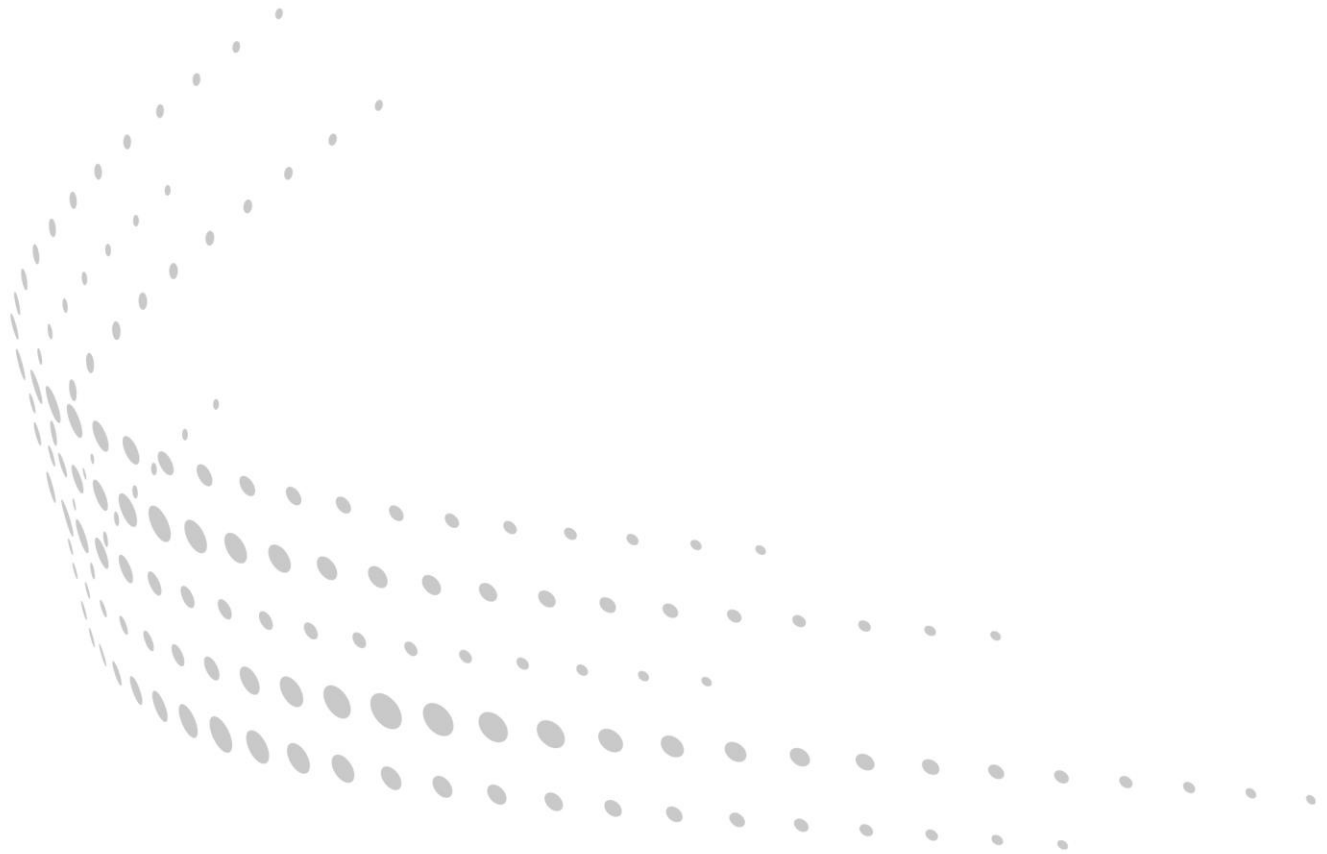


# Author Training

Thomson Reuters Contract Express

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### 1. Introduction

This guide will give you a brief overview of the two day Contract Express training course for Authors. The coverage of the course may be affected by the version of the tool that you have available.

### 2. Agenda

#### 2.1 Timeframes

The training course will run from 9.30 to 5.00 on both days, with a brief lunch around 12.30. Breaks can be arranged during the day. The training will cover the core functionality to create automated documents and design your questionnaire, as well as working on automating your own company's documents.

#### 2.2 Day One

##### (a) Introduction

A brief run through of the potential applications of document assembly and the core concepts used to achieve this.

##### (b) Morning

The first morning will be focussed on the basics of Contract Express, how to insert information such as client details into contracts and how to use areas of optional text to control different clauses.

##### (c) Afternoon

After lunch the session will be geared towards the questionnaire: how to order questions and customise the look and feel. The session will also focus on how to notify users about the impacts of their choices within the questionnaire. If time permits we will begin to consider some advanced functionality techniques.

## 2.3 Day Two

### (a) Morning

The session will start with a brief refresher on the functionality covered on the first day. We will then work on user provided documents and additional labour saving functionalities, such as the ability to share questions between templates and the way to source multiple pieces of information from single questionnaire answers.

### (b) Afternoon

The afternoon session will continue to focus on the documents to continue to develop the earlier functionality techniques. Some more complex techniques will also be covered, such as generating suites of documents from single questionnaires – time permitting. The day will end with a short wrap up to cover any final elements, supplying details for ongoing support, and providing details of further development of authoring skills.

## 2.3 Topics Covered

This section lists the main areas of functionality that can be covered during the training, with a brief description of their uses. There will also be a run through of the user interface throughout the session ensuring Authors know all the tips to make their work more efficient.

<b>Fields (Variables)</b>	The way of creating questions in Contract Express and taking that information into the generated document.
<b>Spans (Business Rules)</b>	The way of using user answers to control what text does and doesn't appear in the document.
<b>Formatting</b>	Utilising various tools in Contract Express to make sure that punctuation and formatting is correctly applied in the generated document.
<b>Questionnaire</b>	Presentation and ordering of questions, and adding guidance for users.
<b>Alerts</b>	Present user with warnings or restrictions on their choices based on questionnaire answers.
<b>Lookups</b>	Using spreadsheet style data to source large amounts of information into a questionnaire.
<b>External Dictionaries</b>	Allows questions to be used across multiple documents and save time setting up new questionnaires.
<b>Includes/Attaches</b>	A specific field that allows multiple templates to interact, generating suites of agreements or adopting a 'clause library' style of automation.
<b>Repeats</b>	Ask questions multiple times, allowing for example multiple parties data to be entered.
<b>Computables</b>	Create variables to store calculations or other information within the template, which can then be included in fields and spans.

## Entities

How to create Entity type variables for use with Contacts and Post Code/Company Look ups.

### 3. Contacts

**Queries:** please direct to your trainer, or contact us at [contractexpress-support@thomsonreuters.com](mailto:contractexpress-support@thomsonreuters.com).

### 4. Resources

**Manuals:** the Administration Manual is available from Thomson Reuters along with more detailed manuals covering specific sections such as Themes and Tables. Please contact [contractexpress-support@thomsonreuters.com](mailto:contractexpress-support@thomsonreuters.com) if you require access to any of these.

**Videos:** for some short guides on the basics of automation and administration please see our Video page. This covers the core elements to get you started. Please note there may be some minor differences between the tool in the videos and the version you have installed, as we are continuously updating the service.

**Blog:** visit the [Contract Express Blog](#) for updates on the industry and articles on application of the tool.

**Knowledge Base:** if you are an existing Customer you will have access to the Knowledge Base, an online community forum that allows Authors and Administrators to discuss what they are working on, approaches to automation and talk generally about the product. If you do not have access please contact [contractexpress-support@thomsonreuters.com](mailto:contractexpress-support@thomsonreuters.com).