



Data Sharing

Help Guide

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1. About Data Sharing

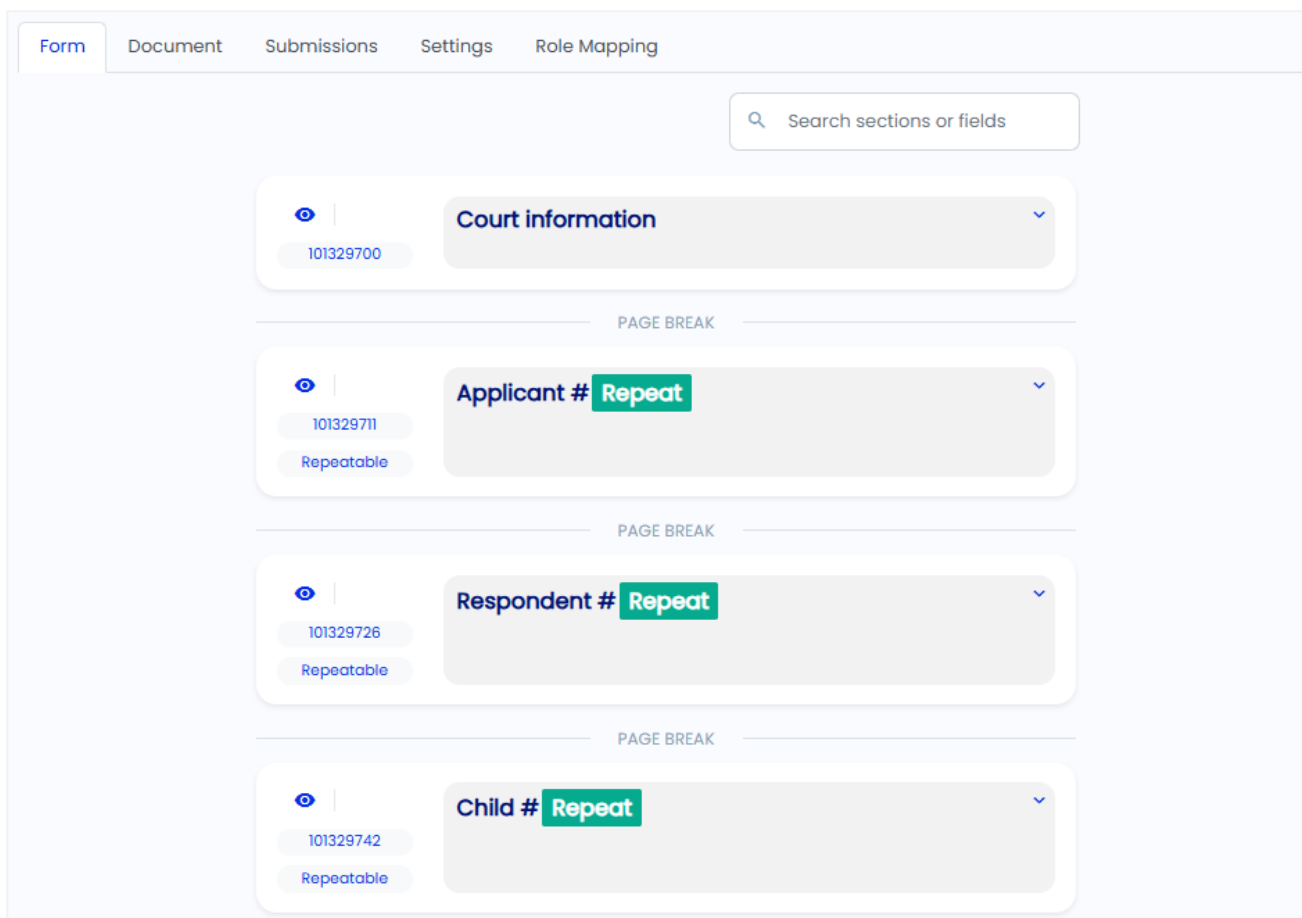
Data sharing is a feature of Smarter Drafter that enables saved contact and role data to be automatically populated when a form is filled out. After contact and user data is mapped to a form, that data can be pulled into the form when it is filled, reducing re-keying and improving accuracy.

For data sharing to work, form aliases and section aliases must be implemented in a disciplined manner – refer to the [Create a Simple Form Help Guide](#), and also the [Manage Field Aliases Help Guide](#) (for Administrators) for more information about the role of aliases.

This guide will provide an example of how data sharing with a PMS can assist a form filler to complete a form quickly and accurately.

2. Build the Form

The form is first built, including fields for all relevant data. In this example, a family court form will be used. Ensure that field and section aliases are used correctly to align with the correct data.




The screenshot displays the Smarter Drafter form builder interface. At the top, there are tabs for 'Form', 'Document', 'Submissions', 'Settings', and 'Role Mapping'. Below the tabs is a search bar labeled 'Search sections or fields'. The form is composed of four sections, each separated by a 'PAGE BREAK' indicator. Each section has a unique ID and a 'Repeatable' status.


- Court information** (ID: 101329700)
- Applicant # Repeat** (ID: 101329711)
- Respondent # Repeat** (ID: 101329726)
- Child # Repeat** (ID: 101329742)

2.1 Apply Role Mapping

Click the **Role Mapping** tab. A list of section aliases and field aliases is found here – one role can be mapped per section alias. To map a role, Click **Assign Role**.

Form Document Submissions Settings **Role Mapping**

 Bulk Assign

 Bulk Unassign

| | Section Alias | Field Alias | Field Type | Mapped Role | |
|--------------------------|-------------------|--------------------|------------|-------------|-------------------------------|
| <input type="checkbox"/> | court_information | FCFCoA_Which_Court | radio | Not mapped | + Assign Role |
| <input type="checkbox"/> | court_information | FCFCoA_Client_ID | text | Not mapped | + Assign Role |
| <input type="checkbox"/> | court_information | FCFCoA_File_Number | text | Not mapped | + Assign Role |

The **Assign role** pop up opens. Begin typing the name of the assignee, and the role will appear in a drop down list, where it can be selected. There is also an option to **Create Role** at the bottom of the list.

Assign role

Court_FCFCoA

Court_VIC_Mag

Create Role "Court_"

There is also an option to **Create Role** at the bottom of the list. If the role does not yet exist, it can be created by clicking **Create Role** and **Add role**.

Assign role

Create Role "Court_QLD"

Close

Add role

If the role already exists, select it from the list and click **Add role**.

Assign role

Close

Add role

2.2 Bulk Role Mapping



An entire section can be mapped at once by ticking the boxes beside the section alias and clicking **Bulk Assign**. This will open the **Assign role pop-up**, as above.

To unassign the roles from a section, tick the relevant boxes and click **Bulk Unassign**.

| Form | Document | Submissions | Settings | Role Mapping |
|--|-------------------|--------------------|------------|--------------|
| <div> <div>Bulk Assign</div> <div>Bulk Unassign</div> </div> | | | | |
| | Section Alias | Field Alias | Field Type | Mapped Role |
| <input checked="" type="checkbox"/> | court_information | FCFCoA_Which_Court | radio | Not mapped |
| <input checked="" type="checkbox"/> | court_information | FCFCoA_Client_ID | text | Not mapped |
| <input checked="" type="checkbox"/> | court_information | FCFCoA_File_Number | text | Not mapped |

2.3 A Completed Role Mapped Form

Each section should be mapped to a role, so that the table has a clear association, as shown in the example. The following three images show all the role mapping applied to this form.

| Form Document Submissions Settings Role Mapping | | | | |
|--|-------------------|-------------------------------|------------|--------------|
| <div>  Bulk Assign  Bulk Unassign </div> | | | | |
| | Section Alias | Field Alias | Field Type | Mapped Role |
| <input type="checkbox"/> | court_information | FCFCoA_Which_Court | radio | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Client_ID | text | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_File_Number | text | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Filed_At | select | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Court_Name_Other | text | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Address_Registry_Other | address | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Filed_On | datetime | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Next_Court_Date | datetime | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Next_Court_Time | datetime | Court_FCFCoA |
| <input type="checkbox"/> | court_information | FCFCoA_Address_Registry | checkbox | Court_FCFCoA |

| | Section Alias | Field Alias | Field Type | Mapped Role |
|--------------------------|------------------|----------------------|------------|-------------|
| <input type="checkbox"/> | applicant_repeat | Name_Full | name | Applicant |
| <input type="checkbox"/> | applicant_repeat | Name_Given | text | Applicant |
| <input type="checkbox"/> | applicant_repeat | Address_Street | address | Applicant |
| <input type="checkbox"/> | applicant_repeat | Email_Address | email | Applicant |
| <input type="checkbox"/> | applicant_repeat | Date_of_Birth | datetime | Applicant |
| <input type="checkbox"/> | applicant_repeat | Occupation | text | Applicant |
| <input type="checkbox"/> | applicant_repeat | Interpreter_Yes_No | radio | Applicant |
| <input type="checkbox"/> | applicant_repeat | Interpreter_Language | text | Applicant |

| | Section Alias | Field Alias | Field Type | Mapped Role | |
|--------------------------|-------------------|----------------------|------------|-------------|---|
| <input type="checkbox"/> | respondent_repeat | Name_Full | name | Respondent | ⋮ |
| <input type="checkbox"/> | respondent_repeat | Name_Given | text | Respondent | ⋮ |
| <input type="checkbox"/> | respondent_repeat | Address_Street | address | Respondent | ⋮ |
| <input type="checkbox"/> | respondent_repeat | Email_Address | email | Respondent | ⋮ |
| <input type="checkbox"/> | respondent_repeat | Date_of_Birth | datetime | Respondent | ⋮ |
| <input type="checkbox"/> | respondent_repeat | Occupation | text | Respondent | ⋮ |
| <input type="checkbox"/> | respondent_repeat | Interpreter_Yes_No | radio | Respondent | ⋮ |
| <input type="checkbox"/> | respondent_repeat | Interpreter_Language | text | Respondent | ⋮ |
| <input type="checkbox"/> | child_repeat | Name_Full | name | Child | ⋮ |
| <input type="checkbox"/> | child_repeat | Name_Given | text | Child | ⋮ |
| <input type="checkbox"/> | child_repeat | Date_of_Birth | datetime | Child | ⋮ |

Note: It's important to maintain a clean list of roles in the Smarter Drafter Pro System. If, for example, there were two roles with different names pointing to the same set of data – such as "child" and "children". These two roles could end up splitting the data into two sets. This would prevent the feature from working, because some of the data would be associated with one role, and some data may end up being associated with the duplicate role.

Administrators should regularly check on the list of roles, to ensure that duplicate or competing roles have not been accidentally created.

3. Fill in the Form with Role Mapping

Now that the form data is mapped, filling in the form will be much faster and simpler. Here's an example. Open the form in the form filler:

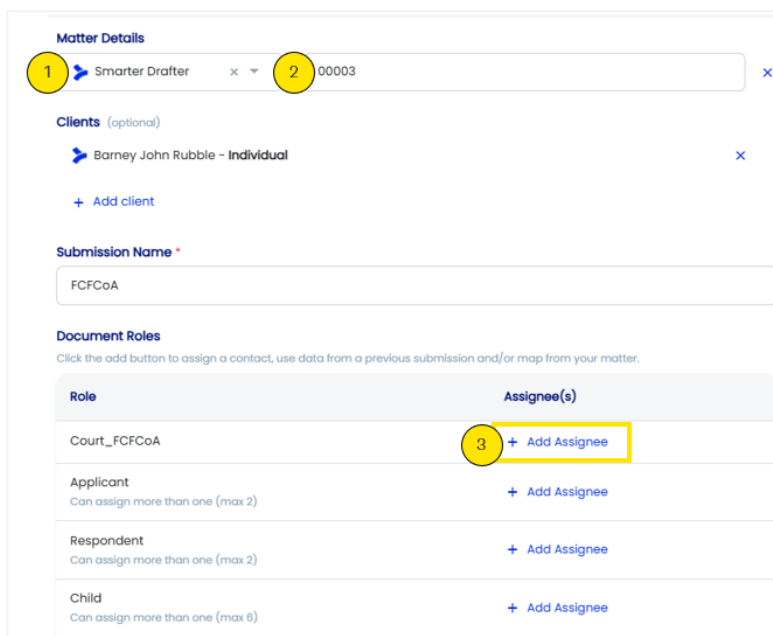
1. Click Forms.
2. Click Fill.
3. Search for the form using the **search** feature.
4. Click **Start form**.



3.1 Begin the Data Share

The filler panel pops out. Begin the data sharing process:

1. Select the **PMS** (Smarter Drafter in this example).
2. Select the **matter number** (00003).
3. Add the first assignee, which is the court in this example.



Matter Details

1 Smarter Drafter x 2 00003 x

Clients (optional)

Barney John Rubble - Individual x

+ Add client

Submission Name *

FCFCoA

Document Roles

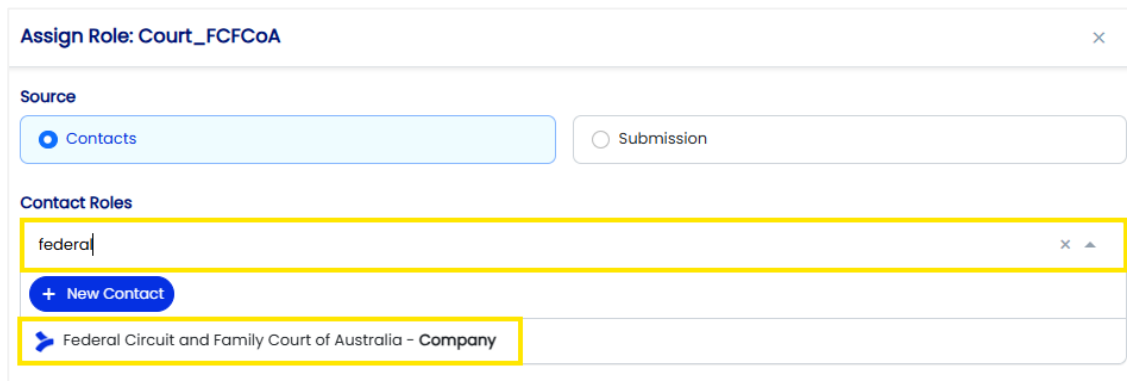
Click the add button to assign a contact, use data from a previous submission and/or map from your matter.

| Role | Assignee(s) |
|--|------------------|
| Court_FCFCoA | 3 + Add Assignee |
| Applicant Can assign more than one (max 2) | + Add Assignee |
| Respondent Can assign more than one (max 2) | + Add Assignee |
| Child Can assign more than one (max 6) | + Add Assignee |

3.2 Assign the Roles

If this is a brand new matter, **Contacts** can be used as the **source** of the data. Type the first word of the assignee in the **Contact Roles** field. The assignee will appear in the drop-down list, where it can be selected. Click **Assign** at the bottom of the screen.

Alternatively, if there is a previously submitted form containing the required data, select **Submission** as the **source** and select the required submission from the drop-down list.



Assign Role: Court_FCFCoA

Source

☒ Contacts ☐ Submission

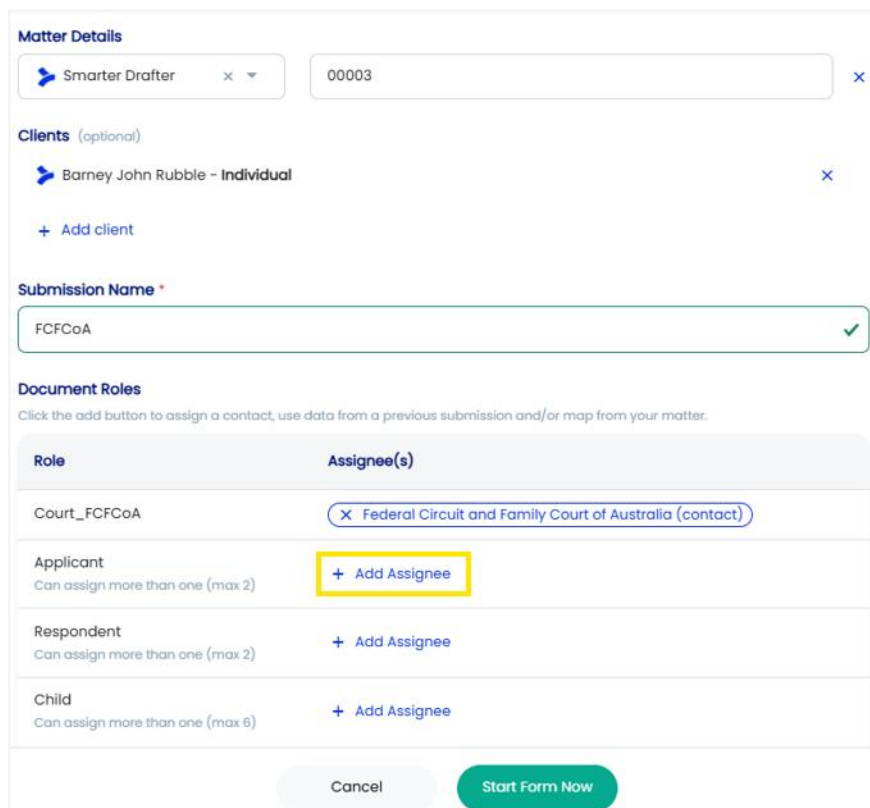
Contact Roles

federal

+ New Contact

Federal Circuit and Family Court of Australia - Company

The second assignee can now be added: the Applicant. Click **Add Assignee** on the next line. Search for the data either through a contact or a submission, exactly as above.



Matter Details

Smarter Drafter 00003

Clients (optional)

Barney John Rubble - Individual

+ Add client

Submission Name

FCFCoA

Document Roles


Click the add button to assign a contact, use data from a previous submission and/or map from your matter.


| Role | Assignee(s) |
|--|---|
| Court_FCFCoA | Federal Circuit and Family Court of Australia (contact) |
| Applicant Can assign more than one (max 2) | + Add Assignee |
| Respondent Can assign more than one (max 2) | + Add Assignee |
| Child Can assign more than one (max 6) | + Add Assignee |

Cancel Start Form Now


Continue this process for each role – in this example, the respondent and the child have been added from contacts as the data source. There is an option to add more than one assignee to each role, by clicking the **Add Assignee** button below the first assignee's name.


When the assignees are mapped, click **Start Form Now**.


 FCFCoA



Clients (optional)


 Barney John Rubble - Individual



 Add client








Submission Name *

FCFCoA





Document Roles

Click the add button to assign a contact, use data from a previous submission and/or map from your matter.

| Role | Assignee(s) |
|--|--|
| Court_FCFCoA | <div><div> Federal Circuit and Family Court of Australia (contact)</div></div> |
| Applicant Can assign more than one (max 2) | <div><div><div> Barney John Rubble (contact)</div><div> Add Assignee</div></div></div> |
| Respondent Can assign more than one (max 2) | <div><div><div> Betty Rose Rubble (contact)</div><div> Add Assignee</div></div></div> |
| Child Can assign more than one (max 6) | <div><div><div> Bamm Bamm Rubble (contact)</div><div> Add Assignee</div></div></div> |

Total rows: 4

 1 

Cancel

Start Form Now

3.3 Fill in the Form

With the implementation of data sharing, a lot of the form data has already been filled in – applicant #1 is filled in with the details of the assignee that was selected. If a second applicant had been assigned, it would appear in the next section.

50%
Save & Resume Later
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Applicant #1

Applicant #1 – full legal name:

Barney John
Rubble

☐ Use Placeholder

Applicant #1 – residential address:

Australia

Start typing here ...

67 Blamey Street

Address line 2

Kelvin Grove
Queensland
4059

You do not have to include a residential address if it is not safe to do so. You can instead repeat the address for service.

☐ Use Placeholder

Applicant #1 – email address:

barney@gmail.com

You do not have to include an email address if it is not safe to do so. You can instead repeat the email address for service.

☐ Use Placeholder

Previous
Next

Note: There may be form fields that have not been filled in, if the data is not saved. Filling in this data will add to the available data associated with the assignee, improving the data sharing options in future forms.