smarter drafter PRO
by tensis

Templates and the Word Add-In (Builder)

Module 5 – Templates and the Word Add-In

Version 1.0

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1. Templates

1.1 What is a template?

A template is an automated Word document. It is the foundation precedent that has been coded to handle the variables and conditions required. Templates are connected to their associated form so that they can share the answers provided by the form filler and input that data into the template to produce the final, customised document.

A template should be designed according to your organisations drafting, branding and styling guidelines. Authors and builders should ensure they follow these guidelines when preparing documents. See the **Document Planning** guide for tips on how to prepare documents for automation.

1.2 How does a Template Work?

A template uses content controls to bring in the answers provided by the form filler. Content controls are linked to the form and are the basis of the automation. See the **Content Controls** guide.

When a builder automates a template, the Smarter Drafter Word Add-In is the tool used to access the form questionnaire and design how the data will appear in the generated document.

1.3 Preparing to Build a Template

When automating a template, ensure that:

- You have the Microsoft Word Add-In installed
  >> without this you won't be able to access the form and automate the template

- You have the Developer Tab enabled
  >> without this you won't be able to access Design Mode

- You have Design Mode turned on
  >> without this you won't be able to see the Content Controls

- You have paragraph marks revealed
  >> without this you won't be able to clearly see the structure of your automation and format the Content Controls properly

See the **Set up Microsoft Word and install the Word Add-In** guide.

1.4   What can be a Template?

A template must be a Word document with extension .docx.

If an author provides a different file type (e.g. PDF), it will need to be converted for it to be automated and used as a template.

# 2.   The Word Add-In

2.1   What is the Word Add-In?

The Word Add-In is a custom Smarter Drafter tool that connects Word to the form. It allows the builder to access the fields and conditions in the Form and design the Word template.

If you haven't installed the Word Add-In, see the Set up **Microsoft Word and install the Word Add-In** guide.

There are 2 versions of the Word Add-In – one for the builder and another for the filler. Each will provide different options to suit the tasks they each need to perform. In this guide we will focus on the builder version.

2.2   Navigating the Word Add-In

The Word Add-In will appear in the side pane and provides the tools required to build automated templates.
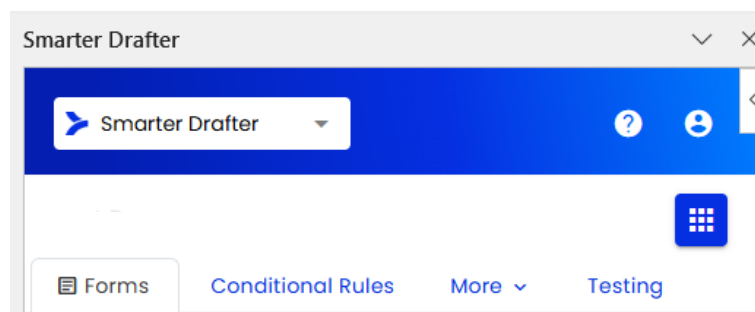
Forms Tab: A list of the fields/questions created in the Form which can be inserted into the template as a Content Control to bring in the answers of the form filler. See the **Automate a Simple Template** guide.

Conditional Rules Tab: A list of the rules created in the Form to direct Word on how to handle the optional and conditional parts of the document. See the **Create and Apply Conditional Rules** guide.

More Tab: Access to additional features and data inputs that will be covered in detail in separate guides. See the **Automate a Simple Template** guide.

Testing Tab: Word will compare the Fields and Conditional Rules used in the Word document to what has been built in the Form and provide any feedback regarding unused Fields/Conditional Rules or other oddities. See the **Automate a Simple Template** guide.

Waffle Menu: Access to Form and Template linking tools, and testing. See the **Automate a Simple Template** guide.