



Create a Static Snippet

Module 7 – Reusable Content

Version 1.0

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1. Snippets

1.1 What is a Snippet?

A Snippet is a portion of a Word document that can be reused within multiple templates. The Word document cannot be automated and can only use utilise the basic features of Word.

1.2 When to use a Snippet?

The key benefit of a Snippet is that it can be reused multiple times but is maintained in a single core version. This is useful where the same text or image is required in many documents and provides certainty that the formatting and content is accurate and consistent, facilitating faster review and approval processes. Snippets also help maintain a standard quality for all documents.

A good example of use of a Snippet is the company's logo. If the design of the logo changes, all of the documents that use the Snippet to bring in the logo can be updated by the single step of updating the core Snippet.

Another example could be text that is used in several documents, e.g. quoting legislation. If the legislation is updated, rather than having to amend each document separately, the text could be created as a Snippet and maintained in a single existence so that all documents are updated with a single change to the core Snippet.

Note: A snippet can contain static text and/or images – no automation can be applied. If automation is required, it is recommended to use a Section Block and Content Block instead. See the Build a Simple Section Block and Create a Simple Content Block guides.

2. Create a new Snippet

2.1 Create the Word Document

To create a new Snippet:

1. Create a new Word Document.
2. Add the content that is required to the document. In this example, a company logo will be used.
3. Save the document as a .DOCX file.



2.2 Create the Snippet

This Word document can now be attached to a Snippet.

Creating a Snippet is a similar process to creating a form; however Snippets are organised under a separate folder structure in **Application Settings**.

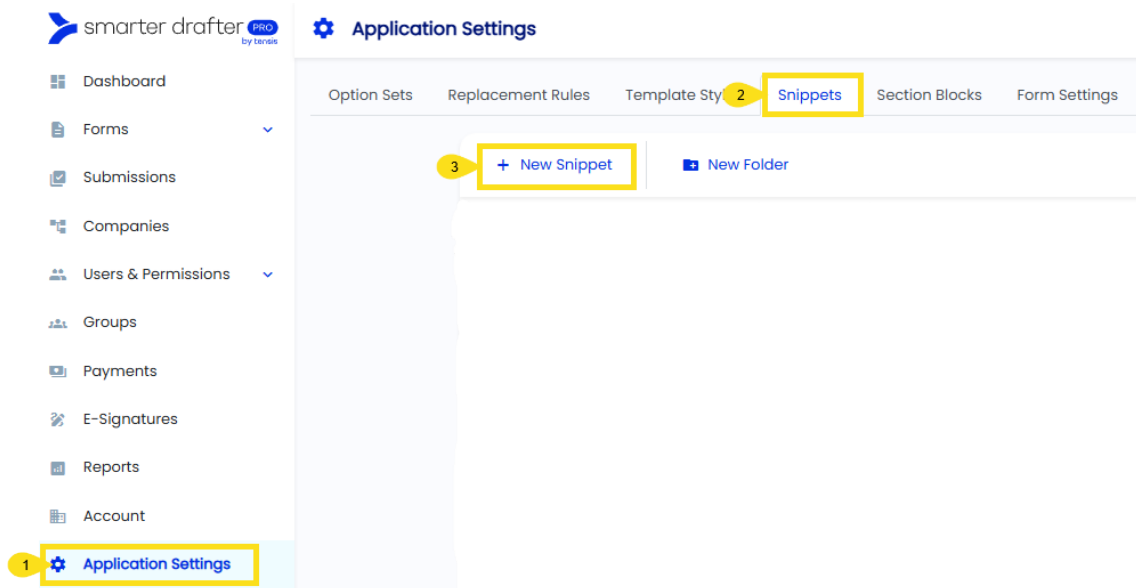
To access existing and/or create a new Snippet, navigate to the Snippet builder.

1. Click **Application Settings**.
2. Click **Snippets**.

Like ordinary forms, to keep the library of Snippets organised, a folder structure is used to categorise and subcategorise them. Managing the library will require the creation, deletion and relocation of folders and Snippets, which follows the same process as managing ordinary folders and forms.

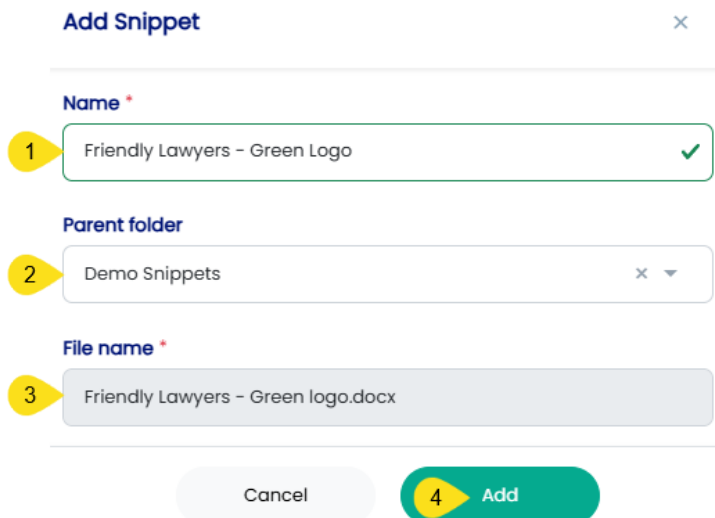
To create the Snippet:

1. Click **Application Settings**.
2. Click **Snippets**.
3. Click **New Snippet**.



The **Add Snippet** pop up opens.

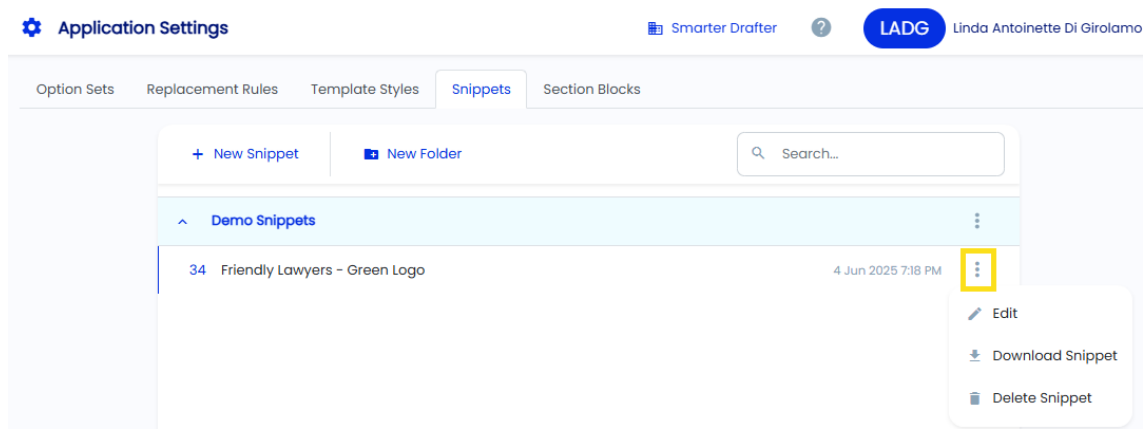
1. Give the Snippet a **name**.
2. Select the appropriate folder.
3. Use the **Upload** feature to add the .DOCX file that was created in the step above.
4. Click **Add**.



2.3 Manage and Edit Snippets

The Snippet is now available in the list. To manage the Snippet, click the **kebab** menu:

1. Click **Edit** to open the Snippet settings to change the name, update the .DOCX file or move the snippet to a new folder.
2. Click **Download Snippet** to download the .DOCX file.
3. Click **Delete Snippet** to delete it.



Note: When you use the edit option to update the attached .DOCX file, the Snippet is updated across all the documents where the Snippet has been used.

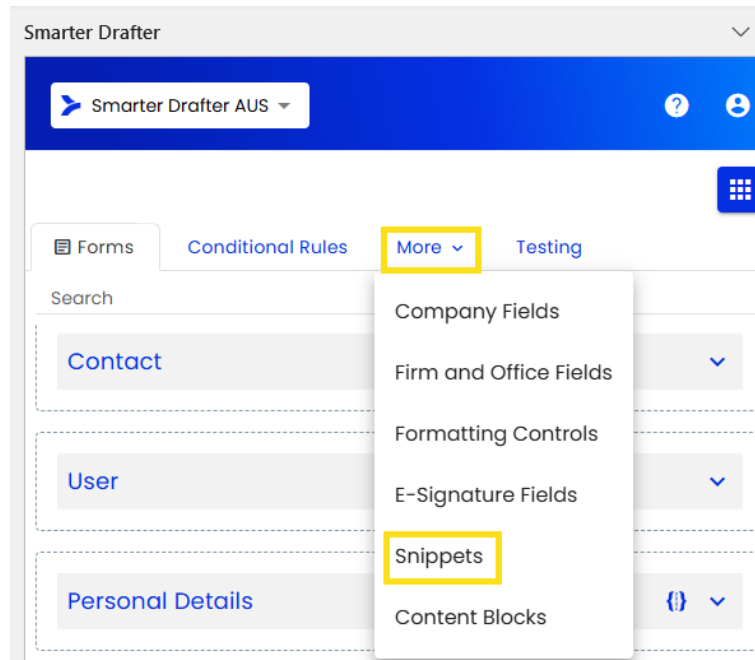
3. Insert Snippets in Templates

Snippets are inserted into templates as a content control via the Word Addin.

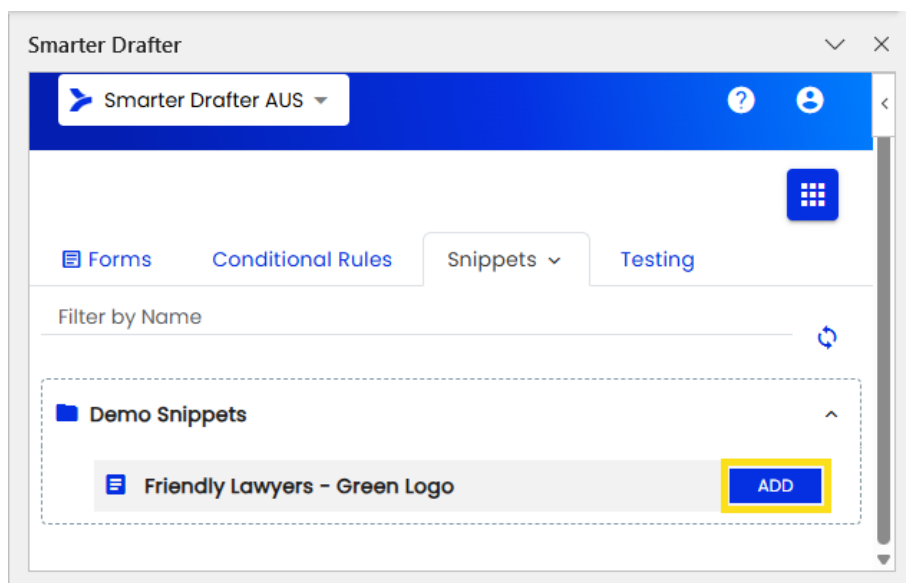
Open the document template in which you need to use a Snippet. Ensure Design Mode and paragraph marks are turned on.

In this example, the Snippet for the logo is going to be inserted at the start of the document. To insert the Snippet:

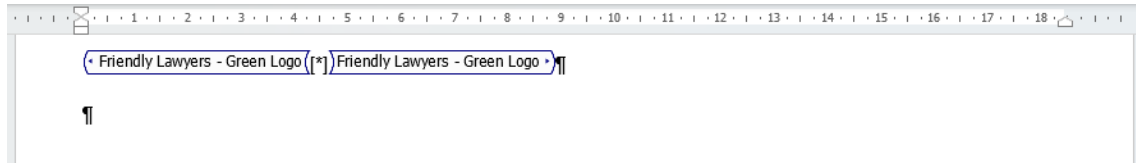
1. Place your cursor in the location where the Snippet is to be inserted.
2. In the Word Addin, click on the **More** menu, and then click on **Snippets**.



3. Locate the required Snippet and click Add.



4. A purple content control for the Snippet will be inserted into the document.



Where a Snippet has been inserted into a template, the file saved to the Snippet will be inserted into the template when it is generated. If the .DOCX file uploaded to the Snippet is updated, the new file will immediately be used in every template that uses the Snippet.