

THOMSON REUTERS CONTRACT EXPRESS

How to Set Up Template Sets

Template Sets, or Document Suites, are a powerful function in Contract Express, where it is possible to generate multiple documents from one Questionnaire.

To achieve this, all that is needed is a Top Template, which holds the Attach Statements, the variables to be used in the Subtemplates, and an organised Questionnaire. Although there are differing methods of using this functionality, the one described below is commonly used and is the most appropriate for larger suites of documents.

1 Create Your Top Template

To start, create your Top Template (sometimes referred to as Dictionary Document). This can be either a blank document or the first template of the Template Set.

IN THE TOP TEMPLATE:

- Save the document in the Word .docx file format.
- Give the Top Template a Reference name.
- Create all the variables you will need to use across all Subtemplates in the Top Template. For example, if there is a question that only applies to one Subtemplate, it still needs to be created in the Top Template Dictionary Editor. This will maintain the integrity of the Questionnaire structure.
- Organise the Questionnaire.
- Create Lookup Tables, if needed.
- Create Alerts, if needed.
- Attach the Subtemplates using Attach Statement fields.

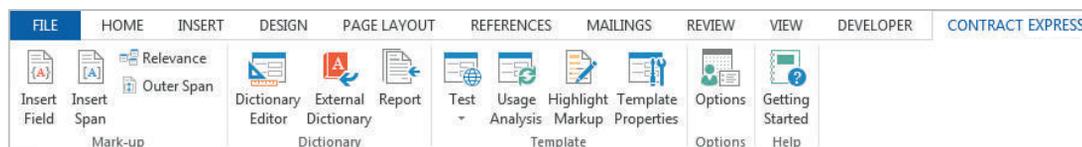
Tip: Remember to edit your variables in the Top Template using the Dictionary Editor.

Once this process is complete, you can share your variables, Questionnaire, Lookup Tables, and Alerts with the Subtemplates that are to make up the suite using the External Dictionary function for each of your Subtemplates. **You must upload the Top Template to the Contract Express server before it can be shared with other templates.**

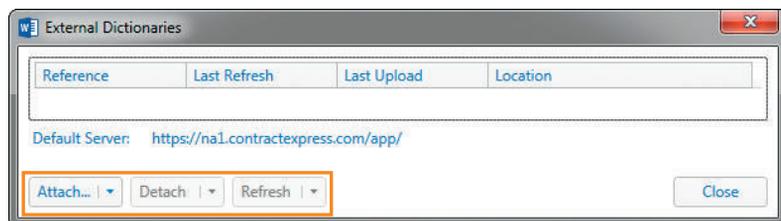
2 External Dictionary

The External Dictionary function allows you to share variables from the Top Template and use them throughout multiple Subtemplates.

Contract Express Toolbar



External Dictionary Editor

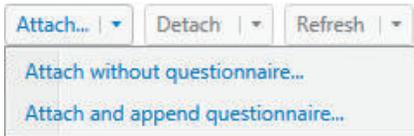


2 External Dictionary (continued)

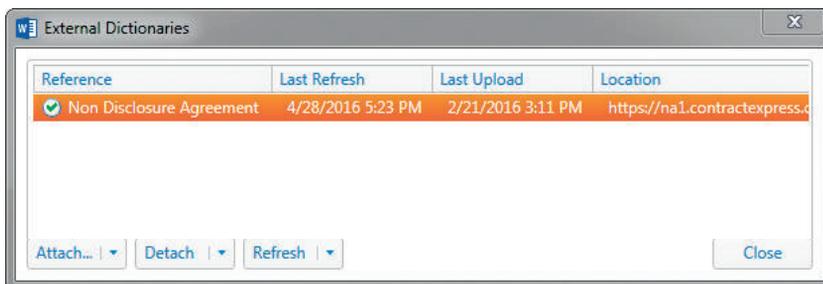
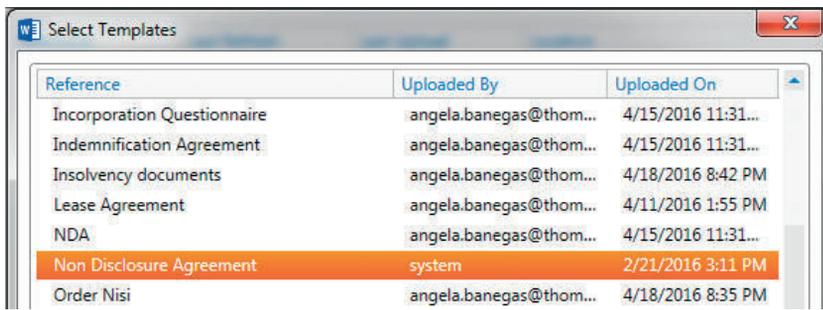
ATTACH EXTERNAL DICTIONARY

To add variables to a Subtemplate through the External Dictionary:

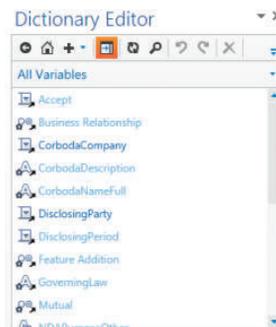
- In the Subtemplate, click the External Dictionary  button in the Contract Express toolbar and then select **Attach**. The template you wish to attach must be uploaded to the Contract Express server before you can select it.
- Select **Attach without questionnaire**. This will import the variables, Lookup Tables, and Alerts, but not the Questionnaire in your current template. This will allow you to use one Questionnaire for your Template Set.



- Select the **Template Reference Name** of the template you wish to attach and click **OK**.



- Close the dialog box and the Subtemplate will be updated. The variables from the Top Template will be imported (attached) to the Dictionary Editor in the Subtemplate and marked by **black arrows**.
- Variables that have been imported through the External Dictionary cannot be edited in the Subtemplates; they must be edited in the Top Template. Further, add any new variables to the Top Template while working through the markup of the Subtemplates.



REFRESH EXTERNAL DICTIONARY

To refresh the Subtemplate after a change has been made to the Top Template:

- In the Subtemplate, Click the External Dictionary  button in the Contract Express toolbar and then select **Refresh**.
- Select **Refresh, overwriting local definitions**. This will update the changes, overriding any locally defined variables that share the same name as the Top Template.



3 Add Variables and Create Business Rules

Now for each of the Subtemplates, the imported variables can be used as required in the Subtemplate. You can also create business rules for Spans from the available variables. Take care to create any new variable in the Top Template.

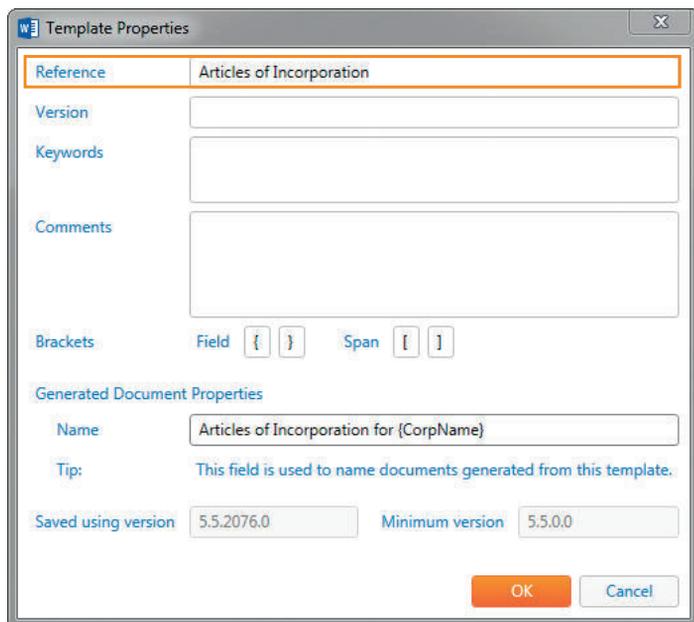
The last step in this process is to join the documents together to form a suite. This is done through the use of Attach Statements, detailed below.

Tip: Be sure to test each Subtemplate individually before attaching it to the Top Template. This will make identifying any coding errors easier.

4 Attach Statements

Attach Statements are used to attach one document to another. The Top Template contains the statement that attaches the Subtemplate (for example Articles of Incorporation). This can be placed at any point in the Top Template.

- Example Attach Statement: {Attach Template 'Articles of Incorporation'}.
- You must use the **Template Reference Name** of the Subtemplate in the Attach Statement, not the Word file name. To find the Template Reference Name of the Subtemplate, click on the Template Properties  button in the Contract Express toolbar. This will bring up the Template Properties editor.
- Copy the Reference name:



The screenshot shows the 'Template Properties' dialog box. The 'Reference' field is highlighted with an orange border and contains the text 'Articles of Incorporation'. Below it are fields for 'Version', 'Keywords', and 'Comments'. There are also 'Brackets' sections for 'Field' (with { } buttons) and 'Span' (with [] buttons). Under 'Generated Document Properties', the 'Name' field contains 'Articles of Incorporation for {CorpName}' and the 'Tip' field contains 'This field is used to name documents generated from this template.'. At the bottom, there are 'Saved using version' (5.5.2076.0) and 'Minimum version' (5.5.0.0) fields, along with 'OK' and 'Cancel' buttons.

- If more than one Subtemplate is attached to the Top Template, they will be generated in the order that the Attach Statements appear. Whether a document is generated or not can also be made dependent upon a business rule using the Span functionality:

[Assemble Doc Is 'Articles of Incorporation'] {Attach Template 'Articles of Incorporation'}

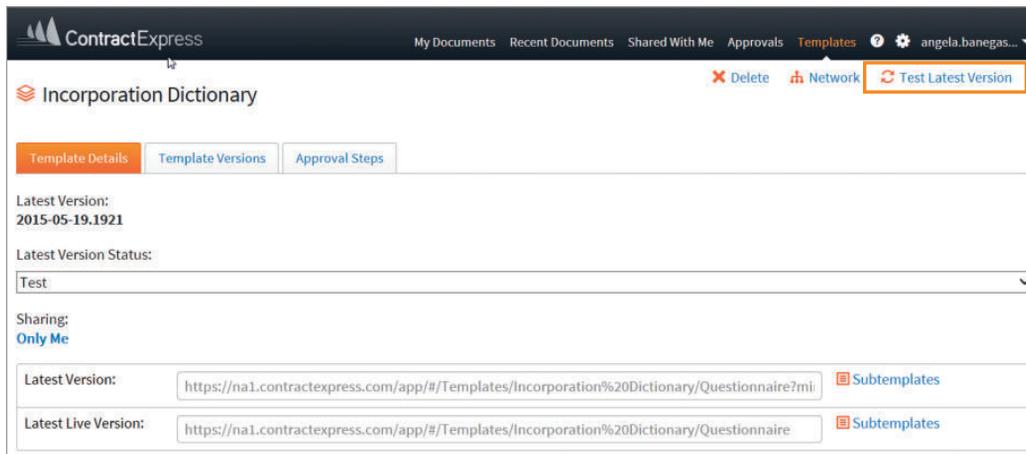
[Assemble Doc Is 'Bylaws'] {Attach Template 'Bylaws'}

[Assemble Doc Is 'Written Consent'] {Attach Template 'Written Consent'}

5 Testing the Template Set

Once you have marked up and tested each Subtemplate and attached the Subtemplates to the Top Template, you can test the Template Set.

- To test the Template Set, the Top Template and Subtemplates must be uploaded to the Contract Express site.
- Launch the Questionnaire from the Top Template, either direct from Author using the Test  button on the Contract Express toolbar or from within the Contract Express site by selecting  **Test Latest Version** on the Template Details page.



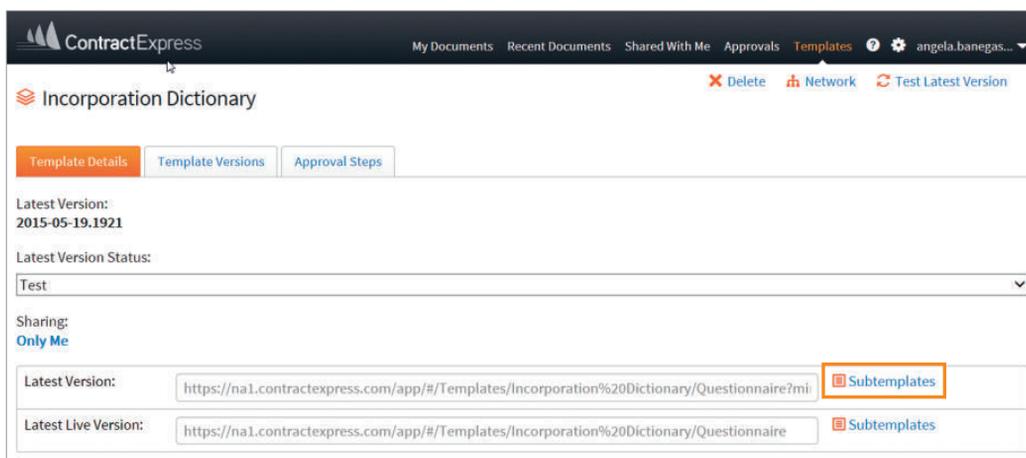
The screenshot shows the Contract Express interface for the 'Incorporation Dictionary' template. The top navigation bar includes 'My Documents', 'Recent Documents', 'Shared With Me', 'Approvals', 'Templates', and a user profile 'angela.banegas...'. The 'Templates' tab is active. Below the navigation, there are buttons for 'Delete', 'Network', and 'Test Latest Version', with the latter being highlighted by an orange box. The main content area shows the template name 'Incorporation Dictionary' and three tabs: 'Template Details' (selected), 'Template Versions', and 'Approval Steps'. The 'Latest Version' is '2015-05-19.1921' and the 'Latest Version Status' is 'Test'. The 'Sharing' is set to 'Only Me'. At the bottom, there are two rows for 'Latest Version' and 'Latest Live Version', each with a URL and a 'Subtemplates' button.

6 Publishing the Templates

All templates must be marked as “Live” to make them available to the users on the Contract Express site, but *only* the Top Template needs to be shared with the users.

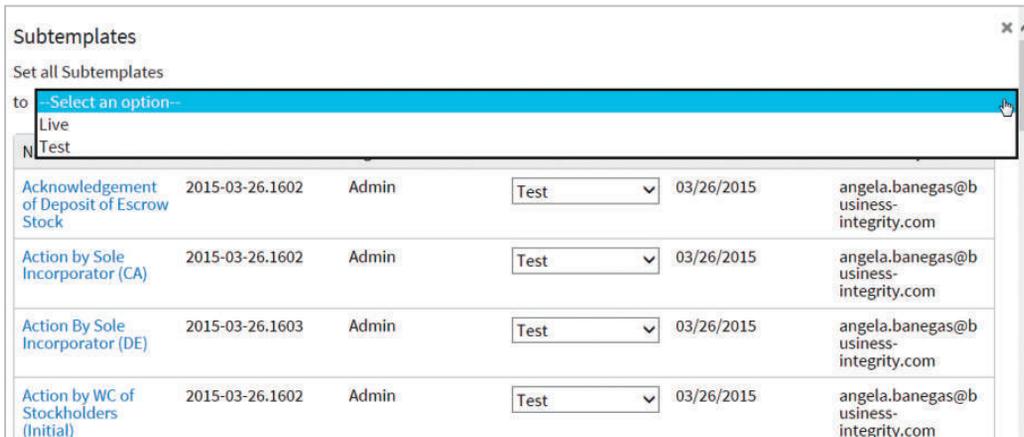
You can set a group of Subtemplates to “Live” from the Top Template:

- On the Contract Express site, select the **Templates** tab at the top of the screen. This will bring up the Template.
- Click on the Template Name of the Top Template. This will bring up the Template Details for the Top Template. Under Template Details, select **Subtemplates**.

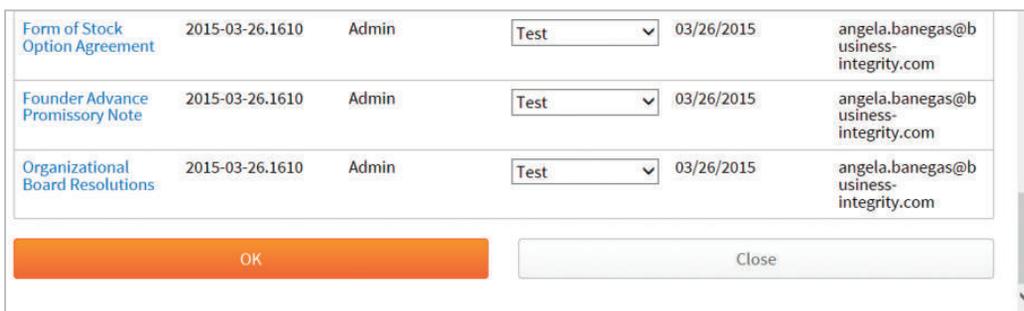


This screenshot is identical to the one above, showing the 'Incorporation Dictionary' template details page. In this view, the 'Subtemplates' button next to the 'Latest Version' URL is highlighted with an orange box.

- This will bring up a list of the most recent uploaded Subtemplates attached to the Top Template. In the Subtemplate window, under "Set all Subtemplates to," select **Live**. This will set all of the Subtemplates to Live.



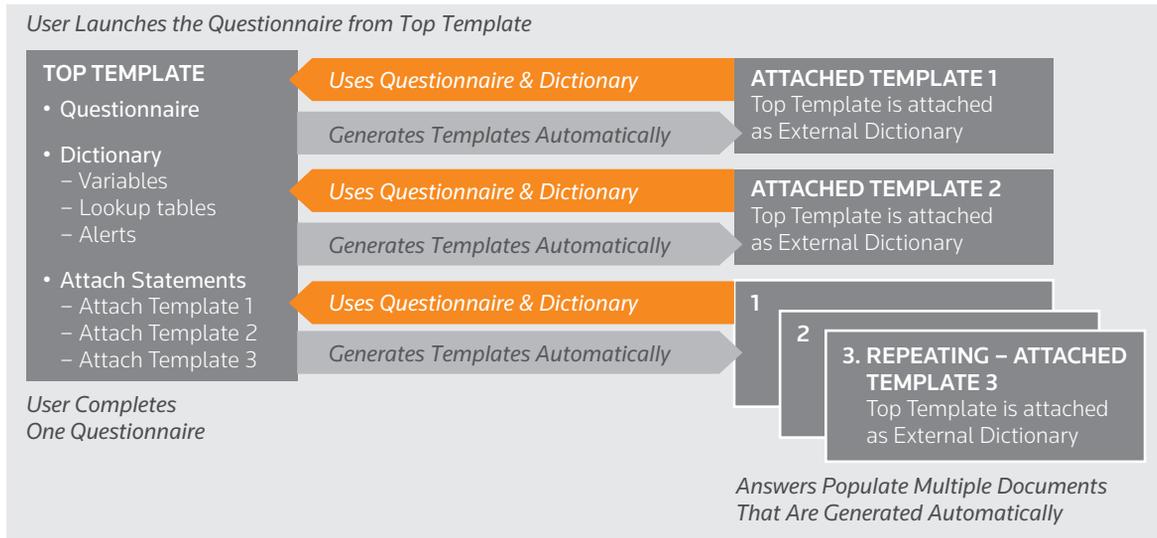
- Finally, scroll to the bottom of the Subtemplate window and click **OK**. Be sure to set the Top Template to "Live" also. Remember that you only need to share the Top Template with the users, not the Subtemplates.



7 Advantages

Creating suites of documents by using the External Dictionary in conjunction with the Attach Statement saves time and effort when managing multiple templates. This method allows you to share questions and data between documents. And it does not interfere with the order of the Questionnaire so questions used in either top or subdocuments can be asked in any order, provided that any controlling variable is asked before its dependent variable(s).

Template Set Structure



For further information, see *Template hierarchy* in the Getting Started manual.

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