrator can enable
documents, use\xa0Workflow\xa0to manage documents and\xa0create\xa0related tasks;\xa0capture\xa0quest
uestionnaire Warnings\n\n\n\n\nUploading and Testing your Templates\n\n\n\nRepeats\n\n\n\nPunctuation\n\
late\xa0screen will be displayed:\n\n\xa0\nIn the\xa0New document from template\xa0screen,\xa0all of the e
nber of one of the Contract Express system groups, to allow access to Contract\xa0Express templates. See the o
iSheet' to the variables required by\xa0the document template. This allows you to generate a single document,
configurable option\xa0for an Attachment column.\n\nAttaching files\nIn the iSheet add item window, select t
\xa0or iSheets folder.\niSheet attachments\nAs of v5.5, iSheet attachments may be viewed and managed in the
pe\xa0at least three\xa0characters in the search box, all files and subfolders in the current folder that have a na
the Files module.\xa0As each HighQ modules provides different content, the search tool in each module may p
search results related to files.\n\n\nIf you require the legacy search\xa0experience, please ask your HighQ repr
search:\n\n\nAfter performing a search, click Advanced search in the left-hand panel:\n\n\n\nIn the Files modu
ersion of a file or wiki page.\xa0The input field for adding tags is the same for every module\n\n\nA\xa0user wit
A blog post can be added to more than one category, so adding the numbers in brackets\xa0may exceed the tot
rexit\n\n\xa0Content-Type\n\nArticles\nBriefings\nNews\nAnalysis\n\nEvent Type\n\nWebinar\nSeminar\nC
it the metadata, if they have sufficient permissions.\n\n\nAs of version 5.6, you may view system-generated Fil
DRM is applied to a file, some or all of these permissions may be removed and the file may be changed through

change a group's permissions, navigate to More actions > Set group permissions:\n\nThe Set group permissions
up\xa0to display the\xa0New site group\xa0screen:\n\n\n\n\nEnter a name for the new group, and\xa0optiona
\xa0User management:\n\nThe Groups screen is displayed. To associate a system group with the site, within th
)\nOpen the Admin\xa0module, then select Users under\xa0User management:\n\nList of Users\n\nThe\xa0Us
y added themselves.\nOverview\nClick the to\xa0Admin\xa0module, then select\xa0Users\xa0under\xa0User r
n group), which is the automatically generated system group that includes all users from the internal organisatio
\xa0User groups\xa0screen is displayed:\n\n\nWe have introduced a change to manage bounceback emails aut
rganisation groups using the search field, or click Bulk add to select multiple groups, organisations and/or organi
er. One of the two Digital Rights Management options available on the Collaborate platform, authenticating each
- using Sites\xa0as an example. From the\xa0Recent\xa0tab, view your list of accessible sites:\n\n\nTo mark a S
ed search in the Files module\nIn the Files module, click the Filter icon next to the search field and select Advanc
ups of users.\n\nWhen a new iSheet is created, a default view is also created. Each new column is automatically
e data by clicking the column names, and run either quick searches or Advanced\xa0searches.\xa0\nFor file met
submitted\xa0from Contract Express; this is the only way to add a record.\n\nBy default, only site admins have
the HighQ Dashboard.\nRecommended audience:\xa0Site administrators\nIf you experience video playback issu

clients from the lookup source iSheet that have been invited to the event. Another example would be to create a
and Comments - If a user has configured their email alerts\xa0on the Notifications and alerts page to receive no
djust settings in your Contract Express templates to best take advantage of features provided by HigQ.\nLinking
se the answers (variables) as needed.\n\nYou can use the arrows to navigate through the questionnaire and upc
.\n\nTo ensure Contract Express generated documents can be saved in HighQ make sure that the file type is not
browse for a file locally on their computer or drag and drop multiple files into the box provided.\nFile options\n
Automation powered by Contract Express module via your HighQ representative and that it has been activated.
e work.\nContract Express integration requires\xa0access to third-party services for system and site administrat
by Contract Express module via your HighQ representative and that it is activated.\nAlso check that Contract Ex
ough minimising the time spent configuring new sites.\xa0Site templates also encourage the use of site best pra
ite cannot be accessed by any user except for system administrators\nNo emails or other automated communic
except for site logo) mandatory as well.\xa0The site name has a max length of 80 characters and\xa0cannot cont
a0Edit\xa0mode. Scroll down to the bottom of the screen and click\xa0Add panel:\n\nThe\xa0Add panel\xa0scr
n\n\nSystem admin for HighQ Forms\n\n\nSite and iSheet\xa0admin for HighQ Forms\n\n\nWorking with HighQ
isabling HighQ Forms at system admin level\nFrom your profile dropdown, click\xa0System admin:\n\nThe\xa0S
ed data.\n\nIf you do not see the Forms column in the iSheets admin page, or the Enable HighQ Forms option in
rms that contain\xa0up to 2,500 columns have been tested, with negligable impact on performance.\n\nManag
ique)\xa0\nUse the More action option in the section design tab\xa0to apply a field size (33%, 50% or 100%)\xa
only files have been selected to be deleted, the user will receive this confirmation prompt:\n\nClick\xa0Delete\x
age when a link to a file is accessed. For example, the file name in the list of files in the\xa0Files\xa0module,\xa0
e\xa0includes a file extension\xa0(like .docx), that file extension\xa0will be added to the file name, but the file\
it for the authentication process to complete. A message will display; if this does not close after a few seconds\x
signature\nIf at least one eSign service is enabled, the\xa0Send to... Signature\xa0or Send to DocuSign option is
Authorisation\nIf a service is authorised, you can send a document for signing on behalf of the system account. I
rvice to electronically\xa0sign documents.\n\nSend a document for signature\nIf at least one eSign service is en
o determine information such as which currencies or jurisdictions are referred to in the document. You can also
l, default off in every site:\n\nThis enables the engine for your instance, but leaves it switched off\xa0at the site
e AI Hub\xa0automatically uses this mapping to train a new File Classifier. The new file classifier is then available
at you want to use for AI training, then hover over the selected text. Click the context menu icon, and select Tra
Home module that access the AI Hub directly\n\n\nFor most fields,\xa0(Yes/No) and (CLAUSE)\xa0fields are als
nto individual paragraphs for training.\n\n\n\nIf a paragraph is split across two pages, as shown below, select bo

ın be identified out-of-the-box:\nCorporate Consent Agreements\nA consent order is generally a voluntary agre
ıjects can be assigned to a single HighQ site (in version 5.2 onwards). Different types of contract can be held in a
HighQ Support to request this. Once this has been done, the option is visible in AI Hub at System Level and can be
d can be configured.\xa0\n\nEnabling Eigen at System level\n\nThis needs to be completed by someone with a S
the chosen AI service is visible in AI Hub at system level and can be configured.\xa0\nEnabling an AI engine\n\n
n the More Actions icon and choose Manage Columns.\nOn the Manage Columns screen, click Add and choose t
ent, navigate to any site and folder location from the Browse view (list of files), then tap the +\xa0icon, which is i
ıage, and check your emails for your reset password email.\nAs long as you entered the correct email address, y
HighQ Stream\nWe would like to announce the retirement of the HighQ Stream application. The HighQ Stream
ıQ Drive for Windows\xa0\n\n\nAdministrative access on a Windows or macOS computer may be required in or
rporate IP addresses. If Collaborate detects that a user is coming from one of those IP addresses, it will try to au
s required is for the firm to install ADFS 2.0 server within their internal infrastructure in order to allow internal u
ıs, including:\n\nWhere a company supports multiple email prefixes (for example, jsmith@acme.com and john.s
Group profiles allow administrators to pre-define email preferences (on metadata only, not on modules or freque
0Organisations\xa0within\xa0Users, organisations & groups\xa0to display the\xa0Organisations\xa0screen:\n\
rs, organisations & groups\xa0>\xa0Users:\n\nThe\xa0Users\xa0screen details some basic information about th
on.\nStatus - The status of your organisation. You can choose from Active, Archived and Disabled.\nInternal - Wl
matter collaboration and transaction management workspaces is more important than ever to improve the daily
de\nThis section is for administrators to help create and manage the navigation elements.\nWithin your profile
:\n\nThis displays your profile, but please note that there are two different profile views;\nSummary\nThe sumr
be used to share news, updates and thoughts with other site members.\xa0The\xa0Blog\xa0module utilises a r
;s\xa0screen is displayed.\nClick the\xa0Language\xa0drop down menu:\n\nAnd select the language you want t
t the language you want and click\xa0Save. Your changes will be saved.\nSetting your system default language\r
oup\nYou can group questions together into different sections or groups. Click the plus sign:\n\n\xa0\nTo add a
And then click Edit details to edit the details or Edit metadata to edit the metadata etc.\nTo add a new module, c
like is below:\n\n\nPlease note that we have improved Publisher filters to remember user defined filter selecti
admin to create custom CSS styling and apply it to specific panel sections, allowing for greater control of the visu
s to create content and edit other users' content. This option is useful for modules, for example, where anyone i
stem alerts, navigate to your\xa0Profile\xa0>\xa0My preferences:\n\nThen click\xa0Email preferences\xa0in th
ings, conference calls or any other events in the calendar. Create your own event types, comment on and tag ev
es in that category.\n\n\nAn event can be added to more than one category\n\n\n\nThe first day of the week c
ns of each available configuration setting within the admin screen:\n\nTime zone\xa0- The Time zone setting ap
d from HighQ support.\n\nMicroblogging, comments and messages\nThese settings allow you to adjust microbl
ıssigned to you across every site which you are a member of, from the My tasks section.\xa0\nTasks can also be
ent task\nYou can select multiple tasks and change the assignee, change the status, or delete the tasks in one ac
ent audiences and purposes\nset column conditionality to build in business logic in each task\ngroup task fields t
the HighQ Drive application can be installed on Windows and Mac computers. Windows HighQ Drive can be ins
read about:\n\n\nConfiguration for Outlook\n\n\nAttach from HighQ\n\n\nUpload and attach\n\n\nDrag and
t in the future by accessing the Office plugin settings option, the Preferences\xa0tab is displayed by default:\n\n
and Visual Studio 2010 Tools for Office Runtime (VSTOR_Redist). These will automatically be installed if they ar
ıarea in Collaborate.\n\nSecurity options\nIn the Security options tab you have the following options:\n\nIn the
nber in brackets next to the tab name indicates how many files are being uploaded. To add further documents cli
ow shows a number next to it, which indicates\xa0that a new file has been added. Click\xa0this folder to see oth
it will be displayed in the Folders Selected area on the right. To remove the folder and choose another folder,\x
ize is larger the\xa0confirmation window will display and the file will be shared to HighQ.\xa0\nIf you require a
the file to. Rename the file if required and then click OK.\n\nThe file is now added to your My Files area of Colla
ıchments via email:\n\nLarge attachments, which often are too large to be sent or received by Outlook, and whi

:r and the listing will update with the updated folder name in Outlook and Collaborate.\xa0\n\n\nYou can chang
:m\xa0administration > Customise)\nWording (Template change)\nStyling (Template change)\nHighQ Publisher
ase contact\xa0HighQ support.\n\nEnabling office online at system level\nOnce HighQ support has activated thi:
ıg Workspace without any office tools installed on their device. Users have the option to create\xa0new office d
's when opening this window is the Details tab. The fields within the Details\xa0tab\xa0are explained below:\n\r
permissions that apply to that item will be impacted by its new location, as well as by how\xa0file security is cor
t assembly\nDocument assembly must be enabled at system admin level. Navigate to your profile drop-down m
\nTo start, click\xa0More\xa0Actions\xa0for the file\xa0and then\xa0Add version.\n\n\nIf\xa0check in/check ou
version/draft action menu is replaced with the Check out menu.\nNormally, only the user who checked out a file
nissions; they can include columns or records that are in the source iSheet.\n\nImportant note for site admins\n
xa0Add\xa0>\xa0Template:\n\nThe New site template\xa0screen will be displayed:\n\nThis form is identical\xa
contact your account manager for more information.\n\nComparing two similar documents\nSelect the two do
ed on at system admin level, via your drop down menu >\xa0System admin. Navigate to\xa0System settings\xa(
can only follow each other if they are in the same site or they are members of the same organisation.\nTo follow
t is available.\n\nDocumentation\nThis section contains links to articles and videos to help you get the most fro
e mega menu column. Then create a bullet-pointed list of what you want to add, as well as the link and click\xa0
and commenting, use a stripped-down version of the Rich Text Editor.\xa0\n\nAll of the available rich\xa0text fo
the instance, then a user can choose to follow (or stop following) another user in the site\xa0and\xa0send a pri
\xa0instance.\nDomain name -\u202fhttps://platformname.clientname.com/instance\nSubdomain/Resource na
language you want your content to be labelled with, navigate to the content you want to label, for example,\xa(
nd the admin status of a channel (but not its content) can be given to external users.\nFor more information on
llaborate instance:\n\n\nSome HighQ instances have this menu item hidden.\n\nAn email invitation will be sent
To enable specific features, such as filtering by client and matter number, please contact your HighQ support rep
2, etc.). As shown below, results are returned that include the terms documentation or\xa0test:\n\n\nThe imag
ou will have access to different sharing options.\nShare as an email\nBy default, the\xa0Email\xa0tab is selectec
ılti-select or bulk select metadata, which tailors their journey through the system, to show the most relevant inf
have comprehensive task documentation\xa0to help you make the most of the tasks module; see here for mor
\xa0that there is a dedicated page where the user can view and manage the items they have already shared\xa(
xa0\n\nAny previously shared items which are no longer being shared will\xa0not\xa0be listed in the "Shared it
with the Received and Shared files options)\xa0to open the\xa0"Send a file..." option:\n\nThis option allows you
message and microblog methods, where the share has not yet expired.\n\n\xa0This tab is available to all Collab
ers with appropriate Add file or folder permissions may send files directly\xa0to a specific folder, without the ne
nethod. Therefore, it is not possible to bulk upload files using a ZIP file from mobile devices.\n\nThe basics steps
'ou will now use the Public image link when adding to CSS moving forward:\n\n\nPlease note that no migration i
ıin level, please click\xa0here.\n\niSheet configuration\nNow the iSheet has been automatically created, you ca
iSheet and updates both with 2-way sync.\n\nDepending on your requirements, open Legal Tracker to enable th
\xa0Campaigns >\xa0Recipients list:\n\nThe\xa0Recipient lists\xa0screen is displayed. Within the\xa0Recipients
0Modules.\nThe\xa0Modules\xa0screen is displayed:\xa0\n\nWithin the\xa0Modules\xa0screen, edit an existi
the initial report and allowing for more tailored results\n\n\nAs of our June 2023 release, you can now filter by
tirely public (like a\xa0website or blog) or be used to just create\xa0sections of content, or even individual piece
stance of HighQ, you can access the Template Marketplace from Manage templates:\nVia the site drop-down m
tter Map integration needs to be enabled by HighQ support. Please contact your\xa0HighQ representative\xa0tc
\xa0Site admin:\n\nThe\xa0Site admin\xa0screen will be displayed. Within the Site admin\xa0screen, navigate
ıemes\nTo export a theme;\xa0within your instance, navigate to your profile dropdown and click System admin:
ı any other column type is used to make the custom colours, these colours cannot be saved in a template.\n\nS
ıistrators to give specific users the permission to add custom Javascript into a site, rather than give full access to
on. To access the Advanced Customisation, when editing a panel, click\xa0Customise\xa0>\xa0Advanced custon

:le on European Travel restrictions on COVID-19. The metadata you use is \'Countries\' and \'Topic Areas\'. You ca
to your drop down menu and click\xa0System admin:\n\nThe\xa0System admin\xa0section will be displayed. V
n their admin rights, or editor approval rights within Publisher.\nAdditionally, Basic users must be maintained wi
nThe\xa0System admin\xa0screen is displayed. Within the\xa0System admin\xa0screen, navigate to\xa0User ac
g these profiles, determined by the Appliance:\n\nContinuous sync: Any change in the Active Directory profile fi
a0Users, organizations & groups\xa0>\xa0User groups:\n\nThe\xa0User groups\xa0screen is displayed. Within t
d. Within the System admin page, navigate to\xa0System settings\xa0>\xa0Metadata system rules:\n\nThe\xa0
:e\xa0 for legal intake, click\xa0Add Request\xa0in the admin bar:\n\nThe\xa0Add record\xa0screen is displayed
admin, navigate to\xa0Workflow\xa0>\xa0Rule builder:\n\nEach rule for this workflow will be displayed:\n\nWe
: called\xa0Tracker integrated matter intake\xa0(TIMI):\n\nSelect this template to view it.\n\nPlease note, that
elds from Legal Tracker.\nIn your instance, click your profile drop-down menu >\xa0System admin:\n\nThe\xa0S
ails\xa0tab:\n\nGeneral\nThese settings are the general module report settings and can be amended.\n\nStatus
ill be supported and\xa0playback controls will be available and the users will be able to switch to full screen and

an be reported against\xa0\nOrganisation report - All organisation reports,\xa0including all metadata\nModule
the OCR service. This is a premium service - for more information, contact your CSM.\xa0\nThe OCR service is e
: two ways to add images to the image library. Either via\xa0Add images\xa0or\xa0Bulk upload\nAdd images\nT
ng the blue globe icon next to the title:\n\nA list of the active language options in the system will be displayed a
: value for sitemap priority is 0.80 and the\xa0default value for frequency is daily\n\nSEO\n\nEach Publisher inst
:\n\nThe\xa0Multi-iSheet sources\xa0screen is displayed:\n\nHere, you can Add new multi-iSheet sources,\xa0I
nend actions of the form\nAccess to view responses\n\nThe key differences between the two roles, are that:\nF
ed\xa0Site metadata:\n\n\nThis is a pre-defined iSheet which allows you to add new columns or new views. By c
:ion. Once you have added the information to these fields, click\xa0Save\xa0to save your changes.\n\xa0\nNow
.3, a Matter Manager will now have the option to populate these additional custom fields or metadata for the si
:ion and navigation links\nSite and module configuration plus folder structure\nUser groups and permissions\nV
Microsoft Word and not any other word processor.\xa0\nIf you open it with another word processor it will overv
:ing the time and risk associated with manual drafting.\xa0\nYou can make the templates available from any Hig
ıble click on it in the right-hand panel.\xa0In the image below we have dragged the Customer Name variable into
ınt to use in the conditional rule.\nOnce this has been chosen, the Property dropdown populates with all the ass
Sheet record the loop encounters.\xa0\n\n\n\n\nDouble-click on the iSheet View that you want to loop through fr
n deleted\xa0then it will check through the template and highlight in red any items that are\xa0no longer valid\
eview option\xa0you must first\xa0'validate' your template. You don't need to validate again, even if you add m
:ategory.\n\nName - The name of the new site\nTemplate - This is the template you are using to create your nev
report. From here, you can download the report as a pdf by clicking\xa0Download report as PDF\xa0or click\xa0
)admin\xa0from the\xa0user drop-down menu:\n\nThe\xa0System admin\xa0screen will be displayed. Navigat
ontent hub, navigate to\xa0Templates\xa0>\xa0Dashboard templates:\n\nThe\xa0Dashboard\xa0templates\xa
reen, you can\xa0Add/Import\xa0new templates,\xa0Edit\xa0and Export\xa0existing templates. Additionally, y
nplate you have selected.\n\nFor more information on how to create a site, click here.\n\xa0\nEdit details\nIn t

a\n\nOnce you have selected your template, a virus scan will be performed:\n\n\nOnce the scan has\xa0comple
)template\nSet the\xa0Category\xa0of a site template\nExport\xa0the template list\n\nAdding a new site temp
ditional dialog will be shown each time you share a link, allowing you to define permission levels, set an access p
to System admin > User admin.\nType\xa0'Automation' in the Display name field and click Search.\n\nFollow th
:ie notice in the Cookie notice text field.\n\nYou can add images to your cookie notice if desired, by adding code
System admin:\n\nThen navigate to Themes in System customisation:\n\nThe Themes screen is displayed:\n\nS
\n\nIn the System admin screen, on the left-hand side, navigate to Audits & reports > People & organisations > S
nFor the rest of this guide, we will be using More actions, but if you want to do the above actions in bulk, select

load file using the following fields, some of which are mandatory:\xa0\n\nContact ID - This refers to the External
client, in conjunction with HighQ, determines how many locations will be required to store encryption keys (one
hosted for legal and data protection purposes, allowing the files in certain sites to be hosted in a specific jurisdic
ed at the top of the page.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', "Reset a user's password in Pu
or Site admins when they choose to import an iSheet from a template in a site.\nList of iSheet templates\nEdit te
ist give the template a name,\xa0unique from any existing iSheet templates. \xa0After giving the template a nan
nager for more information.\nAdding Users from the System Admin Console\nIt is also possible to for a System
e users can be added to or removed from a site, or\nAn individual user can be added to or removed from multipl
l address with an existing organisation, a new organisation or add as a new exception domain and associate it w
tachments added by a user to group messages are stored here and can be managed. Also, internal users can add
te\nDisable\nArchive\n\nFor the rest of this\xa0guide, we will be using\xa0More actions, but if you want to do t
ler on your HighQ Drive\nSelect whether individual files and folders are available online or offline\nSelect defaul
d way of knowing which users to contact to examine their storage requirements.\xa0\n\n\n\nSite summary repo
e site-wide iSheet to see the Generate Document option.\n\nChanging the name of 'Generate Document'\nA Sy
s internal support team.\n\nFor example: publishersupport@domain.com\n\nEmail alert frequency\nPart of the
admin:\n\nAnd in\xa0System admin, navigate to\xa0Users\xa0under\xa0Users, organisations & groups:\n\nThe
o have. All organisations, when created, get added to this group automatically\xa0and all users associated with t
add multiple users at once\n\nAdding a single user is done via the users section in system administration. It is im
a0System bar\xa0screen is displayed:\nIn this screen, you can drag and drop to change the order of how the me
reen:\nA user group\nIf you want\xa0to provide access to content or a module on a per user basis and break the
Collaborate, but System Administrators are encouraged to add others.\nClick on the Exception domains tab:\n\n
email domain has never been encountered before, the person adding that user will be asked to create the user's
ting a password reset doesn't\xa0automatically reset a user's password. Instead, that\xa0user will receive an em
0- The System announcement\xa0is similar to a\xa0site announcement, except the announcement will be displa
search:\n\nEnter any filtering criteria and click\xa0Search. Any sites matching the search criteria will be displaye
:\n\nThe\xa0Add site\xa0screen is displayed:\n\nEnter a name for the site, and if required select a template. Ac
click\xa0OFF.\n\n\nAnd now, in the\xa0Enable My files sharing\xa0drop down menu, select\xa0ON for all syster
en: This allows you to select a date range to search content for\nShow advanced filters: Clicking Show advanced
from.\xa0For this report you just click Download to excel\xa0to receive information on:\n\nOrganisation Name
n:\n\nIn\xa0the\xa0User email/site preference setup\xa0screen, you have access to the following fields:\n\nTa
access to the following fields:\n\nActing organisation: Here, you can specify an organisation you want the repor
to\xa0specify the date range of the action you want to investigate\nType of actions: Here, you can add whethe
t access audit\xa0screen, you have access to the following fields:\n\nPerformed between: This field allows you t
0screen, you have access to one field:\n\nPerformed between: This is the date range of your report\n\nAddition
uding all metadata\nModule access audit\xa0-\xa0generates a report against module access\xa0by user, organis
audit\xa0screen, you have access to the following fields:\n\nActing organisation: Here, you can specify an orgar
n\nWithin the\xa0Mail generation records audit\xa0screen, you have access to the following fields:\n\nPerform
n\nIn the\xa0Email to friend view hits audit\xa0screen, you have access to the following fields:\n\nSelect produ
a0Email to friend audit\xa0screen:\n\nIn the\xa0Email to friend audit\xa0screen, you have access to the followir
elds:\n\nSelect comparison toolkit: Here, you can select the comparison toolkit you want to perform the audit or
en, you have access to the following fields:\n\nDocument title: Here, you can enter a document title that you w
e following fields:\n\nActing organisation: Here, you can specify an organisation you want the report to be filter
have access to the following fields:\n\nSearch: In this field, you can search for an event/workshop to perform the
ng fields:\n\nActing organisation: Within this field,\xa0you can specify an organisation you want the report to be
xa0screen:\n\nIn the\xa0Organisation/Users audit\xa0screen, you have access to the following fields:\n\nActing
lds:\n\nTarget Organisation: In this field, you\xa0can specify an organisation you want this report to be based or
dit\xa0screen, you have access to the following fields:\n\nSelect product: Here, you can select the modules that

)you can specify which\xa0organisation you want to see, who completed the action for the report to be based o
asserted metadata) are returned to HighQ AI Hub and iSheets.\xa0\n\nDocument Intelligence integration needs
Sheets with a join cloumn, and associate your HighQ site and Legal Tracker matter for easier reference and upda
matter in the Matter management iSheet. This view contains the fields from Legal Tracker that are specific to t
equesting a legal intake to the creation of a matter.\nA requester (a corporate user\xa0or a legal client) can rais
voice amount, invoice date, etc.\nBoth the matter and invoice iSheets contain a column for the matter number,
simply enter a name and save the column. If needed, you may change the column width.\nFile Link\nTo add a fil
ta Insights database and the HighQ iSheet.\n\xa0\nYou can create reports that provide high-level updates on the
plate to deploy from the list.\nAs of August 2022, click the Select views drop-down to see a list of available iShee
most cases\xa0you will find it more useful to deploy templates that are not linked, as you need the flexibility to r
a0\n\n\nPlease note that\xa0you can only make teams calls to users\xa0within the same organisation/tenant\n
\xa0is ON.\xa0\n\nEnglish versions of clauses\xa0will automatically be extracted from\xa0non-English contract
Active Directory\xa0connector is enabled?\nA: After the HighQ Appliance and Active Directory connector are i
stance. You can link instances if you are a system administrator\xa0in both Publisher and Collaborate.\nFirstly, n
be a W3C member, helping to create the WCAG.\xa0Through the W3C process, WCAG provides guidance docum
for reference\xa0if configuration changes are required.\n\nIf you import\xa0a template to a new instance then
ted site.\n\nFor example, you can export a number of tasks from a site as a template, then import to your new
different instance\n\nSite preparation\nIf you are saving a site as a site template for use with future projects, it i
ntify the source of any alert issues should they arise.\nEnsure proper nesting of multiple conditions\nIf your aler
ence, we recommend keeping both Acrobat Reader and the FileOpen plugin\xa0up to date.\xa0\nThis includes:
\n\nEnsure that the latest version of Adobe Acrobat Reader\xa0(http://get.adobe.com/reader/)\xa0and the File
der organisation will have:\n\t\nOne or more users with Ask-Question rights\nAt least one user with Submit-Qu
ee dots in the top-right corner, then select Add to Home screen.\n\n\xa0\n\xa0\n\xa0\n\xa0\n'], 'Breadcrumb_
ate Choice column (or columns).\nIn order to successfully deploy iSheet alerts, all of the following steps must be
the column name may not display\n\n\n\nAs an alternative to long column names, give each column a short na
requirements.\nCreate the iSheet and configure its settings, enabling any needed features.\nAdd columns to th
shown below:\nEnter your search criteria, for example, 'Employment law' and press enter to perform the search
Admin a\xa0Site Administrator of\xa0the site\nThe non\xa0System Admin should then enable password prote
e been given the ability to add files.\n\nSet up the site to have, at a minimum, folder-level security.\n\nPreferab
early identical (or possibly identical).\nYou can use this score to decide if a contract should be reviewed in more
re they are applied.\xa0If a default setting is changed is can be reverted back to the system default value by usin
those applications, with Collaborate acting as the gatekeeper.\nOverview\nThere are three principal steps to in
ent\nSite\nModule\nFile/folder\nBlog post\nBlog category\nTask\nTask list\nEvent category\nEvent\nPerson\
ndows and macOS, the latest two major versions of Safari on macOS and iOS, and the latest version of Chrome o
wnload with HTML navigation, if you unzip\xa0the file and click\xa0on the HTML file (index.html), the following
vitation but overlooked it or deleted it\n\n\nThe user was added to the site, but no invitation was sent\n\n\nW
disposal for resolving this situation, a Site Administrator can act as the first-line responder and gather informati
to synchronise personal files for offline use quickly, safely and securely but without the need for a VPN. Gain qu
tation email.\nRecommended audience: Site administrators\nIf you experience video playback issues, please cle
rd from any rich text editor on the platform, drill down into chart data and edit an iSheet record inline.\nRecom
Hub from the Admin area of your site.\nRecommended audience: Site administrators\nIf you experience video
Outlook and save them to the platform.\nRecommended audience:\xa0End users\nIf you experience video playb
n\n\n\n\n\n\n\nHow to associate a HighQ site with a Contract Express template.\nRecommended audience: Sit
How to associate your Word template with data in your iSheets.\nRecommended audience: End users\nIf you ex
nd bring any project/use case to life faster with the ability to import an Excel spreadsheet and automatically cre
duce time to value and bring any project/use case to life faster with the ability to import an Excel spreadsheet ar
w to automatically delete a file using a date trigger.\nRecommended audience:\xa0Site administrators\nIf you e

ɪurage team members to share ideas and opinions with one another in HighQâ€™s open, online environment. Us
cations and email alerts.\nRecommended audience:\xa0End users\nIf you experience video playback issues, ple
a0plugin to your HighQ instance.\nRecommended audience:\xa0End users\nIf you experience video playback iss
of work and remove user frustration with our new edit Contract Express Questionnaires feature for Basic Users
rience smoother and more efficient browsing with the new Remove Empty Categories Feature.\xa0\nHelping sit
a0\n\n\n\nHow to copy emails and attachments in Outlook and save a version of them to the platform.\nRecom
le metadata, all within the Files module.\nRecommended audience:\xa0Site administrators\nIf you experience v
te your own site group.\nRecommended audience: Site administrators\nIf you experience video playback issues
k that has a date dependency on another\xa0task.\nRecommended audience:\xa0End users\nIf you experience
n\nHow to create conditions in your Word template using data from an iSheet.\nRecommended audience: End
for matter management.\nRecommended audience: System administrators\nIf you experience video playback i
older settings.\nRecommended\xa0audience:\xa0End users\nIf you experience video playback issues, please cle
nd configure multiple home dashboards.\nRecommended audience: Site administrators\nIf you experience vide
een tasks.\nRecommended audience: End users\nIf you experience video playback issues, please clear your brow
template.\nRecommended audience:\xa0System administrators\nIf you experience video playback issues, pleas
create folders, sub-folders and automatically move documents to these folders when the selected trigger conditi
avigation bar and add links to modules or individual content items.\nRecommended audience:\xa0Site administ
ta iSheet and apply it to your tasks module.\nRecommended audience:\xa0Site administrators\nIf you experienc
Sheet.\nRecommended audience: Site administrators\nIf you experience video playback issues, please clear you
n with HighQ Forms.\nRecommended audience: Site Administrator\nIf you experience video playback issues, ple
o multiple recipients using DocuSign.\nRecommended audience:\xa0End users\nIf you experience video playbac
to send large files with advanced permissions, full digital rights management, and an audit trail.\nIf you experier
dit Microsoft Office documents in G Suite.\nRecommended audience:\xa0End users\nIf you experience video pla
documents online\nRecommended audience:\xa0End users\nIf you experience video playback issues, please cle
hboards\nRecommended audience: System & Site Administrators\nIf you experience video playback issues, plea
nRecommended audience:\xa0Site and system administrators\nIf you experience video playback issues, please
n it to a folder.\nRecommended audience:\xa0Site and system administrators\nIf you experience video playback
nRecommended Audience: System & Site Administrators\nIf you experience video playback issues, please clear
low to enable or disable HighQ Forms\nRecommended Audience: System Admin\nIf you experience video playb
o enable the Contract Express integration at system level.\nRecommended audience: System administrators\nIf
with our new eSignature tracking feature for file panels and KPI data visualisation panels.\nRecommended audie
n metadata from the AI Hub and display it in an iSheet.\nRecommended audience:\xa0Site administrators\nIf yo
nded audience:\xa0System administrators\nIf you experience video playback issues, please clear your browser c
single DocuSign envelope?\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'E
grity, rectify errors in a timely manner and free up storage space with the new restore and delete feature in files
e documents between your Google Workspace and HighQ environments with the new Google add-on feature.\x
ed to navigate to specific sites to access contact information with the New HighQ People Panel feature for custor
s integration between HighQ and Legal Tracker with the new matter linking feature\nRecommended audience: S
gh selected HighQ feature release highlights from Q2 2023\nRecommended Audience: All Users\nIf you experier
rate and Publisher with a single user account, manage user profiles, organisations, groups and perform a search
nless integration between HighQ and Legal Tracker with the new matter linking feature\xa0\nProviding consister
oducing the new HighQ Doc Auto site feature, enabling System admins to automatically create a new HIghQ Doc
ationships between documents with the new HighQ File Relationships Feature\nRecommended audience: Syste
nships between documents with the new HighQ File Relationships Feature\nRecommended audience: System &
legal professionals create user friendly forms with little to no code.\nRecommended audience: System/Site adm
vith the new Todays Date Feature for iSheets we are delighted to also introduce Advanced Search improvements
culate timespans of matters, contract renewals and more with our new iSheets Todayâ€™s Date feature - provid

our online content with HighQ Publisherâ€™s new Auto-Archive feature, removing administrative burden for co
ails to specific users when hard bouncebacks occur with the new HighQ Publisher Bounceback feature\nRecomm
\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Vid
\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Vi
its in HighQ Publisher\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Bread
lighQ Publisher\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_
ullscreen\xa0\n\n\n\nHighQ Publisherâ€™s new Default Permissions for Snippets feature will provide peace of
nes in HighQ Publisher\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Brea
ove the user journey and save time when creating emails for campaigns with the introduction of Campaign Type
en carrying out audit reports on content with the new remove system metadata feature from HighQ Publisher â€
ew Hide Feature Title for Dashboards release, has very much been designed with the no and low code Publisher
knowledge management in HighQ Publisher\nIf you experience video playback issues, please clear your browse
asily add online video conferencing links to events with HighQ Publisherâ€™s new Online Events feature\nRecon
Publisher\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path
ctory in HighQ Publisher\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Bre
ghQ Publisher\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_
r\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', '\
ve your userâ€™s journey with the new save filters feature in HighQ Publisher, creating a seamless experience f
ou experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos',
er highlight releases of Q2, 2023\nIf you experience video playback issues, please clear your browser cache\n\n\
sFullscreen\xa0\n\n\n\nStreamline document intake with HighQâ€™s new Workflow feature for iSheets that en
how to create a workflow.\nRecommended audience:\xa0Site administrators\nIf you experience video playback
ease clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'How to use the Files inbox'], 'Relat
nded audience:\xa0System administrators\nIf you experience video playback issues, please clear your browser c
Drive allows you to securely access files from your instance of HighQ Collaborate. You can view, sync, manage an
our profile.\nRecommended audience:\xa0First time users\nIf you experience video playback issues, please clea
iSheet column mappings between questions in a Contract Express template and columns in an iSheet.\nRecomm
ng data within a multi-iSheet source.\nRecommended audience: Site administrators\nIf you experience video pl
in data visualisation charts.\nRecommended audience: Site administrators\nIf you experience video playback is
in the approval process with the new One Click Approval Feature from HighQ.\xa0\nProviding legal professional
our Google account in HighQ to collaborate as a team on Google Docs, Sheets and Slides that are saved simultan
\xa0how the Doc Auto Plugin works in Word.\n\n\xa0\nRecommended audience:\xa0All users (note - any user
nission content in the Files module using site groups.\nRecommended audience: Site, content and folder admini
r to-do list.\xa0 It's ideal for planning your time and co-ordinating progress on projects with other members of t
o preview your template before uploading it to the platform.\nRecommended audience:\xa0End users\nIf you e
sion settings for URLs\xa0in navigational menus\nRecommended Audience: Site Admin\nIf you experience video
offline approval via email feature\nRecommended audience: System\xa0Administrator\nIf you experience video
the reordering feature for system and email preferences\nRecommended audience: System\xa0Administrator\n
preferences metadata and numerous campaigns using AND or OR relationships\nRecommended audience: Site
\xa0\n\n\n\nSet highly granular preferences metadata and numerous campaigns using AND or OR relationships
audience: Content administrators\nIf you experience video playback issues, please clear your browser cache\n\
ommended audience:\xa0System administrators\nIf you experience video playback issues, please clear your bro
pleted tasks\xa0\nAdd and configure Lists\nAdd custom statuses\nManage task templates\n\n\nYou can also a
Edge, Firefox and Safari.\n\nPlease note that this functionality is not compatible with Windows Internet Explore
. E.g. Daily, weekly, monthly and the alerter services\n\nTo access the Bounceback management section, naviga
ion is performed\n\nThe following task metadata iSheet fields can be updated from an Update iSheet record act
detailed how to build a rule to\xa0automatically create a task list and add tasks to it.\nNavigate to\xa0Site adm

an create a new iSheet or import iSheets from a template, or import from an Excel file:\n\nIn site Admin for iShe
ɔcument automation section, select\xa0HighQ templates.\n\nClick Add template to create your first document t
ıen a minimum of one iSheet has been created on the site.\n\n\nThere are two conditions that control a userâ€
e Select content element screen.\n\nAnd select the Navigation content element:\n\nClick Add to add the conte
:\n\nIn the Translate - <Site name> screen, you can enter each translation for your site name for each language:
ɛ your changes.\nClick\xa0Home\xa0to display the home module:\n\nThe\xa0Home\xa0module is a single page
for complicated tables or any code.\xa0\n\nAll existing home pages will be automatically migrated to the new c
, publications and events)\n\nTo give a user module administrator status, navigate to your profile dropdown and
ı will automatically move this to the Last invoice date field and a new Next invoice date will be auto-populated w
the standard site navigation.\n\nReports\nThe type of reports are shown below:\n\nMost of the reports can be
ing the Q&A module\nThe Q&A administrative page displays a read-only view of the Q&A permissions granted t
isation, e.g., the client, their lawyers and their corporate advisors\n\n\n\nFor the purposes of Q&A, a bidder or
dded to the site and is grouped by organisation. The administrative page is used to configure the fields of informa
alisation across the site.\n\nThe Update file attachment metadata\xa0rule action is available only if:\n\na file m
; displayed:\n\n\nIf you intend to update an existing rule, click the name of the rule instead of New rule.\n\nWh
ıe textbox will appear in the input form when adding an item. There are no restrictions on the amount of text th
ered into this field will automatically be displayed when a new record is created. This text can be edited or remo
ouble click on text or selection values and edit the value directly. Other values must be edited as shown below.\r
ı (if you have the correct permissions) or print or export the item to .pdf - via More actions:\n\n\nAt the bottom
nd the IP address of the user when the action was taken.\n\nAdministrators may click a\xa0Modified records or
e, but retain access options for full control.\n\nHighQ Doc Auto Public Access powered by Contract Express\xa0u
o to Contract Express.\n\nYou can view Contact Express admin options, and access the library of templates crea
le should be attached to a custom email, task\xa0or both.\nNavigate to the\xa0Rule builder\xa0within your site,
hat it is only possible to create automation rules for templates that exist within the site.\n\nAdding a new rule to
0Admin\xa0>\xa0Workflows\xa0> and then click Add > New Rule\xa0\n\nThe\xa0New rule\xa0window\xa0will
ed etc.\n\nSelect report to edit details\xa0- Here, you need to search the metadata node e.g. country you want
er the term is active or archived. Once you have entered the details, click\xa0Add.\n\nThe new details will then
a0be\xa0Active (it can be viewed) or Archived (it cannot be viewed)\nPublished date\xa0- You can select the da
box and options\xa0enables you to filter all content by specific items for quick and\xa0easy access\n\n\nHere,
: are available within the system. This lets you choose which AI engine(s) you\xa0want\xa0to enable within this s
g will be included in the template.\nImporting a Site template ZIP with AI enabled\nWhen importing an exportec
\nEach field is described below:\n\nFolder name - This is the name of the folder. Depending on the trigger, you
below:\n\nMove to - Click Choose... to select a folder. When this action is triggered, the file will be moved to the
he column you want to move.\n\nUnder Additional column settings, select the desired section from the drop-do
0management.\nManage views - Add, sort, edit and delete views.\nManage permissions - manage iSheet perm
anel\xa0window displays, choose\xa0Data visualisation.\n\nThe\xa0Add panel - Data visualisation\xa0window c
view lists all of your saved draft items. The system generated Status field indicates if the draft was automatically
ow will display a reverse-chronological list of actions taken on the iSheet. \xa0Each audit entry row includes the
hive\nTo create an archive file, navigate to the iSheet configuration page by clicking Admin and selecting iSheets
it enable this feature by selecting the Enable record locking checkbox within the iSheet\xa0configuration setting
the Online notifications\xa0page for more information.\nUsers with access to an iSheet may subscribe to\xa0In
d and you will not receive any email alerts.\nSecond, below the subscription frequency option there may be one
emplate will result in the following changes to a standard iSheet:\n\niSheet level permissions cannot be customi
ting all the views created for the iSheet. Drag and drop the views to rearrange them in the desired order. Click A
; displayed:\n\n\nIf you intend to update an existing rule, click that rule instead of clicking New rule.\n\nWhen c
event\nEnd date\xa0- the end date and time of the event\nCategory\xa0- the category, or categories,\xa0of th
is assigned to\nPriority - This is the priority of the task\nList - The list field allows you to select an already existin

s a record of custom emails sent from your site.\n\n\nEmail content - This is the content of the email\nAttachm
f users, or by anyone accessing the channel ('Public').\nIf Public is selected, click Save to save your changes.\nIf R
it the name of the new channel; click\xa0the pencil icon:\n\nEnter\xa0the new name for the channel\xa0and th
ntent metadata tab, when adding a new channel:\n\nIn this tab, select which pieces of metadata related content
all the details, selected the relevant metadata and chosen the channel permissions and then clicked Next. The A
nd change the order of the sections in your dashboard\n\n\n\nColumn chooser - The column chooser enables yo
er admin and System config admin roles can both be assigned to a single user and further combined with the 'Cr
or our law firm clients.\nPlease note that Basic users cannot belong to an external organisation.\n\nThis article
a0Save. To enable individual permissioning, deselect the\xa0Use groups for permissioning\xa0check box and cli
tions with a team of professional legal project managers, while other\xa0firms have taken the methodology rou
nline repository for project collaboration\nUse the Files module for document storage, sharing and collaboration
on Template marketplace is a hub for templates that you can use to create custom sites quickly and with a minir
ekend of the 5th of August\nThere are no HighQ Publisher updates this month.\nFeature release highlights this r
o complex projects with the new Manage Columns feature for Tasks Hierarchy view from Thomson Reuters High
tions\nTask ID - a unique incremental value. Tasks may have duplicate titles, so the ID is useful for identifying sp
gal matter. Smaller groups of repetitive tasks can also be templated, forming building blocks for bigger matters.\
s will be applied to customer-facing sandbox/UAT instances over the weekend of the 3rd/4th of June, with prod
istrators with the ability to quickly and easily provide access to site files to users\nRecommended audience:\xa0
HighQ.\nOpen HighQ documents in Docs, Sheets and Slides.\xa0\n\n\n\n\n\xa0\nInstall the\xa0HighQ Add-on\n
uirements\nCurrently, the HighQ Drive application can be installed on Windows and Mac computers. macOS Hig
from the 25th February\xa02023 with production deployments being applied to customer instances from the 1
tion of the system\nIntegration\xa0- Changes to the system due to an integration with another Thomson Reute
u have a group of users that are all brand new to Collaborate or to the organisation, you can add these users qu
tion.\nNormally, when HighQ Appliance is first deployed, it is pre-configured as specified with\xa0your HighQ A
r server or DMZ and cannot be performed via the client web interface.\n\n\nDownload the upgrade from the li
connector. You can purchase Collaborate and Publisher connectors\xa0that permit:\n\nActive Directory integrat
nce is deployed remotely\xa0by HighQ Professional Services. Talk to your\xa0HighQ Account Manager if you hav
ore information.\n\nCore technical requirements\nHighQ Appliance is a server component, on which all integrat
on with another Thomson Reuters product that you may have to pay for\nOn request\xa0- Beta features that\xa
click\xa0System admin:\n\nThe\xa0System admin\xa0screen will be displayed. Within the\xa0System admin\xa
on with another Thomson Reuters product that you may have to pay for\nOn request\xa0- Beta features that\xa
drop-down menu.\nTitle - Enter the title of the panel. You can hide the title by selecting the Hide title checkbox
tream\nWe would like to announce the retirement of the HighQ Stream application. The HighQ Stream applicati
erent content for logged-in users versus non-logged-in (public) users.\n\n\nPanel - You can select a different pa
ging content by integrating rich media sources from the platform and facilitate discussions around content with t
earch for people, filter their name by the letter it begins with, or filter by job title, department, organisation and
ace. You can easily:\n\nCreate and manage different types of events\xa0\nCreate dynamic delegate lists to allo
file that already exists in the target folder, then the upload will follow site settings and either:\n\nCreate\xa0a c
on with another Thomson Reuters product that you may have to pay for\nOn request\xa0- Beta features that\xa
0\nPendo lets us add messaging and guidance to HighQ in the form of welcome tours, new user onboarding gui
ent releases ensure we deliver a better user experience and higher quality product.\xa0By focusing on fewer ite
rt Team will contact existing customers\xa0in the coming weeks to let you know about your scheduled update t
.\n\n\n\n"], 'Breadcrumb_path': ['', '', "What's new?", '', 'Version 5.6 On-demand Webinar'], 'Related_materials
on.\nTo find out how the HighQ platform can help your business, visit this page for further details and to book a
Modified date are populated by the last user to either make changes to the File or Folder in the files module or
rt Team will contact existing customers\xa0in the coming weeks to let you know about your scheduled update t
\xa0\n\n\n\n"], 'Breadcrumb_path': ['', '', "What's new?", '', 'Version 5.5 On-demand Webinar'], 'Related_materi

0 Use the More actions option against each term and you can choose to\xa0Remove them if they are not require
structure as the My files settings. The options are as below:\n\nEnable Sites file sharing - This can be set to OFF
e event\'s start date\nEnd date - This is the event\'s end date\nCategory - This will categorise the event\n\nAdd
Please note that as of our June 23 release, we now support the latest version. This will not impact any existing fe
l be available in a few weeks. You're also invited to watch the on-demand\xa0webinar\xa0What's new in HighQ
t columns in Contract Express\nRecommended audience: Site administrators.\n\n\n\n\n\nCreate multiple home
en experimenting with the layout of our release notes and would love to hear your feedback. Click\xa0here\xa0t
n admin\xa0screen. To get there, navigate to your profile drop down menu and click\xa0System admin:\n\nThe S
adjust the acceptable deviation to reflect changes that are typical in your workflow. You may organise clustered
older file in My Files.\n\nThe Add\xa0Placeholder file screen is displayed:\xa0\n\nEnter the name of the Placeho
ase, we have partially reverted it as of version 5.4.2 and have stopped the automatic migration of attachments t
elease notes carefully and be sure to test out the new features in the sandbox environment which will be availab
e notes and other changes\nWorkflow\n\nWorkflow rules are now included in solution templates. This means th
nRecommended audience: Site administrators.\n\n\n\n\n\nData visualisation from a multi-iSheet source\nReco
ng:\n\nEditing word documents within the iOS app\nWithin this new version, HighQ Drive will be natively integra
f why you might want to use this would be if you have a specific area or topic that contains numerous pages.\n\n
\nThe Add folder page lets users enter details about the folder they are creating.\n\nThe user creating the folder
essing you may pause it and then resume it at a later time.\xa0\nPause\n\nResume\n\n'], 'Breadcrumb_path': [
ord document. Click More actions > Open in... > Word Online.\nAdditionally, you can access this menu option fro
d. These options permit the user to create a new task and associate the selected file with a task.\xa0More detai
n\nClick Add to display the Add task screen:\n\nWhere you can add your new task.\nFor an existing file, a task ca
will be shown in bold text.\nTo view more details about a question and take any action on that question that is a
wnload, described\xa0here. The site files are saved in the same\xa0folder as\xa0an\xa0HTML file that shows\xa0
s computer with the following specifications:\n\nOperating System: Windows 7 and above or macOS.\nMicrosof
be mode:\n\nRecent file activity display\nRecent file activity\xa0shows a list of\xa0files that may be sorted by N
ng configuration options are available:\n\nIf you are creating a link to an item, the following configuration optio
em\n\n\n\nDelete one or more existing items\n\n\n\nExport the items currently in view. \xa0Users may export
lect Suppress email alert\xa0from the notification bell icon to not send\xa0email alerts, or select\xa0Send now t
you may click the file name to view the file in the viewer and edit the metadata from the panel beside the viewe
ted the item. This is a user lookup column.\nCreated date - The date and time when the item was created. This i
t be displayed at all.\nIf a group of columns is conditioned on the value of another column and all of those colur
u can hide the title by selecting the\xa0Hide title\xa0checkbox.\nSource\xa0- Select the source, e.g. multiple in
y the New form screen:\n\nWithin this screen, you will have access to the following fields and options:\n\nStatu
o save your changes.\n'], 'Breadcrumb_path': ['', '', 'Working with content', '', 'Re-order related materials inside p
w many tags to suggest - the default is five but a System Admin can choose more or fewer tags. Read and accep
that you want to populate the information from, the Source of the information, e.g. Tasks or iSheets. Then you ca
dded\xa0in a page, such as a list of files.\nThere are more advanced ways to embed content from external sourc
media:\n\nThe\xa0Embed media dialogue\xa0screen is displayed:\n\nWithin this screen, paste the embed code
depending on the source\nOptionally, enter a\xa0Title\xa0for the RSS feed. Alternatively, if the RSS feed itself c
s are added. This is known as the\xa0Lists\xa0feature. You can use this feature\xa0to show, for example,\xa0a t
now be directly edited, including the adding stylesheets. The edited HTML must be valid. To revert to the regula
ted content on a Collaborate site.\nCreating a table\nTo create a table, click\xa0Table:\n\nThe\xa0Table Propert
at all.\nEvents content elements\nTo edit the\xa0content elements for an event, click More actions for the eve
motion and show personality\nBuild trust\nComplements all other content channels and strategies\nDemonstrat
w a trend or measure has changed over time. It avoids manually creating a separate text value column for each t
hose files from your network or computer into the dataroom:\nClick the files tab:\n\nTo recreate your structure
you have access to the page you will see the read-only view of that page by default. The read-only view of a pag

blog post, when it was last edited, any tags applied and the categories\xa0to which the blog post is associated.\r
create a new site, giving the site an appropriate name and enabling the Files module, but disabling the People m
s made the scope of the question\nFile\xa0- any file that was made the scope of the question\nStatus\xa0- Draft
n a\xa0xml file stored within the Publisher instance document library\xa0\n\nWe recommend using\xa0a live fe
lata shown includes who created the event when it was last edited, any tags applied and the categor(ies) the blo
hich displays information on how to find it:\n\nYou can also learn about HighQ Drive -\xa0tap\xa0What is HighC
shown in the image below. Choose Edit Field.\xa0\n\nThe Field window displays.\n\nThe field name needs to b
uto - Velocity manual'], 'Related_materials': ['https://knowledge.highq.com/help/apps-plugins-and-connectors/
e and add Velocity Merge fields to a Word document - to find out more read our Document automation manual\
ns running this version of their Office suite have not received any further updates,\xa0leaving them vulnerable t
es.\nList existing DMS files\n\nIn the Existing DMS files section\xa0is a link to an Excel file. Click Download file\x

o a site invitation\n\nWhen you have\xa0an account created in Collaborate for the first time, you will receive ar
quires information from two separate 'factors', the first that is only known by the user (the password), and a sec
\n\nYou are presented with a login page and successfully enter your\xa0login information.\nYou have enabled\
sed for two-factor authentication;\xa0and can either generate a\xa0passcode\xa0or\xa0a notification on your p
n app\nIf you have not yet logged in, open a web browser on a computer.\xa0You need to perform four\xa0step
n about HighQ Drive -\xa0tap\xa0What is HighQ Drive?:\n\nSwipe left\xa0or tap Next to display more informati
olders at System Level\nAt a system level, Smart folders are enabled by default however it can be switched off i
p and as a duplicate of another file)\n\nDoc Auto Contract Express automatically creates a Doc Auto Parent/Chil
aved.\nFile and Folder Permissions\n\nChoose the level at which permissions will be set in the Files module. Thi
d below when hovering over the edge of the panel.\xa0\n\n\n\nA list of files and subfolders in the currently sele
\nSelect destination folder\nYou see a list of folders. Select the destination folder\xa0for the move action.\n\nT
e files and folders in the source location will not be applied when the files are copied.\xa0\nOnly the most recen
nWho\'s Reviewed\n\nWith file sharing enabled, My files has\xa0additional features. Including:\n\nThe Receive
these key features, many of which can be enabled or disabled:\xa0\n\nLimit access to individual folders and files
le menu, via My Files or My Tasks:\n\n\n\nWhen lists of sites are shown, such as when inserting a link to a file fr
given access to the Dashboard.\n\n\n\nAs of our April release, we have introduced customisable system dashboa
tem admin\xa0screen, navigate to the new\xa0System dashboards\xa0button and click:\n\nThe new\xa0System
ns and system groups, navigate to\xa0your profile drop down menu and click\xa0System admin:\n\nThe\xa0Syst
our profile drop down menu, and click\xa0System admin:\n\nThe\xa0System Admin\xa0screen is displayed. Wit

commodate this change there is a small amount of white space at the top of the screen, however, it is importan
flow, is required in order to be able to set up data driven approvals\n\nUse cases\n\nContract Lifecycle Manage
ot need a metadata iSheet.\n\nPlease note that file approvals hook into the workflow approval process to enabl
. To access the notifications configuration page, click your user profile picture and navigate to Settings to display
g users who have already set up their notification settings.\n\n'], 'Breadcrumb_path': ['', '', 'System administratio
om any location\nUniversal search\nUser Profile Menu\nDirect Messages\n\n\nNot all instances of Collaborate
is screen, you can either create, edit or add new menu items.\nAdd menu item\nTo add a menu item, navigate t
te, click the site you wish to view\xa0and to favourite a site, click on the star next to it. (Sites that have already b
avigation bar of any page via your account image. Select\xa0My profile.\n\nTo access another user's profile, clic
nThomson Reuters accounts enable users to have a seamless authentication process between Thomson Reuters
our account.\n\nYou must agree to the terms and conditions to activate your account.\xa0Additionally, you can
the list. Alternatively, select a domain from in the left pane to add it directly to the text box.\nEmail address\xa0
ed using the following process. The process should be followed in this sequence:\xa0\n\n\nRun the Collaborate
describes how to set up\xa0the Basic user role and the standard permissions that a Basic user can\xa0access.\nS
nents they have uploaded and not files or folders uploaded by other users.\nAttorney-client privilege with the in-
n building workflow rules.\n\nOpen the Rule builder\nThe Rule builder in the Admin module allows you to build
ails, Triggers\xa0and Actions.\nDetails tab\nThe details tab consists of three fields:\xa0Name, Description and St
w workflow screen is displayed:\n\nEnter the name and description of your workflow, and click Save. The new w
ther multiple rules that will perform a series of actions for a more complete and refined workflow.\n\nPreparing
r instance.\n\nExample video - Using\xa0the File\xa0trigger\nWatch our video on using workflows with, for exa
le.\nSelect an Action\nMany different actions are available:\n\nThe actions\xa0in the list change, and are appro
es:\n\n\nDocument review components\nDocument review features the following components:\nDocument re
ion to\xa0access in the Files module library.\n\nIf auto-numbering has been enabled for the site, then a referen
dmin\xa0module\n\n\n\nThe\xa0Admin\xa0module is available to users who have the Site Admin\xa0role or a
uded with the same sequence\n\n\nThe top-level folder is not numbered.\n\n\nThe first folder under the top-le
n Folder Sort\xa0screen will be displayed.\n\n\nThe sorting screen\n\n\nWithin this screen, users can drag and d

-- or click Download\xa0from within the file actions menu.)\n\nThe bulk download option must be enabled by a
nt to add to the bundle, then navigate to\xa0Actions > Create bundle:\n\nThe Create bundle screen gives you op
tion of the cloned view is copied to the new view, however\xa0the new view does not inherit any status as a De
s a view can unintentionally hide a mandatory/required column, please ensure the view\xa0contains all mandato
e will be displayed:\n\nClick Save to keep the auto-saved draft or discard the draft by clicking Discard. Clicking th
the particular cell is still applied. If you do enter any incorrect characters an error message will display to explai
lom", the iSheet will display a "County" picklist.\xa0If a user selects "United States" or "Australia", the iSheet ins
A view of the file metadata iSheet is configured to display these columns along with the file column, and the "Cl
s\n\nSections do not appear and have no impact on iSheet views, which are always displayed in table format.\n
d users with permission to add records to an internal iSheet.\niSheet form sharing - Share forms to external use
ed around, the top navigation bar is connected and will reflect the enabled modules. The custom site navigation
he creation of each blog post involves three required steps, plus additional options that can be configured:\n\n\
formation:\n\nTitle\xa0- This is the title of the content\nModule\xa0- This is the module the content belongs to
tions are available, the number of new notifications are shown in the Notifications button:\n\nAnd within the lis
g comments will be hidden but not deleted\nAllow PDF export - This setting determines whether or not blog pos
the top of the page:\n\nAll pending files are located via\xa0My profile\xa0>\xa0Approval workflow:\n\n\nWhile
A site administrator can build a workflow; however any site user can trigger rules, be assigned a task and receive
v sites, the\xa0Files\xa0and People module will be enabled and all users/groups will be given access to the Files\
template from the drop-down list:\n\n\nApprovals must be active in the Files module for this rule to trigger; op
s, and all or chosen actions as well.\nEnter your audit search criteria and click\xa0Submit. The report will display
se your computer for the file you want to attach or drag and drop the file into the area. Click Save to save your a
d page will be displayed in the left navigation. The currently viewed page is underlined. For simple browsing of th
ing the content, what differentiates a wiki from other types of content (be it a Word document or a blog post) is
)Content type\xa0and\xa0People\xa0when\xa0using the\xa0Filter\xa0option:\n\nFilter by site\nActivity can be
a0 - This setting determines whether microblogging is enabled for the site. If a Site Administrator does not want
ule has been enabled)\n\nThe\xa0Activity\xa0module for a site shows\xa0the same information that is displayed
bled on your instance of Collaborate.\nMicroblogging can be configured so that\xa0some of the features discuss
t list of users in the Send Email form). \xa0(The\xa0Send via email\xa0feature will not be displayed\xa0for any si
\nYou can only message or chat with users of sites where you are also a member. You cannot\xa0message anyo
ovides a good example of how comments can be used.\nAdd a comment\nTo add a comment, navigate to\xa0M
uyer to submit questions to the seller in a controlled and secure manner and allows the seller to respond and at
e bidders in other ways.\nThe special bidder\xa0site tools that are available in Collaborate make it possible for b
, for example, multiple bidders in an auction. Once selected, a site administrator can tag\xa0organisations as bid
cement that the site content will be unavailable for a period of time or that the Site administrator will be on vaca
oose to receive a notification (via email or online) when either:\n\nanother user likes content you authored\nar
ages of a wiki can be exported to PDF. Please note, that a page and some or all of its child pages can be included
icking More actions and selecting Edit permissions: \xa0\n\nBy default, every column inherits the permission se
is not checked, meaning all users who have access to the site can access the iSheet.\n\nCheck the box to Enable
ce time zone), and the username of the version author.\n\nTo view a specific version, click More actions and sel
Edit permissions for a view:\n\nAccess to all users is checked, as all views are available to all users with view acc
.\n\nEach view of an iSheet includes an Export option, which can be accessed from the iSheet view under More a
will import correctly.\n\nUp to 50 columns and 500 rows may be imported. The maximum file size is 15 MB.\n\n
link\nFolder link\niSheet link\nLookup\nJoin\nCalculation\nAuto-increment\n\n'], 'Breadcrumb_path': ['', '', 'Sit
g the question mark icon. See Field descriptions in the Creating an iSheet article.\nInline:\n\nSlide-in:\n\nThe de
eet\nSelect Admin, then iSheets under Module settings.\nFrom the iSheet admin area, click the Add drop-down
nplate preserves the following features of the source iSheet:\n\nThe main configuration of the iSheet\nAll colum
be accessed from the User Profile menu in the Top navigation bar:\n\nOnly System Administrators will see the S

self-registered account) will be required to register.\nRegistration steps\nFirst, the intended recipient will receiv
ne, not only as part of an existing site.\nFiles are shared by individual users to other individuals.\n\nSecure file tr
t line, which may have been modified from the default. Typically this includes the name of the person who share
en all existing columns will be added to the General section by default, as shown above.\xa0\nThe\xa0General s
the Manage columns page. Each section name is a link to an Edit section screen. Click on the linked section nam
here you can click on the More actions icon for the column you wish to delete and then click Delete.\n\nYou will
up source iSheet, then any file or folder permissions applied will be respected. Users will never have access to a
r reports being unable to delete a particular iSheet item, and there is no other reason other than that item is bei
n the Admin module.\nTo add\xa0values from a saved list, the admin\xa0requires access to the site and\xa0iShe
hard drive.\n\nOnce the image file has been virus checked click Add.\xa0\n\n\nOnce loaded to the image librar
n\nTo add numerical values to a choice column, you can define it as a\xa0score column. These values may be ma
n. Change the Column Type to Score as shown below.\xa0\n\nIn addition to the standard choice options, you m
configured by an admin and performed against the value of number columns in a single iSheet record.\nSelect A
uirements of your use case. By default, the format is set to Date Only.\n\nDate format\nThis setting will allow yo
g Date Based alerts.\nHere are the key steps required to set up an iSheet alert:\n\nSelect\xa0Enable sheet alert
both fields in order to create a permitted range.\nSelect decimal places\nYou can set the number of decimal pla
seen below.\n\nThe Add column page is split into three sections:\n\nName and type - This is where you will nam
ta visualisation is a premium feature. Contact your account manager for more information.\n\nAdd a data visual
ated as part of the same KPI chart, with a separate measure for each distinct matter number in the 'matter ID' co
ns you want users to select for their email preferences must have Include within alert preferences checked on t
ld hyperlinks to text and insert images. Click\xa0Post\xa0to submit your\xa0comment\xa0or\xa0Cancel\xa0to ca
elected iSheet view,\n\n\nThe print-friendly format shows the iSheet name and View name, along with the rows
rch term in the quick search box, items that include any of those terms will be listed in the search results, which
share a single record, click\xa0More actions next to the record and select Share.\n\nThe Share\xa0window oper
ted to a selection of admins. Please contact HighQ support to discuss and enable iSheet form sharing.\nSystem a
article) - Share forms to external users, using the standard system iSheet form design.\nHighQ Forms - Create c
up allows you to define the pool of users you can select from. The following options are available:\n\nAll System
e grows and the number of branches in the folder tree increases, it becomes harder to locate files through simp
s, insurance claims tracking solutions, out-of-office and expense solutions, and much more.\n\n\nSpreadsheet c
to.\xa0This is covered in more detail here\nOpen in... - Open the file in an online editor\nEdit details - Edit the
redaction in Files admin:\nClick\xa0Admin in the navigation bar, then select Files under Module settings.\n\nSe
ionnaire\xa0input and output in\xa0iSheets\xa0to control and audit your data and processes.\n\nPlease visit th
n\n\nCompanies House\n\n\n\nTemplate Suites\n\n\n\nTemplate Suite Viewer\n\n\n\n\xa0\n'], 'Breadcrumb_
xisting templates you have permission to view are displayed.\n\nPlease note that if you have many templates, yo
verview for more information.\n\n\n\n\nTo add a new template to the site, navigate to\xa0Admin, within a site
or a series of documents, from iSheet records.\n\nYou can also store information generated by Contract Express
he type of upload (default or custom location or image) then click Browse to access your computer and select th
Files module.\xa0Open the Files module, then click Attachments.\n\nAttachments are organised into folders, u
me that matches the search text are shown.\n\nThe match must occur at the beginning of a word, for example,
provide different options. Please check the help provided for that module. Some guidance for many types of sear
esentative to disable \'search using APIs\'.\nIf your instance uses the legacy search interface (shown below), plea
ule search box, click Filter > Advanced search:\n\n\nAdvanced search window\nIn most cases, when accessed fr
h edit rights regarding content has the ability to add new tags\xa0or delete existing tags from\xa0content - but\
al number of unique blog posts.) Click on a category to filter the list of blogs shown in the middle to just ones in
onference\nLunch and Learn\n\nWhat can you do with Metadata in Publisher?\xa0\nStructure of a dashboard\n
e status columns, such as approval template status (approved, rejected or awaiting approval), Contract Express s
the addition of uneditable watermarks.\nThere are two separate (DRM) options available in Collaborate, which

- screen is displayed:\n\nHere, each module is displayed and the permissions granted for each module. The File
ally enter a group description.\xa0If another site is available on your instance, you can copy folder and file permi
e Groups screen, navigate to Add > System group:\n\nThe Add system group screen is displayed, listing every no
ers\xa0screen\xa0lists all of the site users\xa0grouped by organisation (shown alphabetically);\xa0users within a
management:\n\nThe user management\xa0section of the\xa0Admin\xa0module provides settings\xa0for users
n.\n\nTypes of system groups\nThere are three types of System Groups, each of which is indicated with a differ
omatically as a proactive preventative method to stop sending spam emails to users that don't exist. By automa
sation groups and add them to the list of people who can view the comparison toolkit.\xa0\nThe list of organisa
n open and print command with the Collaborate server. When permission is granted, the FileOpen Viewer displa
site\xa0as a favourite,\xa0click the star icon.\xa0The star will change to yellow.\nAn item that is marked with the
ed search.\n\nAs of March 2023, you can select either the Files and folders tab or the iSheet attachments tab:\n
/ added to this default view unless otherwise specified in the column configuration.\n\nAdd and configure views
adata iSheets,\xa0click the file name to view the file in the viewer directly from the iSheets module. Click on the
permission to view Output iSheets; however, an admin can grant permission for other users to view an Output i
ues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Create KPI cards in the Dashb

a list of countries and related information in the lookup source iSheet, then reference that country data in one o
otifications when there are comments or changes made to content involving that user, they will receive email ale
Dynamic tables for use in a site template\nAs of April 2023, select the 'dynamic site' option to use the same Co
date or edit your answers.\n\nThe progress bar will always be full at this stage, as the questionnaire has been co
\xa0blacklisted under System admin, File, File types.\n\nFrom a Doc Auto panel on the Home page\nIf a Doc Au
nThe Add File page lets the user enter details about the file and control how the file will display to other users.\n
.\nAlso check that Contract Express is enabled at on your instance (at the system admin level).\n\nAs of the Sept
ors.\xa0This allows admins to upload templates, set up access to the service for users, and allows users to access
press is enabled at on your instance (at the system admin level), and that the Contract Express licence file has be
ctices that have been developed by Collaborate experts.\nA site template can determine almost every aspect of
ations will emanate from an archived site\nA system administrator can access an archived site only by running a
tain the following characters: \\ / : * ? " < > |.\nGlobe icon\xa0-\xa0The globe icon is displayed next to fields wh
reen is displayed. Within the\xa0Add panel\xa0screen, you now have the option to select\xa0Doc template:\n\n
Q Forms\n\n\nTips and tricks\xa0for HighQ Forms\n\n\nUsing a HighQ Form in Microsoft Teams\n\n\n\n\n\xa0
System Admin\xa0screen is displayed. In the\xa0System Admin\xa0screen, open\xa0System settings\xa0in the l
the Edit page, check that HighQ Forms is Enabled in System settings.\n\nScroll down and select Enable HighQ Fo
ging HighQ Forms\nOpen iSheet settings in the Admin module.\nClick More actions for the iSheet, then select Ma
0to all fields in a section\xa0\nRemember to Preview\xa0changes before you make them public\xa0\n\t\nPrevi
xa0to confirm deletion of the files.\nConfirming deletion of folders\nIf the user is deleting a folder, the confirma
a link to a file in Recent Activity or in an email alert can be configured either to download the file directly or disp
xa0will not be of that type. Therefore, including a reference to \'Agreement.docx\' in an Excel file will cause the
xa0please read the points listed below.\xa0\n\n\nYou are viewing the document using an application (or a versio
available. Select one or more files, or a folder, then open the\xa0Action menu (either at the top of the page for
If a service is NOT authorised, a user can still send a document but must have their own eSigning service account
abled within a site, a Send to option is available in the Files action menu for each file:\n\nClick\xa0Send to see\x
train the HighQ AI engine to classify new document types as well as train folders.\n\nAccess to the AI Hub\xa0in
level.\n\nThis allows\xa0you to have more control over which files from which site are sent to which AI engine.
as a classification type across the whole HighQ instance (unless you create a \'Private\' classifier, which is only u
in AI.\n\nAs the custom clause is based on the selected paragragh;\xa0please highlight the entire\xa0paragraph
o created\xa0so you can:\n\ncheck if the field exists in the document, which allows you to create views or trigge
oth halves as a single paragraph.\n\n\n\nIf a document contains text formatted in a table, select only the paragra

ement worked out between two or more parties to a dispute (such as bankruptcy or divorce) that can be enforc
set of folders in a HighQ site - the AI Hub can send the files to the designated\xa0Kira AI project so that the Kira
e configured.\xa0\n\nEnabling Leverton at System level\n\nThis needs to be completed by someone with a Syst
System Admin role.\xa0\n\nTo use the Eigen AI, a system administrator must first enable it at the system level. N
This requires System Admin permissions.\xa0\n\nTo add an AI engine that uses\xa0the HighQ generic connector
o add a single column or to import multiple columns.\nSingle column\nIf you selected to add a single column th
in the top of the screen for iOS and shown as a floating action button for Android.\xa0Tap Scan Document:\xa0\
ou will receive the following email:\n\nClick please click here to display the Set your password page again. Now
application, currently available on macOS, iOS and Android, will progressively be removed from application mar
der to install HighQ Drive. \xa0\n\nSyncing files\nThe time required to sync a file varies depending on the versio
tomatically log the user in using their Windows session via ADFS (Active Directory Federation Services), or simila
sers within their own corporate network to be able to authenticate against the active directory via the ADFS 2.0
smith@acme.com), that are aliases for the same person\nWhere a company supports many regional and one glo
ency) for the users that are applied to the profile.\nExternal ID\xa0-\xa0This ID is linked to your active directory
nFor more information on editing an organisations details, click\xa0here.\nAdding organisations\nTo add a new
e users currently in the system - Name and email, Organisation, Status, Invited date and Last login date:\n\nAdd
hen selected, the Internal checkbox automatically adds this group to the Internal organisation's organisation gro
use for all users of our products.\nWith the new unified platform, you can move seamlessly from thought leade
picture menu, navigate to\xa0System admin:\n\nWithin the\xa0System admin\xa0screen, navigate to\xa0Syste
nary displays basic user information including Name, Organisation, Location, Email Address, Avatar, Organisation
ich text editor, making it possible to include attachments, links and images and\xa0with the comment and reply
o use.\nClick\xa0Save\xa0to save your changes.\nFor example, the\xa0General\xa0screen in French looks like:\
nAs a user, you can set your system language preference in your\xa0Profile\xa0>\xa0My preferences:\n\nThe\xa
few question groups. The question group names can be changed by clicking the current name, displaying a new
lick Add module:\n\nAnd a drop-down list is displayed, select Events.\nEvents module\nThe events module look
ons when reviewing articles. This means that when a user filters to view certain content, after browsing for and
al and functional aspects of the platform. \xa0\n\nPanel types\nEach panel type is described in detail in its own
n the content management team may revise content created by someone else.\nIn a Closed editorial environme
e left hand pane:\n\nThe\xa0Email\xa0preferences\xa0screen is displayed (this is split into multiple screenshots
ents and subscribe via RSS or iCalendar feeds.\nThe Dashboard includes a list of all of the upcoming events from
an be adjusted in\xa0Events module settings.\n\nUpcoming Events\nThe right panel shows a list of upcoming ev
plies only to the Events\xa0module of this site and is used\xa0for synchronising events to an Outlook Calendar c
ogging service and message options:\n\n\nFor more information see Microblogging, the Activity stream, File co
viewed in the Events module or on your smartphone.\nSee below for more information about these options.\nI
tion\n\n\xa0\n\n\n\xa0\nManaging columns in the Hierarchy view\nYou can add and remove columns in the Hi
together for better user experience\nset permissions to restrict access to certain groups\nsearch and filter task
talled on Windows versions 7 through 11 (32-bit and 64-bit). For Windows machines, the application also requir
drop\n\n\nFile email\n\n\nAutomatic upload\n\n\n\n\nShare and Upload in Microsoft Office\n\n\nSecure file
The settings on this tab govern how attachments added to emails will be handled by default. Depending on how
e not found.\n\nThe Office plugin can be used only by internal Collaborate users. External users who have limite
Accessible by options, you can set\xa0the security levels for\xa0accessing the document:\n\nAnyone with the li
ick Browse.\nSecurity options can be used, as described\xa0in the\xa0Attach from HighQ\xa0page.\n\nIn the Up
er items in the folder and a preview of the new file.\n\nThe new file added will also be updated in the same fold
a0use the red cross.\n\nAn icon will now display against your email in Outlook to indicate\xa0this has been uplo
confirmation window before automatically sending attachments this will display if you check the last highlighted
borate in the chosen folder and site selected in the previous Upload location window.\n\nSave and View\nOnce
ch can severely degrade the performance of (or even crash) Outlook, can be shared via email without regard to

e the name of the folder in Collaborate by using the More actions option and choose Edit details.\n\nThis will op
(via System\xa0administration > System\xa0settings or LSTVProperties $Client name and $Product Name)\n\n']
s feature at the instance level, it must be enabled at system level by a system administrator. As a system adminis
ocuments using Workspace integration or they can edit existing documents in the file module. Other users can j
nName (required):\xa0A user can change the folder name by replacing the text in this field\nDescription:\xa0A u
nfigured for the site.\xa0\n\n\n\n\n\n\n\xa0\nSite-Level Security\xa0-\xa0If permissions are set up at the site leve
enu and click\xa0System admin. In\xa0the System admin\xa0screen, navigate to\xa0System settings\xa0and se
ut\xa0has been enabled for the site, the\xa0Add version\xa0option will not be displayed, but instead the user m
can check it back in (or cancel the check out), although a Site or Content Administrator can cancel a check out i
A custom view can include any column that is available in the source iSheet, even if the user only has permission
a0to the\xa0new site form, except here you will enter the new\xa0name of the new template.\nEnter the details
cuments you want to compare, using the checkbox next to the names of each document:\n\nAnd click Actions >
0and search for\xa0Enable Impersonation:\n\n\nPlease note that this setting is set to OFF as default\n\nOnce yo
another user, access their profile via the search functionality or click their name in a post or update\xa0and in t
m HighQ.\nProduct Updates\nA Product Updates section contains information about HighQ updates and release
0Add.\xa0\nNavigate back to the list of containers and click More actions\xa0next to the container you originally
ormatting options have not been enabled in every instance of Collaborate. If an instance does not have an option
vate message to them:\n\nClick\xa0Send a message\xa0to display the\xa0New message\xa0screen:\n\nClick\xa
ame\u202f-\u202fhttps:/platformname.clientname.com/instance\nContext name\u202f-\u202fhttps://platform
0Content, and click the\xa0Content\xa0tab:\nSelect the language from the options available to you.\xa0When y
channels, please view the articles below.\n'], 'Breadcrumb_path': ['', '', 'Getting started', '', 'Publisher channel ov
to the email address on record for that Collaborate instance, inviting the user to HighQ Hub. Click on the link in
resentative and check that Search using APIs is turned on in System configuration.\nIn addition, it is possible to
e above is using the OR search; as Enter was pressed when searching.\n\n\nThere may be a delay before you ca
d:\n\nEnter, the recipients' email address, a subject and an optional message. Click\xa0Send\xa0to share via em
ormation for that user.\n\nOrdering of system and email preferences\n\n\n\nAs of version 5.7, we have introdu
e details:\n\nManaging tasks\nWorking with different task views\nCustomise task metadata\nManaging task nc
0(Shared Items), and also a page where the user can view all of the items shared with them\xa0(Received Items)
ems" tab. If those items have not been deleted,\xa0however, they will be listed in\xa0My files\xa0and the infor
u to quickly and securely share a single file with one or more people, regardless of whether those people have Co
borate users, both internal and external, as an internal user may share files and folders with external users.\n\nT
ed for any action from an admin.\n\nThe site Inbox is only visible to\xa0site or content admins; the Inbox is disp
to upload multiple files or folders are:\n\nCreate a ZIP file that contains all of the files and folders to be upload
is needed as we have ensured backward compatibility. This enables all images already used within CSS to remain
n add fields from Legal Tracker.\nIn your instance, click your profile drop-down menu >\xa0System admin:\n\nT
ne integration, then open system admin\xa0in HighQ to enable legal matter intake, matter management, or both
list\xa0screen, click\xa0Add list:\n\nThe\xa0New recipient list\xa0screen is displayed:\n\nHere, you can give th
ng Publication or create a new one and scroll down to\xa0Content settings\xa0within the\xa0Details\xa0tab:\n\
Status, Organisation or Group.\xa0\nTo filter by Status, click the\xa0Status\xa0drop down and select either\xa0
s of content and\xa0profiles.\xa0\xa0\nThe system will be configured with a default SEO setting which all conte
enu:\n\nThen click\xa0Template Marketplace\xa0in the\xa0Manage templates\xa0screen:\n\nAlternatively, cli
request this. Once this has been done, the available Practical Law Matter Maps will be visible at System level\n
to\xa0User management\xa0>\xa0Users:\n\n\xa0\nThe\xa0Users\xa0screen is displayed, listing all users withi
\n\nThe\xa0System admin\xa0screen is displayed. Within the\xa0System admin\xa0screen, navigate to\xa0Sys
etting the custom colours\nTo set your custom colours;\xa0when editing your dashboard, click\xa0More actions
all users.\n\nPlease note that for these permissions to take effect, you need to contact HighQ support and have
nisation:\n\nThe\xa0Advanced customisation\xa0screen will be displayed. Within the\xa0Advanced customisati

ın tag this article with all\xa0European Countries, as it applies to all of those countries and under Topics you can
Vithin the system admin section, navigate to\xa0Customize:\n\nThe\xa0Customize\xa0screen will be displayed.
thin your collaborate instance and NOT the publisher instance.\n\nBasic users in Publisher\nTo view the basic us
dmin\xa0>\xa0Add users\xa0>\xa0Bulk import:\n\nThe\xa0Import users\xa0screen will be displayed:\nIn the\xa
eld will automatically be changed in Publisher\nOne-off sync: This is\xa0a new forced sync at the beginning of th
the\xa0User groups\xa0screen, you will see a new group called\xa0System reports administrator:\n\nUsers who
System rules\xa0page is displayed:\n\nTo edit a specific rule, click the pencil icon next to that rule:\n\nThe\xa0I
d:\n\nWithin this screen there are several sections and fields that must be filled in before creating the Legal inta
will go through each of the relevant rules for this workflow.\n\nPlease note, for each of these rules, if they do r
within this template, the iSheet we configured previously is already linked. Meaning any changes committed the
System admin\xa0screen is displayed. Navigate to iSheet admin in the left-hand side panel:\n\nThe list of sheet t
; â€"\xa0Active (This means it\xa0is available to be\xa0viewed) or Archive (this means it is not\xa0available to b
picture in picture display.\xa0\nAdditional information\nThe system supports adaptive bit rate, which means th

access - Module access broken down by user, organisation or specific role\nUser report -\xa0All user reports inc
enabled on an individual site by enabling the feature within the\xa0site administration section.\xa0\nOnce enabl
The add images functionality enables you to upload single or multiple files from your device. Click\xa0Add image
nd you can add a new version title and tooltip for the label, in another language:\n\nAs the workflow describes,
tance has\xa0site-wide SEO settings - configurable by request\nSEO options are also available per-page, per-moc
Edit\xa0or\xa0Remove\xa0existing multi-iSheet sources, and also check on the\xa0Status,\xa0Last modified by\
Form administrators:\n\nHave all rights to all forms\nCan edit the stylesheets behind them.\nCannot create a ne
default, there is a view that can be utilised to display all of the metadata of sites.\n\nClick the\xa0Site metadata\
you can navigate to\xa0Manage\xa0sites:\n\nAnd view this information displayed for each site (if applicable):\n
te. Once the additional fields have been populated, these details will be visible within\xa0the Manage sites\xa0p
Workflow, including triggers and actions\nHighQ AI engine configuration\n\n\nSome items cannot be saved. For
write document properties which is where your associations have been saved.\xa0\n\n\nImportant -\xa0if\xa0D
hQ site, trigger the creation of a document automatically within a workflow, kick off an automated review proce
o the template.\n\nRepeat this process for all the variables you need in order to automate the template.\xa0\n/
sociated columns from the iSheet view. Choose a column from the Property dropdown and then select a\xa0logi
om the right-hand panel.\n\n\nWhen you have placed the loop in the template it will look like this:\n\nRememb
n\nHow to Validate\nTo validate your template simply click on Validate. Validation will be performed and a mes
ore automation, but it is advisable that you validate often to ensure the validity of any changes.\nOnce you've va
v site\nDescription - This is a description of the site\nModules - This dropdown contains a predefined selection c
)Export\xa0to continue exporting the template.\n\nThis will automatically download the list of site templates in
e to\xa0Users, organisations & groups\xa0>\xa0User groups:\n\nThe\xa0User groups\xa0screen is displayed, cli
ı0screen will be displayed:\n\nWithin the\xa0Dashboard templates\xa0screen, you can\xa0Add\xa0and\xa0Imp
ou can click the name of the template on the list\xa0to view its\xa0configuration and click on the star icon to ad
the\xa0More actions\xa0dropdown,\xa0click\xa0Edit details\xa0to edit the details of the template.\xa0\n\nThe

eted, click\xa0Continue.\xa0\nCompatibility report\nThe\xa0Import template Compatibility report\xa0will be di
plate\nTo add a new site template, click\xa0Add\xa0>\xa0Template:\n\nThe\xa0New site template\xa0screen is
password and set a time limit on link accessibility.\xa0\xa0\n\xa0\n\u200b\n'], 'Breadcrumb_path': ['', '', 'System
e processes below to change the email user name or domain.\nChanging the email address\nClick\xa0Automati
in the\xa0notice text\xa0Source.\xa0\n\nClick Save to save your changes. Your new cookie notice will be displa
elect which Theme you want to manage the JS & CSS file administration for, and click\xa0Javascript, CSS and For
Subject access request:\n\nThe Subject access request screen will be displayed:\n\nEnter either the name or em
the users you want the actions to apply to and click More.\nOnce you have clicked Send invitation, the Send Inv

l ID of the user. This can be as simple as sequential numbering or an ID from an external CRM etc. For instance, f
will often be sufficient) and where that location will be. Similar to Hybrid Storage, the "key manager" can be sto
tion,\xa0separate from files in other sites. This would be an alternative to licensing several instances of Collabor
ıblisher"], 'Related_materials': ['https://knowledge.highq.com/help/system-administration/manage-users-in-pul
emplate properties\nClicking Edit beside an iSheet template in the list of templates allows you to update the nar
ne and making configuration changes, if needed, click Save.\nKey considerations about iSheet templates:\n\nAn
Administrator to add users from the System Admin console, and then to send invitations to those users. \xa0Thi
e sites.\n\nFor example,\xa0Acme Corp is a large client, with over 20 sites in Collaborate. \xa0A team of 15 user
ith an organisation.\xa0\nAssociating the new domain with an existing organisation, will disply the following fiel
l files directly to their My files tab.\n\nIf My files is disabled, then the My files section of the User Profile (or of M
the above actions in bulk, select the users you want the actions to apply to and click\xa0More.\nOnce you have
t sync settings for files and folders\n\nUsing On demand sync\nIf On demand sync is enabled, files are stored as
ort - this report shows the total size of each document. It\xa0can be filtered by document size\xa0to ignore smal
stem Admin user with access to the System Admin module can change the default name under System Admin >
e Publisher user experience includes email notifications and alerts, based on the preferences that users have det
\xa0Organisations\xa0screen is displayed:\n\nIn the\xa0Organisations\xa0screen, click\xa0More actions\xa0ne
these companies\xa0inherit these permissions.\xa0You can also create other 'Organisation groups' to collect you
portant to note that all users must be associated with an organisation and that they are bound together by a dor
nu items are displayed in the system bar, create new menu items that can link to almost anywhere in your instar
e organisation inheritance, you can create a 'User group' and add people to it.\nContent specific\nYou can also p
n\nTo access the Exception domains section, which looks like this:\n\xa0\n\nWhich has two principal functions:
s organisation as well. In that case, the new organisation will have a status of Active. However, using the Add nev
ail indicating that a password reset was requested and, if the user wants to continue to reset their password, th
yed\xa0at the top of\xa0the Dashboard. In the\xa0System announcement\xa0screen, enter the content of the a
ed in the search results screen.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Find a site in Collaborate
dd further information, such as dates\xa0and a Client or Matter number. Click Save to create the site.\nOnce the
n users:\n\n\nClick\xa0Save. The system is now set up to have 'My files' disabled, but you can still send a file.\n
features\xa0will display more fields\n\n\nWithin the\xa0Advanced features\xa0section, you have the option to
:\nIf the Organisation is Internal\nThe number of users\nNumber of active users\nIf Autologin is enabled for this
rget organisation:\xa0Here, you can specify the organisation that you want this report to be based on. (If this fie
rt to be filtered by. (If this field is left blank, \xa0the results will be shown for all organisations)\nSelect product:
r the user has logged in or out of the platform during the specified date range\n\nAs of our 5.7 release, we have
o\xa0specify the date range of the action you want to investigate\n\n\nShow advanced filters -\xa0It is possible
ally, there is a\xa0Show advanced filters\xa0option that displayed more fields:\n\nWithin the\xa0Advanced fea
sation or a specific role\nUser report -\xa0view all user reports including all relevant metadata\nUser email/site
nisation you want the report to be filtered on. (If this field is left blank, the results will be shown for all organisati
ned between: This is the date range for the audit\nSuccessful mail records / Failed mail records: This enables you
ct: Here, you can select any piece of content to run the audit against. If you select\xa0All products, the report w
ng fields:\n\nSelect product: Here, you can select any piece of content to run the audit against. If you select All p
n\nPerformed between: This is the date range for the audit to be performed\n\nClick\xa0Show audit\xa0to show
ant to perform the audit against. (If this field is left blank, the audit will be performed against all documents with
ed on. (If this field is left blank, the results will be shown for all organisations)\nActing user: Here, you can speci
e audit on. (If this field is left blank, all events and workshops will be searched)\nSelect user/organisation: Here,
e filtered by. (If this field is left blank, the results will be shown for all organisations)\nSelect product: Here, you c
g organisation: Here, you can specify an organisation you want the report to be filtered on. (If this field is\xa0left
n. If the field is left blank, it will display all organisations\nPerformed between: Here,\xa0you can specify the dat
users have access to\xa0in the system (e.g.\xa0Publications, Events, Videos, Comparison Toolkits etc.)\nPerforr

n. If this field is left blank, it will display\xa0for all currently available organisations\nSelect product: Here, you ca
to be enabled by a HighQ admin - please contact HighQ Support to request this. Once the integration is enabled
tes..\n\nMatter Management and reporting\nOften, corporate In-house legal teams do not have a centralized v
hat matter.\nIf a site is linked to one or more matters, then the site provides navigation links so the matter can b
e an intake request using\xa0HighQ iSheets\xa0or HighQ Forms as an intake form.\n\nIf you use iSheets, the rec
a common data value which can be used to create a join from the matter information iSheet to the matter invo
e link to your iSheet record, click on Select files in the Add record screen.\n\nYou will then be presented with a v
e current financial status of\xa0matters, replacing reports created in financial management systems which often
t views:\n\nSelect one or more entries to add the views and the columns in those views.\n\nEach view can be u
nake modifications to that iSheet that are specific to a site.\nCreate a column 'pick list'\nTemplates that are not
\n\nAdditionally, please ensure that a Microsoft Teams supported browser is used when linking your Teams and
s\xa0using HighQ AI data.\n\nThe translated text does not replace the original file - it is only used within the Hig
nstalled and enabled, an Administrator at your firm will configure a search query in the AD connector to determi
avigate to your instance of Collaborate and register an API client in System\xa0administration\xa0>\xa0API appl
nentation on how to make web content more accessible to all people.\nThe main goal is to provide a global share
\xa0the new instance may not include all the features required by the template.\xa0The Compatibility report, di
site.\n\n\n\nModules\nEach module, if active on the\xa0new site, should be checked to make sure that the con
s best to prepare the site before saving it, so that the template will be easy to set up and use.\n\nA site that has
ter condition requires more complex logic and multiple conditions chained together using Boolean logic, make s
\nOperating systems\n\nWindows operating system\nMac operating system\n\nBrowsers\n\nMicrosoft Edge\n
Open plugin (http://plugin.fileopen.com/) are installed\n\n"], 'Breadcrumb_path': ['', '', 'Best practices and more
estion rights (but possibly more)\n\n\nFor the seller organisation:\n\t\nAt least one user with Reply-to-Question
path': ['', '', 'Best practices and more', '', "Add a shortcut to a mobile device's home screen"], 'Related_materials'
e completed by each of these user groups: \xa0\nFor Site Administrators\n\nEnable the iSheet for alerts and ma
me and enter a column description to provide context for users filling in iSheet items:\n\nGet the column type o
e iSheet. Other than the system-generated columns (Created by, Created date, Modified by and Modified date; t
. The search results will be displayed:\n\nClick on each result\xa0to display more information about that piece o
ction on the site, adding a secret password.\xa0The password should not be shared with any Collaborate System
ly, this will be a top-level folder that only the designated group of users (and Site Administrators) can access, usi
detail. The final comparison can be viewed using the native HighQ comparison tool (in document viewer), or a c
g the checkbox to the right of the setting.\nOverriding settings\nTo override any default setting on the page, un
nplementing a pass-through style authentication from Collaborate to another web application:\n\nRegistering a
niSheet view\niSheet item\niSheet add item - you will need to pick the site and the iSheet. Click\xa0here\xa0to
n iOS and Android.\nThe best experience will be in the latest versions of Edge, Chrome, Firefox and Safari.\n\nA
may display:\n\nIn that case, please ensure that Javascript is enabled for the browser.\xa0How this is set will be
hen a Site Administrator or System Administrator is alerted to this type of issue, it is recommended that these st
on from the user.\n\nGather Information\nAsk the user to provide the following three pieces of information:\n\
ick and easy access to all your files from PC, Mac, Android or any iOS device.\nIf you experience video playback
ar your browser cache\n\n\n\n\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Add users to a site'], 'Related_mat
mended audience:\xa0End users\nIf you experience video playback issues, please clear your browser cache\n\n
playback issues, please clear your browser cache\n\n\n\n\n\n', '\n\n\nHow to manage and configure the AI Hub
ack issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Archive emails in Outl
e administrators\nIf you experience video playback issues, please clear your browser cache\n\n\n\n\n\n\n\n\n'
perience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'A
ate an iSheet.\nRecommended audience:\xa0Site Administrator\nIf you experience video playback issues, please
nd automatically create an iSheet.\nRecommended audience:\xa0Site Administrator\nIf you experience video pl
experience video playback issues, please clear your browser cache\n\n\n\n\n\n\n'], 'Breadcrumb_path': ['', '', 'Vi

;e microblogging to create posts, start conversations and discuss objectives with the team.\nIf you experience vi
ase clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Configure notifications and alerts'], '
;ues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Configure the Doc Auto Wor
.\nRecommended audience: Basic users\nIf you experience video playback issues, please clear your browser cac
:e administrators to add Contract Express templates quicker and end users to generate documents faster by rem
mended audience:\xa0End users\nIf you experience video playback issues, please clear your browser cache\n\n
/ideo playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Create a bu
;, please clear your browser cache\n\n\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Create a site group'], 'Relat
video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Create a ta
users\nIf you experience video playback issues, please clear your browser cache\n\xa0\n\n\n'], 'Breadcrumb_pa
ssues, please clear your browser cache\n\xa0\n\xa0\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Create custor
:ar your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Create folders in Files'], 'Related_materials
:o playback issues, please clear your browser cache\n\n\n\n\n\n\n\n\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos',

e clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Creating a site from a template'], 'Rela
ons are met\xa0\xa0\nRecommended audience: Site administrators\nIf you experience video playback issues, p
rators\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': [''
:e video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Customi
ir browser cache\n\xa0\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Date calculation column'], 'Related_mater
ase clear your browser cache\n\xa0\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Design a form with HighQ For
:k issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'DocuSign multiple docu
ice video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Easily s
ayback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Edit documents in (
:ar your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Edit in Office Online'], 'Related_materials':
ise clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Editing a System Dashboard'], 'Relate
clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Enable AI training'], 'Related_materials':
(issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Enable HighQ AI engine']
your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Enable HighQ Forms - Site admin'], 'Related_r
ack issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Enable or disable High
you experience video playback issues, please clear your browser cache\n\n\n\n\n\n\n'], 'Breadcrumb_path': ['',
:nce: All Users\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_
u experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos',
ache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Exporting a site template'], 'Related_materials': ['https://kn
3readcrumb_path': ['', '', 'Videos', '', 'FAQ - DocuSign'], 'Related_materials': ['https://knowledge.highq.com/help/
;.\nContent admins can now restore or delete specific historical versions of documents. This new feature can hel
(a0\nCreating a seamless link to unite your favourite Workspace apps with the power of the HighQ platform\nRe
m landing pages\xa0\nProviding your users with quick and easy access to key contacts and all from one location'
;ite administrators\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcru
ice video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ
across both platforms.\xa0\nRecommended audience:\xa0End users\nIf you experience video playback issues, p
nt, near real time data and complete matter management â€" and all accessible from a central legal intake locat
: Auto dedicated site.\xa0\nComplete with automatically synced Contract Express templates - when HighQ Doc A
m & Site Administrator\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Brea
Site Administrator\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcru
ninistrators\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_pat
; for iSheets date type columns - offering greater flexibility and enhanced user experience when searching and ru
ing business users with the information that they need in order to manage, escalate, visualise and use calculatec

ntent admins through the setting of end date triggers - to automatically archive content that is no longer relevar
nended audience: Site administrators\nIf you experience video playback issues, please clear your browser cache\
eos', '', 'HighQ Publisher - Campaigns'], 'Related_materials': ['https://knowledge.highq.com/help/getting-startec
ideos', '', 'HighQ Publisher - Client Portals'], 'Related_materials': ['https://knowledge.highq.com/help/getting-sta

_path': ['', '', 'Videos', '', 'HighQ Publisher - Customisation'], 'Related_materials': ['https://knowledge.highq.com/
mind to admins when setting up snippet permissions for organisations or groups â€" helping to prevent the accic
dcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher - Ease of Use & Design'], 'Related_materials': ['https://knowled
: Defaults from HighQ Publisher, removing the need for users to repetitively set email types each and every time
€" streamlining your reporting process\nRecommended audience: Site administrators\nIf you experience video p
approach in mind â€" providing greater self-service and removing the need for CSS expertise to remove feature
r cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher - Knowledge Management'], 'Related_ma
nmended Audience:\xa0Site Admin\nIf you experience video playback issues, please clear your browser cache\n
': ['', '', 'Videos', '', 'HighQ Publisher - Overview'], 'Related_materials': ['https://knowledge.highq.com/help/gettir

path': ['', '', 'Videos', '', 'HighQ Publisher - Personalisation'], 'Related_materials': ['https://knowledge.highq.com/l
/ideos', '', 'HighQ Publisher - Publications'], 'Related_materials': ['https://knowledge.highq.com/help/getting-sta
or your content consumers\nRecommended audience: All users\nIf you experience video playback issues, please
, '', 'HighQ Publisher - Use Cases'], 'Related_materials': ['https://knowledge.highq.com/help/getting-started/pub
n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher 2023 Q2 Release'], 'Related_materials': ['https://know
ables the automatic movement of attachments to an automated unique folder - resulting in a more efficient inta
issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'How to create a workflow

ache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Importing a site template'], 'Related_materials': ['https://knc
d share files stored in 'My files' as well as view, sync and manage files in any other team site that you have acces
r your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Login as a new user'], 'Related_materials': ['l
nended audience: Site administrators\nIf you experience video playback issues, please clear your browser cache
ayback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Multi-iSheet sourc
sues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Multi-iSheet source setup'],
s with the ability to directly action approvals from within their Microsoft 365 email application.\nRecommendec
eously in HighQ. Watch our video to see how to do it.\nMicrosoft Office: Our\xa0Office add-in and advanced Off
may download and install the plugin, but only a System or Site Administrator may configure and use the plugin)\
strators\nIf you experience video playback issues, please clear your browser cache\n\n\n\n\n'], 'Breadcrumb_pa
he team. It also helps ensure everyoneâ€™s clear on whoâ€™s doing what and keeps projects on track.\xa0\nIf
xperience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', '
playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Publisher - Meg
playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Publisher - Offlir
If you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Vide
Admin\xa0\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_pat
\nRecommended audience: Site Admin\nIf you experience video playback issues, please clear your browser cach
xa0\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Redaction in Files'], 'Related_materials': ['https://knowledge.h
wser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Saving a site as a template'], 'Related_materials': ['htt
dd capabilities to the Tasks module by connecting it to a Task metadata\xa0iSheet.\n\nRestrict edit access for ta
r\n\nAdding folders via drag and drop\nWithin your site, navigate to the\xa0Files\xa0module:\n\nAnd within th
te to your profile dropdown and click\xa0System admin:\n\nThe\xa0System admin\xa0screen is displayed. With
ion:\n\nList\nAssignee\nStart date\nDue date\nStatus\nCustom column\n\nConfiguring the rule\xa0\nNavigate
in\xa0>\xa0Workflow\xa0>\xa0Rule builder:\n\nThe\xa0Rule builder\xa0screen will be displayed:\n\nYou can

:eets you can manage the Document Automation templates. For more information click here.\xa0\n\nThe order i
:emplate:\n\nThe Add template window allows you to upload the template, name it and set how it is used:\n\nE
™s ability to view the iSheets module:\xa0\n\nAt least one iSheet must be created\nThe user accessing the site
nt element. The Navigation content element will now be displayed in your list of elements:\n\nDefault navigatic
\n\nClick Save once you have entered all the required translations and then Save the changes you have made tc
of the site that typically serves as the site landing page.\nConfiguring the Home\xa0page\nClick\xa0Edit\xa0to
dashboard builder.\n\nTo start, navigate to the\xa0Home\xa0page, and click\xa0Edit\xa0in the top right-hand c
d click System admin:\n\nThe System admin screen is displayed:\n\nSelect the user you want to give module adr
vith an increment of one month.\n\nThe Next invoice date field can always be manually overwritten using the da
filtered by time frame, and all of the report results can be exported to Excel.\nSummary report\nThe Summary
o various site users:\n\nAs the name implies, the Q&A module is used for asking and answering questions about
seller group will be treated as one entity and provides all members of the group with visibility to the questions t
ation\xa0about the users that will be shown in the People module. The user's name and organisation are always
etadata iSheet is configured\xa0in the site\nthe workflow rule trigger is an iSheet with one or more attachment
en creating your new rule, give it a Name and Description. When you have finished, click Save and continue.\nSe
at can be entered into a multiple-line text field and if the text entered exceeds the dimensions of the field, a scrc
ved if a user has sufficient editing privileges for the column.\nColumn width - The width of the column displayed
\nThe Edit record screen is displayed:\n\nThe Edit record screen has\xa0the same layout as the\xa0Add record
of the page, whoever created and last modified the item and when they did so is displayed. If permissions have
Created records link to view the version of the item resulting from that action:\n\nThe Versions tab allows a use
uses\xa0Contract Express templates and questionnaires\xa0and benefit from the tools and reports provided by I
ted in Contact Express.\n\n\nTo simplify access, your HighQ credentials\xa0are used to automatically sign\xa0in
, via\xa0Site\xa0Admin\xa0>\xa0Workflow\xa0> Rule builder:\n\nThe Rule builder\xa0screen will be displayed,
o your workflow\nWe will start in the\xa0Rule builder\xa0screen. Within the\xa0Rule builder\xa0screen, click\x
be displayed. The rule builder consists of three\xa0tabs,\xa0Details,\xa0Triggers\xa0and\xa0Actions. For more
to edit the content for\xa0\nReport\xa0author\xa0- You can choose to include who the author is by changing\x
be added.\n\nPlease note that cross-report glossary means that any item\xa0within the selection\xa0can be us
te that it will be\xa0published\nPage Options\xa0- Choose whether to display the published date or to display\x
you can filter by Status, Modules and Authors.\nStatus allows you to filter the content based on the status of th
site and\xa0enable Microsoft AI translation (if it is enabled on your instance of HighQ).\nAs a Site administrator,
d site template ZIP with AI enabled, the AI configuration, folder settings and the iSheet column import mapping i
may use Insert variable\xa0to assign a name based on the source that\xa0triggers the Action (a file or file metac
selected folder.\n\n\nCopy file\nIf you select\xa0Copy file\xa0as your action, the following fields are displayed
own list.\n\nClick Save to apply the changes.\n\nPlease note that default columns cannot be moved between se
issions.\nSet as default sheet - Configure\xa0an iSheet so it is the landing iSheet in the iSheets module, and the\
displays.\n\nEnter a panel title and choose the site where the AI engine is being used. In the Source field choose
saved by the system (Auto-saved) or manually saved by the user (Draft).\n\nUsers can make further edits to the
name of the user who took the action, the action taken, linked to the item as it appeared as a result of the actio
s. Click the name of the iSheet to access its configuration page and click the Manage archives button.\n\nTo add
s:\n\nWith record locking enabled, a user who attempts to edit an iSheet item that is currently open and being e
nmediate, Daily and/or Weekly\xa0alerts. Daily and weekly alerts are sent as a digest, sent out at the same time
or more columns that can be used as filters. The site administrator who configured the iSheet will choose whet
zed\nAdditional system generated\xa0fields for File and/or Folder\n\nFile and folder metadata iSheet level perr
pply to save the changes.\n\nThe Draft items view, which is automatically created by the system, can also be rea
creating your new rule, give it a Name and Description. Once you have supplied both, click Save and continue.\nT
e event\nContacts\xa0- add any people you want as contacts for the event\nDescription\xa0- a description of th
g task list for your task\nStatus - This is the status of the task, e.g. In progress, complete etc.\nReminder - This a

ents - You can attach a static file from your site, the triggering document if the trigger is a file, or\xa0dynamically
Restricted is selected, you have access to the following screen:\n\nThe Organisations and groups section enables
en click the tick icon,\xa0or click the cross icon to cancel any changes.\xa0\n\nClick the globe icon to edit the tra
:\xa0to display\xa0in your channel. So, for example, if you want to display a content list in your channel, select t
Admin tab will be displayed:\n\nYou can define any number of\xa0users as channel administrators.\nClicked Ne
ou to select how many columns you have in your section, and the layout of those columns:\n\n\nEach column ca
reate site' role.\n\nSystem Admin\nDefault system admins have access to the System Admin option in the profile
describes how to set up\xa0the Basic user role and the standard permissions that a Basic user can\xa0access.\nS
ck\xa0Save.\n\xa0\nIf you have deselected this option, in order to set a user's permissions from the\xa0User\xa
ite by creating LPM toolkits to help their lawyers deliver consistent, best practice project management. Some fir
\nSet notifications for all site activity and customise notification settings\nManage and share transaction docum
num of effort.\nThey include access and configuration for the modules required for the chosen function, configu
month\nThis month's updates include:\nTasks management\xa0\n\n\nYou can now manage your checklists mo
Q\nRecommended audience:\xa0Site\xa0administrators & end users\nIf you experience video playback issues,
ecific tasks when importing or bulk updating tasks, creating dependencies and adding sub-tasks\nStatus - shows
\nIf you have particular types of transactions that are highly repeatable and relatively standardised\xa0and you h
uction deployments taking place from the weekend of the 10th/11th of June onwards.\xa0\nThere are HighQ Pu
Site Administrator\nIf you experience video playback issues, please clear your browser cache\n\n\n'], 'Breadcru
nOpen Gmail and click the + in the\xa0Add-ons\xa0bar (normally on the right of the screen).\n\nSearch for\xa0H
ghQ Drive can be installed on\xa0existing x86- and M1-based Macs with Catalina or\xa0Big Sur.\n\nAll informatio
1th March 2023.\nFeature release highlights this month\nThis month's updates include:\n\n\n\u200bTime to Va
rs product (that you may have to pay for)\nOn request\xa0- Beta features that\xa0have to be switched on or en
ickly in AD and use the sync to grant them access to Collaborate.\nAlso if you have a group of users that are no l
ccount Manager and purchased modules will be enabled. Further configuration, such as the addition of new mod
nk provided by your HighQ contact.\xa0\nSign in to the Appliance application on your service.\nTurn off any pop
tion\xa0(Publisher or Collaborate)\niSheet integration\xa0(Collaborate only -\xa0external SQL database, RSS and
ve specific deployment requirements.\nEach connector is provisioned separately, according to your needs.\xa0Y
tions are configured to connect internal systems to HighQ Collaborate or HighQ Publisher.\nThe HighQ Appliance
a0have to be switched on or enabled by our support team\n\nSeptember updates\nUAT updates starting the we
0screen, navigate to\xa0System customisation > Error page:\n\nThe\xa0Error page screen is displayed. Here, sc
a0have to be switched on or enabled by our support team\n\nJune Release\nUAT updated June 25th-26th\nCus
.\nInstance\xa0(required) - Select the instance you want to display the file(s) from.\nSite (required) - Select the
on, currently available on macOS, iOS and Android, will progressively be removed from application marketplaces
nel from this drop-down menu.\nTitle - Enter the title of the panel. You can hide the title by selecting the Hide ti
the commenting system.\nPublications allow you to:\n\n\nCreate engaging online publications and posts or add
location. All of these options are optional and can be turned off (see below).\nAdditionally, there is a\xa0Downl
v the ease of management of your contacts and audience\nAdd additional content such as speakers, contacts ar
duplicate copy of the file.\xa0\nAdd\xa0a new version of the file.\xa0\n\nOr ask\xa0you for your preference (i.e
a0have to be switched on or enabled by our support team\n\nMarch Release\nUAT updated April 1st.\nCustom
des, and new features guides, as well as providing the ability to collect feedback directly from users on the platf
ms per release, we can do more frequent, in-depth testing to check the updates being released.\xa0\xa0\n\xa0
o the new version. When you update, you will be able to use and access the capabilities of the platform that you

demo.\n\nFinding the app in the Teams App Store\nOpen Microsoft Teams. Click Apps at the bottom of the Tea
edit the associated record in the iSheet module.\n\tIf an iSheet is associated with files or folders after the file or
o the new version. When you update, you will be able to use and access the capabilities of the platform that you

ed.\xa0Use Edit to open the Add redaction vocabulary and make changes to the term.\xa0\n\nThere is the capal
, ON for all internal users only or ON for selected users only\nDefault "Share via email" permission - This can be
itional fields include:\n\nLocation - The location where\xa0the event will take place\nRepeats - The event can b
eds that you currently have. If you have RSS icons on your Publisher dashboards and wish to have this be the up
5.4, to see a demonstration of the new features and capabilities.\xa0\nHighQ's Support Team will contact you i
pages\nRecommended audience: Site administrators.\n\n\n\n\n\n'], 'Breadcrumb_path': ['', '', "What's new?",
to let us know what you think and share any suggestions or thoughts.\xa0Thank you.\xa0\n\nDetailed release n
System admin\xa0screen will be displayed. Within the\xa0System admin\xa0screen, navigate to\xa0Services\xa
l files as required, for example, storing signed contracts in a contract 'database' for quick reference and security.
older file in\xa0the Details tab, then add any further information, such as tags and version notes.\xa0\nTo add a
o the Files module.\nAs of version 5.4.2 the Attachments folder in the Files module\u202fs no longer the defaul
le in a few weeks. You're also invited to watch the on-demand webinar, What's new in HighQ 5.3, to see a dem
hat workflow templating includes\xa0automation of tasks, events, email notifications, documents, iSheet record
mmended audience: Site administrators.\n\n\n\n\n\n'], 'Breadcrumb_path': ['', '', "What's new?", '', 'Version 5.
ated within the Files module. If you've got a Word document within HighQ Drive\xa0and access that document it
n\n\nPanel - You can select a different panel from this drop-down menu.\nTitle - Enter the title of the panel. You
will be treated as the author of the folder.\n\n\nName (required)\xa0- Enter the name of the folder that will be
'', '', 'Working with content', '', 'Suspend and restart a bulk download'], 'Related_materials': ['https://knowledge
om the document preview screen:\n\n\nIf you have selected a powerpoint document or an excel document, the
ls can be found\xa0here\xa0and tasks created from the Tasks module or the\xa0Files\xa0module are identical i
an also be added to it with\xa0Add task\xa0in the file actions menu:\n\nClick\xa0Add task to display the Add tas
vailable to the user, click on the question itself. \xa0Additional details will be revealed in a new pane that opens
0an index of the\xa0files, which makes it easy to access the downloaded files in a browser. As the files are saved
ft Office 2013 (365) or newer.\xa0\nInternet Explorer 8 and above, Chrome, Firefox, or Microsoft Edge browser.
lame, Author, Last modified date and\xa0Size by selecting an option in\xa0View > Name/Author/Last modified/S
ns are available:\n\n'], 'Breadcrumb_path': ['', '', 'Working with content', '', 'iSheets - Link to items'], 'Related_ma
the item table to PDF by selecting "Export to PDF" within the More Actions menu:\xa0\n\n\n\nOr export the d
o every subscribed user\xa0to trigger an immediate alert to users, even if they are\xa0subscribed to less freque
r.\nFile and folder metadata may also be updated in bulk using the iSheet import process. See the Importing iSh
s a date and time column.\nModified by - The name of the user who last modified the item. This is a user looku
nns are organised into a single section, then the section (and its columns) will not appear until the condition is s
stances or a single instance.\nInstance(required)\xa0- Select the instance(s)\xa0you want the user to be able to
us - Active means that the form is viewable, archived means this form is no longer in use\nOwner - The person w

ot the terms and conditions and click Save.\xa0\n\nMicrosoft Azure AI tagging is now configured, but the default
an decide how to Align it in the Wiki and the Width of the panel.\nFor more information on setting up a data vis
ces and to make these rich\xa0text editor pages even richer:\niFrames\nFirstly, content from another web site c
and then\xa0click\xa0OK.\xa0An\xa0IFRAME\xa0box will be displayed\xa0in the editor. To modify the properti
ontains a title, select the check box next to\xa0Use feed title\nSelect the number of items to show. The default i
team's outstanding tasks, the key contacts for a specific topic, or the files from a certain folder, inside of a wiki p
ar view, click\xa0Source\xa0again.\n\nThe ability to edit the HTML directly has been disabled on certain instance
ties\xa0screen will be displayed:\n\n\nThis screen is\xa0used to configure options that define table size, its disp
nt:\n\nThen click Edit content elements. The Content elements tab is displayed:\n\nYou can drag and drop the e
te expertise\n\nA collection of Videos (or podcasts) will belong to a Module, and each module can have differen
ime group.\n\nUsing data visualisation date grouping\nTo create a chart using the data visualisation date groupi
within the room you need to zip your document structure. For example, to do this on a Mac, right-click on the f
ge contains:\n\nPage title\nPage info - To view a wiki's page info, navigate to More actions > Info:\n\n\nThe Inf

\n\n\nIf the site administrator chooses to hide the author or date of every blog post, then this information will
odule.\n\n\nThe System Administrator will then add a user and make them the Site Administrator, who can con
t, Sent for Approval, Answered, Pending Response or Draft Response\nPriority\xa0- Low, Medium or High\nOrga
ed for ongoing content syndication. Utilising\xa0the static xml file method is recommended for imports where n
g post is associated with\nAttachments\xa0- A list of all attachments to the event (if any). Attachments can be f
Q Drive?:\n\nSwipe left\xa0or tap Next to display more information\xa0or tap Sign in to return to the sign-in scre
e updated to reflect the information that needs to be added.\n\nYou need to enter the characters exactly as the
'doc-auto-velocity-library', 'https://knowledge.highq.com/help/attachment_dw.action?attkey=FRbANEucS95NM
\xa0about manual Velocity coding and please see our Velocity Library for further examples.\xa0\n'], 'Breadcrumb
to security risks.\xa0\nHighQ\xa0endeavours to keep HighQ plug-ins running within MS Office client applications
a0to download an Excel file which lists every DMS files in every site of Collaborate. These are files that were add

ı email invitation similar to the one above.\n\nThe email will have the branding of the firm or organisation mana
:ond that changes each time and is sent\xa0to the user (a passcode). Normally, this passcode is\xa0only seen by
xa0Remember me\xa0in order to bypass the login page from a particular device and click\xa0on a Collaborate li
paired device\xa0to allow\xa0access.\xa0If notifications are used,\xa0it is possible to send the passcode directly
ɔs:\xa0\n\nInitiate log in through the browser.\xa0\nDownload and open the app and log\xa0in.\xa0\nReceive\
ion\xa0or tap Sign in to return to the sign-in screen.\nAfter entering your instance URL, the following screen is d
f required by a System Admin.\n\nIf a Smart folder is disabled at any time the Smart folders will disappear from
d relationship when a document is created.\u200b\n\n\xa0\nRelationships are displayed in a tab in the Details p
s determination should be made based on the requirements of a given site. The\xa0options are:\n\nSite only (al
:cted folder on the right\n\nFolder navigation\nThe left panel of the Files module contains a view of all of the fol
'he destination folder cannot include any of the subfolders selected to be moved.\n\n\nThe folder list is displaye
t version of each file will be copied.\xa0\n\nIf the source site had PDF conversion or DRM applied, those settings
d Items tab and Shared Items tab\nAn indicator of the storage used\xa0compared to your storage quota\nItems
; to selected users and groups. Access rights can be determined at the site level, folder level or file level.\nVersic
om a site or copying files from one site to another:\n\n\nMy Site capabilities\nEach user's site is unique and per
ards. This will\xa0enable our users to create and edit system dashboards within Collaborate.\nTo get started, cli
ı Dashboards\xa0section will be displayed:\n\nWithin the new\xa0System Dashboards\xa0section, system adm
tem\xa0admin screen is displayed. Within the\xa0System admin\xa0screen, navigate to the\xa0System dashboa
hin the\xa0System Admin\xa0screen, navigate to\xa0Global navigation, and click:\n\nThe\xa0Global navigation

t to note that this is only visible if the user is a dashboard editor. Regular users will not be able to see this space.
ment\nDocument Management\nTransaction Management\nLegal Intake/Self Serve\n\nBenefits\n\nSecurity -
le\xa0data-driven approvals.\n\nSetting up file approvals\nCreating an approval template\nOn your site, naviga
the following screen:\n\nSettings page\nThe Settings page has four sections:\n\nGeneral\nSite email alerts\nSy
ɔn', '', 'Set notification defaults for new users'], 'Related_materials': ['https://knowledge.highq.com/help/getting
have all of these features enabled.\n\nNavigation on small screens\nThe Top Navigation Bar is condensed on sr
to\xa0Add menu\xa0>\xa0Menu item:\n\nThe\xa0Add menu item\xa0is displayed:\nThere are a number of wa
ɔeen favourited, will have a gold star.)\nIf the list of sites is very long, there are two ways to whittle down the lis
k their name anywhere in Collaborate and then click their name again:\n\nOr by searching for the user from the
products in a secure, consistent, and connected way.\xa0\n\nThomson Reuters accounts use\xa0Customer Ider
choose to be remembered on your computer by selecting the\xa0Remember me on this computer\xa0checkbo
)- Any part of the email address of the user(s) to be managed: the prefix ("jsmith") or the suffix ("abc.com") or th
advanced search with the user\xa0name, email or any other details that can identify the user. There is an optior
Setting up the Basic user\nThe Basic user is managed in System admin.\nTo manage the Basic user, navigate to y
house legal team\nOnly allow business users to see their own files to maintain confidentiality.\nAbility to uploac
rules defined by triggers and actions.\n\nBuild your rule in\xa0Workflow. Open the Admin module and select Ru
tatus.\n\nName - You need to give the rule a name, which is shown in the list of workflows.\nDescription - Add a
workflow\xa0is saved as a Draft and the Create rule screen is opened:\n\nAfter creating a\xa0workflow,\xa0add
; a rule\nEnter a meaningful name and description for your workflow. You can start with a name that identifies y
mple,\xa0the File\xa0trigger:\n\n\n\n\n\nAdding triggers\nThe Triggers tab is an essential step when creating a
priate for the\xa0Trigger defined for the rule.\n\nFor more information on adding events, click here.\xa0\nFor r
:view allocation\nAn administrator can assign document review tasks for each file to different site users (or indic
ce\xa0number is shown in the first column.\n\nIn addition to the selection box (and optionally the assigned\xa0
nother, more restricted\xa0administrative role. Click\xa0Admin\xa0within the site navigation ribbon to access tl
vel folder is given number 1, the second is given 2, etc.\nAs shown above, if there is a subfolder three levels dov
drop the folders within their folder into whatever order they want. Simply click on the folder you wish to move a

ı site administrator for a specific site, in order for the bulk download option to be available. If enabled, the bulk c
ɔtions to\xa0organise\xa0files in the bundle,\xa0and if any numbering should be\xa0included (if auto-numbering
fault or Alerter view.\n\nClick the name of the new view and follow the instructions in Edit Views.\nConfiguring
ɔry/required columns.\nIn the Available columns list, and the\xa0Manage views window, a Required column not
e x icon and closing the message also discards the draft. Saving an auto-saved draft makes it available to access i
ı this.\xa0\n\nOnce you have finished, click anywhere outside of the cell and a message is displayed on the top r
tead displays the relevant "State" picklist.\n\nIf a user selects "Australia" from the "Country" choice list, the "Sta
ient 1" folder has been configured to display this view (More actions > Edit details > Settings > File view).\n\nAs
], 'Breadcrumb_path': ['', '', 'Working with content', '', 'View columns in iSheet sections'], 'Related_materials': ['h
rs, using the standard system iSheet form design.\nHighQ Forms - Create custom, branded forms to share on a w
can be completely tailored - you can change the order, change what appears, hide modules, add links to iSheets,
nGive the blog post a title\n\n\nEnter content in the main section\n\n\nSelect at least one category. Only the ca
\nSite\xa0- This is the site that the content is located in\nStatus\xa0- This displays whether the content was aut
t of notifications, the new notifications are listed with a light blue background.\nNotification details\nEach notif
ts can be exported to PDF\nApproval Workflow - Use this setting to require approval for any new blog posts or c
: the name is similar, this is not to be confused with Workflow, used for task automation.\n\nThe\xa0Approval w
custom emails, as part of the workflow process.\n\n\nTo make the best use of workflow you should ensure tha
\xa0module. Most modules can be configured to limit access to particular security groups or users\n\n\nDeterm
ɔen Admin, Files, then scroll down and select Enable approvals:\n\nYou must also create one or more\xa0approv
a list of all of the actions that have been performed by workflow:\n\nThis includes the:\n\nExecution date & tin
ıttachments.\n\n\nTags - You can add one or more tags to the page.\n\n\nPermissions - By default, a child page
ıe hierarchy, use the > button\xa0next to each parent page to list the child pages beneath it.\xa0\n\nClick on an
that the content is typically created collaboratively, with many users contributing or editing to wiki, which resul
filtered by any site the user has access to, or by all the sites listed as favourites. Most recently viewed sites will
to encourage communication among the members of a site, then this setting should be disabled.\xa0\nDisplay u
d on the\xa0Dashboard, except that the information is limited to the current site. Otherwise, the same type of R
ed below may not be available at all, may only be available on certain sites\xa0or may be available only to intern
ite content if the rule is not satisfied)\n\n\nSending a\xa0private\xa0message\xa0to a user (if direct messaging i
ıe else unless you are system admin, in which case you can see every user on the instance.\n\nClick Messages to
Iore actions\xa0>\xa0Add comment\xa0for the file you want to add a comment to:\n\nThis displays the Docum
the same time limit access to the response. \xa0If the transaction is structured as an auction, with multiple pote
idders to be unaware that other bidders exist. For example, if a member of a bidder organisation has been adde
ders and manage the bidders on two additional administrative pages\xa0that are displayed via\xa0User permiss
ıtion for a week and to contact someone else during this time. Typically, an announcement will be displayed only
ıother user likes the same content you\xa0have\xa0already liked\xa0\n\n\nThis screen is accessed via\xa0Profil
in the PDF export. This setting is enabled as default.\nEnable approval workflow - Enabling this setting ensures p
ttings of the iSheet to which it belongs and has Inherit iSheet permission enabled:\n\nTo set custom permissions
permissions. Once selected, a Site admin can restrict which groups can access the iSheet and configure exactly v
lect View:\n\nCompare versions\nTo view a comparison of two iSheet items, select two versions and click Comp
ess to the iSheet by default:\n\nTo restrict access to the view, first uncheck Access to all users:\n\nAll groups th
actions > Export.\n\nAll users are granted view, print and export access to all views in an iSheet by default. Unles
ıSupported data types\nSupported data types from Excel files:\n\ntext\xa0\nemail address\nnumber\ndate\ncl
e, content and user administration', '', 'Column types in iSheets'], 'Related_materials': ['https://knowledge.highc
escription can provide guidance to the user about how to fill in the field. For example, it might describe the prefe
and select iSheet from the list.\n\nIf you have previously created, or have access to, an iSheet template, then yo
ıns and their configurations\nAll views and their configurations\nAny sections and the order of columns\nLooku
System admin option. Typically, multiple users in the internal organisation will be given System Administrator pri

e the regular sharing email, like:\n\nSecond, when the recipient clicks on the link in that email to download the f
ansfer is part of a user\'s My files page, incorporated into that user\'s My Site. \xa0(A user can share files from M
d the file or folder and the name of the file or folder.\nThe first name of the recipient (if sent to a Collaborate us
section may be renamed, as described in Adding and configuring sections.\n'], 'Breadcrumb_path': ['', '', 'Site, con
e to edit its name, description or the order of the columns that have been assigned to it.\n\nClick and drag the c
then be asked to confirm the deletion. Click Delete to complete the action.\n\nThe Edit Column page is identica
n item (or a document or folder in the case of file or folder metadata iSheets) in the source iSheet via a lookup if
ng referenced in another iSheet via a lookup and restrict delete is enabled.\nIn order to determine which iSheet
eet where the list was\xa0originally saved.\xa0Images must be saved in the iSheet image library.\n\nIf you have
y, it will be available for selection by site admins when configuring Choice columns.\nDeleting Images\nTo remo
anipulated and displayed in\xa0calculation columns.\n\nEnter choices\nThe first step in creating a Choice colum
ay choose a score column. Add your scores in for each choice.\xa0\n\nMake any further changes if required and
dd column; enter a name for the column, then select Calculation.\n\nCreate a formula with columns\nThe Add c
u to determine how a date will be displayed once the value has been entered.\n\nBelow are examples of how t
er\xa0on the iSheet Properties page.\n\n\nDesignate an iSheet Alerter view on the iSheet Manage views page.\
ces required, if any, up to a maximum of 5, as seen below.\n\nAdditional settings\nYou also have the ability to c
e the column and select which type of data will be held within the column. Column names must be unique withi
isation panel\nClick Data visualisation\xa0in the Add panel screen to display the Add panel - Data visualisation s
olumn.\nAnyone with permission to create or edit dashboards, and has the data visualisation module enabled, ca
he specific column configuration page\nEach users Email preferences must be set in the iSheet module itself. A
ancel the comment.\nMentions and hashtags\nAll comment fields can include @mentions and #hashtags.\xa0To
and columns of data, based on the\xa0selected view. Comments are not included (see below).\nClick Print to pr
will be based on the\xa0current view of the iSheet.\xa0\n\nQuick search summary:\n\nQuick search does not r
s.\nShare multiple records\nTo share multiple records, select the checkbox on the left of each record to share a
admin configuration\nTo add iSheet Form sharing, a system administrator must first enable it at the system leve
ustom, branded forms to share on a website, Microsoft Teams, and your websites.\n\n\nOptions allow records t
Users\nAll Site Users\nContent Administrators\nSite Administrators\nAll System Users and Groups\nAll Site Us
le navigation. Searching\xa0iSheet metadata can make it easier to find files that are needed.\nAdditional Fields\
collaboration -\xa0Multiple users can view and edit iSheets simultaneously, meaning you will always have access
title, add tags, and add a file disclaimer to the file\nMove or Copy - Move the file to a different site, or to anothe
croll down to Advanced settings and click to Enable document redaction. Click Save to confirm the change.\nRed
e Contract Express video gallery for additional information.\n\n\nPlease note that authoring (creating a templat
_path': ['', '', 'Site, content and user administration', '', 'Contract Express - Video Gallery'], 'Related_materials': ['h
ou can filter by recently viewed or by category to help you find the template you are looking for. Additionally, yo
:\n\nThe\xa0Site admin\xa0screen is displayed. Within the\xa0Site admin\xa0screen, navigate to\xa0Documen
s in an 'output isheet'.\n\n\n\n\n\n\nAccess Contact Express templates\nYou can add or edit templates from th
e desired file.\n\n\nAlternatively, as of March 2023 you can drag a file from your computer to the Add item or E
using the name of the source module, iSheet and column name.\nDocuments in the Attachments section may be
typing \'agree\' will match the file "Merger Agreement" but typing \'ment\' will not. All search\xa0is case insens
ch is provided below:\nYou want to search iSheet data\niSheet search - You can only do this at a site level and y
ase click here for further details.\n\n\nGlobal search\nGlobal search now includes the ability to:\n\nSearch one
om the top bar the Advanced Search window looks like this:\n\n\nThe search page will be slightly different if\xa
xa0tags are not personal to you - they\xa0can be viewed by any other user with access to the content.\xa0\nMa
that category\nOptionally At the bottom, a tag cloud of tags added to blog posts, unless the\xa0site administrat
Using this flexible classification framework, Metadata\xa0can\xa0be used to categorise all content within Publis
status (ready or incomplete), or DocuSign\xa0signature status (sent for signature or signed).\n\nWhen viewing a
can be configured by the Site Administrator, as discussed here.\nEnabling DRM options\nIn the Admin tab, open

s module is set to View as default, but the others will not be set.\nIf any Digital Rights Management options hav
ssions. You can also assign existing members to the group in the\xa0Members\xa0field.\n\nA single group may
n-archived system group available:\n\n\nAssociating a system group with the site means that every site adminis
an organisation are listed alphabetically (by first name).\xa0Up to\xa0100 users are displayed at a time.\n\nThe
s and groups:\n\nUsers\xa0- This page is used to add new users to the site and view and manage existing users,
ent icon and indicator.\nManually created and maintained. System administrators will have the right to create a
tically 'pausing' emails sent to certain users,\xa0after 5 different attempts, when bounce back emails are return
tions, groups and/or organisation groups that are already added to this list are displayed in the Organisation/grc
ys the file, which can then be used according to the permissions set by the site administrator.\nTo learn more, v
e yellow star icon is already a favourite. To remove an item from the favourites,\xa0click on the yellow star icon.
Files and folders search\nSelect the Files and folders tab.\n\nFrom the Files module, you may combine a text se
\nEdit and delete views\nSort views\n\n\nEvery iSheet must have one designated default view, which serves as
pencil icon in the iSheets module to edit the metadata in the\xa0file viewer.\nSmart folders\nA Smart folder is
Sheet.\n\xa0\nContract Express variable mapping for the Output iSheet\nThe format of each answer in Contrac
oard'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/data-visualisation-kpi-ch

r more other primary iSheets. The country information would be viewable directly in those other primary iSheet
erts for the following:\n\t\nCreated tasks: if a task that they created is edited or commented on in any way\xa0\
ntract Express template over multiple sites, using just one external template. This ensures that any new sites cre
mpleted.\n\nAs you edit answers, the page list shows the current status of each page:\n\na green tick indicates
to panel with links to CE templates is\xa0added to the Home page, simply click the title of a template to start a
\nFields with a red asterisk (*) are required.\n\nThe user uploading the file will be treated as the author of the f
t 2022 release, a new HighQ Doc Auto site is automatically created when the HighQ Doc Auto (powered by Contr
s templates for document automation.\n\nAs described in the overview, first check you have purchased\xa0the
een uploaded to your Contract Express licence space by a system admin.\n\nAfter Contract Express is enabled o
f how a new site will look and behave, including:\n\nGeneral site configuration settings\nWhich modules are en
site search from the full site list\n\nArchiving a site does not do any of the following:\n\nAutomatically delete c
ere user generated content can be translated.\xa0Click on the icon and the Translate screen is displayed.\xa0\n\
The\xa0Add panel\xa0-\xa0Doc template\xa0screen will be displayed:\n\nWithin the\xa0Add panel\xa0-\xa0D
\nHighQ Forms allows you to publish a single web page, or embed a form on an existing page. Add your own intr
eft-hand menu:\n\nThe\xa0System settings\xa0screen is displayed, scroll down to the HighQ Forms section:\n\
orms:\n\nA confirmation message informs you that an initial form will be created based on the default iSheet vie
anage forms:\n\nManage forms opens. Click the name of the form to edit the form.\n\nEdit a form\nThe Edit fo
ew will display an example of a published page - not the embed\xa0code version\xa0\n\n\nDelete only when ne
tion prompt will tell them how many files and sub-folders the selected folder contains:\n\xa0\n\nClick\xa0Delet
lay the file's information page.\n\n\n\nThe Audit history page\nThe audit history page displays basic informatio
System to create a file called \'Agreement.docx\' but it will be a placeholder file, not a Word file, and it will not
on of an application) that is not supported by Seclore FileSecureâ„¢.\n\tTo view the document, you should use a
one or more files or the More actions menu for a single file or folder):\n\nClick\xa0Signature\xa0or Send to Doc
to do so.\nTo authorise a service, click More actions > Authorise:\n\nEnter your DocuSign credentials to author
a0the available services.\xa0\n\nIf only one service is enabled, this option will display Send to [Service Name] e.
cludes\xa0access to the HighQ AI at no additional cost.\n\n\nAs there is no per-document cost to use the HighC
\n\nClick Save to save your changes.\nSite-level settings\nTo switch the engine on at the site level, navigate to
used in a single site).\xa0If the HighQ AI finds any examples of this file anywhere in the system, it will label it with
\xa0that contains the clause. HighQ AI does not extract specific entities or values from\xa0the selected clause.\
er workflows\xa0without searching for blank values in the iSheet, and\ncheck the original text for\xa0context\n
aph text, not the table row or cell.\n\n\n\n\nIf selecting an\xa0entire\xa0paragraph does not make sense, choo

ed by a court if a party does not comply with the order. In the UK, this is used as part of a divorce where the par
AI\xa0review process matches the contract type.\xa0\n\nPlease note that the fields available within the AI Hub
em Admin role.\xa0\n\nTo use Leverton, a system administrator must first enable it at the system level. Navigat
Navigate to your Profile > System admin > System settings:\n\nThe System settings screen is displayed:\n\nScroll
r for AI, a system administrator must first enable the AI at the system level. Navigate to your Profile > System ad
e Add Column screen displays.\n\nGive the column a name and choose the column type from the dropdown op
n\nThe app opens the camera. Focus on the first page to capture.\nFor iOS, in most cases the camera will auto-
enter your new password, confirm the password, agree to the terms of use and click Set password. Your new pa
ketplaces and turned off.\xa0\nKey Dates\n\nEnd of release of new features: Immediate Effect\nEnd of support
n of the app, the file size and your internet connection.\nHighQ Drive for Windows or macOS - priority is given t
r technology. This is referred to as pass-through authentication.\n\nThe HighQ platform uses a standard ADFS se
server using the Automatic Windows Authentication feature built-in to most common browsers.\nThe ADFS 2.0
bal email domains (for example, @us.acme.com and @europe.acme.com, and @acme.com), where the same p
account. If you are bulk uploading users, this field must be populated.\xa0\nDepartment\xa0-\xa0This is the dep
organisation, click\xa0Add organisations:\n\nThe\xa0Add new organisation\xa0screen is displayed:\n\nGive the
ling a new user\nTo add a new user, within the Users screen, click\xa0Add user. The\xa0Add new user\xa0scree
up.\xa0\nAuto login - Selecting the auto-login checkbox will create an Autologin user. Autologin users are cover
rship and knowledge content to matter financials, documents, tasks and processes with a single user account, p
m customisation\xa0>\xa0Navigation:\n\nThe Navigation\xa0screen will be displayed.\xa0Within the Navigatio
Logo (if added to the organisation record) and Recent activity:\n\nFull profile\nAs the name suggests, the full p
capabilities, users can enagage in rich, threaded discussions.\xa0By combining categories and comments, the Bl
n\nSystem default language\nAdditionally, you can contact HighQ to have us set your system's default language
a0My\xa0Preferences\xa0screen is displayed:\n\nClick the drop-down in the\xa0System preferences\xa0sectior
text box, enabling you to enter the new name:\n\nClick the tick to save the new name of your questions.\nPare
ks like this:\n\nEach of these modules has a creation wizard, and the common module types\xa0(publications, e
viewing an article and then returning to the previous page, the filter selection will be saved\n\nPublisher has dra
article:\n\nBrowse\nChannel list\nCollaborate feed\nCollaborate files\nCollaborate sites\nComparison toolkit
ent, existing content is strictly controlled and edits can only be done by users in designated editor groups. Editor
):\n\n\nWithin the Email preferences\xa0section,\xa0you can choose the\xa0frequency of the emails:\xa0\n\n
all of the sites that a user is a member of. The Events section appears on the lower right-hand side of the Dashb
vents that match the filter (category or date archive) that has been applied, in chronological order. By default, no
or any imported calendar. This setting does not change the default time zone of the site or instance of Collabora
mments,\xa0iSheet comments, use a 'Like' button, access My tasks and use Private messages.\n\nPasswords, pe
List View\nIn List view, each task is represented by one row, and each column represents a different field for eac
ierarchy view to focus on metadata specific to your needs. Select the information you need to see on the hierarc
metadata\nexport and import tasks to Excel for bulk updating\n\nThese features enable you to categorise or org
es .NET 4.5.1 Framework although those prerequisites will automatically be installed if they are not found. \xa0\
transfer in Outlook\n\n\nand\xa0Folder management\xa0\n\n\n\n\n'], 'Breadcrumb_path': ['', '', 'Apps, plugins
the settings are configured, each time an email is sent, it may be possible to apply different settings to the attac
d secure file transfer rights will not be able to use it.\n\n\nTo deploy the HighQ Office plugin throughout an orga
nk - Anyone can access the document\nUsers in my organisation - Any users in the organisation with access to t
oload location\xa0choose where the file should be uploaded. If Shared items\xa0is selected\xa0the file will be a
ler within Collaborate.\n\nUse the arrow icon shown in the picture above or the More actions\xa0option to dow
oaded into Collaborate.\n\nRight-click on the email message to display further options at the bottom such as Sav
box.\xa0\nWhen you create an email with an attachment and then send the email, the Upload and send attach
you have uploaded a file from Office into your My files area of Collaborate the Save and View options are availa
size.\nAttachments can be secured, to ensure that only recipients who have Collaborate accounts can access the

ɔen the Edit folder window.\n\nThe name of the folder can be changed here and this will update in Collaborate a
, 'Breadcrumb_path': ['', '', 'Site, content and user administration', '', 'Alerter service email'], 'Related_materials':
strator, navigate to your drop-down menu >\xa0System admin. The system admin\xa0screen is displayed. Withi
oin the editing session and once users have completed working on the document a new version is created in the
ser can add or edit a description. These comments only appear to users with permission to edit folders\nLocatic
l\xa0so that every folder and file inherit\xa0security from the top-level folder,\xa0moving a folder or file will no
arch for\xa0Document Assembly:\n\nSelect either Enabled, default ON\xa0in every site or\xa0Enabled, default
ust click\xa0Check out,\xa0check the file out\xa0and then check the file back in to create the new version, as de
f necessary.\n\nOnce a file has been checked back in it is considered a new version.\n\nTo start, click More Actio
to see views with a limited selection of columns.\nIf there are specific columns that should not be visible to a u
s of the site within the above screen, and click\xa0Save. Your new template will now be saved. You can now con
Compare.\n\nThe Compare screen will display:\n\nIn the Compare screen, you will see two sections:\xa0Chang
ɔu are impersonating your chosen user, you will see the following message:\n\nThis informs you that if you navi
the top righthand corner click\xa0Follow:\n\nOnce you have followed a user, the button will display\xa0Followir
s.\xa0\nTechnical Support\nContact the global support team or confirm the HighQ operational status.\nOther s
selected\xa0and\xa0enable the Megamenu.\xa0Then you can\xa0add all the relevant columns into the mega n
n that is discussed, contact HighQ\xa0to have that option enabled\n\nTypically, when there is existing content ir
a0Send\xa0to send the message.\nA site administrator determines whether or not to enable the\xa0People\xa0
name.clientname.com/instance\nURL\u202f-\u202fhttps://platformname.clientname.com/instance\nCNAME\
ou click\xa0Publish\xa0the content will be labelled as your chosen language.\nAt the moment, the types of cont
verview'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/channel-admin-in-puk
that email and create a password for HighQ Hub. HighQ Hub has a separate password from any other Collaborat
make Boolean operators visible in the search field after each search query (i.e.if you search for 'legal document')
n search for content in recently saved content;\xa0new content is indexed approximately every 10 minutes.\n\n
ail.\nShare as a link\nClick the\xa0Link\xa0tab to display the link options:\n\nClick\xa0Select link\xa0to select th
ced the ability to re-order system and email preferences, allowing users to reduce errors when setting up their
otifications\nTask templating\n\nKey features\n\nManage tasks in the Kanban style card view for agile task man
\xa0by other Collaborate users.\n\nMy files\xa0is not enabled on every instance of Collaborate.\n\nAccessing M
mation about the expired shares can be obtained from the\xa0Share info page.\xa0\n\nThe Shared items tab inc
ollaborate accounts. The system will send an email\xa0which includes a link for accessing the file.\nSharing a File
he page simply shows a list of the items shared in reverse chronological order:\n\nFor each item, the following i
layed when it contains files and\xa0serves as a temporary folder for files that are to be checked and organised.\
ed.\nIn the Files module, click navigate to Add > Zipped Files\nEither browse to the zip file or drag and drop the
private\n\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Document Library - Publisher'], 'Related_ma
he\xa0System admin\xa0screen is displayed. Navigate to iSheet admin in the left-hand side panel:\n\nThe list o
.\n\nAs of August 2022, you can sync matter management data with Legal Tracker and use HighQ to help mana
e recipient list a name and also add rules to the list. To add a rule, click\xa0Add\xa0> Preferences:\n\nThe\xa0A
nWithin the\xa0Content settings\xa0section, click the\xa0Teaser\xa0dropdown:\n\nHere, you have 4 options fo
Active,\xa0Archived\xa0or\xa0Disabled.\nAdditionally, you can exclude internal organisations by selecting the\
nt within the system will inherit:\n\nAnd then each individual piece of content can influence SEO through optim
ck a Marketplace notification in your Notifications:\n\nThis takes you to the template gallery, opened in\xa0a w
\nOnce Practical Law Matter Map integration has been enabled, a new tab labelled\xa0Practical Law Matter Ma
n that site, and also labelling whether they are a System administrator or not. Find the user you wish to imperso
tem customization\xa0>\xa0Themes:\n\nThe\xa0Themes\xa0page is displayed:\n\nThe\xa0Themes\xa0page w
\xa0>\xa0Edit\xa0for the chart you wish to set the colours for:\n\nThe\xa0Edit panel - Data visualisation\xa0sc
the restriction turned on for the entire instance to prevent any user from adding customer Javascript. Once ena
on\xa0screen, navigate to the\xa0Number formatting\xa0section:\n\nWithin this section, select the\xa0Show w

select \'Health and Safety\',\xa0or because it is so important, you could decide that it deserves its own label:\nh
Within the\xa0Customize\xa0screen, navigate to\xa0Data visualization charts\xa0>\xa0Themes:\n\nClick\xa0C
sers\xa0in Publisher, navigate to your profile drop down menu and click\xa0System admin:\n\n\nThe\xa0System
a0Import users\xa0section, you can browse for a file located on your computer to upload the users, via\xa0Brow
e process (when a new user has joined).\xa0The client can sync the users\' images and then if any new users joi
are added to this user group will have access to view and run the audit report.\n\nPlease note, that by default,
Edit rule\xa0screen will be displayed:\n\nMake the changes you need to make to this rule and click\xa0Save. For
ke request.\n\nPlease note, you can simply click the header of a section, e.g. Status, to expand that section and
not exist within your site, click\xa0Add\xa0>\xa0New workflow:\n\nAnd create each workflow similar to what w
ere, will be reflected here.\xa0\n\nOnce you have selected the template, navigate to\xa0Admin:\n\nWithin the\
templates is displayed.\n\nClick Matter management to see one or more iSheets, depending on which options a
e viewed)\nPermissions\xa0â€“ You can\xa0restrict\xa0content to a specific group or organisation or you can m
hat if a device is viewing the media content and the bandwidth is poor, a lower bitrate version of the file can be p

cluding all metadata\nUser preference - Email and system preference report generation, including date comparis
ed, all existing and new documents uploaded to the site will be sent to the OCR server for processing, following
s:\n\nTo display the\xa0Add images\xa0screen:\n\nClick Browse\xa0and select the files you want to upload. Th
the default language will always show unless there is an associated version of that title in the users selected lan
dule\xa0and per-content item. By default, content published to a module will use the SEO settings of the module
xa0and\xa0Last modified on\xa0data.\nAdding a new multi-iSheet source\nTo add a new multi-iSheet source, c
ew form or clone an existing form.\n\nForm admins:\n\nOnly have rights to the forms they have even given acce
\xa0iSheet.\xa0\nAdding and editing Site metadata columns\nOnce you have clicked the\xa0Site metadata\xa0i
\n\nAdditionally from within this screen, you can search via\xa0Advanced search:\n\nAnd search using these new
age. You will also be able to filter files using the custom file metadata fields applied to a specific folder view, help
example,\xa0Associations in Doc Auto documents must be reapplied\xa0after you create a site from a template
Doc Auto is enabled, any user may download and install the plugin, but only a System or Site Administrator may c
ess, add it to a project task and much more. And every document version is automatically managed in HighQ, wh
After adding variables, you can add conditional rules, loops or validate the template.\n'], 'Breadcrumb_path': ['',
c Operator. The value field\xa0updates with all available values for the chosen column. Choose a value from the
ber you can also place conditionals inside loops so you take only the data that meets the conditional rules, eg in
sage will notify you if any issues exist.\nYou will also see a full Validation Report in the right-hand panel with a li
alidated the template, click\xa0Preview\xa0and choose one of the following further options:\n\nSitewide previe
of the modules within the template. You cannot edit this selection during this process, but modules can be edite
a .xlsx format.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Export a single site template'], 'Related_
ick the\xa0Users blocked from Publisher\xa0group:\n\nThe\xa0Users blocked from Publisher\xa0user group wil
port\xa0new templates. Additionally, you can\xa0Search\xa0and\xa0View\xa0existing templates.\nView existing
d\xa0a template\xa0as a\xa0Favourite.\n\nTemplate source columns:\n\nTemplate source\xa0indicates if\xa0t
\xa0Edit template\xa0screen is displayed:\n\nIn this screen, you can edit the details of the template. This screen

splayed. The report will set out how compatible the template you are trying to import is, to the instance you are
s displayed:\n\nWithin the\xa0New site template screen, you have access to the following fields:\n\nName - The

on engine\xa0in the search results.\nIn the 'Automation engine' profile page click More actions > Edit profile.\n\
yed to new users.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Custom Cookie notice'], 'Related_ma
nts:\n\nIn order to add a file to be used for JS, CSS and fonts, click Add file. The Add file screen is displayed:\n\nE
ail address and click Download results to view every instance in Publisher.\xa0\n"], 'Breadcrumb_path': ['', '', 'Sy
itation screen is displayed:\xa0\n\nHere, you can either use the default text or enter your own email subject and

or the first entry, you would set the Contact ID as \'1\' and the second entry would be \'2\', etc.\xa0This field is r
red in any of the client\'s own data centres or in any cloud-based provider (like Amazon AWS), in which case the
ate\xa0hosted in different jurisdictions\n\n\nHybrid storage is a premium feature;\xa0please contact your High

ne of a template or change the status. \xa0Changing an iSheet template status from Active to Pending will remo
y changes made to an iSheet after it is saved as a template will have no effect on the template.\niSheet templat
s is a two-step process.\nStep 1: Add New Internal Users\nNavigate to the System Admin > User Admin page:\n
rs (the Acme Client Team) is always added to those sites. That team consists of 10 users at the law firm, 4 users f
d:\n\nWhere you can search for an existing organisation and select it.\nAssociating with a new organisation, dis
Iy Site) will no longer be visible and external attachments to group messages can no longer be managed by users
clicked\xa0Send invitation, the\xa0Send Invitation\xa0screen is displayed:\xa0\n\nHere, you can either use the
placeholder files with an hqc extension, as shown in the image above. When a file is clicked, a blue 'downloaded
ler files. Sort the report listing by document size to see which files are largest.\n\n\n\nUser summary report - th
System vocabulary. Once changed\xa0the new terminology will be displayed when accessing the options for a s
ermined within their email preference page.\xa0\nA user has several options in relation to how they receive the
xt to the organisation that you want to create the auto login link for and select\xa0Edit details:\n\nThe\xa0Orga
ur clients for filters like 'All banking clients'\xa0if you wanted to. To access\xa0All organisations\xa0navigate to\x
main. Each organisation can be linked to a single domain or a series of domains such as barclays.com, barclayswe
nce, edit the details of each menu item, and also hide the menu items.\xa0\nAdding to the system bar\n\nIf you
permission individual\xa0content items published in modules to more people if required, by tailoring the permiss
\xa0 To create new exception domains and to manage existing exception domains.\n\n\nCreate a new exception
w organisation button, new organisations can be created separately. For example, a law firm's largest clients cou
ey should click on the provided link in the email and then enter a new password on the login page.\n\nThe user
announcement using the rich text editor\xa0and select the Display content checkbox. Click\xa0Save\xa0to save

e site has been created, it is advised to add\xa0one or more users as site administrators. Until then, only system
Click\xa0My files\xa0within your profile settings to display the\xa0My files\xa0screen:\n\nHere, 'My files' is effe
filter your report by\xa0Title,\xa0Module,\xa0Author or Contact\xa0and\xa0Metadata.\nClick\xa0Show audit\
s organisation\nWhat they Autologin URL is for this organisation\nWhat the Organisation URL is\nWhat the Orga
eld is left blank, it will show results for all organisations)\nTarget users:\xa0Here, you can specify which user\xa0
Within this field, you can select the modules that users have access to\xa0within\xa0the system (E.g.\xa0Publica
introduced a new filter within this audit report to enable administrators to remove system administrators or co
e to filter this report by Module,\xa0Organisation or Group or\xa0User\n\nAs of our 5.7 release, we have introdu
tures\xa0section, you have the option to filter your report by\xa0Title,\xa0Organisation or Group,\xa0Organisat
preference setup audit -\xa0generates a report of users' system and email\xa0preferences\nUser search proxy
ions)\nPerformed between: This is the date range of the audit\nSelect users: You can select specific users to bas
to audit against any of the successful or failed mail records\n\nClick\xa0Show audit\xa0to show your final audi
ill run against all reportable pieces of content in the instance\nPerformed between: This is the date range of the
roducts,\xa0the report will run against all reportable pieces of content in the instance\nPerformed between: Th
w your final audit. Once you have clicked\xa0Show audit, you can click\xa0Download to excel\xa0to download y
in the document library)\nPerformed between: This is the date range for your audit\n\nClick\xa0Show audit\xa
fy a user you want the report to be filtered on. (If this field is left blank, the results will be shown for all organisat
you can select whether you want to search specifically for organisations, users, or both\nSelect Event/Workshop
can select each of the Modules that\xa0users have access to within\xa0the system (E.g.\xa0Publications, Events,
blank, the results\xa0will be shown\xa0for all organisations)\nTarget organisation:\xa0Here, you can specify an
e range of the action you want to investigate\nTarget User:\xa0Here, you can specify a user\xa0you want this re
ned between: Here, you can specify the date range of the action you want to investigate\n\nClick\xa0Show audi

ın select each of the Modules that\xa0users have access to within\xa0the system (E.g.\xa0Publications, Events,
for your instance, the option is visible in AI Hub at system level and can be set up.\xa0\n\nConfiguration notes\
iew and management of in-house and outsourced matters; Corporate legal teams use multiple systems to mana
e opened for quick reference or revisions.\n\nPlease ensure Legal Tracker integration and\xa0\xa0Legal Tracke
quester must be invited to the HighQ instance in order to raise the intake request.\nIf you use HighQ Forms, the
ices iSheet.\nThe join creates an automatic link from a matter information entry to all invoice entries for that m
window displaying the folder structure of the Files module. From here you can select multiple files or a folder. If
take quite a bit of time and effort.\n\xa0\nRequirements\nElite 3E integration with Collaborate requires:\n\nar
sed to control access to sensitive data; only records in the view are available to users with access to the created
linked can also be used as a source of common columns required for different iSheets on sites. \xa0For example
HighQ accounts\n\nEnabling the integration\nIn order to enable the integration on your instance, first, you mu
hQ AI analysis process. \xa0\n\nFor example,\xa0in the Files module, you will see the multi-language document
ne which AD users and AD groups will be added to Collaborate. \xa0(For example, only employees in your Londo
lication registration:\n\nIn Publisher you need to\xa0navigate to System admin > System settings > Linked collab
ed standard for digital content.\nThomson Reuters strives to follow\xa0the standards set out by the latest WCA
splayed before the template is imported will highlight missing features,\xa0if you are unable to activate a featu
figuration and content are appropriate for its intended purpose.\xa0\nHome module\nIf the Home module incl
been used for a specific project makes a good candidate to be saved as a template and reused for similar proje
ure you have enclosed connected conditions in parentheses (brackets).\nDecide who will set user email prefere
nFirefox\nGoogle Chrome\xa0\n\n\nIf are logged into Collaborate using either Internet Explorer, Chrome or Fire

n rights (but possibly more)\nOne or more users with View-All-Question rights\n\n\n\nAll users should be given
': ['https://knowledge.highq.com/help/best-practices-and-more/supported-browsers-and-mobile-devices']}
ke sure at least one group has access to this iSheet, if permissions are applied to the iSheet. \xa0(By default, eve
correct during creation. With only one exception (changing a single line text to multiple line text), column types
file and folder metadata iSheets also have default columns for related files and folders), a new iSheet does not h
of content.\xa0\nAdditional search features\nThere are extra features you can utilise to improve your overall se
n Admin.\xa0(The non\xa0System Admin\xa0may share the password with another person on their team, if they
ing folder permissions, giving those users the ability to add files and/or folders.\nAny files added by these users,
omparison tool configured on your instance, such as Workshare Compare. If further analysis is required, scores
check the checkbox next to the setting, change the value and hit Save\xa0at the bottom of the page. It is also po
new API application in Collaborate that corresponds to each of the other applications, which will include a redir
watch our video for how to set this up.\xa0\nExternal link\n\nOnce you have created your link, it will look like t
ndroid Nexus - 8.1 (Oreo) is also officially supported\xa0\niPad stable versions are iOS10 and iOS11.4\xa0\nVers
based on the browser being used.\n'], 'Breadcrumb_path': ['', '', 'Best practices and more', '', 'Optional browser
teps be followed:\n\nThe Site Administrator should confirm that an invitation was sent, by looking at the User\x
n\nThe email address they are entering on the login page. If the user has multiple corporate email addresses (lik
issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Access from anywhere'], '
terials': ['https://knowledge.highq.com/help/site-content-and-user-administration/add-users-and-groups-in-coll
\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Add, visualise and edit iSheet data'], 'Related_materials': ['https://kno
from the Admin area of your site.\nRecommended audience: Site administrators\nIf you experience video play
ook'], 'Related_materials': ['https://knowledge.highq.com/help/apps-plugins-and-connectors/drag-and-drop']}
], 'Breadcrumb_path': ['', '', 'Videos', '', 'Associate a site with a Contract Express template'], 'Related_materials': [
ssociate your word template with iSheet data'], 'Related_materials': ['https://knowledge.highq.com/help/apps-
e clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Auto-create iSheets from Excel Files'], '
ayback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Auto-create iSheet
ideos', '', 'Automatically delete a file with Workflow'], 'Related_materials': ['https://knowledge.highq.com/help/

deo playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Communica
Related_materials': ['https://knowledge.highq.com/help/getting-started/configure-notifications', 'https://knowl
d Plugin'], 'Related_materials': ['https://knowledge.highq.com/help/apps-plugins-and-connectors/doc-auto-wo
he\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Contract Express - Edit Questionnaires'], 'Related_materials': ['
oving empty Contract Express category folders from displayed lists â€“ speeding up the time it takes to find rele
\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Copy emails into the platform using the Office plugin'], 'Related_mate
ndle of files'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/download-or-exp
ed_materials': ['https://knowledge.highq.com/help/site-content-and-user-administration/add-and-manage-site-

ath': ['', '', 'Videos', '', 'Create conditions with the Doc Auto Word Plugin'], 'Related_materials': ['https://knowledg
m site metadata'], 'Related_materials': ['https://knowledge.highq.com/help/system-administration/creating-cus

, '', 'Create multiple home pages'], 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-us

ted_materials': ['https://knowledge.highq.com/help/system-administration/create-a-site-from-a-template']}
lease clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Creating Workflow Rules'], 'Relate
, '', 'Videos', '', 'Customise the site navigation bar'], 'Related_materials': ['https://knowledge.highq.com/help/sit

ials': ['https://knowledge.highq.com/help/site-content-and-user-administration/isheets-calculation-column']}

ments'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/esign-electronic-signat
hare files'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/secure-file-transfer-
G Suite'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/edit-documents-with-
['https://knowledge.highq.com/help/working-with-content/edit-and-create-office-online-documents-in-files']}
d_materials': ['https://knowledge.highq.com/help/system-administration/creating-system-dashboards-and-add

, 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-user-administration/import-data-fr

'', 'Videos', '', 'Enable the Contract Express integration'], 'Related_materials': ['https://knowledge.highq.com/hel
path': ['', '', 'Videos', '', 'eSignature Tracking Statuses'], 'Related_materials': ['https://knowledge.highq.com/help
'', 'Export AI Hub metadata into an iSheet'], 'Related_materials': ['https://knowledge.highq.com/help/site-conte

p to protect against accidental inclusion of confidential data and removes the need to re-upload files to restore
ecommended Audience:\xa0All users\xa0\nIf you experience video playback issues, please clear your browser ca
\xa0\nRecommended audience: Site Administrators & End users\nIf you experience video playback issues, pleas
mb_path': ['', '', 'Videos', '', 'HighQ & Legal Tracker Matter Linking'], 'Related_materials': ['https://knowledge.higl
2023 Q2 Feature Release Recap'], 'Related_materials': ['https://knowledge.highq.com/help/whats-new/release-
please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ 5 unified platform'], 'Relate
ion\xa0\nRecommended Audience: System & Site Administrators\nIf you experience video playback issues, plea
Auto is enabled for their instance.\nRecommended audience: System/Site administrators\nIf you experience vid
dcrumb_path': ['', '', 'Videos', '', 'HighQ File Relationships Feature'], 'Related_materials': ['https://knowledge.higl
umb_path': ['', '', 'Videos', '', 'HighQ File Relationships Setup'], 'Related_materials': ['https://knowledge.highq.cor

unning date queries and utilising the power of today's date.\nRecommended Audience: Site administrator & End
d time spans in matters and document generation.\nRecommended Audience: All users\nIf you experience videc

ıt\nRecommended Audience:\xa0Site Admin\nIf you experience video playback issues, please clear your browse
\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher - Bouncebacks'], 'Related_materials': ['https://kn

ɔdental setting of restricted content to public\nRecommended Audience:\xa0System/Site Admin\nIf you experier

they set up a new email\nRecommended Audience:\xa0Site Admin\nIf you experience video playback issues, pl
ɔlayback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher -
titles. Thus improving time to value.\nRecommended audience:\xa0Site\xa0administrators\nIf you experience v

\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher - Online Events Feature'], 'Related_materials': []}

e clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher - Remember Content F

ake process for your users.\nRecommended Users: Site Administrators & End Users\nIf you experience video pla
/'], 'Related_materials': ['https://knowledge.highq.com/help/videos/create-a-workflow-using-the-files-module',

ss to.\nRecommended audience: Everyone\nIf you experience video playback issues, please clear your browser c
https://knowledge.highq.com/help/getting-started/user-profile-in-collaborate', 'https://knowledge.highq.com/h
\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Map iSheet columns in Contract Express'], 'Related_materials': ['h
e charts'], 'Related_materials': ['https://knowledge.highq.com/help/system-administration/multi-isheet-sources
, 'Related_materials': ['https://knowledge.highq.com/help/videos/multi-isheet-source-charts', 'https://knowledg
d Audience: All users\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'One-Click Approvals'], 'Related_materials': []}
fice 365 integration enables you to view, create and collaboratively edit Word, Excel and PowerPoint files in real-
\n\xa0\nIf you experience video playback issues, please clear your browser cache\n\n\n\n'], 'Breadcrumb_path'
ath': ['', '', 'Videos', '', 'Permission content in the Files module'], 'Related_materials': ['https://knowledge.highq.co
you experience video playback issues, please clear your browser cache\n\n\n"], 'Breadcrumb_path': ['', '', 'Video
Preview option in the Doc Auto Word Plugin'], 'Related_materials': ['https://knowledge.highq.com/help/apps-pl
a Menu Permissions'], 'Related_materials': ['https://knowledge.highq.com/help/getting-started/mega-menu-na
ne Approval Via Email'], 'Related_materials': ['https://knowledge.highq.com/help/getting-started/publisher-over
eos', '', 'Publisher - System & Email Preferences'], 'Related_materials': ['https://knowledge.highq.com/help/getti
h': ['', '', 'Videos', '', 'Publisher - Targeted Email Campaigns'], 'Related_materials': ['https://knowledge.highq.com
ne\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Publisher - Targeted Email Campaigns Feature Release'], 'Relate

sk assignees\nBy default, a user who can view\xa0tasks can also edit\xa0the\xa0assigned task.\nAs of August 2(
e\xa0Files\xa0module, navigate to where you want to upload your new folders. Once you are in the correct loca
nin the\xa0System admin\xa0screen, navigate to\xa0System settings\xa0>\xa0Bounceback management:\n\nTh
e to\xa0Site admin\xa0>\xa0Workflow\xa0>\xa0Rule builder:\n\nThe\xa0Rule builder\xa0screen will be display
either select an existing workflow, or create a new workflow. Once the workflow that you wish to add the rule to

in which the iSheets are displayed in the iSheets module is controlled by the order that they are listed in the Sort
Enter a name for your template, then select if it is a site wide or single record template.\nSite wide templates\nH
must have access to one of the available iSheets\n\nOnce both of these conditions are satisfied, the iSheets tab
on\n\nOnce you have added your navigation content element, you can set the\xa0default navigation in the Details
your site.\xa0\nOnce you have saved your changes, users viewing that site in their chosen language\xa0will see
configure the home page:\n\nThe\xa0Edit\xa0home page will be displayed:\n\nThe Home edit page consists of
orner of the screen:\n\nThe\xa0Home\xa0page will now be displayed in Edit mode:\n\nDashboard name, colum
min status to, and click More actions:\nWithin the More actions options, click Edit permissions:\n\nThe Manage
ate picker.\n\n'], 'Breadcrumb_path': ['', '', 'Site, content and user administration', '', 'The Billing page'], 'Related_
report provides an overview of all\xa0files in the site and the file access rights assigned to each security group:\n
specific files and folders or about the site/matter in general. In order to see the Q&A module and have any type
hat are asked and the responses sent.\n\n\n\nThe ability to allocate topic experts - all questions tagged with a s
displayed by default and the name is a link to the user's profile page. The other fields shown above, are optiona
columns\xa0or CE Output\xa0iSheet\nif the attachment column in the iSheet is configured to use a Custom Loc
et triggers\nThe Triggers tab is displayed:\n\nSelect iSheet record from the first drop-down menu:\n\nAnd selec
oll bar will appear to accommodate the extra text. If you wish to provide a bigger space for your users to add tex
l when the iSheet is viewed in the iSheets section. entries that are too long continue on a new line. The minimum
screen. Values may be added, deleted or changed.\nSelect Edit next record on save to automatically open the r
been enabled on an iSheet limiting which items a user can view, then the item will not be listed at all when the
er to see the Version number, the Date and time the version was created and the Author of the version. The user
HighQ's integration\xa0with Contract Express.\nSetting up Doc auto public access\xa0\nDoc Auto Public Access
to Contract Express.\n\n\nTo see more about Contract Express templates and admin, please access the Contac
showing all of your existing workflows:\n\nWithin this screen, either edit and existing rule, or create a new rule
a0Add >\xa0New rule:\n\nThe\xa0New rule\xa0screen is displayed:\n\nWithin the\xa0New rule\xa0screen, you
information about adding a rule please click here.\xa0\nSet triggers\nIn the Triggers tab you should make sure y
a0this option to Enabled and adding in the author by name\nPublish date\xa0- This can be enabled to show whe
ed for any one of those countries, or the item could be used\xa0for each metadata node (usually jurisdiction).\x
xa0the author\nContent table\xa0- Here, you can determine if the content table is expanded, collapsed or disabl
e pubication:\n\nPublished - This is content that has been published on the system and therefore visible to the e
navigate to the Admin page for your site >\xa0AI Hub\xa0>\xa0Configure:\n\nThe\xa0AI Hub services configura
s included in the Site template.\nCreating a site from a Site template with AI configuration\nWhen creating a site
data iSheet).\n\n\n\nAs of April 2023, if you know the name of the variable, you can use the Search field to quick
:\n\nEach field is described below:\n\nCopy to - Click Choose... to select a folder. When this action is triggered,
ctions.\n\n'], 'Breadcrumb_path': ['', '', 'Site, content and user administration', '', 'Move columns to an iSheet sec
xa0first iSheet listed;\xa0other iSheets will be listed according to the defined sort order.\nDelete - Delete an iSh
Viewing imported data in Data Visualisation Analysis and then choose the AI engine. Choose how to display your
eir drafts via More actions > Edit. After editing a draft, you have the same options to save or discard the draft by
n, the date and time the action was taken (based on the instance time zone) and the IP address of the user who
an archive, type an archive name and click Add archive. Each saved archive must have a unique name.\nIn addit
edited by another user, will see the following screen:\n\nThe user will be unable to edit the item until the other
each day, based on the time zone of the Collaborate instance. If user preferences have been enabled, users may
her to make any such filters available, and each user can determine under what circumstances they want to rece
missions\nPermissions cannot be set at the iSheet level, but are governed by permissions set for files and folders
arranged in the view sort. \xa0\n\nThe Draft items view\xa0only appears in an iSheet view list for users if they h
Triggers\nThe Triggers tab will be displayed:\n\nIn the Triggers tab, select Task from the first drop-down menu:\
ne event\n\nVariables\nYou can\xa0add variable content to some fields,\xa0dynamically retrieving data from th
llows you to add a reminder to the ask\nAttachments - Here, you can add the triggering file to the newly create

/ attach a file from an\xa0iSheet record\n\n\nTo attach a file from an iSheet record, select\xa0iSheet record\xa0
you to add specific organisations and groups, which acts as the permission grouping. All users in each of the org
anslations of your new channel name. If the\xa0instance is configured to provide\xa0Spanish, for example, you c
he\xa0metadata\xa0related to the content\xa0and click Next. If you have additional pieces of metadata that are
xt\xa0to display the Edit Dashboard tab that\xa0enables you to\xa0customise your dashboard.\n'], 'Breadcrumb
an have its own panel(s), and if there is enough space in the column it can have its own subsection. To add this su
e menu. This gives full access to instance settings, all content and all features enabled by HighQ support.\nSystem
Setting up the Basic user\nThe Basic user is managed in System admin.\nTo manage the Basic user, navigate to y
0page, click\xa0More actions\xa0>\xa0Set permissions\xa0for the user who you want to change permissions:\n
ms use a mix of both approaches.\nThomson Reuters HighQ provides a set of tools that help firms handle LPM d
nents and redlines\nMessage team members privately\nComment on content across the platform\nLike content
ured so that they\xa0may be customised with your firm's name and identity, contacts and permissions.\n\nHow
re easily and save time by customizing your Hierarchy view to see the columns you need. Simply select the colum
please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Tasks Hierarchy View - Manage C
the current status of the task and the drop-down menu shows available statuses. Click Add new status to create
have already used lists to categorise those types of transactions along with their sub-lists, tasks and sub-tasks all
ublisher updates this month\n\n\n\nUse case overview June release\nUse cases: CLM, Document Approvals\nYo
mb_path': ['', '', 'Videos', '', 'System Dashboards - Files Panel'], 'Related_materials': ['https://knowledge.highq.co
HighQ (or HighQ\xa0Add-on for Google Workspace) in the Add-on list.\n\nSelect the\xa0HighQ\xa0Add-on for G
on on this page is applicable to macOS HighQ Drive.\n\nInstallation\xa0\nThe HighQ Drive application can be do
alue\n\nFaster solutions for customers who use AI and customised forms. Sites can be built faster because site a
abled by our support team\n\n\xa0\nNovember updates\nUAT updates start the weekend of the 3rd December
longer part of your company you can then set these users to archived (within your AD) and this will then restrict
dules, or to match updates to your system, can only be performed by your administrators. Access to HighQ Appli
pup blocker installed on your server.\xa0\n\n\nPopup blockers will stop logging pages from loading, please make
d XML feed)\nEnterprise Key Management (EKM) (Collaborate only)\nHybrid storage connector (Collaborate only
Your\xa0HighQ Account Manager can provide purchasing details.\n\nWhat is HighQ Appliance?\nHighQ Applianc
e will be installed on a dedicated server inside the client network.\nServer specifications\n\nVirtual server (VMw
eekend of the 1st October\nCustomer updates during contractual service windows, starting\xa0from the 8th Oct
croll down to\xa0Archived content:\n\nYou can now edit the page title and content of the error message. Once y
tomer updates during contractual service windows, starting\xa0from July 9th\xa0\nInternal version number 5.7
site in the instance you want to display the file(s) from.\nFolder (required) - Select the folder in the site and inst
s and turned off.\xa0\nKey Dates\n\nEnd of release of new features: Immediate Effect\nEnd of support and rem
tle checkbox.\nLayout - You can select whether you want to display the title only, or the title with a small, mediu
attachments\xa0\n\n\nSearch across all publications including full document content\n\n\nFilter publications u
load\xa0button at the end of the list of people, this will let you download a list of your current list (and will be fil
nd related materials\nSet event capacities and when reached automatically show as fully booked\nManage restr
. add new version or a\xa0new copy).\xa0\n\nFile emails automatically on send\nOpen Outlook, then HighQ Off
er upgrades from April 9th.\nInternal version number 5.6.13.\nAI Hub\n\nYou may now use bulk actions to\xa0s
orm. The messaging will focus on functionality of the product, guiding users through capabilities and offering tips
\nStay informed of whatâ€™s coming\xa0\nWe will be posting regular pre-release notes and video overviews, as
have previously licensed. Contact your Client Manager about enabling any of the new features on your instance

ams window.\n\n\nAlternatively, click the More icon (three dots) then More apps.\xa0\n\nSearch\xa0for 'TR Hig
folders were added, the Modified date becomes the date that the association was made.\n\n\n\nChanges to a
have previously licensed. Contact your Client Manager about enabling any of the new features on your instance

bility to make use of the Regex (Regular expression) field, where if you have the regex or criteria for matching th
set to Anyone with the link, Anyone with the password, Recipients must register or Specified system users only.
e set to repeat daily, weekly, monthly or yearly. See Recurring events\xa0below\xa0for more information. \xa0\
dated version, please contact customer support. For more information on these changes, click here\n\nCreating
ı the coming weeks to let you know about your scheduled update to the new version. When you update, you wi
'', 'Version 5.4 videos'], 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-user-adminis
otes and other changes\nThese tags can help you find changes that are relevant to your user type:\n\xa0\n\n\nU
0>\xa0Preference management:\n\nThe Preference management\xa0screen is displayed:\n\xa0\n\nPlease note
\nClustering similar documents can also find duplicate copies of a contract and allow you to easily assign a contr
disclaimer to the file, select\xa0the Disclaimer\xa0checkbox. Click Add to save changes and create the placehol
t location to store iSheet attachments. Instead, iSheet attachments will revert to the behaviour found in 5.3 - the
onstration of the new features and capabilities.\nHighQ's Support Team will contact you in the coming weeks to
s, files and folders\nYou can now sort workflows and rules alphanumerically\n\t\n\n\n\nFiles\n\nWe have prov
3 videos'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/document-redaction'
: will now be opened in Word, enabling you to\xa0edit it\xa0and save it back to itâ€™s original location\nThis giv
u can hide the title by selecting the Hide title checkbox.\nLayout - This is the layout of the panel. Select whether
e displayed in the Files module. This name does not need to be unique, meaning two subfolders can share the sa
.highq.com/help/getting-started/files-module-overview', 'https://knowledge.highq.com/help/working-with-cont
e option here will be Open in... > Powerpoint Online or\xa0Excel Online respectively.\xa0\n\nA new tab will open
ı every other way.\n\nAll tasks associated with files will only be displayed in the files module\xa0if they are com
sk screen.\n\nTasks created from the Tasks module or the Files module are identical in every other way.\n\n'], 'E
to the right.\n\nWhenever details of a question are shown in the detail pane to the right, the Expand\xa0button
in a flat format, there are no issues with file path length.\nHowever, as the files\xa0are renamed documentid-v
\n\nCompatibility notes:\n\nThis feature can be used with Office 97-2003 documents (such as .doc files) and\xa
Size:\n\nBy default, the files are shown in a column view, with the most recent at the top. The parent folder of e

ata to Excel, CSV or XML by selecting Export.\n\n\n\nPrint the items currently in view in a printer-friendly forma
nt daily or weekly alerts.\n\n'], 'Breadcrumb_path': ['', '', 'Working with content', '', 'iSheets - Bulk updates and a
eet Data article for more information.\n\nFrom the files module\n\nFrom the files module, click More actions n
column.\nModified date - The date and time when the item was last modified. \xa0This is a date and time colu
atisfied.\nIf there is more than one column based on the same condition, it is suggested that those conditional c
navigate to via this panel.\nNo of items to display\xa0-\xa0This allows you to select the number of items you wa
who created the form\nType - This is a system Metadata node that will need to be added before proceeding furth

status is\xa0Disabled.\xa0\n\nThe setting can be Enabled (default OFF) to make it an option for Site Admins, or
ualisation chart, click here.\n\nCharts are not versioned, so if you modify a Wiki version separately to changing t
an be included using an <iframe> element. Click\xa0Source\xa0within the editor:\n\nThe\xa0Source\xa0screen
es of the embed, such as the width and height, right click and select\xa0iFrame Properties.\xa0A user viewing th
is set to\xa0All\nOptionally, display any metadata\n\nClick\xa0Insert\xa0to insert the RSS feed.\nThe configurat
age. The Lists feature is most useful when used on the Home page, where content like Recent Activity and a list
es, at the request of the client\n\n'], 'Breadcrumb_path': ['', '', 'Working with content', '', 'Miscellaneous rich text
lay properties, and other advanced properties. The\xa0Advanced\xa0properties tab will not be used to create th
elements to change the order that they are displayed:\n\nYou can select whether the field is a mandatory field c
t settings for how videos are displayed, so the screens below may differ depending on how the module that the
ing, navigate to a site and click Add panel within a section:\n\nThe Add panel screen is displayed:\n\nClick Data
older or files and click Compress [x] items or Compress [Folder name]:\n\nThe finder automatically opens and hi
screen will be displayed:\n\nThis Overview tab gives you information about the wiki page, including who create

not be displayed.\n\n\n\nAttachments - All attachments are displayed in the blog post. Attachments can be files
tinue configuring the site.\n\n\nPut the site into Preparation mode, so no other users can view the site until it is
anisation\nDate\n\nSimply select the appropriate criteria (all of which must be satisfied for a question to be disp
o live feed is available or you are planning a one-off initial data import.\xa0\nAdding an RSS feed\nTo access the
iles in the\xa0Files\xa0module (in which case the permissions applicable to those files will depend on\xa0a user'
een.\nAfter entering your instance URL, the following screen is displayed:\n\nEnter your Email address and Pass
ey are displayed, with the same casing.\n\nEach section of information should be added in between the two apo
ILRN47z%2BeeOgEFCt8EGQJsWJiCH2WAUfXUFhmInsHtJoOZpfnhtB&fromContentView=1&nav=FRbANEucS95NN
o_path': ['', '', 'Apps, plugins and connectors', '', 'Use Doc Auto without the Word plugin'], 'Related_materials': ['h
s as secure and up-to-date as possible and, as part of this commitment,\xa0our plugins use\xa0the latest .Net Fra
ed to Collaborate directly from the DMS, using one of the DMS integration tools. Files that were first downloade

ıging that instance of Collaborate.\n\nTo accept the invitation and access the site, click\xa0Please click here to a
the user when needed (e.g. in their work email account or an authenticator app) and is valid only for a short per
nk.\nYou are automatically logged in via\xa0Single Sign-On\xa0(users accessing Collaborate via SSO will NEVER b
to your browser and log in without typing the passcode.\n2FA with HighQ apps can provide instance or site acce
xa0an access request notification.\xa0\nRedirect to the logged-in view in the browser.\xa0\n\n\xa0\nLog in with
isplayed:\n\nEnter your Email address and Password and tap Log in. If you have forgotten your password,\xa0ta
the user view.\n\nTo change this or view the options available a system administrator can click on their\xa0Prof
panel of the Document viewer:\n\u200b\n\n\nA user can only see relationships if they have access to both files
lso known as site-level) - With this setting, the same permissions will apply to every file and folder in the site. In
lders in that site. The top-level folder is always given the name of the site. Users with View Folder rights can use
ed as a tree hierarchy of folders and subfolders\nFolders that contain subfolders will display an arrow\xa0to the
s will be ignored and the native version of the files will be copied. The copied files will take their attributes solely
that are being shared show up with a Shared flag and items that have been shared at any time include a Shared
on control\nCheck-in/check-out\nBulk upload and downloads\nShow files from an iSheet attachment column\nD
sonal to that user in comparison to every other user's site.\nIn many ways My Site is like any other site - Files ar
ck here for more information on actually creating the dashboards and setting up permissioning.\nVersions of Da
inistrators can add new system dashboards, edit, archive and set existing ones as the default\xa0and manage sy
rds\xa0button, and click:\n\nThe\xa0System dashboards\xa0section is displayed:\n\nWithin this screen, you ca
\xa0screen is displayed:\n\nWithin the\xa0Global navigation\xa0screen, ensure\xa0Global navigation\xa0is on.

\n\nHere, you can edit and manage your dashboard.\nFirstly, click Edit dashboard\xa0to Edit the dashboard:\nA
be sure any File and associated metadata are approved before users are able to take further action\xa0\nVisibili
te to site Admin:\n\nThe\xa0Site admin\xa0screen is displayed. In the\xa0Site admin\xa0screen, navigate to\xa
ystem notifications\nTwo factor recovery codes\n\nFor the purpose of configuration notifications, we can ignore
-started/configure-notifications', 'https://knowledge.highq.com/help/system-administration/system-administra
naller screens, such as on smartphones. For example, on a typical screen the Top Navigation Bar looks like this:\n
ys you can add a menu item:\xa0\nList tab\n\nFrom this screen, you can create a navigation menu. Within the\x
t of sites shown.\nAutosuggest sites\nOne method used to whittle down the list of sites - is the autosuggest fiel
Top Navigation Bar, subject to profile access rules.\nOnly a user (or System Administrator) may edit his or her o
ntity and Access Management (CIAM) principles to integrate with SSO identity providers.\nPlease note that we c
x).\n\nIf your password does not meet the criteria specified by your System Administrator, you will see the follo
e entire email address.\nStatus\xa0- By default, the search will look for active users, but archived users can be l
to enable search across all versions of the content and this can be enabled in the global advanced search interf
our profile drop-down menu and click\xa0System admin:\n\nThe\xa0System admin\xa0screen is displayed. Wit
l but not download\nAbility to upload and then not be able to download the file while it is processed or reviewe
ule builder under Workflow.\xa0Either Add a new workflow, or select an existing workflow. In this example, the
a description for future reference. This is displayed\xa0in the rule builder.\nStatus - The rule's status determines
\xa0rules\xa0to\xa0define what it does (actions)\xa0and when it does it (triggers and conditions).\nActivating a
our workflow as a test (e.g. 'Test workflow'), then edit to rename it later with the More actions menu.\xa0\nClic
rule. First,\xa0add a rule, then name and describe the rule in the Details tab before adding one or more\xa0trig
nore information on adding folders, click here.\nFor more information on adding\xa0iSheet records, click here.\
ate that a file should not be reviewed) from the Index View. Files can be allocated for review in bulk and\xa0a\x
number), the Index view shows the file name and\xa0icon, the status, size and date the file or folder was last mo
he\xa0Admin\xa0module.\n\n\n\nSite summary\nThe\xa0Site summary\xa0page will be displayed:\n\nHere, w
vn that is given number 6.1.2;\xa0the files in that folder are given numbers 6.1.2.1, then 6.1.2.2, etc.\n\nThe nu
nd drag it to the position you want the folder to be in.\n\n\n\nChronological sorting\nWithin the\xa0Edit Folder

download capabilities are available to any user who has access to the Files module\xa0but each user can only do
g is active for the site):\n\nBundle options\n\nInclude folder structure - include the folder structure to help orga
a View\nMultiple configurable options are available in the Add View screen:\nName\n\nEnter a View name, wh
te indicates\xa0that a view is missing one or more mandatory columns:\n\n\nYou can check if a view includes al
n your Draft items view, with a status of Auto-saved.\nIf the system has auto-saved a record and the user closes
right of the screen. This is to let you know that a change has been made and offers you the chance to have an op
ate (AU)" column displays:\n\nIf the user selects "United Kingdom" instead, the "County (UK)" column would disp
of version 5.6, you may add\xa0system-generated File status columns to a View, such as approval template statu
ttps://knowledge.highq.com/help/site-content-and-user-administration/enable-sections-in-isheets', 'https://kno
website, Microsoft Teams, and your websites.\n\n\nClick Add:\n\nTo display the Add record screen:\n\n\nThe co
, tasks or folders, and even add containers to group items into dropdowns. The below information shows you to
ategories for which the blog author has edit permissions will be visible, see Blog categories and permissions.\n\n
o-saved, or whether it was purposely saved as a draft\nLast saved\xa0- This is the time that this content was las
ication reveals:\n\nWho took the action that triggered the notification\nThe action that was taken\nThe subject
changes to an existing blog post, made by anyone other than an Administrator. When a post is created or edited,
workflow\xa0screen is displayed:\nYou can view the\xa0files that are Pending approval\xa0and the files that hav
t the Files, iSheets, Tasks and Events modules are all enabled.\n\n\xa0\nBuilding workflows and rules overview\
ine whether any of the modules should be renamed and rename them.\xa0While any module can be renamed c
val templates.\n\nA\xa0request for approval\xa0is sent to the assigned 'approvers', as\xa0defined in the templa
ne\nRule\nWorkflow\nTriggering object (as of version 5.6, this includes a link to the triggering object)\nAction\n
will inherit permissions from the parent page. To access permission settings, navigate to Settings tab > Permissi
y wiki page and it will be displayed on the right side of the screen.\nCreating new top-level pages\nTo create a n
ts in a living, breathing knowledge repository. The use of a browser facilitates this process, as there is no owner
be displayed in the drop-down list, or users can use the search field to search for another site.\n\nFilter content
user avatars\xa0-\xa0If this checkbox is selected, a user's avatar\xa0will be displayed next to their name in some
ecent Activity, Tasks and Events will be displayed and those sections work in the same manner.\n\nAs always, yo
nal users. This article assumes that microblogging has been enabled and is available for any user.\nMicroblogging
is enabled)\n\n\n@mentioning\xa0a user in a microblog post or comment\n\n\nSearching for a user\n\n\nView
o reveal the list of recent private messages (both sent and received).\n\nUnread messages have a blue backgrou
ent viewer, where you can click in the\xa0Add a comment\xa0box, to add a new comment:\n\nHere you can en
ntial bidders, then the seller can choose to disclose the question to some or all of the bidders, with the question
d to a security group, then that group cannot have\xa0edit\xa0rights to the\xa0Files\xa0module.\xa0Also,\xa0w
sions\xa0>\xa0Manage organisations\xa0and\xa0User permissions\xa0>\xa0Data room team\n\nRestrict site to
y for a limited period of time, although this is not required.\xa0\nTo access the\xa0Announcements\xa0screen,
e\xa0>\xa0Settings\xa0>\xa0System notifications\nBelow is an example of the email notification:\n\nBidder sit
publishing approval is required for any new wiki pages or changes to any existing wiki pages made by anyone oth
s for the column, disable Inherit iSheet permission by unticking the checkbox. A table of groups and permission s
what type of access each group has to iSheet items.\xa0\n\nWhen Enable permissions is selected, a table like th
pare.\n\nYou may change which versions to compare by using the arrows beside each version in the legend pane
at have at least view access to the iSheet will appear in the permissions matrix.\n\nGroups that have no access t
ss their view permissions are restricted, users may export all of the data found in an iSheet into one of three forr
hoice (data validation)\n\nCells that\xa0use other formats\xa0are not imported.\xa0\n\nNote on merged cells -

erred format of the information, such as a US social security number in the format ###-##-####. \xa0Or, the desc
ou can also Import from a template.\xa0\nIf you have an excel sheet , then you can also add columns and record
p columns are preserved in deployed templates but in most cases must be re-created if you wish to link to anoth
vileges.\n\n\n\nSummary Information\nThe landing page of the "System admin" console contains summary info

file, a page will open where the recipient must enter the email address to which that email was just sent:\n\nThi
My files only if the My files feature has been enabled generally in Collaborate and only if file-sharing has been en
ser).\nThe name of the person who shared the file or folder, which is a link to that user\'s Collaborate profile. (If
ntent and user administration', '', 'Enable sections in iSheets'], 'Related_materials': ['https://knowledge.highq.co
columns into the desired order.\nAlso, a section can be deleted by clicking the Delete button. However, if\xa0th
l to the Add Column page used initially for creating and configuring the column. \xa0Nearly all column configura
they do not have access to the item in the lookup source. \xa0\nConsider how these item-level permissions aff
s reference the lookup source iSheet, a system admin can select the site and sheet name of the iSheet reported
created an iSheet with a choice or score column, open iSheets settings:\xa0click\xa0the Admin module, then se
ve an image, check the box next to the image to select it.\n\nClick Delete at the top of the page and confirm the
n is to create the different values that your users can select from. To do so, click the Add button to add a choice
d then press Save. To see the new scores you will need to go to the iSheet that contains the score column. In the
column page for calculation columns allows you to create formulas with the name of the columns and simple op
he same date will be presented in each different format:\nDD MMM YYYY = 16 Nov 1979\nDD/MM/YYYY = 16/1
n\nAdd an alerter condition on the iSheet Properties page.\n\nEnsure users who wish to receive alerts sign up f
decide whether you would like to display thousand separators or whether you would like to show the value ente
in an iSheet.\nAdditional column settings - Although there will be some consistent settings across all column typ
creen:\n\nThe available fields are described in more detail below:\n\nPanel title\xa0- The name that will be dis
an create or edit KPI charts.\nWhen you click on a KPI chart, it will take you to the iSheet that contains the data
user must have one of the frequencies checked (immediate, daily or weekly) plus any particular choice values th
o @mention a user, enter the @ symbol and then start to enter the name of the user you want to mention from
rint the selected view.\nSearch and print filtered records\nUse a quick or advanced search\xa0to find and filter a
un until you have entered at least three characters\nAlways uses an OR search ('any of these words')\nYou may
and then navigate to Actions > Share:\n\n\nAn Admin\xa0can limit the number of records shared in one action\x
l. Navigate to your\xa0Profile\xa0>\xa0System admin\xa0>\xa0System settings. Scroll down to iSheet form shar
to be created even by users who would not normally have access to your site.\xa0This allows users to, for examp
ers and Groups\nSite Groups\n\n\n\nChoosing All System Users\xa0or All System Users and Groups makes all u
\nOnce an iSheet has been associated with the\xa0Files\xa0module and\xa0a new file is added or an existing file
to the most recent version, without the need for email distribution and complicated version control.\nFlexible c
er folder in the current site\nAdd version - Upload a new version of the document which replaces (but does not c
acting text and areas\nIf document redaction is enabled, you may redact text, areas and entire pages in the doc
e) is only compatible with the Windows OS.\n\nSetting up HighQ integration with Contract Express\nIf you alrea
ttps://knowledge.highq.com/help/site-content-and-user-administration/map-isheet-columns-to-contract-expre
u can search for the name of the template you want to use.\nAs of August 2023, a site admin can archive unuse
t automation\xa0>\xa0Contract Express templates:\n\nThe\xa0Contract Express templates\xa0screen is display
e site Admin module. Select Contract Express templates under Document automation.\n\nClick on the More act
dit item window.\nDrop the file on the Drop files to upload area for the\xa0default location, custom location or
bundled for download\xa0(if you are an admin), searched\xa0(with basic search only) and organised.\nIf DRM a
sitive.\n\n\nTo display all files and folders again, delete the search parameters you entered into the search box.\
ou need to search in the site containing the iSheet.\nYou know the name of the content, but are not sure where
site or search the whole of HighQ\nSeparate out file-related results\nSelect one or more results to perform bulk
0it is filtered by a specific module, or accessed from the Files module.\n\nThe search form includes a number of
tching existing tags\xa0\nTo match with existing tags within Collaborate, type the name of the existing tag into
or has hidden the tag cloud. Click on a tag to filter the list of blogs shown in the middle to just ones with that tag
her to drive the\xa0whole structure\xa0of the platform, allowing control of what content is shown where:\n\nF
file in the files module, the right pane will display the file metadata.\n\nIf the metadata needs to be displayed a
Module settings then Files.\n\nManaging DRM permissions\nTo manage DRM permissions for User Groups, clic

e been enabled for the site you are in, then two additional columns will be displayed in the Files section of the ta
contain members from different organisations.\n\nClick\xa0Save\xa0to save your changes and create the new g
strators and member administrators will be able to add any system group to a site.\n\nWhile site administrators
following information is displayed\xa0for each user:\n\nAvatar\xa0- If the user has uploaded an avatar, that wil
including assigning permissions to users when user-based security has been enabled\nGroups\xa0- This page is u
nd manage this type of system group. Manually created system groups can have any type of user as a member,\
ed and adding those users to a quarantine list, this temporary precaution will stop users being added to the bloc
oup name section. Additionally, you can remove groups from this list, or remove every group by clicking Remove
iew the\xa0FileOpen Viewer for iPad/iPhone\xa0product page, or the\xa0FAQ for Publishers\xa0and\xa0FAQ fo
.\n\nAccessing Favourites\nCollaborate makes it easy to tag almost any piece of content as a favourite, but this\
arch of searchable files (i.e Word, Excel or PowerPoint files) in the standard search fields with a filter applied usi
the landing view of the iSheet. If a user does not have access to the default view, they will see the first view tha
a virtual collection of files\xa0from different locations. A query determines which files are listed in\xa0the Smar
t Express reflects the type of data that is expected. Answers can be multiple choice, a number, Yes/No, text, com

s.\n\nMany primary iSheets can reference columns from the same lookup source iSheet.\n\nLookup columns fu
nAssigned tasks: if a task that they have been assigned is edited or commented on in any way\n\n\nReminders -
ated from the site template ignore the HighQ site and use the iSheet unique identifier of the new site, rather tha
that a page is complete\na grey tick indicates that a page has been opened, but is not yet complete\n\n\n\nAs c
document.\n\nIn the example below,\xa0click Non Disclosure Agreement to create an NDA.\n\n\n\nIf this panel
ile:\n\n\nBrowse... or drag file(s) here - Within the Files tab, users can upload the file(s) either click Browse... or
ract Express) feature is enabled in system admin settings. This site automatically includes your published Contrac
HighQ Document Automation powered by Contract Express module via your HighQ representative and that it ha
n your instance, you can select Contract Express templates on your sites.\nEnabling Contract Express on a site\n
abled and how each module is configured (for example, if autonumbering is enabled in the\xa0Files\xa0module
or remove content from the site\nAutomatically remove users from the site or change user permissions\nAffect
n\nUsers are able to provide content translations by adding the translated content into the relevant language fi
oc template\xa0screen, you have the following fields:\n\nPanel title\xa0- This is where you add the name of the
roduction, header and footer and style for forms as simple or as complex as required.\nHighQ Form examples\nH
nBy default, the setting is Enabled. To disable HighQ Forms on your entire instance, click the drop-down menu ar
ew:\n\nClick OK, then Save to confirm the changes.\nCreating a form for a public site\nIf you need to embed the
rm window provides the tools needed to design and configure your form.\n\n\n\nTabs divide the configuration
ecessary - it is not possible to\xa0restore deleted items\xa0\nUse the Source option in the CK editor to add more
e\xa0to delete the folder(s) and all of its content.\n\n\nDeletion complete\nThe item(s) will be removed from t
on about the file, including a list of audits, notes about the current version (users also have the ability to add new
show the Word file icon type, but the placeholder file icon type.\n\nThis setting is turned off by default in all inst
supported application. To do this, right-click on the file and choose the Open\xa0menu option provided by FileS
uSign to open eSign services.\xa0\n\nIf more than one eSign service has been configured, the following screen i
rise the service.\nUse\xa0More Actions to Revoke authorisation or Remove third-party services:\n\nSite-level ac
g. Send to Adobe Acrobat Sign.\n\nClick\xa0Send to. If more than one eSign service has been configured the Ser
Q AI engine (for low volumes of documents), the AI Hub allows you to\xa0assess the HighQ AI engine.\xa0You ca
your site and click Admin > AI Hub > Configure:\n\nScroll down to AI Hub services configuration\xa0and\xa0turn
n the new classification.\xa0\n\nIn addition to classifiers, you can train your own clauses, or re-train HighQ provi
xa0\nPlease see\xa0our\xa0AI clause training guidelines.\n\nIn the Clause training window, either select an exis
\n\nFields\nDocument content extraction\n\n\n\nField\nDescription\nRelease\n\n\n\n\nTitle\nThe title of the
se the part of the paragraph that is relevant to the clause being trained.\n\n\n\xa0\nExamples of bad AI training

ties agree on the financial settlement, approved by a judge, without needing to go to court. This classifier has be
are limited to only those found in the default Kira Project Worksheet. If more than one worksheet is assigned to
e to your Profile > System admin > System settings:\n\nThe System settings screen is displayed:\n\nScroll down
l down to AI Hub services configuration:\n\nEigen is not yet available as\xa0an authorised AI Hub;\xa0click on M
min > System settings:\n\nScroll down to Generic\xa0AI:\n\nClick Add and enter the requested information, inc
tions.\n\nYou can import data from the AI Hub to Single Line Text, Multi-Line Text, Number, Date, Choice,\xa0Sc
detect the page, showing a box around the area to be captured, and\xa0automatically captures the page.\xa0\n
ssword will now be set and you will be redirected to the Edit profile page.\n\nRequesting a new password does
t and removal from Play Store and Apple Store: 31st of August\nShutdown of the application for all users: 15th\
o files that are uploading; files will first upload, and then files are downloaded. Downloads begin within 30 secor
etup. If your system uses ADFS, then it can use SSO with HighQ.\n\nBelow is a primer on how end users will expe
server does not need to be accessible from the internet as all requests to the ADFS 2.0 server are made from th
erson may have email accounts with different domains\nWhere a company has multiple regular email domains
partment that the user is a part of.\nPractice Area\xa0-\xa0This is the area of law that the user practices.\xa0\nI
new organisation an\xa0Organisation name\xa0and a\xa0Domain.\nThe\xa0Domain\xa0is the email domain tl
n is displayed:\nEnter the first name, last name and email address of the the new user. Once the email address i
ed in more detail here.\nDomain - The Domain is the domain that belongs to the organisation. For example, if th
rofile and unified search.\n\nA single log-in and base URL across the platform allows users to navigate seamlessl
n section you can create, edit or add menu items:\n\nTo add Menu items,\xa0click\xa0Add\xa0Menu\xa0>\xa0
profile shows all the user information that is stored in the system; including the information described in the Sun
og module can be used as a forum to solicit questions and feedback and provide responses and users can save p
to one of these languages. This means the whole system is set to that particular language\xa0and a user does n
, and select the language you want your instance to be displayed in.\xa0\n\nThis is YOUR preference. It won't c
nt questions\nTo add questions within a group, click Add parent question. The Add parent question screen is dis
vents and videos) have the following tabs:\n\nDetails - high-level configuration elements such as title, permalink
g and drop functionality which allows an administrator to customise each section of the page. Additionally, the
contacts\nComparison toolkit map\nComparison toolkit quick-report\nComparison toolkit updates\nContent lis
groups are collections of users who can edit each otherâ€™s content. Editors can be a member of one, many or
\n\nDaily\n\n\nWeekly\n\n\nFortnightly\n\n\nMonthly\n\n\nQuarterly\xa0\n\n\nNever\xa0\n\n\nYou can\xa
board, below My tasks and is displayed like this:\n\n\nNo more than 11 upcoming events will be listed here at or
filters are applied and all upcoming events are displayed.\n\nOnly upcoming events will be displayed. Events th
te.\n\n\nThe default time zone for the Events\xa0module is set to the default time zone for the instance.\n\n\n
ermissions and privacy\nThese settings control basic security options:\n\n\nFor more information see Password
h task. This is the most flexible view in terms of grouping and sorting.\nGroup tasks in List View\nWhen in List V
hy board for all tasks, so you do not need to open each task to see details, and you can use the search and filter
ganise your tasks and present insight to project team members. For example, you could add fields to display regi
n\nPlease note that Windows 8.1 and\xa0earlier releases are no longer supported.\n\nInstallation\xa0\nThe Hi
and connectors', '', 'HighQ Office plugin - Overview'], 'Related_materials': ['https://knowledge.highq.com/help/
chments in that email.\nDefault security options\nThe first section of the Preferences\xa0tab governs the securi
anisation, please contact your HighQ Account Manager.\n\nInstallation\nClick on your Profile image in the top-r
he Collaborate instance\nAny registered system user - External users who are already registered with Collaborat
dded to the Shared items folder in My Files.\n\nIf you choose Custom folder, select a folder from Collaborate wh
nload the full file including attachments.\n\nTo open the file only, click on the file title in the listing. To view the
ve to HighQ and Show in Collaborate Folder.\n\nBy clicking Show in Collaborate Folder you will be taken to wher
ments window will display.\xa0\n\nAs previously mentioned this will not appear if you have chosen the file size
ble in Office. These can be found in the HighQ ribbon on the top right. Use the\xa0Save\xa0option if further cha
em.\nRestrictions on how attachments are accessed can be applied, such as how long an attachment will be avai

and be reflected back in Outlook.\xa0\xa0 \xa0\xa0\n\n\nDrag and drop from your desktop\nSelect and click on

n the\xa0System admin screen, navigate to System settings\xa0>\xa0Open in office online:\n\nAnd ensure that
files module, containing\xa0the edits from all users.\xa0\n\nUsers must have edit rights in the Files module in c
on: This field displays the full path to the folder in the\xa0Files\xa0module. (The folder location cannot be edited
t have any impact on the permissions applied to the item that has been moved.\nFile- or Folder-Level Security\x
OFF in every site. If you select default OFF in every site,\xa0 Document assembly must be enabled for each\xa0s
escribed\xa0here\n\nThe\xa0Add new version\xa0page is displayed:\n\nThe\xa0Add new version\xa0page is vir
ons for the file and click Check out:\n\nThe Check out page will be displayed:\n\nClick Check out to download th
ser please configure appropriate column permissions to restrict access to those columns.\n\nYour custom views
figure the template just as if it was a regular site.\nCreating a template from an existing site\nAlternatively, as a
ge Summary on the left and the document on the right. The Change Summary breaks down the changes betweer
gate away from the site you are impersonating within, your session will expire.\nYou will now be able to:\n\nVie
ng\xa0instead of\xa0Follow, allowing users to easily determine who they are following and who they are not.\n\
sections\nYou may see other custom guides or menus that contain information specific you your site or configur
menu that\xa0you want.\nAs of our August release, you can now add snippets to the Mega Menu.\xa0This\xa0pr
n a module that uses the rich-text editor, it will be shown in the\xa0view\xa0mode, by default and if a user has e
module and if enabled, the\xa0People\xa0module will be available to\xa0all\xa0users. A\xa0site administrator
u202f-\u202fplatformname.clientname.com.cn.highq.com.\nDomain name\nThe domain name is the main real
tent where\xa0you can set the language\xa0are:\n\nComparison toolkits\nContent - Publications, Events and vi
blisher', 'https://knowledge.highq.com/help/working-with-content/channel-content-metadata', 'https://knowlec
te instance, but is otherwise subject to the same minimum password requirements.\nAccessing Collaborate Insta
), it is clarified as 'legal AND document'). Please contact your HighQ support representative to have this feature e
nMultiple search terms in the top navigation bar\nWhen using multiple search terms and using the global search
he full link, and then either use\xa0Ctrl+c\xa0or\xa0Cmd+c\xa0to copy the link.\nSelect the\xa0Use\xa0short UI
preferences\xa0by defining the importance of the metadata, e.g.\xa0topics and countries,\xa0they are choosing
agement\nGroup, search, sort and filter tasks in list view\nVisualise a project in timeline view\nSet up workflow
My Files\nMy files\xa0is a module in a user\'s My site, which can be accessed from the dashboard menu\n\nand
cludes items shared through\xa0My files\xa0as well as files shared via\xa0Quick Share.\nViewing Currently Shar
e via Quick Share\nIn order to share a file, select Send a file...\n\nSharing a file in this way involves a two-step pr
information is listed:\n\nThe item name, size and last modified date\nWho shared the item with the user\nWhe
n\n\n\nA user must be a site member, with appropriate Add file or folder permissions, to send files to a specific
file into the box.\nUse the Metadata tab to add any further metadata such as tags.\nClick Add.\n\n\n\nThe files

f sheet templates is displayed.\n\nClick Matter management to see one or more iSheets, depending on which o
ge legal projects and also\xa0use HighQ Forms to create your intake form for Legal Tracker.\n\nIn order for High
Add by preferences\xa0screen will be displayed:\n\nWithin this screen, you can add rules to your preferences, w
or your teaser, detailed below:\nDefault\xa0- This displays roughly 90 characters of the summary\xa0but with a
xa0Exclude Internal Organisation\xa0check box.\xa0\nFinally, you can search for organisations or groups to filte
nisation of certain elements,\xa0such as title, description and\xa0keywords. You can even see how that will be d
window in HighQ:\n\nSelecting and installing your solution template\nIn this gallery, you are able to see all\xa0sc
ups\xa0will be visible within System Admin:\n\nWithin\xa0System admin, navigate to\xa0Task templates. The\xa
nate and click\xa0More actions\xa0>\xa0Impersonate User:\n\nThe following message will be displayed:\n\nInf
will list all default and custom themes that are available to you. Within the\xa0Themes\xa0page, navigate to the t
reen is displayed. Within the\xa0Edit panel - Data visualisation\xa0screen, navigate to\xa0Customise\xa0within
abled, you can then specify which users you want to bypass this protection.\nAlso note that users without permi
whole numbers only\xa0checkbox, to ensure only whole numbers are shown within the axes.\nClick\xa0Apply\xa

ıttps://<yourinstance>/<yourcontextname>/insights/coronavirus-europe-plans-full-border-closure-in-virus-battle
ustomize\xa0to open the\xa0Custom themes\xa0screen:\n\n\nPlease note that the ability to change the name
n admin\xa0screen will be displayed. Within the\xa0System admin screen, navigate to Users, Organisations and
ʋse.\n\nPlease note that the you can upload users using the .CSV file and Excel file types\nYou can also select mu
in they will have their profile synced. (This will be an Appliance setting)\n\nContinuous\xa0Sync\nTo provide use
users will not be added to this group. You must add users via\xa0More actions\xa0>\xa0Edit group.\xa0\nIn ad
r more information on how the metadata rules work and how they are explained, click here.\n\xa0\nYou will be
access the fields, but some fields are to be completed by the reviewer, so please be vigilant and only fill in the d
/e are detailing below.\n\nNew request\nFor the\xa0New request\xa0rule, the details tab is shown below:\n\nT
\xa0Admin\xa0screen, you can configure your template. Below is an example showing you how to set up permis
re enabled.\nThe List of sheets screen is displayed:\n\nNext to Legal Tracker - Matter intake, click\xa0Add / Edit
ıake it\xa0public, which means it is available\xa0to anyone.\xa0The reason why this might be restricted is, for e
ɔlayed. Additionally, the system uses HTML5 playback technology, meaning\xa0the media types supported by ht

;on\nUser search proxy audit\nLogin - the ability to report on users which have logged in and out\n\nContent\n
a set schedule. Please note that it might take some time for all documents to go through the OCR process.\xa0\
e files will then be virus scanned and uploaded one by one.\n\n\nDuring this process you are able to rename the
guage.\nSystem bar\xa0\nWhen editing the details within the system bar you can click the Globe\xa0which will
ɜ, however these can be overridden at the time of content creation\nSEO options are only available for public or
lick\xa0Add:\n\nThe\xa0Add source\xa0screen is displayed:\n\nWithin this screen, you need to give the new so
ɜss to\nCannot change the owner of the forms\nCan add or remove fields, but cannot change fields that already
Sheet, the following screen is displayed:\n\nHere, you can Add and Edit both\xa0Columns\xa0and\xa0Views.\xa
/ properties:\n\n\nPlease note that when exporting, all filters that you have selected will be active in the inform
ɔing you find the relevant documents quickly and efficiently.\nFor more information on creating custom site meta
.\n\nTo save an existing site as a template, open\xa0the site, then open\xa0Admin:\n\nThe\xa0Site summary\x
:onfigure and use the plugin as the Doc Auto Plugin must be associated with a site and an isheet\xa0to create au
ere it can be easily accessed, shared, tracked, audited and archived.\xa0\n\nImportant -\xa0if\xa0Doc Auto is e
'', 'Apps, plugins and connectors', '', 'Doc Auto Word Plugin - Variables'], 'Related_materials': ['https://knowledge
dropdown or users can type a known value that\xa0can be used in the selected column.\n\nThe value for this fi
the example below the customer records that the loop will return are only for customers whose 'Jurisdiction is in
st of automation items that need your attention.\nExample of a deleted Column\nIn the example below the Col
ɜw - for templates that have been automated to generate a document from more than one record from an iShee
d once the site is created.\nLanding page - Select which page you want the site to load first\nStart date - The sta
_materials': ['https://knowledge.highq.com/help/videos/exporting-a-site-template', 'https://knowledge.highq.co
l be displayed:\n\nHere, you can view every user who is currently a member of this group. Additionally, you can
; dashboard templates\nTo view an existing dashboard template, click the name of the template you wish to vie
:he template was created from a site on this instance, or from an external source.\nIf Template type* is\xa0Allo
ı provides you with the chance to quickly edit the details that are important for managing a template. Click\xa0S

ɜ trying to import to:\n\nAdditionally, you have the option to download the report as a PDF file. This can be usef
ɜ name of the new site template\nDescription -\xa0This is a description of the site template. Consider writing a c

\nChange the name, email address and profile picture of the 'automation engine' user as required. You may char

Either Browse for the file(s) you want to use, or drag and drop. Once the files have been selected, additional fielc
stem administration', '', 'Subject access request report'], 'Related_materials': ['https://knowledge.highq.com/he
d body. Additionally, choose whether to send the invitation now or to schedule the invitation for a late date and

required.\nCUP ID - This refers to GUID of the organisation.\nCUP name - This refers to organisation name, used
: client must install the HighQ Appliance and a database to store the keys.\nWhen a site is created in Collaborate
iQ account manager for licensing information.\n\nHybrid storage options\nA site's files may be stored in differer

ve the iSheet template from the list of available iSheets for import by site admins.\nIf you have the SQL Connect
es are available to all Site Administrators in your instance to deploy as needed to new sites.\n\n'], 'Breadcrumb_
\nOnce there, select the Add user\xa0tab on the left:\n\nThis page allows users to be added to Collaborate, in a
from Acme, and Acmeâ€™s outside accountant.\xa0Every time a new Acme site is created, the team lead is task
plays the\xa0Add new organisation\xa0screen:\n\nWhere you can add a new organisation to associate your dor
s. If My files is enabled and later disabled, the existing files still exist but are hidden. Re-enabling My Files will bri
default text, or enter your own email subject and body. Additionally, choose whether to send the invitation now
d' icon appears next to the file name and it is downloaded\xa0for instant viewing.\n\nThe size of the file will also
is report shows which users haven't logged in and are not actively using the system. This allows System Admins
ingle record in an iSheet or options to change an iSheet on a site-wide basis.\xa0\n\n"], 'Breadcrumb_path': ['', '
se notifications: daily, weekly, fortnightly, monthly and quarterly or they can choose to receive none at all. You
nisation details\xa0screen is displayed:\xa0\n\nClick the\xa0Auto login\xa0checkbox to display a new field with
xa0Your profile\xa0>\xa0System admin:\n\nClick\xa0Organisation groups\xa0under\xa0Users, organisations &
ealth.com, barclayscapital.com or even an exception domain such as hotmail.com and each users email address
cannot access the following options, please contact your CSM.\n\nClicking\xa0Add\xa0in the\xa0System bar\xa
sion structure at the time of publishing content.\nUser roles\nThere are two main\xa0types of user, both of whi
1 domain\nTo add a new exception domain, click the Add exception domain button and enter the exception don
uld be added this way. That ensures that the name of each client is entered correctly and does not need to be ch
can ignore the email and keep their existing password.\n\n\nSend invitation\xa0- For users who never received
your changes.\nTerms of use\xa0- The Terms of Use are displayed as a link in the footer of every page and every

administrators and the user who created the site are able to configure the site.\n\nThe process of creating a ne
ectively turned off and the tree in the left hand pane has been disabled,\xa0but you can still send a file by clickin
xa0to show your final audit. Once you have published your audit, you can download the audit to excel by clicking
anisations key contacts are\nWhat the homepage for the organisation is (this can be different channels for differ
you want this report to be based o.\xa0(If this field is left blank, it will show results for all organisations)\nType:\
ations, Events, Videos, Comparison Toolkits etc.)\nSelect country: You\xa0can use this field to\xa0select a\xa0co
ntent administrators (or both) from the reports.\nThis enables you to provide accurate statistics of the publicati
uced a new filter within this audit report to enable administrators to remove system administrators or content a
tion name\xa0and\xa0User.\xa0\nAs of our 5.7 release, we have introduced a new filter within this audit report
audit -\xa0generates a report of users that have been logged in as a\xa0proxy user\nLogin audit -\xa0reports on
e the audit on\nSelect reason: Here, you can select a specific reason you want to base the audit on\n\nClick\xa0
t. Once you have clicked\xa0Show audit, you can click\xa0Download to excel\xa0to download your report to an
audit\nSelect users: Here, you can enter in any specific users you want the audit to run against. If this field is lef
is is the date range of the audit\nContent title: Here, you can enter a title for the piece of content you want the
our report to an excel spreadsheet.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'CTK Comparisons a
0to show your final audit.\xa0Once you have clicked\xa0Show audit, you can click\xa0Download to excel\xa0to
tions)\nSelect product: Select the product you want the audit to be performed on.\n\nClick\xa0Show audit\xa0t
): Select whether you want to audit Events or Workshops\nSelect product: Select from a drop-down\xa0which p
Videos, Comparison Toolkits etc.)\nPerformed between: Here, you can specify the date range of the action that
organisation you want this report to be based on. (If this field is left blank, the results will be shown for all orga
eport to be based on. If this field is left blank, it will display all users\n\nClick Show audit\xa0to show the final au
it to show your final audit.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Content import audit'], 'Rela

Videos, Comparison Toolkits etc.)\nPerformed between: Here, you can specify the date range of the action that
nConfiguration requires you (the\xa0HighQ customer) to also be a Thomson Reuters Document Intelligence cust
ge matters and centralized matter reporting is a challenge.\xa0\nThe Legal Tracker integration includes matter r
r near real-time sync are enabled.\n\nPreparing Legal Tracker iSheets\nIf you have not set up the Legal Tracker I
requester can create anonymous requests or have the ability to self-register and create an intake request.\n\nC
atter. The join link is dynamic.\nAs new invoice entries are added for each matter, the join link on the matter inf
a folder is selected, then all files in that folder will be displayed as links. Once the desired file or files have been s
ı Elite 3E instance (on-premises or Cloud-based) that supports 3E Data Insights.\n\n\nNew Elite 3E installs suppc
iSheet.\n\nClick Import to create the new iSheet.\n\nNormally, if you create more than one iSheet from a singl
:, you may frequently require choice columns in iSheets that take some time to configure, such as a US 50 state p
st contact HighQ Support in order to get the integration enabled. Once enabled,\xa0System administrators\xa0v
at the top. Because AI translation with Azure was enabled the document has been translated and recognised as
n office may be added that way.) Any AD users who match the search query will have Collaborate accounts crea
oorate instances\n\nClick Add instance\n\nThe fields in the\xa0Add collaborate instance\xa0screen are describe
G guidelines, or the best practices outlined at the time. \xa0\nThe importance of accessibility for all has only incı
e in System settings, please contact HighQ support to configure missing features.\n\nDependency reports\nBef
ıdes any panels, the configuration of the panels is included in the template, also content entered in a Content Ec
cts. However it is important to examine and 'tidy up' the site before saving it as a template so that any configura
nces\xa0\nEither allow users to set their own preferences, or dictate to users that the alerts have been set for tl
fox you will not be prompted to log in to view FileOpen protected files they have downloaded, for up to 24 hour

Q&A Email rights as well, so that they will receive email notifications.\n\nWith this configuration, a question mi

ry group will have view access.)\nCreate either a choice- or date-based alert, considering the instructions and be
may not be changed after a column has been created\nIf you would like a column to have a default value, set th
ave any columns for users to enter any data. Consider your project or use case, and create columns that match y
arch.\nChanging the view\nYou can view the view of your search results via the different\xa0View\xa0buttons:\
/ like, so the password is not accidentally lost.)\xa0\nIn the presence of the non\xa0System Admin\xa0(or anoth
who otherwise have only read access, can be reviewed by the Site Administrator and then moved to the approp
for every analysed contract can be added to\xa0an iSheet\xa0for further comparison and investigation.\n\nCont
ossible to preview many of the visual changes by using the Preview\xa0button before saving.\xa0\nTo revert bac
ect URL to a specified page in the other application.\nEmbedding a link on a Collaborate rich-text page back to tl
his:\n\nEditing a link\nTo edit a link,\xa0double click on the link when editing your blog/wiki etc.\xa0The\xa0Ins
sions upwards of IE10 are supported as are the latest two major versions of Chrome (67.0.3396.87), Firefox (60.C

a0admin page for the site in question:\n\n\nIf there is no record of an invitation having been sent, then the Site
e jsmith@acme.com and john.smith@acme.com), it is possible that the user was invited with one email address
Related_materials': ['https://knowledge.highq.com/help/apps-plugins-and-connectors/files-app-integration-for-

owledge.highq.com/help/working-with-content/data-visualisation-overview', 'https://knowledge.highq.com/help
back issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'AI Hub management

['https://knowledge.highq.com/help/system-administration/contract-express-integration-adding-templates']}

'Related_materials': ['https://knowledge.highq.com/help/working-with-content/import-isheet-data', 'https://kn
ts from Excel Files Overview'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/ir

te with your team'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/enterprise-

vant templates.\nRecommended Audience: Site administrators & end users\nIf you experience video playback is
erials': ['https://knowledge.highq.com/help/apps-plugins-and-connectors/file-email-into-collaborate']}
port-a-bundle-of-files', 'https://knowledge.highq.com/help/videos/permission-content-in-the-files-module']}

d_materials': ['https://knowledge.highq.com/help/site-content-and-user-administration/create-workflow-rules-

ling-permissions', 'https://knowledge.highq.com/help/videos/system-dashboards-overview', 'https://knowledge

om-the-ai-hub-into-an-isheet', 'https://knowledge.highq.com/help/system-administration/set-up-highq-ai', 'http

/working-with-content/esign-electronic-signature-with-docusign', 'https://knowledge.highq.com/help/working-
nt-and-user-administration/view-imported-data-in-data-visualisation', 'https://knowledge.highq.com/help/site-

a correct version.\nRecommended audience:\xa0Site administrators\nIf you experience video playback issues, p
ache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ - Google Workspace Add-on'], 'Related_materials': ['ht
e clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ - People Panel Feature'], 'Relate
hq.com/help/working-with-content/legal-tracker-linking-sites-and-matters-for-matter-management']}

ed_materials': ['https://knowledge.highq.com/help/site-content-and-user-administration/unified-user-profiles-a
ase clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ and Legal Tracker Matter Linki
eo playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Doc Au

l user\nIf you experience video playback issues, please clear your browser cache\n\n\n"], 'Breadcrumb_path': ['',
o playback issues, please clear your browser cache\n\n\n"], 'Breadcrumb_path': ['', '', 'Videos', '', "HighQ iSheets

r cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher - Auto-archive Feature'], 'Related_materi
owledge.highq.com/help/site-content-and-user-administration/publisher-email-bounceback-management']}

nce video playback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ

lease clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Publisher - Email Type Defau
Exclude Metadata'], 'Related_materials': ['https://knowledge.highq.com/help/system-administration/content-r
video playback issues, please clear your browser cache\n\xa0\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'High

ilters'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/create-a-publication-in-

ayback issues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ Workflow -

cache\n\n\n"], 'Breadcrumb_path': ['', '', 'Videos', '', 'Introduction to the HighQ Drive mobile app'], 'Related_mat
help/videos/create-folders-in-files', 'https://knowledge.highq.com/help/videos/configure-notification-and-alerts
https://knowledge.highq.com/help/site-content-and-user-administration/map-isheet-columns-to-contract-expre

-time and save them in HighQ. You can also file emails and save attachments directly from Outlook. Watch our v
: ['', '', 'Videos', '', 'Overview of the Doc Auto Word Plugin'], 'Related_materials': ['https://knowledge.highq.com/
om/help/site-content-and-user-administration/move-files-and-folders-permissions-and-inheritance']}
s', '', 'Plan your day'], 'Related_materials': ['https://knowledge.highq.com/help/getting-started/introduction-to-l

vigation', 'https://knowledge.highq.com/help/getting-started/system-preferences-in-publisher', 'https://knowle

ng-started/system-preferences-in-publisher', 'https://knowledge.highq.com/help/getting-started/email-preferen
/help/videos/publisher-system-email-preferences', 'https://knowledge.highq.com/help/system-administration/
ed_materials': ['https://knowledge.highq.com/help/getting-started/email-preferences-in-publisher', 'https://kno

022, you can restrict an assignee\'s\xa0ability to edit their tasks.\xa0Click on the Select editable fields for assigne
ation, find your folders within your computers file system,\xa0select which folders you wish to drag and drop an
he\xa0Bounceback management\xa0screen is displayed.\xa0\n\nPlease note that the Bounceback management
ed:\n\nYou can either select an existing workflow, or create a new workflow. Once the workflow that you wish t
exists, click it to display that workflow.\nWithin the\xa0Workflow\xa0screen, either add a new rule, or edit an

t iSheets screen. If you want to change the order of how they are listed, click Sort iSheets then\xa0drag and drop
HighQ Doc Auto site wide templates generate\xa0documents combining information from multiple iSheet record
is displayed. If a user has access to an iSheet but does not have access to any views of that iSheet, the iSheets ta
tab:\n\nClick the Default Navigation drop-down menu to display all available navigations, and select which one
e the site name displayed as the translation you have provided here.\nDashboard translations\nYou can also pro
a field to add a\xa0Dashboard name, and buttons to add\xa0Panels\xa0and\xa0Sections.\nFor more informatic
ns and colours\nFirstly, you can enter a dashboard name, (which will be displayed when viewing the\xa0Home\
permissions screen is displayed:\n\nWhich lists all of the available modules, and whether this user is user admir
materials': ['https://knowledge.highq.com/help/system-administration/system-administration-overview']}
n\nThe No of files column indicates how many of the files in the site\xa0the security group may access.\nAccess
e of access to it, a user must be given access to at least one of the rights listed on this page. Bidder organisations
pecific topic can be directly allocated to the topic expert\n\n\nA more complex workflow with the option to req
l.\n\nThese settings are not used to restrict what information a user can view about another user.\n\nMany of t
ation\n\n\nAdd a new rule\nNavigate to Admin > Workflow management > Rule builder:\n\nThe Rule builder sc
t if your rule will trigger if an\xa0iSheet record is Added or Updated:\n\nSelect an iSheet from the\xa0iSheet drc
t, increase these settings to increase the size of the available text field.\n\nNumber of lines displayed while ente
n\xa0column width is\xa020 and the maximum\xa0is 650.\n\nAdditional settings\nYou can\xa0select options fo
next record in the iSheet after the open record is saved.\nClick Cancel to close without changing any values, Save
iSheet is viewed.\n\nViews\nViews allow you to 'break up' an iSheet. This means, for example, that if there are\
r can use the More actions menu for previous versions to either View or Restore that version:\n\n\nRestoring a
powered by Contract Express requires the same authorisation as\xa0the HighQ Document Automation module,
t Express knowledge base.\n\n'], 'Breadcrumb_path': ['', '', 'Site, content and user administration', '', 'Open Cont
via Add\xa0>\xa0New workflow:\n\nAnd once your workflow is created, click it. Within your workflow, click\xa
u have 3 tabs;\xa0Details,\xa0Triggers\xa0and\xa0Actions.\xa0\nDetails tab\nWithin the details tab, you need t
you choose either iSheet record or Date from the dropdown options.\xa0\n\nSet the trigger for the rule, then cli
en the content was created\nHeader information\xa0- This can be enabled to show some introductory text\nFoo
a0The glossary terms will not be added inline but as a separate pop up box for the text.\n\n'], 'Breadcrumb_path
led, as well as if it is visible in two columns\nContents list levels\xa0- You can choose up to 4 levels\nAuthor nam
end user\nDraft - This content has been drafted and saved to be accessed at a later date. This is not visible to the
ation\xa0screen will be displayed:\n\nHere, you have the ability to see which AI engines\xa0are enabled and to e
e from a Site template with AI configuration, the AI configuration, folder settings and the iSheet column mapping
kly find the variable from a long list of variables.\n\n\nAutomated folders and sub-folders will inherit parent fold
the file will be copied to the selected folder.\n\n\nDelete file\nIf you select\xa0Delete file\xa0as your action, the
ction'], 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-user-administration/enable-se
eet\xa0from the module.\n\n\nTo delete an iSheet, click Delete. When attempting to delete an iSheet, the follo
r data by selcting the chart type and finally, choose if this information should be displayed on mobile devices. Wi
clicking the x button, as described above. Discarding the draft item from the drafts view will delete the draft. Dr
took the action.\xa0\n\nUsers can click on the Created item or Modified item links to see a version of the iShee
tion to its name, each saved archive will include an auto-incrementing version number, the username of the user
user that is currently editing the item either saves the item, saves the item as a draft, or cancels their edit.\nOth
y choose specific choice values to trigger their alerts.\nThere are two ways alerts may be set up:\n\n\nAn admin
eive an email alert. You can decide whether to receive alerts about changes in certain countries (for example, jus
s in the Files module.\n\nColumns and views may have custom permission settings applied.\n\nFile and folder m
ave any draft items, either auto-saved or manually saved. (See Item drafts for more information.)\n\nDefault vie
n\nAnd then select whether you want All or Any of the following conditions to be met, in order to trigger the rul
e triggering object.\xa0\nThere are five fields in the\xa0Add event\xa0action that can use variables:\xa0Title,\xa
d task. The triggering file could be located in the files module or it could be a file metadata iSheet\n\nVariables\n

)as the trigger and the iSheet must:\n\nbe a file metadata iSheet, or\nhave one or more attachment columns,\n
;anisations, user groups or organisation groups will have permission to view the channel.\nAfter selecting the us
:an provide the Spanish translation of the channel name.\n\nIn the General section, you have access to the follo
en't displayed, click More to view them.\nAfter\xa0adding your channel, content tagged with the selected meta
)_path': ['', '', 'Working with content', '', 'Channel admin in Publisher'], 'Related_materials': ['https://knowledge.h
ubsection, click Add sub section:\n\nA new subsection will be added to your column:\n\nIn each subsection, you
m User Admin\nThis admin role can administer users and groups at the system level. In other areas, such as site
our profile drop-down menu and click\xa0System admin:\n\nThe\xa0System admin\xa0screen is displayed. Wit
\nThe\xa0Set user permissions\xa0screen is displayed:\n\nHere you can select some\xa0Module\xa0based per
luring engagement, delivery and closure.\xa0For more information about how we can help with Legal Project Ma
t across the platform\nDocument annotations\nBlog deal updates and attachments with full control of the audi
to download a solution template\nIn order to download and configure a template, your instance must support
nns you want to see, including custom columns, and save that view to return to it at any time. \xa0\xa0\n\n\nTa
:olumns'], 'Related_materials': ['https://knowledge.highq.com/help/videos/tasks-hierarchy-reordering', 'https://
a new status option. A task becomes overdue if\xa0the due date has passed and the task is incomplete\nList - s
containing a lot of information (priority, start date, duration) and dependencies on other tasks - then task temp
ɔu can now enable the one click approval option directly from your Outlook. With this option, the notification yo

oogle Workspace panel and click Install to add the add-in.\n\nOnce the plugin has been installed a HighQ icon is
wnloaded from the user's profile:\n\nClick Install HighQ Drive and the HighQ Drive application will be download
dministrators can clone data views with a single click and users can choose their own data columns - rather than
r\xa0\nCustomer updates during contractual service windows, starting\xa0from the 10th December\nHighQ int
the user's access in Collaborate.\n\nWhen HighQ Appliance is first deployed, it is pre-configured as specified wit
ance configuration and how to make changes are described below.\nExamples\nShould your database structure
sure any popup blocker is disabled during this process.\n\nCheck that the Apache Tomcat installer service is ru
y)\nImporting content to\xa0the Events\xa0module\xa0(Collaborate only)\nImporting content to\xa0the Blog\
:e\xa0is an integration application, independent from Collaborate or Publisher. It manages connectors\xa0where
/are, Microsoft Hyper-V) or physical server\nProcessor - a minimum of two cores\nRAM - 16 GB or more\nAvaila
tober\nHighQ internal version number 5.7.7\nPublisher internal version number 5.7.5\n\n\nSystem administrati
/ou have made your changes, click\xa0Save. Your new title and error message will now be displayed when some
\nPublisher\n\nSite and System administrators can now archive a domain linked to an organisation from Publish
ance you want to display the file(s) from.\nOrder by - You can select the order in which the files will be displaye
oval from Play Store and Apple Store: 31st of August\nShutdown of the application for all users: 15th\xa0of Oct
um-sized or wide thumbnail. Or you can choose to display the image only.\nFeatures - Select which features you
using\xa0the powerful system\xa0metadata engine\n\n\nCreate â€œHot topicsâ€ for trending industry news a
tered if you have filtered it) as an excel spreadsheet.\nManaging the people directory\nAdministrators can man
icted organisations, users and unsubscribers\nIncludes full auditing and reporting for events\nTightly integrate
ice Plugin settings.\xa0At the bottom of the Settings window, enable\xa0Auto filing.\n\nClick Save to keep the
speed up configuration when mapping fields to iSheet columns\xa0SITE ADMIN\n\nHighQ Contract Analysis [no
and tricks on efficiency and advanced features.\xa0\nPendo only collects data about interactions with the appl
s well as the product roadmap, to help you understand whatâ€™s coming in the next couple of\xa0updates. This
.\xa0\nYou can also see some of our many features\xa0detailed here\xa0on our Thomson ReutersÂ®\xa0HighQ

ghQ' in the Microsoft Teams App Store.\n\nClick\xa0the TR\xa0HighQ\xa0card to display the store listing.\xa0\n
fileâ€™s iSheet metadata are not considered new versions and do not impact the version history of a file. File m
.\xa0\nYou can also see some of our many features\xa0detailed here\xa0on our Thomson ReutersÂ®\xa0HighQ

e particular term this can be added in here. A tip is displayed underneath the Regex field to note where the infor
You can also use the tick box to restrict to one of those options only\nDefault "Share via link" permission -\xa0T
nContacts - Any contacts for the event\nDescription - A description of the event\nTags - Any tags related to the
a standard RSS feed\nTo create a standard RSS feed, you need to:\n\nCreate an RSS User\xa0-\xa0Create a use
ll be able to use and access the capabilities of the platform that you have previously licensed. Contact your Clien
stration/map-isheet-columns-to-contract-express-templates', 'https://knowledge.highq.com/help/site-content-a
Users - Changes that are visible and will affect users\nSite admin - Changes that affect the configuration of sites\
e that if the Preference management section is not available, please contact HighQ support to get this enabled.\n
ract template to further analyse revisions.\n\nPlease do not use\xa0clustering on sites that contain placeholder
der file.\nIf the Add another placeholder box is selected, after the current placeholder file has been added the w
ey are stored in the iSheets module.\nHowever, it is still possible to choose a custom location for your iSheet att
let you know about your scheduled update to the new version. When you update, you will be able to use and ac
ided automated file and folder management, including adding a folder and moving, copying and deleting files\n
, 'https://knowledge.highq.com/help/site-content-and-user-administration/add-actions-to-a-rule', 'https://knov
ves users a whole new\xa0open-edit-save workflow for Office files from within the native iOS files app.\n"], 'Bre
you want the layout to be a horizontal menu or a vertical menu. Then you can add either your menu item\xa0or
me name in the same folder.\nDescription\xa0- Add a description that may be useful to other users (Site and Co
tent/download-a-zip-with-long-file-and-folder-names', 'https://knowledge.highq.com/help/working-with-conter
n, which will ask you to log in to your Office Online account.\n\nTo ensure that the new tab is opened, you need
nplete.\n\nAsk question\nWhen the Q&A module has been enabled for a site, any user with access to that modu
Breadcrumb_path': ['', '', 'Working with content', '', 'Add a task to a file from the files module'], 'Related_material
n can be used to expand the width of the detail pane to make it easier to view and respond.\xa0The button will t
ersion.suffix (such as ABCD-1.doc)\xa0instead of the filename shown on the site, the HTML navigation option ma
0the most current version of Office documents (such as .docx files).\nUsers with Office 2010 for Windows or Off
ach file (but not the full file path) is shown for each file, along with other file metadata.\n\nOnly the most recen

t\n\n\n\nSearch for items (and save the search)\n\n\n\nRun a saved search\n\n\n\nMark an iSheet as a favouri
alerts'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/import-isheet-data']}
ext to the file or folder you want to edit the metadata for and select Edit details:\n\n\nFrom the Edit screen, clic
mn.\n\n\nIf Enable modified date override is ON\xa0for the iSheet, any user with edit rights to an iSheet item ca
olumns be organised into a single section.\n\n'], 'Breadcrumb_path': ['', '', 'Working with content', '', 'iSheet sect
ant to display.\nOpen link in\xa0- Select whether you want to open the link in the same window, or in a new wir
ner\nDefault Stylesheet - This is where you can apply the css stylesheet (also found in resources and can define t

Enabled (default ON) if you want auto-suggestion tags\xa0to\xa0be available for all wiki pages on all sites.\xa0\
the Chart, the Chart always shows the latest configuration. If you were to restore an earlier version of the Wiki, i
is displayed:\n\nAs described in more detail\xa0here, an IFRAME should include a src attribute which is the URL
e page will see the embedded content.\nVirtually any content that has a URL can be embedded using the techni
tion of the RSS feed will be shown as a yellow area in the edit mode of the\xa0rich-text editor.\n'], 'Breadcrumb_
of contacts can be displayed.\n\nA user who does not have read access to the content that has been embedded
editor features'], 'Related_materials': ['https://knowledge.highq.com/help/working-with-content/rich-text-edit
his layout.\nTable properties\nThese are the settings that can be configured in the\xa0Table Properties\xa0tab:\
or not, by selecting the Mandatory? checkbox:\n\nClick\xa0the red x at the end of the relevant column\xa0to rer
video belongs to is structured.\nAdding video and audio content\nTo add video and audio content, navigate to t
visualisation. The Add panel - Data visualisation screen is displayed:\n\nEnter a title for the panel and select you
ghlights a new Zip folder called Archive.zip by default. (You can rename this zip file if you want to):\n\nIn the da
ed and last updated the wiki page, which version of the page it is, a link to the page and any tags that are associa

s in the Files module (in which case the permissions applicable to those files will governance a user's access) or u
ready.\n\n\nIf appropriate, add the client\'s logo to the top-right of every page and enable other optional modu
played) and click Filter.\xa0 To clear the search criteria, click Reset.\nInbox Summary\n\nFor a quick overview of
e RSS content syndication options, navigate to\xa0System administration >\xa0RSS content syndication\nWithin
's access) or uploaded from the author's computer\nActions\xa0-\xa0The actions may include the ability to mak
word and tap Log in. If you have forgotten your password,\xa0tap Forgot password?\xa0to reset it.\nAfter you h
ostrophes e.g. \'comments I have added\'. For example:\n#set($sheetTitle=\'Enter your sheet title here\')\n#set(
MLRN47z%2BeeOgEFCt8EGQAt3O09NcWhE%3D&attdocparam=pB7HEsg%2FZ312Bk8OIuOIH1c%2BY4beLEAeI29

amework and VSTOR_Redist components provided by Microsoft. Since official support for Office 2010 has cease
d to a user's desktop from their DMS and then uploaded to Collaborate would\xa0not\xa0be included.\nThe Exc

ctivate your account. Passwords will never be sent via email or otherwise.\nActivating your account\n\nAfter cli
riod of time.\n2FA may be activated at the system (instance) or individual\xa0site level.\nInstance-level\xa02FA
be asked to enter a passcode.)\n\n\nThe\xa0Remember me\xa0feature is not available in all cases.\n\nCollabora
ess:\xa0\n\nInstance access: If 2FA authentication is required to access the HighQ platform, use HighQ Drive or H
h\xa0the browser on your computer\nGo to your instance address and enter\xa0your\xa0username and passwo
p Forgot password?\xa0to reset it.\nThe first time you log in, you see the following screen:\n\nA passcode is se
file>System Admin>System Settings and scroll down to Smart Folders. The options are Disabled, Enabled, default
in the relationship.\n\nHighQ provides these types of relationships by default (these are 'system-defined'):\n\nF
other words, every folder and file inherits the permissions of the ultimate parent folder. As a result, every user w
the folder tree to navigate through the folders they have access to.\n\nThe folder panel of the Files module will
left of the folder icon\nClick the arrow to view the subfolders below\n\n\nSelect the desired destination folder
from the destination site, such as whether DRM applies or\xa0the applicable permissions, etc.\nWho can move
l info action\n\nShared and received items\nWithin My files you have access to the Shared items\xa0and Receiv
Digital rights management, to restrict users from saving and printing files, as well as the option to add watermark
nd Tasks stored there can be found in search results and with the new Copy File feature, files can be copied to an
shboard\nConsistent with Collaborate's\xa0mobile responsive design, there are different versions of the Dashbo
stem dashboard permissions.\nAdding a new\xa0System Dashboard\nTo add a new\xa0System Dashboard, with
n select which dashboard you want to be your default, by clicking\xa0More actions\xa0on the corresponding\xa
Click\xa0Add\xa0>\xa0Menu item:\n\nThe\xa0Add menu item\xa0is displayed:\n\nThe\xa0Add menu item\xa0

\n\xa0Add section\xa0button will be displayed. Click it.\n\nA new section will be displayed:\n\n\nPlease note th
ity - system level\xa0audit trail\nTime saving - workflow process automation\nFlexibility\xa0- approvals are agn
0Approvals\xa0>\xa0Approval templates:\n\nThe\xa0Approval templates\xa0screen is displayed:\n\nTo add a n
e the General\xa0and Two factor recovery codes sections.\nSite email alerts\nThe Site Email Alerts section is use

n\nOn a smaller screen, click the menu icon to see navigation options:\n\nDashboard access\nOn a desktop com
xa0List\xa0tab, you must enter a\xa0Title, List Type\xa0and the\xa0No. of columns\xa0that the list will display in
d.\xa0Start typing in the\xa0Search sites...\xa0text box and beginning with the first character entered, a list of
wn profile, however, most sections of the user profile are available for other users to see. Also, only a user may
an offer integration with any identity provider (SSO) that uses SAML and OIDC protocols.\n\nActivating a new ac
owing error message:\n\nEnsure your password meets these criteria and click\xa0Submit. You will be redirected
ocated as well. The search can further be filtered to include just locked users.\n\t\nAn active user can log in and
ace. Five hundred results are displayed in one go. Our clients can then export these results to excel and then upo
hin the\xa0System admin\xa0screen, navigate to\xa0Basic user permissions\xa0in the left-hand menu:\n\nThe\
d.\xa0\nContract lifecycle management (CLM)\nUsers who â€˜ownâ€™ the contract in an organisation are often
workflow already exists.\n\n\n\nAdd or select a rule.\n\n\n\nSelect the Triggers tab and make sure the rule use
whether the rule will trigger or not. If the rule is\xa0Active (and the underlying workflow is also active), it will tr
draft workflow\nAfter adding and configuring\xa0rules, return to the Rule builder\xa0screen to change the stat
ck the workflow name to open it, then\xa0Add a rule. Each workflow may contain multiple rules, but to start it is
ggers.\xa0\n\nChange the Status to Active after you have built\xa0and checked your rule.\n\nTriggers tab\nThe
nFor more information on adding tasks, click here.\nFor information on changing a task assignee, click here.\nFo
a0task will be created for and associated with each selected file.\nDocument review status\nThe status of each
odified.\xa0\n\nNavigating the Index\n\nIn addition to providing a high-level overview of the content in the Files m
e display\xa0a high\xa0level overview of the\xa0site's statistics. This information can be used to provide period
mbering is based on the order in which the files are sorted. By default, files and folders are sorted in the order in
r\xa0>\xa0Settings\xa0tab screen, users can click\xa0the\xa0Sort folders by\xa0drop down menu\xa0which is se

wnload the files and folders they can view.\nEven if this feature has not been enabled, site administrators will a
nise files. Note that if you selected folders and files for your bundle and did not tick "Include folder structure", tl
ich must be unique in that iSheet.\n\nView names can have a maximum of 80 characters.\n\nColumns\n\nSelec
l mandatory columns. Open Admin, iSheets, then select Check mandatory columns.\n\nIf necessary, select the i
; the browser tab or window before saving the record, it is automatically saved as a draft and can be retrieved in
itional refresh of the view.\xa0\n\nInline editing limitations\n\nInline editing is enabled for most of these colum
play:\n\nMultiple conditions may be combined to determine if a column should display. For example, if a user se
us (approved, rejected or awaiting approval), Contract Express status (ready or incomplete), or DocuSign\xa0sigr
owledge.highq.com/help/site-content-and-user-administration/add-and-configure-sections-in-isheets', 'https://k
olumns and fields change depending on the setup of the iSheet.\n\nYou can input values in every field, subject t
set up your custom site navigation.\xa0\nClick the\xa0Custom site navigation\xa0check box to display the\xa0C
\nClick Save to save the new blog post.\nIn addition to those required steps, you have other options available:\
t saved\n\nAdditionally, you can\xa0Resume editing\xa0or\xa0Delete\xa0the content, via the\xa0More actions
: matter of the notification\xa0(for example, the file that was commented upon)\nWhen the action took place\r
, it will not be published immediately, but instead an Administrator for the site will have to accept or reject the p
e been\xa0Rejected. You can also\xa0Revoke\xa0or\xa0Delete\xa0the files pending approval from the\xa0Mor
nAdd a workflow\xa0in Admin >\xa0Workflow management, then build rules that trigger actions\xa0in your wo
on a site-by-site basis,\xa0the\xa0Vocabulary settings\xa0in the system administrator console can be used to ch
te.\nClick Save to save your actions.\n"], 'Breadcrumb_path': ['', '', 'Site, content and user administration', '', 'Cre
Status\nTriggered by (user)\xa0\nRule ID\nWorkflow ID\nMessage ID\n\n\nThe Rule ID, Workflow ID and Mess
ons:\n\n\n\nClick Show to show all available permissions. You can filter permissions by entering information int
new top-level page, click\xa0Add top-level page:\n\nThis displays the new page screen:\n\nEnter the details of t
of the document/content,\xa0updates are published to everyone automatically\xa0and everyone has access to
type\nVia the\xa0Content\xa0menu, activity can be filtered by the type of content, such as one of the module t
areas of\xa0a\xa0site, including in the People\xa0module and as a part of comments. If a user has not uploade
ou will only see the content you have permission to see.\n\nIf enterprise microblogging\xa0has been enabled fo
g cannot be enabled on bidder sites;\xa0when a site is configured to be a bidder site, microblogging is automatic
ving a user's\xa0profile\n\n\nSame site rule\nThe first rule of user interaction requires that the following three
ind. Each\xa0message shows who sent the message, the content of the message and when it was sent.\nView al
ter a comment in the comment box using the rich text editor. Add basic text formatting, such as bold, italic, and
s stripped of any identifying information.\xa0In that type of transaction, the site will usually be configured as a E
vhen the bidder user is added to a group you will be prompted that the group permissions will be restricted for a
internal users -\xa0If you choose this option, any external users to the site will be suspended. Select the checkb
navigate to\xa0Admin\xa0>\xa0Site settings\xa0>\xa0Announcements:\n\nIn order to configure an announcem
es\n\nLiking is always disabled for a bidder site(s).\n\n'], 'Breadcrumb_path': ['', '', 'Getting started', '', 'Use the L
er than an Administrator. When a page is created or edited, it will not be published immediately, but instead, Sit
settings will appear:\n\nYou may apply custom permissions for each group by unticking the appropriate checkbo
e one displayed above displays, with a row for each group in the site. By default, access will be fully disabled for
l to navigate to different versions.\n\nRestore a version\nTo restore a previous version of an item, click More a
o the iSheet cannot be given access to a view and will not appear in the view permission matrix.\n\nThis table is
mats:\n\nXLSX\nCSV\nXML\n\n\nSite Admins have an additional option, to export an Import template.\xa0\n\n
the contents of merged cells are imported as if they were in the top-left cell only; other cells in the merged are

cription field may be used to ask a lengthy question that need be answered. It is best practice to keep column na
ds\xa0from an Excel file.\xa0\n\n\nOn the Add iSheet page, you can select options to configure your iSheet.\n\n
ner source iSheet, as the lookup column source sheet is a configuration that cannot be changed once created\nJ
ormation about the instance, including how many sites there are in different statuses, how many users, and the

ird, after entering the correct email address and clicking Verify email address,\xa0the recipient will see a confir
abled for that user in particular.) \xa0\nAs described in the other pages of this section, there are two p
the recipient is NOT a Collaborate user, they will not be able to access this profile.)\nInformation about the fil
m/help/working-with-content/view-columns-in-isheet-sections', 'https://knowledge.highq.com/help/site-conter
ere is a\xa0column inside a section, the section cannot be deleted. In addition to this, and because at least one s
tion settings can be changed, except for the Type of column.\n\nYou can change a Single line text column to a M
ect the following scenario. A lookup source iSheet is configured so that members of the "External Users" group c
by the end-user and clicking Show references:\n\n\nAll iSheets that reference the selected lookup source iSheet
lect iSheets under Module Settings.\xa0\nClick the More actions icon for the iSheet to edit, then select Manage
deletion to complete the action.\n\nEditing existing images\nTo edit an existing image click the More actions ic
. Each choice will be presented as another row in the table, as seen below. \xa0Enter the choice values by left-cli
Add Record screen, the \'choice\' option allows you to select a value.\n\nTo see the score displayed in the iShe
erators such as +. -, / and *. You may use parentheses '(' and ')' to isolate calculations in a complex formula.\nSe
11/1979\nMM/DD/YYYY = 11/16/1979\nDD.MM.YYYY = 16.11.1979\nDefault value\nLike with many other colur
or alerts at a frequency of immediate, daily and/or weekly.\n\n\nTypically, an alert is sent out when today\'s dat
red into the column as a percentage, as seen below.\n\nFor clarification, Show as a percentage will just append
es, this section will change depending on what data type has been selected in the first section.\nColumn conditio
played for the panel\nSite - The site from which you will import information\nSource - Select iSheets or Tasks as
displayed.\n\nAdding and managing KPI charts\nTo add a new KPI chart, navigate to a site and click Add panel w
ey wish to be alerted on\nThe correct written condition must be entered into the \'Email alert conditions\' text
the\xa0list of matching users\xa0shown.\n\nOnce the comment has been posted, the mentioned user's name i
a selection of records.\n\nSelect More actions then\xa0Print preview to display\xa0the filtered records in the iSl
search for part of a word, including text\xa0in the middle of a word\nYou may use quotation marks to search fo
xa0(this does not apply if\xa0sharing the entire iSheet). If you select more records than are permitted, a message
ing settings:\n\n\nRemove the tick from the checkbox next to an option to change it from the default setting. Th
ple:\n\nSelf-register to fill an iSheet form for legal intake\nUse a self-service desk to generate a document (e.g a
sers in every site on your instance available for selection, including sites that users of the current site do not hav
is edited, the user performing the action is asked to complete the fields of information found in the associated
data -\xa0Define specific column types for your data collection needs, including single or multiple text lines, choi
delete) the old version. A user can also add a new task for that document from the\xa0Task\xa0tab\nAdd task -
ument\xa0viewer.\xa0\n\nRedacted sections in downloaded or shared documents cannot be edited. Only the o
ady use HighQ Collaborate, it is a simple process to access powerful\xa0Contact Express features:\n\nPlease con
ss-templates', 'https://knowledge.highq.com/help/site-content-and-user-administration/contract-express-integ
ed templates so they do not appear in the list of templates.\n\nSelect which template you wish to use to create y
ved:\n\nAdd a template\nWithin the\xa0Contract Express templates\xa0screen, click\xa0Add. The\xa0Add temp
tions button and select Edit details.\n\nSelect a Linked iSheet, which will act as the input iSheet for the linked ter
image section of the window.\n\n\nOnce you have selected the file and the virus check is complete, the file wil
and Approval workflow are enabled, they are applied to files in the iSheets folder in the Attachments section.\n\
nFull site search\nTo search\xa0all of the files in the site,\xa0instead of matching against file and folder names i
to find it\nQuick search - By default Quick search uses a wildcard search, meaning it will find your search terms
file management actions (e.g. download, share, move, copy)\nChange to the search filters without performing
fields. If criteria are entered in more than one field, then all of the criteria must be satisfied. For example, if the
the\xa0Tags\xa0field and\xa0any matching tags that exist in\xa0any\xa0site within that\xa0instance of Collabor
g\n\n\n\nEach of these content areas is discussed in more detail below.\n\n\n\nRecent blog posts\n\n\nThe cor
For example, you can filter on that metadata in content lists:\n\nSystem preferences\nUsers can have the ability
against all documents within the Files module, this can be set as the Default metadata view. Go to Admin > Modu
ck the Admin tab then select Groups in User management. Click the More options icon for a User group, select S

able (Disable print and Watermark). This allows DRM features to be enabled or disabled for any folder or file liste
;roup.\xa0\n\nIf you want to create another group, select the\xa0Add another group\xa0checkbox and after you
and member administrators can add System Groups to a site using this method, that it is limited to internal use
l be displayed, otherwise the generic avatar is shown\nUser name\xa0- The user's full name, including an indicat
used to create new groups and manage existing groups, including changing the set up of groups and configuring g
xa0including\xa0internal users and external users. These system groups are indicated with a green gear icon and
k list. Users can then be removed from this quarantine list when applicable\n\nClick\xa0Add\xa0group:\n\nTo d
all. This makes the comparison toolkit viewable to System and module admins only.\nClick Save to save all of yo
r End-Users. To learn more about the Digital Rights Management options available in Collaborate, click\xa0here
xa0capability is only useful if those favourites can be quickly accessed later. To access your favourites, click\xa0F
ng custom metadata fields in the file metadata iSheet.\nFor example, you could search the files module for files
t is available to them. If a user does not have access to any of the iSheet's views, the iSheet will not be available
t folder. Click the folder to see the list of files that match the defined criteria.\n\nA\xa0Smart Folder is identified
nputed values, or others.\nThe Output iSheet matches each answer type ('variable') to the equivalent column typ

nction in a similar way to choice columns, allowing users to select one or more items from a defined list, but wit
- If a reminder has been added to a task, then the assignees of the task will receive an email reminder at the app
an the old site.\n\n\nPlease note that Administrator access is required to retrieve data from the external table. A
of August 2023, the ticks display the current view status of each page as soon as you open the questionnaire. It is
l is not available, a\xa0site admin can set up dashboard panels on the site's Home screen.\n\n\nIf, and only if,\xa
drag the file(s) to the box.\nTags - Within the Metadata tab, users can enter tags which may be one or more wo
ct Express templates and Contract Express system groups, ready for further configuration.\n\n\n\n\nIf you do no
as been activated.\n\n\n\n\n\n\nEnabling Contract Express in your instance\nA System Admin\xa0must add acc
Once you have enabled Contract Express in your instance, if you selected to have it set to off as default on every
etc.)\nSecurity groups on the site and the access rights the groups have to site content; this includes system gro
in any way the audit records for a site. All of the records related to actions that took place in a site will remain\n
eld.\xa0To see any translation changes you have made,\xa0navigate to Settings from your profile dropdown, cha
panel, e.g. Contract Express panel\nChoose templates\xa0- Here is where you select the template(s)\xa0you wa
HighQ Forms can create a wide range of forms, and be used as a single webpage, as an embedded element on yo
nd select\xa0Disabled then scroll down and click Save.\n\nWhile HighQ Forms is enabled, a site admin\xa0can en
e form for\xa0'public'\xa0access, such as a website, and the form will be filled by non-members of the site; i.e. th
into five steps:\n\nLayout - design the form layout, including a header and footer\nConfirmation - define a conf
e advanced design changes\nIf you use a single-line text column to capture email addresses â€“ please enable En
he file list and moved to the\xa0Deleted items\xa0bin which is only accessible by Site and Content Administrato
notes if they have the correct permissions), access to the file's previous versions\xa0and the option view who h
tances of Collaborate. Please contact your account manager or Support to have this feature enabled.\n\nImporta
Secure\xa0(marked with a red lock icon).\n\tIf this menu option isnâ€™t available it means you might not have F
s displayed. Select DocuSign to continue.\n\nNote that Adobe Acrobat Sign is not shown if more than one file is
dministration\nOnce enabled and configured, the services are set as default at the system level, and therefore\x
nd to - Services screen is displayed:\n\n\nIf multiple documents are selected in the Files module the Adobe Acro
n\xa0either use HighQ AI alongside other AI engines, or as a tool to reduce costs by identifying the type of file be
on the HighQ AI:\n\nClick the drop-down and select ON to enable the engine for your site and click Save\xa0at t
ded clauses.\n\nThe information below will help you train your AI engines to better understand file metadata
ting clause that the new text will help define then click Done, or select New clause to define a new custom claus
contract, as per the content of the text (not the file name).\n5.1\n\n\nAddress\nAddress (or addresses) found i
g practice\n\nDo not select footers or other sections of text not related to the clause.\n\n\n\nDo not select table

:en trained using examples of US consent orders and consent agreements.*\xa0\nEmployment Contract\nAn em
 the project, the fields from the additional worksheets are not visible in AI Hub.\n\nEnabling Kira at system level
 to AI Hub services configuration:\n\nIn the LEVERTON section, click More actions > Configure:\n\nAdd the insta
lore Actions and then choose Configure. You now need to authorise Eigen\xa0as a document analysis engine.\n\
luding the Instance URL,\xa0Client ID and Token (Client secret key). Set a name, description and add an image to
:ore (number values will default to zero) and Hyperlink columns. Other column types are not supported.\n\nTo h
For Android, tap to focus on the picture and\xa0press the shutter button, after which\xa0the app will automatic
not by itself reset your password. If a user did not request a password reset and they receive a password reset e
xa0of October\n\nWe recommend that you download our HighQ Drive application instead. It's available on mult
ids.\n\nFile uploads do not take priority over a file that is already downloading.\n\nHighQ Drive for Android or i
:rience SSO.\nThe end-user experience\nEven with SSO enabled a user first needs to have an account created in
ie internal network via users' browsers.\nOnce the ADFS 2.0 Server has been installed, a new trusted relying part
(for example, @acme.com and @acme-corp.com) and the same user may have email accounts with different do
Public website profile ID\xa0-\xa0This allows a user to display a third party URL in their profile.\nRoles\xa0-\xa0\
hat belongs to the organisation. For example, if the domain name is\xa0highq.com\xa0any user who is added to
s entered, you will have a couple of options:\n\nAn existing Organisation will be displayed if the new user email
e domain name is @highq.com any user that exists within that instance of Publisher with that domain, will be ac
y between personalised knowledge content and matter collaboration workspaces with a consistent user experie
Add menu item:\n\nWithin the Add menu item\xa0screen, you can create a navigation menu items using any of
nmary.\nThe Full profile also displays the user's phone number and office address, including a map. It also conta
osts as drafts to ensure they are ready to go out\xa0before publishing to\xa0a wider audience.\xa0\nWith the a
ot have to set their own language via their settings. (Unless they want a different language to the default langua
hange the language for anyone else.\n\nClick\xa0Save\xa0to save your changes. Your system will now be display
splayed:\n\nEnter your question details, the status of the questions and whether you want to display a legend, n
, content settings and if it's public,\xa0SEO settings\n\n\nYou can change the Editorial environment. An Open e
panel that sits in that section design can be implemented using custom CSS.\nYour dashboard\nEditing a dashbo
t\nEvent\nFeatures\nForm\nHero\nMasonry\nModule list\nNavigation\nPeople\nRSS\nSearch\nSlider\nText/
 no editor groups. Each editor group can be assigned approvers, allowing\xa0tighter control of who can approve
i0then tailor content through the selection of the modules that you have permission to see\xa0and the associate
ie time.\xa0\n\nTo view more detail about a specific event, click the title of the event to display the following:\n
iat have passed will no longer be displayed but can be accessed from the archives.\n\n\nHere are some of the fe
Default view\xa0- You can change the default view of the Events module via this dropdown. Select either List, Da
 protected sites, Site permissions level and Global people search.\n\nCache, HighQ apps and blog alerts\nThese
iew, you can group tasks by Task ID, Due date, List, Priority, Status and Assignee using the Group button. Once g
 options more effectively.\n\n\n\nYour saved selection of columns may not be shared with or accessed by anoth
ion and country in order to assign work to a specific user group, or fields for the estimated and actual hours take
ghQ Drive application can be downloaded from the user's profile:\n\nClick Install HighQ Drive and the HighQ Dri
apps-plugins-and-connectors/automatic-upload-into-collaborate', 'https://knowledge.highq.com/help/apps-plug
ity settings that will be applied by default when attachments are sent to Collaborate and replaced with links:\n\n
ight of the Collaborate screen to view further options.\n\nSelect Install HighQ Drive. If you already have HighQ D
:e\n\nIn the Download rights options, you can set security for downloading of the document:\n\nDownload, view
iere\xa0the file will be uploaded.\n\nClick Upload and Attach. A link will be included in the content of your Outl
: attachment click on the paperclip icon shown in the top right of the preview.\n\nYou can also drag and drop yo
e the email has been uploaded to in Collaborate.\xa0\xa0\nYou can also drag a file from Windows Explorer into
 option and your attachment is smaller than the set size.\xa0\n\n\nIn this option, you can choose to send your e
nges are made to the file and the change will be replicated into the file saved in Collaborate.\n\nClick on\xa0Vie
ilable and whether an attachment can be downloaded or only viewed.\nAudit records are maintained to help de

a folder from the HighQ folder tree on the left\xa0within Outlook. Drag a new file into the folder.\nA green icor

the drop-down is set to On.\nClick\xa0Save\xa0to save your changes. Office Online is now enabled at the syster
ɔrder to make changes with Workspace integration.\xa0\n\nUsers should go to Files\xa0and select the\xa0file tl
from here.)\nSite ID:\xa0The ID of the site this folder is located in\nFolder ID:\xa0The ID of the folder\n\nWithi
ka0-\xa0If permissions can be set at the folder or file level, then the permissions applicable to the moved item\xa
iite that requires the function. In a site, navigate to\xa0Site admin:\n\nIn the\xa0Site admin\xa0screen, navigate
tually identical to the\xa0Add single file\xa0page, with the same options, such as overriding the notification sett
ie file to your computer. The Check out button will now change to Check in. Click Close to return to the list of file
are available when you:\n\nbrowse any iSheet (including metadata and output)\ncreate a document from a Co
system administrator, you can take an existing site and create a template based on that site. To do so, navigate
the two documents.\nThe red text with a strikethrough is text that has been deleted or replaced. The blue und
ew the site as the user you have impersonated\nView the content and actions available to the user and can take
\nTo unfollow a user, hover over the\xa0Following\xa0button which will change to\xa0Unfollow\xa0and click it.
ation.\n\xa0\n\nPlease contact HighQ support if HighQ Resources is not appropriate for your site and you want
rovides\xa0different text to\xa0organisations / user groups based on the permissions of the snippet.\nFor more
edit rights to that content, an Edit button or tab will be displayed. Once selected, the content will be shown in\xa
also determines which fields of information and which organisations\xa0are displayed. A name is a link to a user
m that the platform will live under. The most common approach for our clients is to use their existing domain e.
deos\xa0\nNavigation\nTitles and content of panels\n\n'], 'Breadcrumb_path': ['', '', 'Getting started', '', 'Publish
dge.highq.com/help/working-with-content/create-channels-in-publisher', 'https://knowledge.highq.com/help/w
ances via HighQ Hub\nOnce a user's HighQ Hub account has been created, the user only needs to remember the
enabled.\n\nDifferent areas of a site\xa0provide different search tools and functions:\n\n\nFrom the Dashboarc
option in the top navigation bar, criteria entered before\xa0pressing Enter will search for the first AND the othe
RL\xa0checkbox to shorten the URL before copying.\n\nOnly site users (and, if the underlying content has restric
from.\nTo do this, within your profile drop-down, navigate to\xa0System admin. Within the\xa0System admin\
rules to automatically assign and manage your tasks\nTrack progress and KPI's using dashboards and data visua
can also be\xa0directly accessed from the user profile menu:\n\nHow to Transfer\xa0Files and Folders\nAdding
ed Items\nThe Shared items tab shows the currently shared items, sorted\xa0by the items that were most recer
ocess:\nStep 1: Select the File to Share\nThe "File" tab in the "Send a file" window is displayed by default. \xa0C
n the item was shared\nWhen the share expires\n\nClicking on the item\'s name will bring up the\xa0downloac
folder as an email attachment. Any site member can send files to the root folder of the Inbox.\n\nAs of Octobe
and folders will be uploaded to the Files module with the same file and folder structure as existed on the user's

ptions are enabled.\nThe List of sheets screen is displayed:\n\nNext to Legal Tracker - Matter management, click
nQ to sync with Legal Tracker services, system settings must be configured to enable\xa0HighQ to access and us
vhich is how we will target specific users and groups. Click\xa0Add rule\xa0to display the metadata drop downs:\
fade-out applied\nFull summary\xa0- Display the full summary when displaying the teaser content\nLimited Su
r on by using the\xa0Organisation or group\xa0search box. You can also bulk add organisations or groups via\xa
isplayed in Google via a preview function:\n\nYou can then compile and submit an XML sitemap which will only\
olution templates\xa0marked as default or marked as created by Thomson Reuters.\n\nPlease note that this scr
a0Task templates screen will be displayed. Within the\xa0Task templates\xa0screen, click the\xa0Practical Law I
forming you of the limitations and settings that will be applied when you are impersonating that user. Click\xa0C
theme you want to export, and click\xa0More actions\xa0>\xa0Export theme:\n\nThe following message will be
the\xa0Chart preview\xa0section:\n\nThe\xa0Customise\xa0tab is displayed. Within the\xa0Customise\xa0tab
ssion to bypass XSS protection cannot edit any part of a\xa0page with Javascript, even if the Javascript is in a dif
a0to apply your changes. The preview will update showing only whole numbers and not decimals.\n'], 'Breadcrur

\nFor both the Dashboards and system aggregated generated content emails, you can filter what content is displ
and colours of these themes will not apply to the None theme, as this is built into the chart library and cannot b
Groups > User groups:\n\nThe\xa0User groups\xa0screen will be displayed. Within the\xa0User groups\xa0scre
ultiple files at once, if required.\n\n\nOnce you have selected your file, click\xa0Save. This will start the import p
er profile images from Active Directory on a continual basis, you must select Synchronise user profile image with
dition, only internal organisation users can be added into this group.\n\nOnce you have added users into the grc
returned to the\xa0System rules\xa0screen. Click\xa0Save\xa0to save your changes.\xa0\n\nPlease note that if
etails required of you.\n\nOnce you have entered all the details of the intake form, click\xa0Add at the bottom c
The triggers of this rule are as follows:\n\n\nPlease note that the intake status will change to new automatically,
sions for your users, groups and columns etc.\nUse case\nFor this example, we have created some users which a
\xa0in the\xa0Columns\xa0section to display a list of the default iSheet\xa0columns for that iSheet:\n\nThese c
xample, a client that might be giving insights into employment law and they might want to only give this to custo
ml5 video playback are supported.\xa0\nWhen clicking a media file, the system opens the media file in a new H

\nContent access - the ability\xa0to report against content items have been accessed by a specific organisation c
nAdditionally, the status of the OCR(ed) documents can be viewed within the site administration interface. The C
e file\n\nOnce you are finished, click\xa0Close. The files will now be available within the\xa0Image library.\n\nB
enable you\xa0to add multiple language versions for that title.\xa0\nThe default language will be\xa0shown unl
teaser content\n\nRedirects\n\nPublisher does not have an inbuilt redirect tool\n\n'], 'Breadcrumb_path': ['', '
urce a\xa0Name. Additionally, you must select the\xa0Source type\xa0from the drop down menu:\n\nOnce you
exist\nCan change the stylesheet of that form only\nCan see responses of the forms they have access to\n\nFo
a0\nAdding, editing and deleting columns\nTo add a new column, or to edit or delete an existing column, click\xa
ation that has been exported, enabling you to export very useful specific data.\n\n'], 'Breadcrumb_path': ['', '', 'S
adata for matter management, click here.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Custom site n
a0is displayed. Click\xa0Save as template:\n\nThe\xa0Save as template\xa0screen is displayed:\n\nIn the\xa0Sa
tomated content\xa0(i.e. only a System or Site Administrator\xa0may perform this step).\n\nAdd Association\n
nabled, any user may download and install the plugin, but only a System or Site Administrator may configure and
e.highq.com/help/videos/using-variables-in-the-doc-auto-word-plugin', 'https://knowledge.highq.com/help/app
ield should exactly match the text of the value in the iSheet.\xa0\n\n\nA condition can be built from\xa0many co
n the UK':\n\nBuild a dynamic table\nIf you want to display the output of a Loop as a table you can use the Dyna
umn 'Registration number' was deleted from the iSheet after it was used in the automation of the template.\nA
et or records from many iSheets, or\nSingle record preview - for templates that have been automated to genera
rt date can be used to track when a site was actually put in use\nEnd date - The end date can be used to track w

Add\xa0new users\xa0or\xa0Remove\xa0existing users.\nAdding a user to the Users blocked from Publisher lis
w. The template will be displayed:\n\nHere, you can\xa0Edit\xa0and\xa0Add\xa0to your template. For more inf
w derivatives, then system admins can create a site based on this template, then save that site as a new templat
Save\xa0to save your changes.\nView modules\nThe View modules\xa0option shows which modules in the temp

ul if you want to share the report with your system administrator, if you need them to change any system settin
description that will help you find and organise your site templates\nModules - This dropdown contains a selecti

nge the domain, but only to a domain\xa0registered for the current organisation.\n\nClick Save to apply the char

ds will be displayed:\n\nSelect the location of the image, from the Location drop-down.\xa0Once you have selec

time. Click Send to send the invitation. You will receive a confirmation message if the invitation was sent succes

to identify which organisation the user is part of in the system. This field is required.\nDepartment\xa0- This is a
, a unique encryption key will be created for that site and all files stored in that site. The encryption key will be s
nt types of location:\n\nA data centre in any location where HighQ hosts Collaborate.\nAny location selected by

:or, this is where Template parameters are defined. \xa0If you would like more information about the SQL conne

lmost the identical fashion that users can be added to a site. \xa0First, enter the email address(es) of the users t
ed with adding each of those 15 users to the site. Then imagine that the primary paralegal on the Acme Client Te
nain with.\nAdding as a new exception domain and associate with an organisation, allows you to do both of the
ng back all pre-existing files.\n\nOn overall My files storage quota for all users can be set from the System settin
, or to schedule the invitation for a late date and time. Click\xa0Send\xa0to send the invitation. You will receive
increase from 0 KB.\xa0\n\nIn\xa0HighQ Drive\xa0Preferences,\xa0choose the Advanced tab and\xa0select th
to repurpose licenses and add other users to the system.\xa0\n\n\n\nAdditional columns show a link to a list of
', 'System administration', '', 'Document generation - System settings'], 'Related_materials': ['https://knowledge.
need to define a time for the daily email notifications to be sent and the day AND time for weekly, fortnightly, m
the URL in it:\xa0\n\nCopy the URL that is displayed and then click\xa0Save\xa0to save your changes.\nNow yo
groups\n\nThe\xa0Organisation groups\xa0screen is displayed:\n\nAll organisation groups will be displayed. Clic
is effectively its unique identifier.\nThe invitation process is separate to this process.\nSingle user upload\nTo ac
a0screen displays the following options:\n\nMenu item\nA menu item is a 'navigation' button, located in the sys
ch can be given\xa0a number of different roles in the system.\xa0\nExternal users\nAn 'External user'\xa0is any
nain using the form below:\n\nException domains can be Active, Pending or Archive. \xa0By default, all new dor
anged later, as described below.\nExisting organisations can be managed, as described in more detail below.\n\
their invitation to the site, or for users who lost their original invitation,\xa0an Administrator can (re)send a site
user is required to accept them when they first access Collaborate. In the\xa0Terms of use\xa0screen,\xa0use t

w site, although not available to site administrators, is demonstrated so that site administrators understand wha
g\xa0Send a file.\n\nThe\xa0Send a file\xa0screen is displayed:\n\n\nFrom here, you can send a file as you norr
g\xa0Download to excel.\nExisting fields in the content report\n\nLast edited\xa0- This field is the last time a Co
ent organisations)\nWhat the organisations GUID (unique identifier is)\nWhat the overall status of the Organisa
\xa0If you want to view a comparison between what a user has changed regarding their preferences, you need t
ountry\xa0within the system. Please note that this is based on the metadata node\nSelect users:\xa0Here, you c
on views, without statistics from the content administrator.\nTo use this new filter, within the audit screen, clicl
dministrators (or both) from the reports.\nThis enables you to provide accurate statistics of the publication view
to enable administrators to remove system administrators or content administrators (or both) from the reports
users who have logged in and out of the instance\nSubject access request -\xa0reports every instance that a us
)Show audit\xa0to show your final audit. Once you have viewed the audit, you will have access to a new option
excel spreadsheet.\n\nPlease note that from version 5.4.5, when you try and download to excel over a 6 month
ft blank, the audit will perform against all users\nContent title: Here, you can enter the title of any pieces of cont
audit to run against. If left blank, the audit will run against all pieces of content\nGrid Report / Pivot Report: Her
audit'], 'Related_materials': ['https://knowledge.highq.com/help/system-administration/audits-in-publisher']}
download your report to an excel spreadsheet.\n'], 'Breadcrumb_path': ['', '', 'System administration', '', 'Docum
o show your final audit. Once you have clicked\xa0Show audit, you will have access to your newly generated au
roduct you want to audit. If you select\xa0All\xa0all events/workshops will be audited\nStatus: Select the status
t you want to investigate\nSelect users:\xa0Here, you can specify a user that you want this report to be based o
nisations)\nPerformed between: In this field,\xa0you can specify the date range of the action you want to invest
dit.\n\nOnce results have\xa0been produced a new Download to excel\xa0button will be displayed, enabling yo

you want to investigate\nSelect users:\xa0Here, you can specify a user that you want this report to be based on
:omer and generate an API key in the Document Intelligence application which is then entered in the instance co
nanagement, this provides an integrated experience that combines HighQ's flexibility with Legal Tracker's streng
Matter intake and Matter management iSheets, please check the Legal Tracker integration is enabled.\n\nPlease
)nce the client has\xa0purchased the new integration, the setup is very simple and can be configured by the clie
ormation iSheet will direct users to an updated, filtered view of the invoices entries in the invoices iSheet for tha
;elected, click Add.\n\nOnce the files have been added they will appear in the Add record screen, as below. Click
ort 3E Data Insights, but older on-premise installations may need to be upgraded or have a Data Insights instance
e template, even with a different view, you create a separate, brand new iSheet.\nHowever, If you create an add
oick list, or a country pick list. \xa0You could create an iSheet with all of these commonly needed iSheet columns
vill be able to enable it within the\xa0System admin\xa0section. To access this option, navigate to your profile d
an Employment Contract with an English Classifier.\xa0\n\n\nThe classification displays\xa0as unknown if the s
ted for them automatically.\xa0\xa0\nThere may be AD users who do not match the search query initially, but c
d below:\n\nInstance Name: This is the context name, so for example,\xa0https://collaborate.highq.com/sitepc
eased during the COVID pandemic. With many people across the world now working from home, or adopting a
ore you export a template, a Dependency report is created. This report lists dependencies that the site template
litor panel (using the Rich text editor) is included.\xa0\n\nRich text editor\nDynamic lists\nAdd a\xa0Link\n\nA
tion and information specific to the original site is removed.\n\nBuilding a template\nThere are two approaches
hem.\xa0Mixing the two will likely create conflicts which may result in users not being alerted.\nConsider permi
s. Though you may not be prompted to log in, the FileOpen software still checks your saved login information w

ght be asked, approved, responded to and disclosed in the following manner:\n\nA user from Bidder1 with Ask-(

est practices outlined in the preceding articles.\nEnable a view for email alerts and make sure at least one group
at default value when you first create a new column.\xa0The value will be automatically populated as items are
your specific data collection requirements. Column data types cannot be changed once they are created, so try t
n\nYou have the option to select,\xa0Title list\xa0(default),\xa0Title thumbnail list\xa0and\xa0Thumbnail view.
er user who knows the password),\xa0a\xa0System Admin\xa0should then attempt to access the site, but perm
riate folder(s) in the site.\nUse the Inbox as a Staging Area\nA simpler method is to use the Inbox as a staging a
tracts and templates must be in Word, PDF or TXT format. However Workshare Compare must be enabled on yo
:k to a default setting, recheck the checkbox next to a setting and hit Save.\n\nSignificant features\nBelow is a li
nis OAuth application that a user can access, which will cause the user to be redirected to the other application,
ert link\xa0screen\xa0will be displayed\xa0and new link information can be configured.\nRemoving a Link\nTo
).2) and Mac/Safari (10.13.4 Sierra).\xa0\n\nResponsive\xa0mobile devices and desktop browsers have a minim

Administrator can initiate sending an invitation from this page.\xa0\n\n\nIf the invitation was sent, the Site Adn
; but is attempting to log in with the other. \xa0\n\n\nThe name of the site to which they were invited.\n\n\nTh

)/working-with-content/place-charts-into-a-wiki', 'https://knowledge.highq.com/help/working-with-content/ad
area'], 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-user-administration/manage-

ssues, please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'Contract Express - Remove

.highq.com/help/system-administration/adding-a-system-dashboard-to-the-global-navigation', 'https://knowlec

ps://knowledge.highq.com/help/videos/enable-ai-training', 'https://knowledge.highq.com/help/videos/export-a

please clear your browser cache\n\n\n'], 'Breadcrumb_path': ['', '', 'Videos', '', 'HighQ - Delete & Restore Specific

ng'], 'Related_materials': ['https://knowledge.highq.com/help/system-administration/configuring-the-legal-trac
ito - Contract Express Templates'], 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-us

- Today's Date Feature"], 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-user-admin

Automatically move iSheets Attachments'], 'Related_materials': ['https://knowledge.highq.com/help/working-w

erials': ['https://knowledge.highq.com/help/apps-plugins-and-connectors/highq-drive-ios', 'https://knowledge.h
', 'https://knowledge.highq.com/help/videos/upload-files-into-the-files-module', 'https://knowledge.highq.com/

ideo to see how easy it is.\nIf you experience video playback issues, please clear your browser cache\n\xa0\n\n\

email-configuration-in-publisher', 'https://knowledge.highq.com/help/system-administration/targeted-content-l
wledge.highq.com/help/system-administration/targeted-content-based-on-preferences', 'https://knowledge.hig

ees\xa0drop-down and deselect fields you want to protect.\xa0\n\nThis only restricts assignees with View-only a
d drag and drop them into the files module:\n\nAs you are attempting to drag and drop your folders, you will se
screen will only be available if it has been\xa0enabled by HighQ\n\nManaging your email bouncebacks\nWithin
to add the rule to exists, click it to display that workflow.\nWithin the\xa0Workflow\xa0screen, either add a new
existing rule. Within the\xa0Add/Edit rule\xa0screen, navigate to the\xa0Triggers\xa0screen, and set up your tr

) items in the list:\n\nTo apply any changes that have been made to the Sort order, click Apply or click Cancel to
ds from one or more iSheets. The document automation searches through the chosen iSheet or iSheets and retur
ıb is displayed, but a message stating there are No views available is shown.\n\nEnabling and then disabling the
you want to be the default navigation. Click Save to save your changes.\xa0\nUsing the navigation in content\nE
vide translations for the dashboard, dashboard name, panel titles and dashboard CK editor content.\nIn order to
on on the dashboard builder, click\xa0here.\n\nOnly a Site Administrator can edit the contents of the\xa0Home\
\xa0module):\n\nNow, you can select how many columns you want to\xa0display\xa0by clicking\xa0Column cho
ı, an internal user, an editor, an approve or a module admin for each specific module. For example, a GDPR mod

reports\nThere are three file access\xa0reports:\n\nAccess by organisation - For each organisation, which files
are denoted accordingly.\nUsers with access to the Q&A module will fall into one of two categories; those invol
uire additional levels of approval\n\n\nThe ability to limit the numbering of questions each bidder group can asl
these fields will always be available on a user's profile page. \xa0Hiding certain fields from appearing in the Peop
creen is displayed:\n\nClick the workflow that\xa0will contain the\xa0new rule, then click Add > New Rule:\n\n\
opdown menu:\n\nSelect the column that will be monitored to trigger the rule:\n\nIn this example, we have cho
ering data\xa0- controls how many lines deep the text field will display before the scroll bar appears.\nWidth -\x
r the column such as checking that an entry is a valid email address, or that the entry is required when a record
to keep changes, or click the arrow and select Save as draft to keep changes but not save them yet. Edit the rec
xa0150 columns in one iSheet, you can create 10 views with 15 columns in each. Making it easier to dissect and
previous version will add it as a new version of the record to preserve the full version history.\xa0\n\nComparis
powered by Contract Express:\n\n\nPlease contact your HighQ representative to purchase and register the High

0Add\xa0>\xa0New rule:\n\nThe\xa0New rule\xa0screen is displayed:\n\nWithin the\xa0Details\xa0tab, enter
o give your rule a name, a description and select its status:\n\nOnce you have entered this information, click\xa
ck Save and Continue.\xa0\nActions\nIn the Actions tab choose Add iSheet record from the dropdown option.\r
oter information\xa0- This can be enabled to show some footer text\nSummary\xa0â€“ This is a plain text sectio
ı': ['', '', 'Site, content and user administration', '', 'Comparison toolkit glossaries'], 'Related_materials': []}
ne and link\xa0- Here, you can add the author name and its\xa0link\xa0\nContent\xa0- Here, you can add the co
end user\nSubmitted for approval - The editor has written the content and has submitted it to be approved by
enable and configure different AI engines.\xa0Within this screen, you can turn\xa0the HighQ AI engine\xa0ON\x
g is included in the new site.\n\nNote for Kira admins:\xa0a new Kira site will be created for each Kira project cr
er permissions - By default the folder inherits permissions from the parent folder. Deselect this option to make\
e following window is displayed:\n\nWhen this action is triggered, the file will be deleted (moved to the recycle
ections-in-isheets', 'https://knowledge.highq.com/help/working-with-content/view-columns-in-isheet-sections',
owing message window will be displayed:\xa0\n\nClick Delete to delete the iSheet.\n\nYou can delete multiple iS
thin this window a\xa0chart preview displays where you can further customise your data by adding a category,
afts items are saved and available in the Draft items view until you save them into the iSheet, or delete them.\n
t record at the time it was saved:\xa0\n\nThis opens a new window and displays the corresponding version of th
who saved the archive (Created by), and the date and time it was saved (Created on).\n\nDownload a saved ar
er conflict scenarios\nA user may begin to edit an item and then open up another browser or tab and attempt t
decides that an iSheet alert should be triggered only when certain choice values are selected and/or when one
t Canada and France) or about changes in any of the listed countries. If no values are selected, the user will not
netadata iSheet system generated fields\nAdditional system generated fields will appear for file and folder meta
ew\nThe default view is always shown first when an iSheet is selected from the iSheets module, regardless of wh
le:\n\nThe conditions that are available for Task, are Status and List. Select either List or Status, and then enter v
a0Start date,\xa0End date,\xa0Contacts. and\xa0Description.\nTitle\nClick\xa0Insert Variable\xa0next to the Ti
ıIn addition to the above, you have the ability to add variable content to the date and assignee fields. V

\n\n\xa0\nSubject\nEnter the subject for the email.\xa0\nIf you need to vary the subject of the email, click Inse
er groups, organisations and organisation groups that will be able to view the channel, they will be shown in a lis
wing fields:\n\xa0\n\nStatus - This is the status of the channel. The channel will either be Active or Archived.\nF
data will be displayed.\n\nPlease ensure that you contact HighQ\xa0support to notify\xa0them of the metadata

u can add panels and an additional subsection.\n\nBackground colour - This lets you choose the background colo
content or site settings, this role has the same permissions as any non-admin role.\nA system user admin can se
hin the\xa0System admin\xa0screen, navigate to\xa0Basic user permissions\xa0in the left-hand menu:\n\nThe\
rmissions, specific\xa0Files\xa0permissions\xa0and also you can add a user to an\xa0Admin group. Once you hav
anagement please watch our video:\n\xa0\n\n\n\n\n\n\xa0\nWhat is LPM?\nLegal project management can be
ence\nRecord meeting notes and attachments using the Wiki module\n\nBudget and fee estimates\xa0\xa0\n\r
both templates and the modules included in the template, and you must know the version number of Collaborat
sk and sub-task statuses can now be automated, eliminating the need to manually update subtasks when monit

set up lists to categorise tasks for navigation and to manage task permissions\xa0\nPriority - high, medium or lov
lating would let\xa0you save all the tasks into the system and use them again when creating a new site for a sim
u get to approve a document now adds an option to approve or reject directly form the email, without having to

displayed in the\xa0Add-ons\xa0bar (normally on the right of the screen).\n\nClick the HighQ icon to see a welc
ed to your computer. Open the downloaded file and follow the installation steps.\xa0\nYou must:\xa0\n\nEnter
rely on administrators to create every view\n\nCore Platform Improvements\n\nFast and comprehensive searc
ernal version number 5.7.11\nPublisher internal version number 5.7.8\n\nDecember updates -\xa0A maintenan
th\xa0your HighQ account manager;\xa0all purchased modules will be enabled and fully configured.\nSee Config
change, or should you change the configuration of a Collaborate or Publisher instance, you may need to access
nning.\nOpen the Windows Start menu > search for Services > look for Apache Tomcat 7 HighQAppliance install
xa0module\xa0(Collaborate only)\nFile sync using CMIS for Sharepoint and network file share (Collaborate only)'
each handles\xa0a specific task, typically with a one-way connection from your system to your HighQ instance.
ble storage (i.e. hard drive) - 120 GB (this should be the free space after the OS install and mounted as a D:\\ dri
ion\n\nWe have added System config admin and System user admin roles to improve site confidentiality\xa0SIT
one attempts to view archived content:\n\n\xa0\n"], 'Breadcrumb_path': ['', '', 'System administration', '', 'Custo
ner\xa0SITE ADMIN\xa0SYSTEM\xa0ADMIN\nWe have introduced a new filter to enable administrators to excluc
d. You have the option of either Recently updated or Alphabetical.\xa0\nDisplay - Here, you can select whether y
ober\n\nWe recommend that you download our HighQ Drive application instead. It's available on multiple platf
want to add.\n\t\nIn order to create a feature you need to navigate to Content Hub > Content Manager > Featu
nd important events\n\n\nAdd content as a favourite to quickly access it again when you need it\n\n\nShare a lir
age the people directory in the content hub. To access this, navigate to your profile dropdown and click\xa0Con
with the Campaigns and Form builder features, allowing you to send customised emails to event attendees and
changes.\nClick the Auto filing pane\xa0button to open the HighQ auto email management pane\xa0at the top c
longer available]\n\n\nUsers will now be able to see the review status for files sent to Contract Analysis, enablir
ication interface for the sole purpose of product improvements and functional purposes as set out in the\xa0Th
information will be available here,\xa0on the\xa0HighQ\xa0Knowledge Center. \n\xa0\nIn addition, please rea
web page.\nDetailed release notes and other changes\nThese tags can help you find changes that are relevant

\nInstallation\nThe store listing displays details about functionality, along with permissions required to run the a
etadata iSheet fields are associated with every version of a file.\n\nFile status columns\nAs of version 5.6, you m
web page.\nDetailed release notes and other changes\nThese tags can help you find changes that are relevant

rmation can be found if you do not know the syntax. Click Update to save any changes.\xa0\nUsing Auto redacti
his can be set to Anyone with the link, Anyone with the password, Users within my organisation or Any registere
event\nStatus - The status of the event, e.g. Draft, Published etc.\nComments - This sets whether comments are
r in the organisation. A good example of this is\xa0RSSALL@clientdomain.com\nRSS Feeds -\xa0Copy the email
t Manager about enabling any of the new features on your instance.\xa0\nDocument automation\xa0\nDrive e
and-user-administration/home-module', 'https://knowledge.highq.com/help/system-administration/contract-ex
nSystem admin - Changes that affect the configuration of the system\nIntegration - Changes to the system due t
\nOnce you are in the\xa0Preference management\xa0screen, click the\xa0More actions\xa0button for the pr
files, as they can interfere with the clustering process.\n\nOpening the Clusters window\nIf you are a site admin
vindow will be refreshed so you can enter the details for the second placeholder file.\xa0A message displays\xa0
achments in Attachment column configuration settings.\nBelow is a summary of the options available for storin
ccess the capabilities of the platform that you have previously licensed. Contact your Client Manager about enab
The files module now supports manual document redactions. Site and content administrators can\xa0now add r
vledge.highq.com/help/system-administration/creating-custom-site-metadata-for-matter-management', 'https:
adcrumb_path': ['', '', 'Apps, plugins and connectors', '', 'HighQ Drive - Files app integration for iOS'], 'Related_ma
your container.\nDisplay in - Select whether you want to display panel on all devices, or just desktop/tablet.\nP
ontent Administrators and users with Folder admin permissions).\nLocation\xa0- Displays the parent folder in wh

to disable any pop-up blocker and ensure that 3rd party cookies are enabled.\n\nOnce you have logged in, your
le will see the\xa0Ask Question\xa0option for every folder and file in that site:\n\xa0\nClicking\xa0Ask Question

then change to Close\xa0to return the pane to its normal size.\nEvery question will have a\xa0Q&A ID that is un
ay not be appropriate.\nZIP download\nIf the downloaded files must be shown with their folder structure and\x
fice for macOS X may find it works with this feature, but these versions are not well supported in combination w
t version of each file is shown.\xa0\n\nInstead of displaying all\xa0files at once, which could\xa0delay loading th

ite\n\n\n\nEdit an existing item\n\n\n\nView an existing item\n\n\n\nCompare versions of an item\n\n\n\nSwi

k the Metadata tab, make any required amendments and then click Save to commit the changes:\n\n\nFor file r
an edit the default Modified date.\n\nAlthough the values in these fields cannot be edited, except for the modifi
tion features for end users'], 'Related_materials': ['https://knowledge.highq.com/help/site-content-and-user-adr
ndow.\nDisplay in\xa0-\xa0Select whether you want to display panel on all devices, or just desktop/tablet.\nPan
he colour of the buttons etc.)\nRequire sign-in - Should you want a public form you would leave this blank, alter

n\nThere is a cost every time this feature\xa0is used,\xa0billed by Microsoft to your\xa0Azure account. Please b
t does not change the Chart configuration o the way it was when that version of the wiki was created, as the Cha
of the content to be included,\xa0and don\'t\xa0forget to set the height and width of the IFRAME. Those attrib
que above, not just videos. However,\xa0it may be necessary for the "src" value in the embedded text to refere
_path': ['', '', 'Working with content', '', 'Embed RSS feeds with the rich text editor'], 'Related_materials': []}
on a page will not be able to view that content (although the user will see the title given to that section, if any, a
or-features', 'https://knowledge.highq.com/help/working-with-content/display-external-content-in-rich-text-pa
\n\nRows\xa0- This is the number of rows in the table\nColumns\xa0- This is the number of columns in the table
move content elements that you do not want to display:\n\nClick Save to save your changes or click Cancel to ca
the Content Hub:\n\nAnd click Content under\xa0Content manager:\n\nThe Content screen is displayed:\n\nTo
r source:\n\nSelect the iSheet you want to use (if you have selected iSheets as your source) and then select the
ta room, navigate to Add > Zipped documents:\n\nThe Add zipped documents page is displayed:\n\nBrowse for
ted with the page. The Versions tab displays all versions of the page and\xa0provides\xa0options to compare ve

ıploaded from the author's computer.\n\n\nMore actions menu - The actions may include the following:\n\n\n\

ules, like "Home" (which would likely become the default landing page and needs to be filled with content about

all of the questions available to a user, simply click on the â€œInbox Summaryâ€ �n the left pane. \xa0This sum

the\xa0RSS content syndication\xa0screen, click Add RSS feed to display the Add RSS feed details\xa0screen:\n\

e a copy of the event,\xa0add the event to the user's calendar, via\xa0More actions\xa0>\xa0Add to calendar:\ı

ıave logged in, you are asked to allow HighQ Drive to access your account.\n\n\nIf you decline, you will be logge

$viewName=\'Enter the view here e.g. Default\')\n#set($map={"c1":"Enter the lookup column name here||ent

ƆF8uurRJI%3D&zKey=Ec8teaJ9VapCuBRH%2FglfDq%2FdwZ0I6NkpBiaRvcQ1%2B0trYQ6QELAnKJt10Uhj3hgP']}

d, we can no longer guarantee these components work as expected with Office 2010 or older versions\xa0and\x

cel file contains three columns of information about every DMS file:\n\nThe unique ID of the Collaborate site wh

xa0module.\n\nTo configure the Home module:\n\nEnter a name for the dashboard, whic