smarter drafter PRO
by tensis

Create a Simple Template

Module 5 – Templates and the Word Add-In

Version 1.0

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1. Prepare for Automation

1.1 Get the Precedent Ready

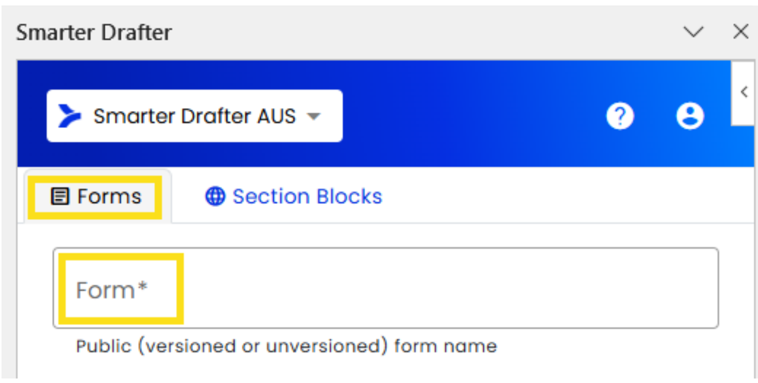
Step 1: Ensure that the author has provided the final version of the base precedent in .docx format (or convert it to .docx format).
>> See the **Document Planning** guide

Step 2: Familiarise yourself with the variables and conditioning requirements of the document and build a mental map (or mark-up the document with comments) to set your automation plan.
>> See the **Document Planning** guide

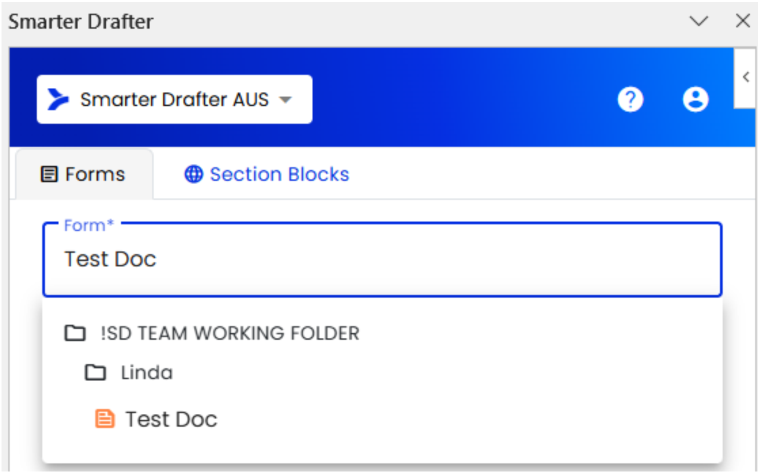
Step 3: Save a copy of the precedent to your source document folder (if applicable). Some organisations also like to upload a copy of the initial version to the form.
>> Uploading is covered later in this guide.

1.2 Link the precedent to a Form

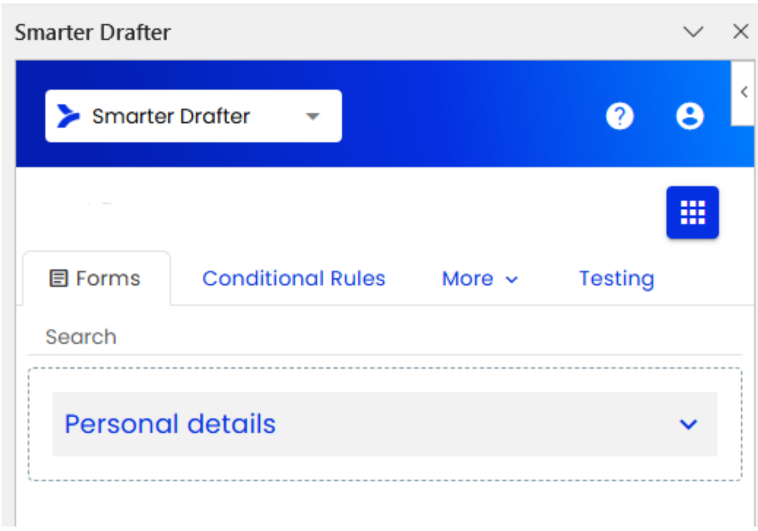
The precedent will need to be linked to the Form so that you can access the fields and conditional rules that you have created. By linking the precedent with the form, it has now become the associated template with the form and will be the basis of the automation. The Word Add-In will update and display the available menu, tabs and options based on the connected form. Initially, the Word Add-In will be quite basic:



To link the precedent to the form, click on the **Forms tab**, and then click in the **Forms box**. This will open a drop-down list of the available forms. To search, start typing the name of the form, or otherwise scroll through the list to locate the relevant form and click on it.



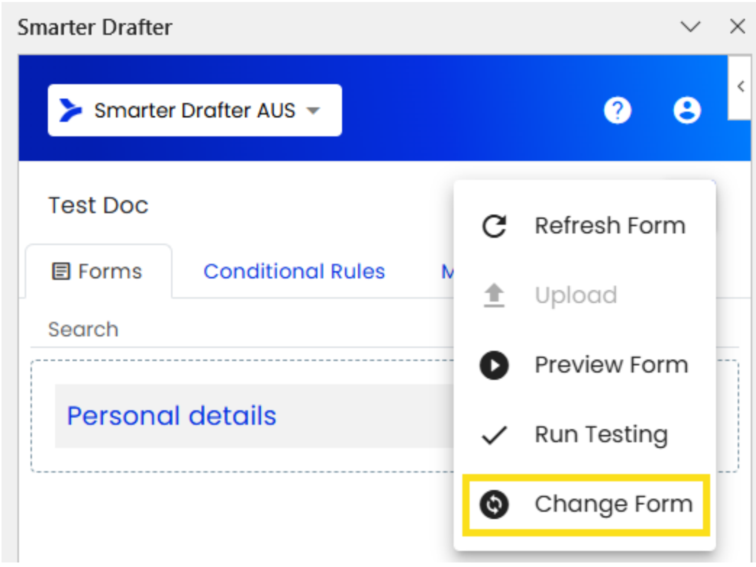
When you have selected a form, the link will be established and the Word Add-In will update:



The precedent is now ready to automate and will eventually become the template for the form.

1.3 Changing the Linked Form

If the incorrect form was selected, it can be removed and/or replaced. Click on the **Waffle Options** button and select **Change Form**.



This will clear the form that was attached and re-open the search box, where you can remove the selected form and/or select an alternative form.

2. The Word Add-In

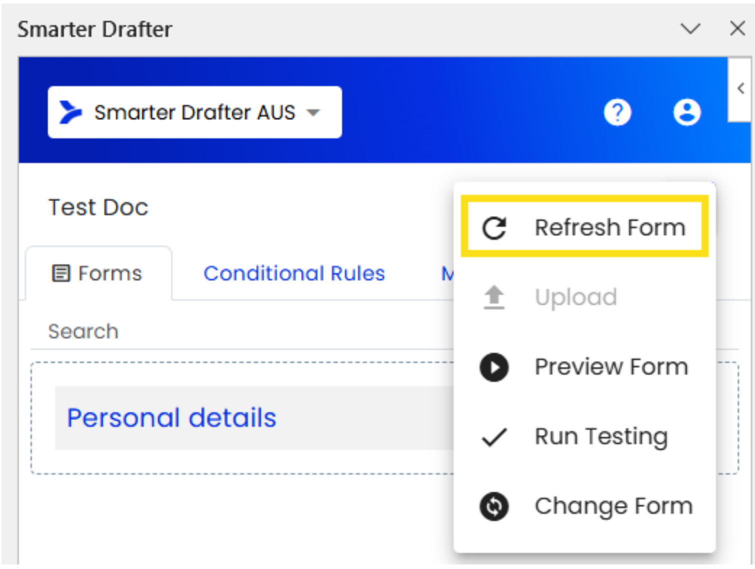
2.1 Navigate the Word Add-In for Builders

The Word Add-In will now display the fields and conditional rules from the form, and the other builder tools.

Forms Tab:	A list of the sections created in the form. Click on a section label to open the relevant list of fields.
Conditional Rules Tab:	A list of the conditions/rules that you have created in the form. See the **Create and Apply Conditional Rules** guide.
More Tab:	A list of advanced automation features that will be covered in separate guides.
Testing Tab:	A test that will compare the fields/rules created in the form to the fields/rules used in the template and provide feedback on discrepancies and unused fields/rules.
Waffle Menu:	A list of features to assist in the link of the template to the form. These features will be covered in this guide.

2.2 Updating the Word Add-In with Changes to the Form

As you apply automation to the template, you may discover additional fields/rules that are required (or existing ones that aren't needed). You can make these changes to the form as you work on the template, but you will need to refresh the Word Add-In to transfer the updates across. To refresh the Word Add-in, click on the **Waffle Options** button and select **Refresh Form**. The adjustments made in the form will now be reflected in the relevant areas of the Word Add-in.

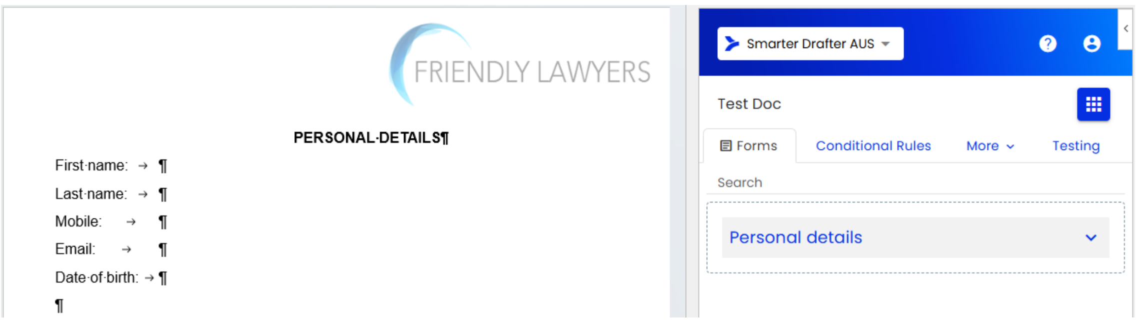


3. Automating the Template

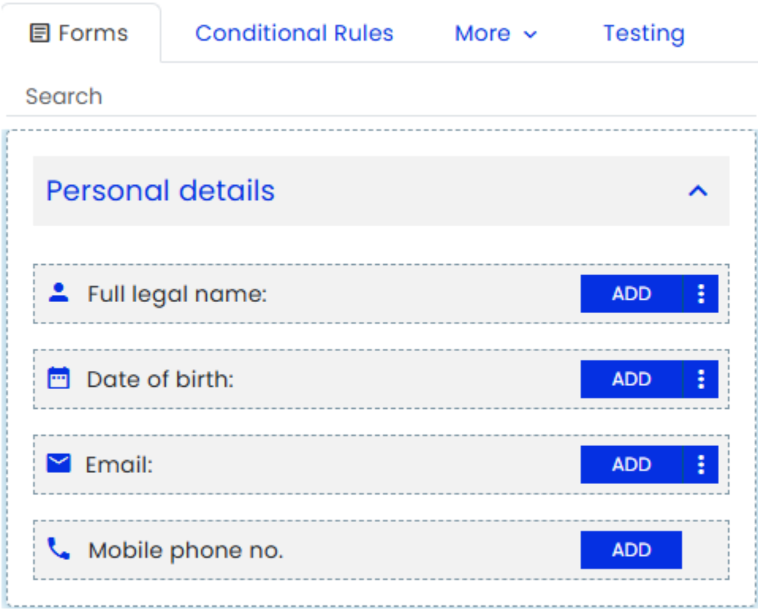
These instructions cover the creation of a simple template, using the basic step of inserting fields into the template. This is an introduction to the most common feature used in document automation, together with all of the before and after steps required to complete the full automation process. Separate guides will instruct you on the more advanced features of Smarter Drafter and help to develop your knowledge to a higher level.

3.1 Inserting Fields

With your precedent open, the Word Add-In enabled and the precedent linked to the form, you are now ready to code the precedent and transform it into an automated template.



Click on the section label in the form to open the drop-down list and reveal the fields available in that section of the form. If you have a long list of fields, you can use the search and type a key word to help find the field.



Where the **ADD** button has a **kebab menu**, this indicates that there are additional options available for this field, e.g. by adding the name field, the default field will insert the 'full name' but the kebab menu has options for the separate components of the name so that you can insert the first name only, last name only etc.

These options will change depending on the type of field, e.g.:

Name fields: Select the separate components of the name (first, last) and alter the default case.

Address fields: Select the separate components of the address (line 1, line 2, city, state, postcode, country) and alter the default case.

Date fields: Select the separate components of a date (day, month, year) and alter the default format.

Email: Alter the default case.

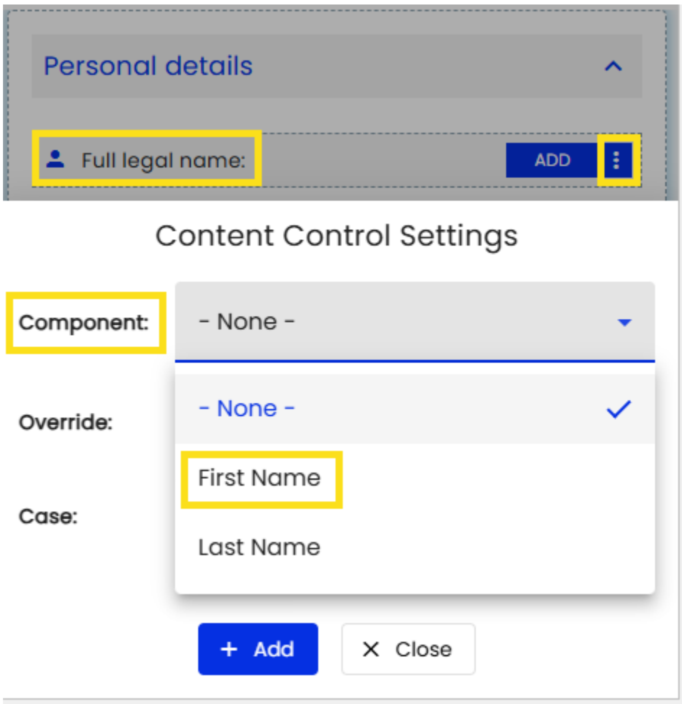
REMINDER: You must have Design Mode turned on and paragraph marks revealed.

You can now insert fields into your document by:

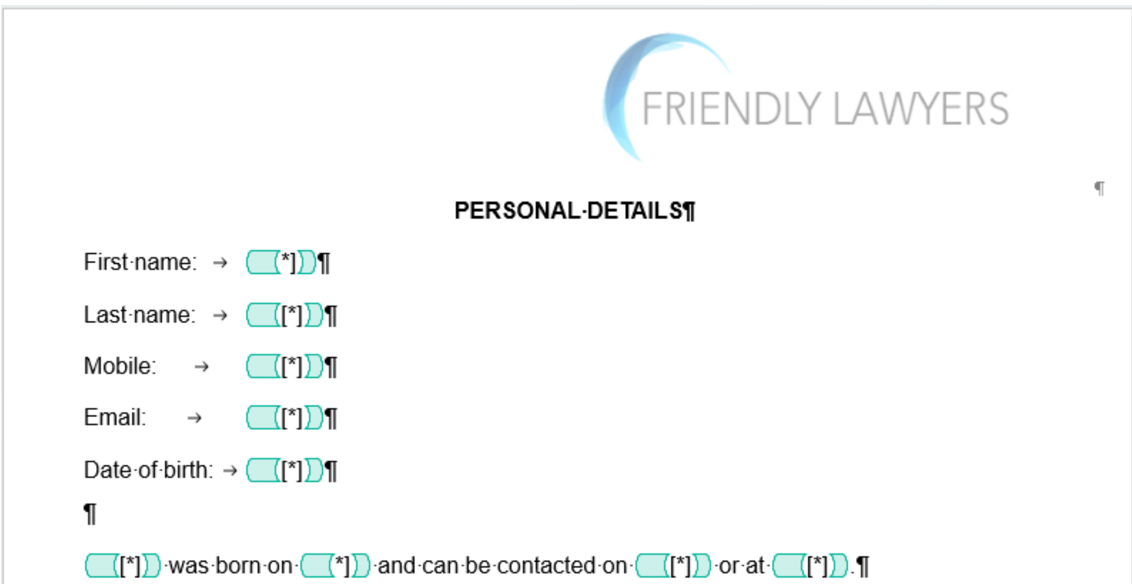
1. Place your cursor where you want the data to appear.
2. Locate the relevant field in the Word Add-In and click **Add**.

To insert the component of a field:

1. Place your cursor where you want the data to appear.
2. Locate the relevant field in the Word Add-In.
3. Click on the kebab menu and alter the default settings.
4. Click Add.



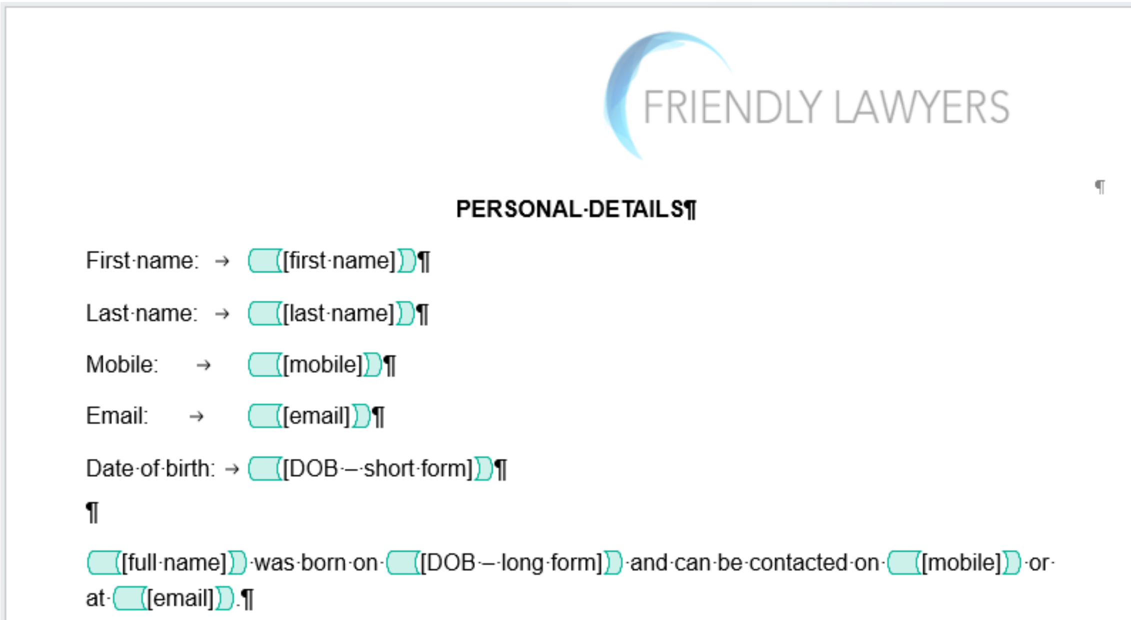
When all fields have been added to your document, it will look something like:



The fields will be displayed by green content controls, being the type of content control for simple mergefields. See the Content Controls guide for more information.

3.2 Field Placeholders

The default placeholder for fields is [*]. You can update the placeholder to something more descriptive, such as:


FRIENDLY LAWYERS

PERSONAL DETAILS

First name: [first name]

Last name: [last name]

Mobile: [mobile]

Email: [email]

Date of birth: [DOB – short form]

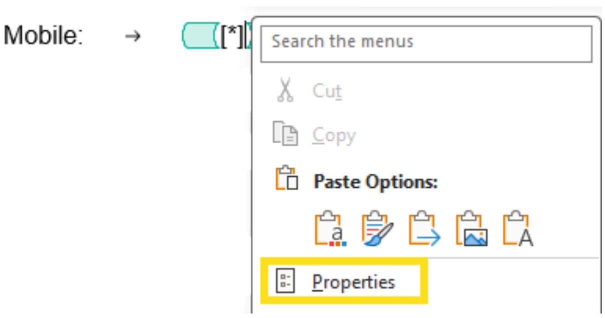
[full name] was born on [DOB – long form] and can be contacted on [mobile] or at [email].

The type of placeholder used has no impact on the automation output and just comes down to preference. It should be outlined in the organisation's drafting guidelines so that there is consistency in the design of templates.

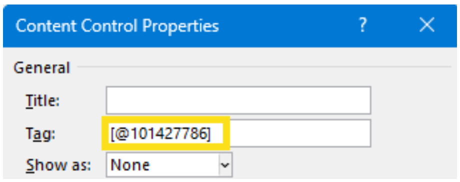
3.1 Field IDs

If there are many fields in your form and you are struggling to keep track of which fields you have used, e.g. there are various name or address fields, you can use the field IDs to check what fields you have used. On the form, the ID number will be displayed on the field banner.

In the word document, right-click on the content control and then click on Properties.



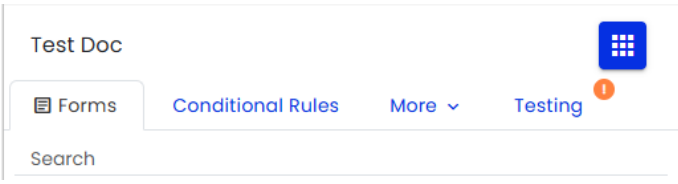
The properties pop-up will open, revealing the field ID number.



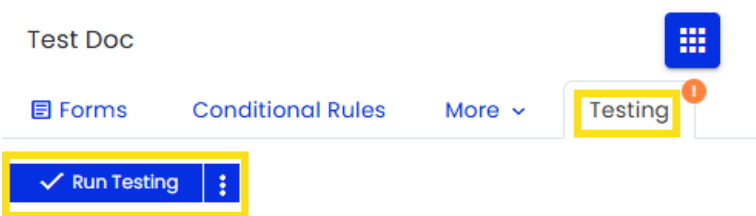
3.2 Testing the Fields

Use the Word Add-In testing feature to compare the template to the form. Testing the fields will identify and fields that were created in the form but not used in the template. This could alert you to fields that were created unnecessarily, or a field being missed in the document.

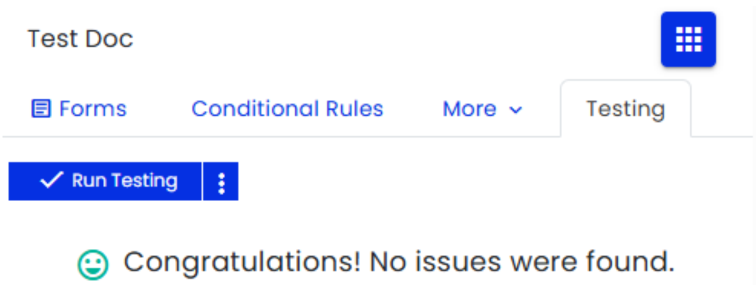
Once fields have been added, the Testing Tab will have an orange exclamation mark to remind you to run the test.



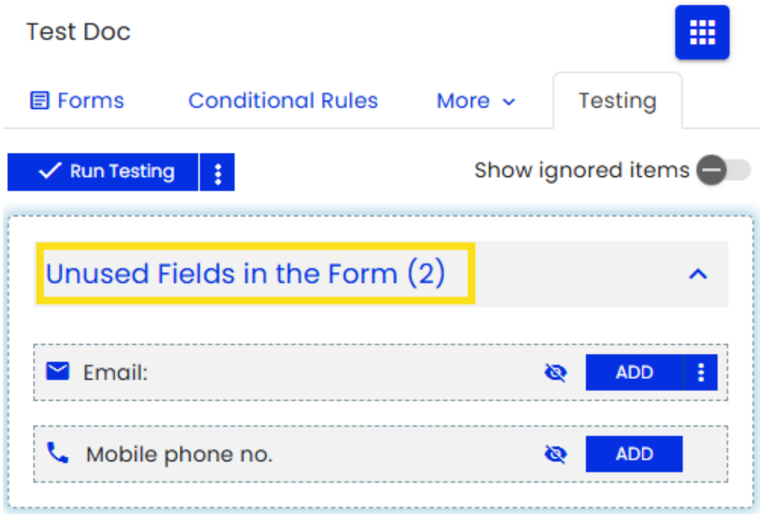
To test the fields, click on the Testing Tab



Results will be displayed. As all fields from the form have been inserted into the template, the testing is successful:



To demonstrate how errors would be displayed, the mobile and email fields have been removed from the template so testing has returned different results indicating that 2 fields haven't been used in the automation:



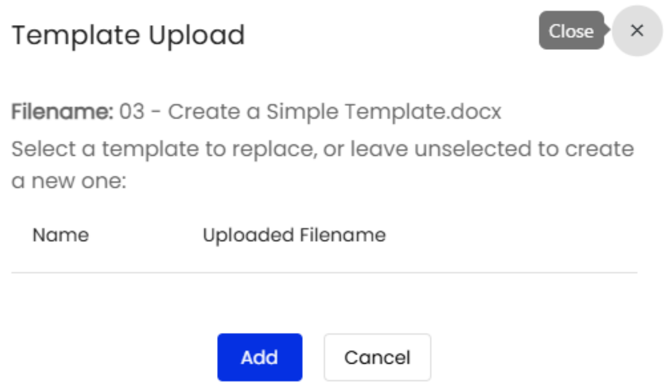
Testing can also be run from the **Waffle** menu.

4. Uploading the Template to the Form

While the template has been linked to the form for access to the automation tools, the Word document itself needs to be uploaded to the form so that it becomes the template that is generated. There are 2 ways to upload – via the Word Add-In **Waffle** menu or by uploading it within the form directly.

4.1 Uploading the Template using the Word Add-In

Once the template has been tested and saved, click on the **Waffle** menu and select **Upload**. A pop-up will appear, click **Add**.

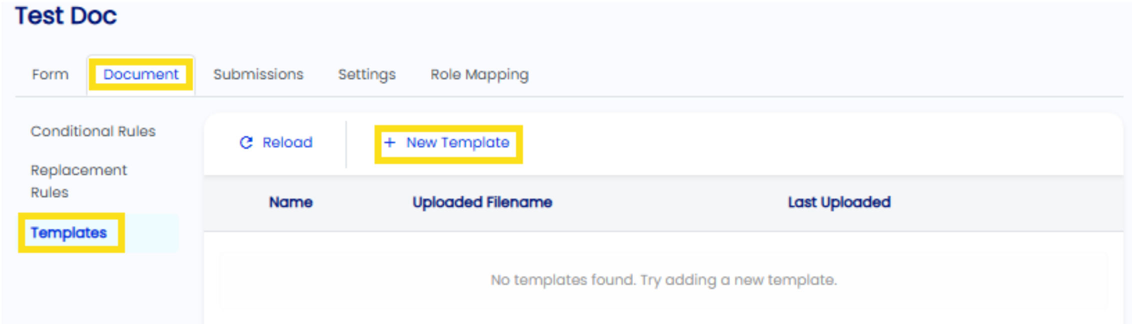


The template has now been uploaded and will be the document that is generated.

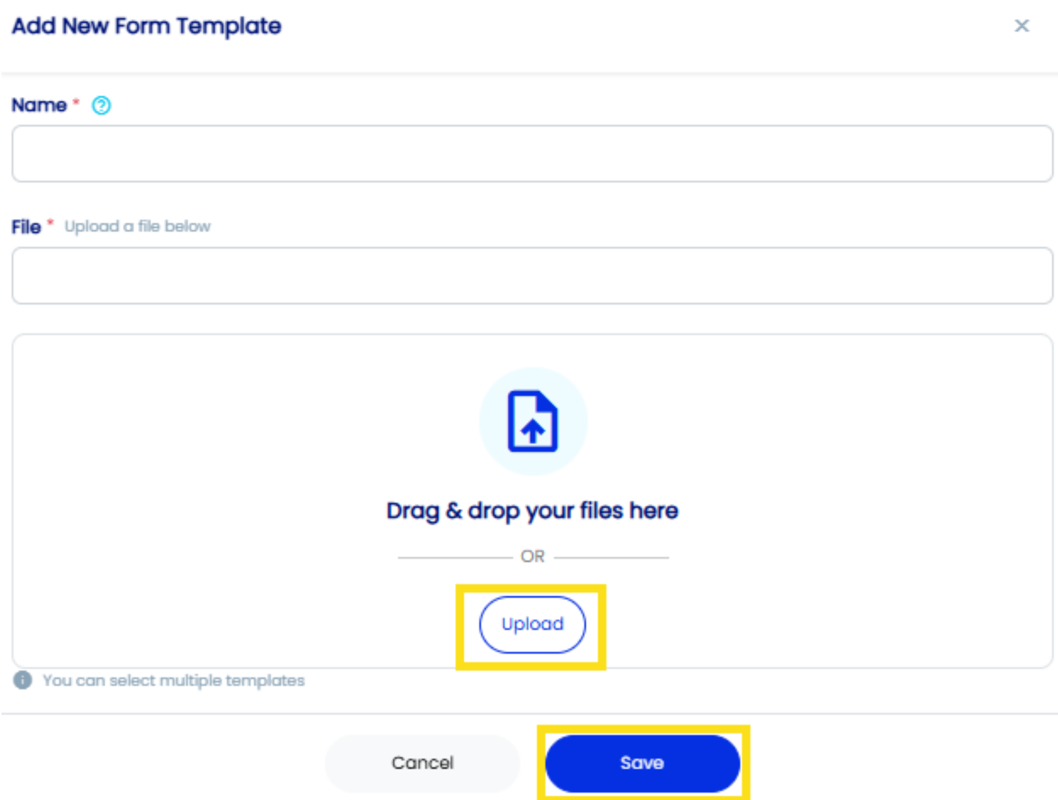
Note: You must save the form and immediately click upload, otherwise the upload option won't be enabled.

4.2 Uploading the Template Directly in the Form

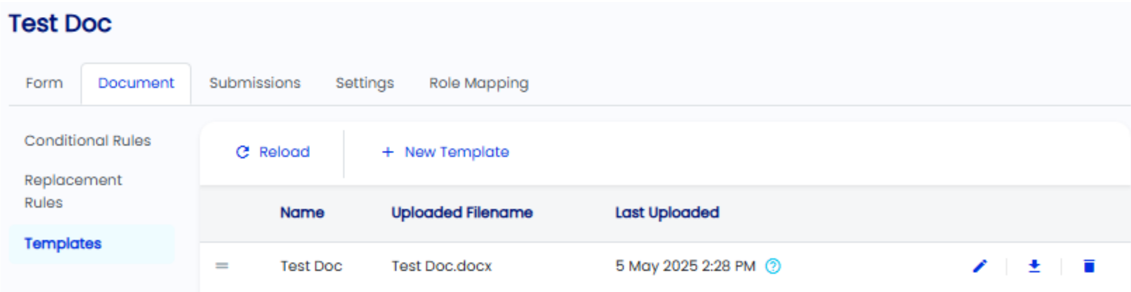
Once the template has been tested and saved, go to the **Document** tab, click on **Templates** in the side pane, and then click on **+ New Template**.



The upload window will open. Click on **Upload** and navigate to the relevant file and click **Open**. The selected file will be uploaded and the other details in the upload window will automatically be completed. Click **Save**.



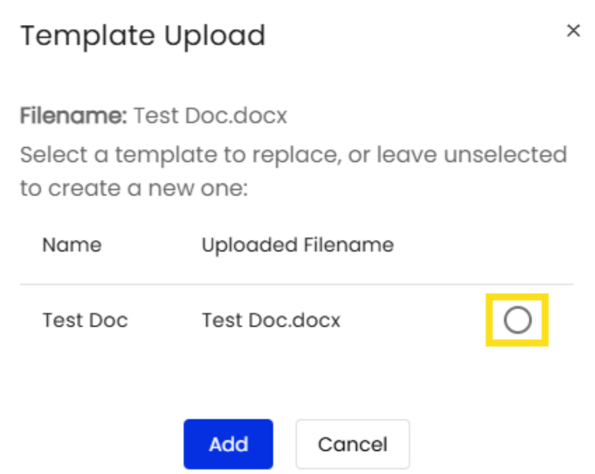
The template will appear in the list:

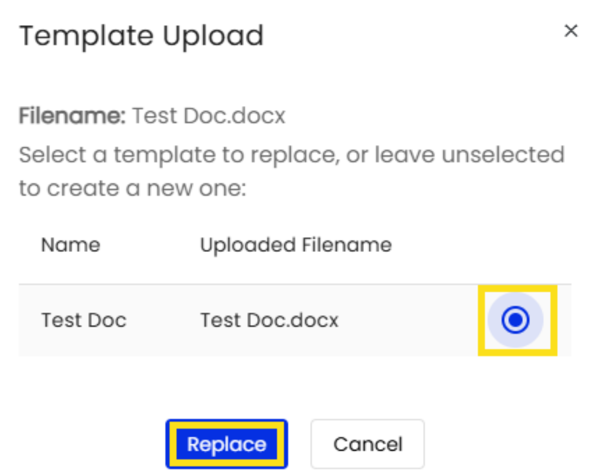


The template has now been uploaded and will be the document that is generated.

4.3 Updating the Uploaded Template using the Word Add-In

Once the template has been tested and saved, click on the **Waffle** menu and select **Upload**. A pop-up will appear listing the current template already on the form. Initially you will see an option for **ADD**. Select the radio button and click **Replace**.





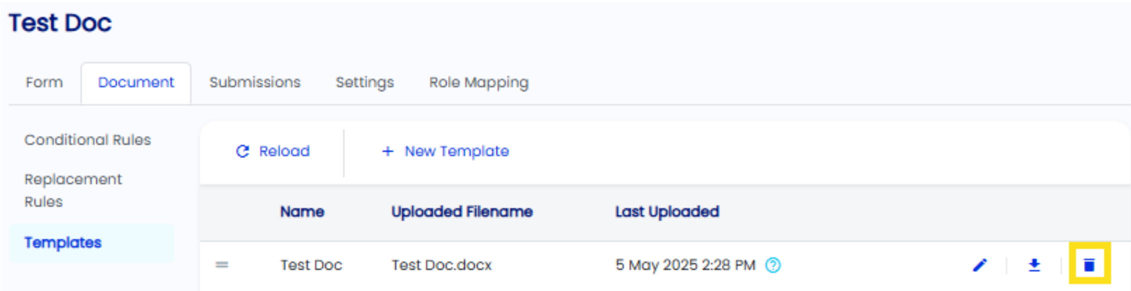
Note: If you click ADD, the old template will still remain rather than be replaced. If this happens, go to the form directly and delete the old version there.

4.4 Updating the Uploaded Template Directly in the Form

Go to the **Document** tab, click on **Templates** in the side pane and then click on the **Pencil** of the template to be updated/replaced. As above, click on **Upload** and navigate to the relevant file, Click **Open and then** click **Save**.

4.5 Deleting the Uploaded Template

Deleting the template can only be done from the form. Go to the **Document** tab, click on **Templates** in the side pane and then click on the **Recycle Bin** of the template to be removed/deleted from the form.



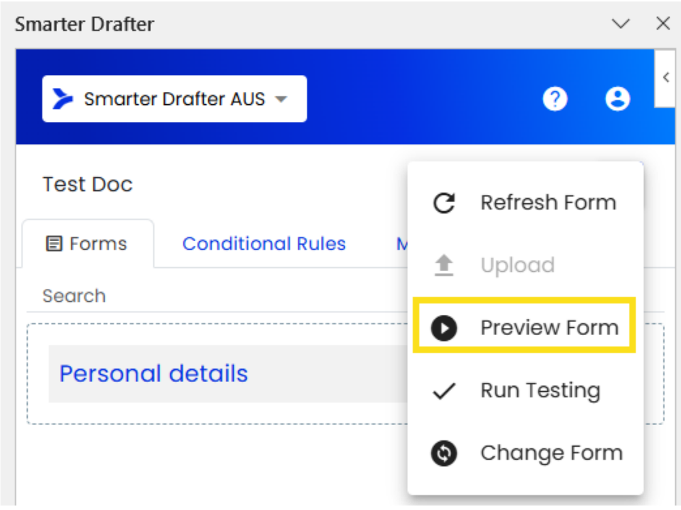
5. Testing the Template

To test the template, you need to run a preview of the form which will take you through the submission process without having to generate a real document into your PMS/DMS.

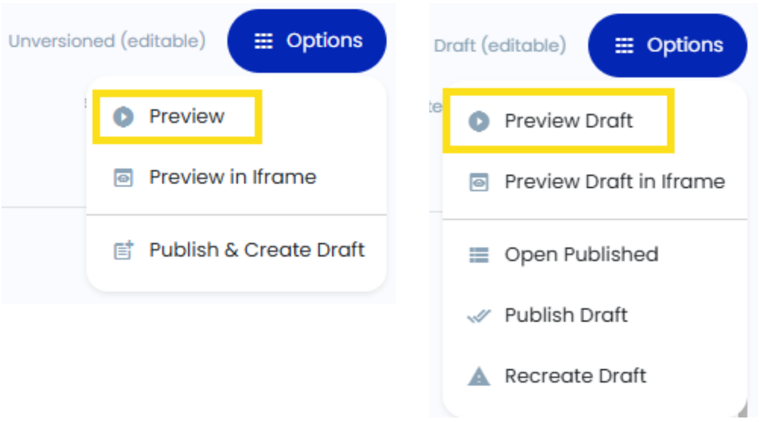
5.1 Running a Preview

You can run a preview from the Word Add-In or from the form.

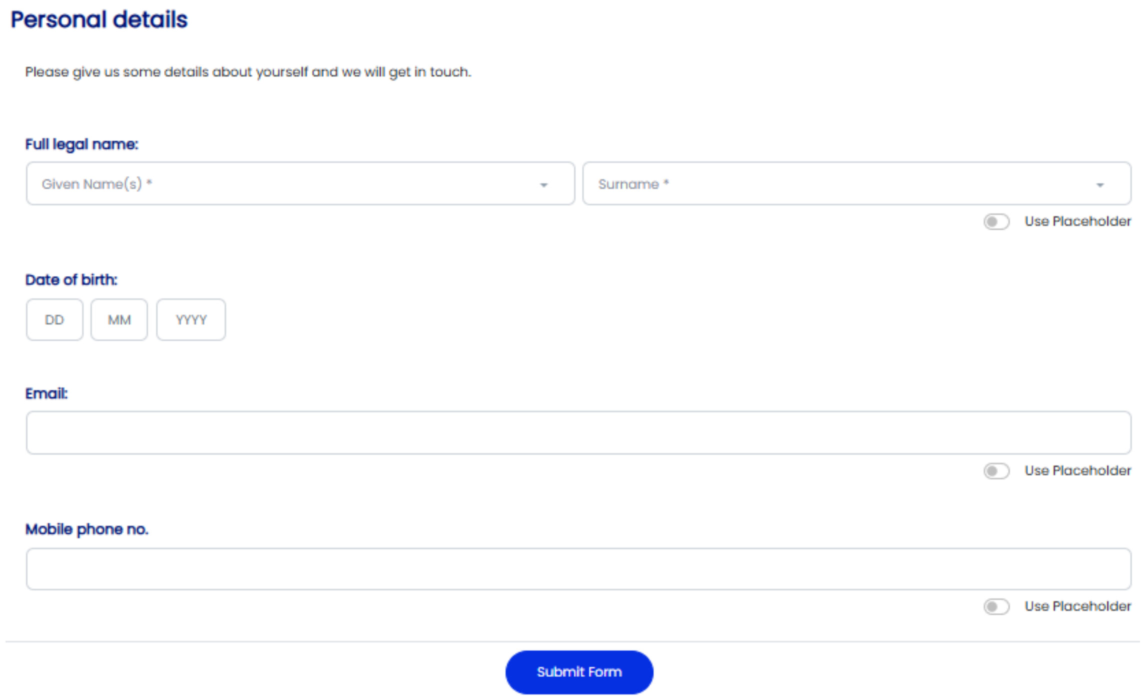
To run a preview from the Word Add-In, click on the **Waffle** menu and select **Preview Form**.



To run a preview from the form, click on the **waffle Options** button. Depending on the status of the form, the preview option will be either:



The questionnaire will open as a filler, allowing you to answer the questions and review the build of the form. See the **Testing, Publishing and Releasing Forms** guide for detailed testing instructions.



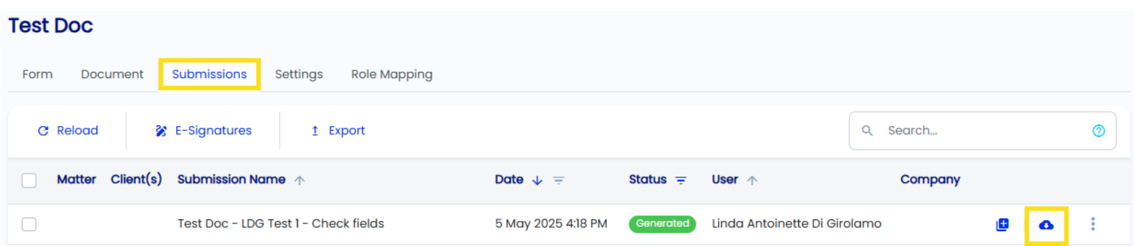
When you have answered all of the questions, click the **Submit Form** button. This will generate the custom automation of the template and produce the final document.

6. Reviewing the Generated Document

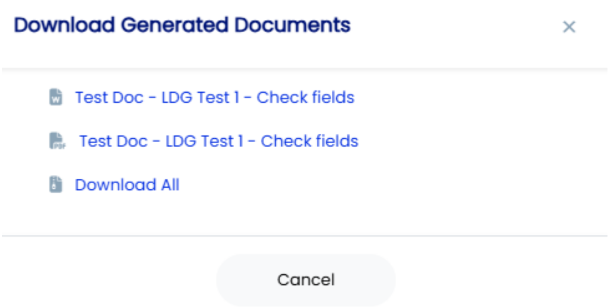
Generated documents can be found in the Submissions List on the form.

6.1 Submissions

On the form, go to the **Submissions** tab and a list of the submitted forms will be displayed.



Locate the specific submission you want to open and click on the **Download** button. You will have the option to download the Word or PDF version, or both. Click on the relevant option and the document will open.



Submissions are covered in greater detail in the **Submissions (Generated Documents)** guide.

7. Updating the Template

If the generated document is incorrect, you can make changes to the template.

1. Open the template and make the necessary changes to the Word document. Save.
2. Follow the steps above in section 4 to upload the updated template to the form.
3. Follow the steps above in section 5 to re-test the template.

If the errors relate to the structure of the form, make the changes to the form as required.

As you work on a template (and in particular a template that uses the advanced features of Smarter Drafter), you may need to repeat this process several times.