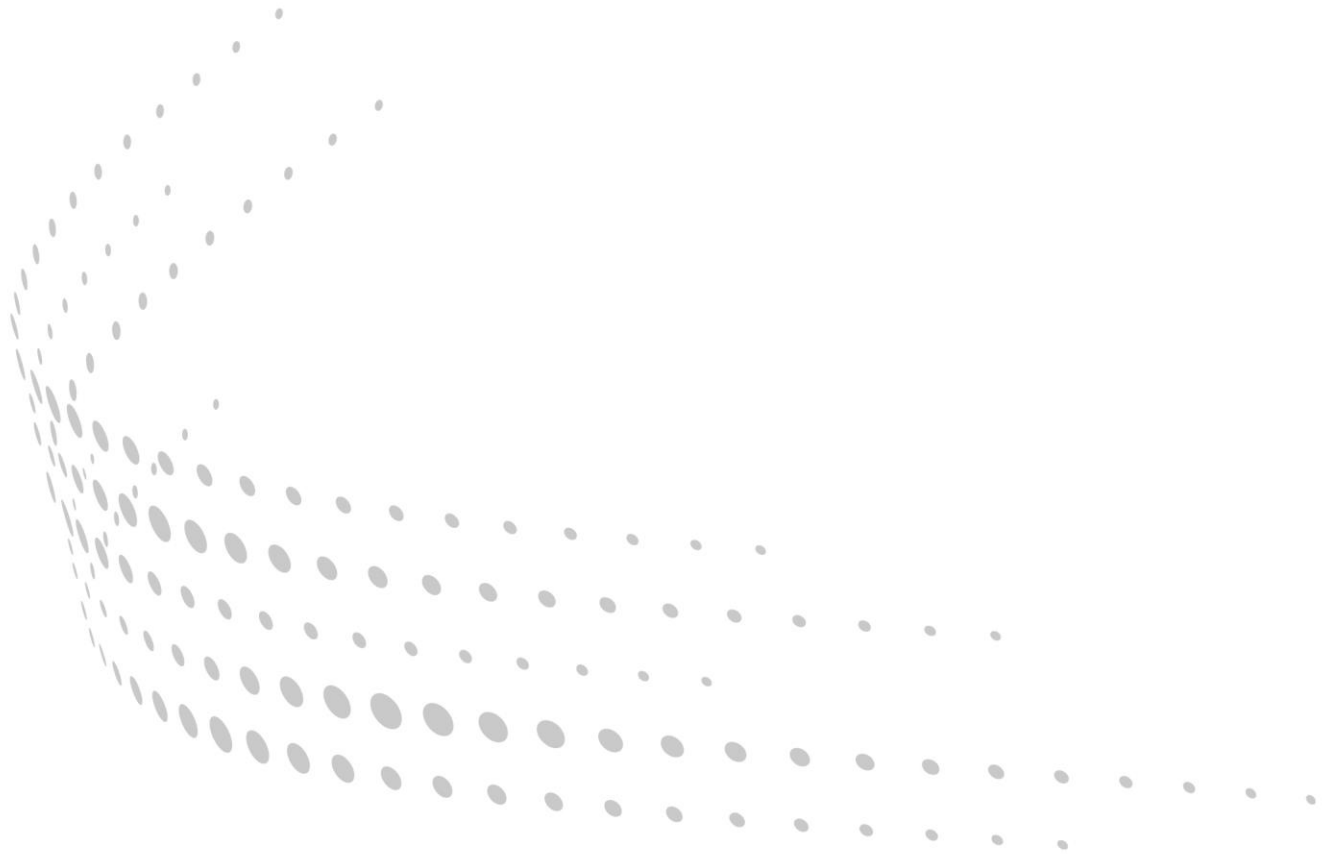


# Remote Author Training

Thomson Reuters Contract Express

---

August 2017



**Disclaimer**

This manual as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such a license. The content of this document is furnished for informational use only, is subject to change without notice and does not represent a commitment on the part of Thomson Reuters. Thomson Reuters assumes no responsibility or liability for any errors or inaccuracies that may appear in this manual.

**Copyright © 2017 Thomson Reuters.**

All rights reserved. Except as permitted by such license, this manual may not be copied, photocopied, reproduced, translated or converted to any electronic or machine readable form in whole or in part without the prior written approval of Thomson Reuters.

**Trademarks**

Contract Express, Contract Express 5, Contract Express for SharePoint, Contract Express for Salesforce, Contract Express Author, Contract Express Negotiator, Contract Express Drafter, Contract Express DealBuilder, Contract Express Administrator, ContractExpress.com, Contract Express Cloud, Contract Express for SharePoint Cloud, Contract Express QuickStart, and the Contract Express system are trademarks of Thomson Reuters. All other brand or product names are trademarks or registered trademarks of their respective owners.

For technical support contact: [contractexpress-support@thomsonreuters.com](mailto:contractexpress-support@thomsonreuters.com)

## Contents

|   |   |
|---|---|
| 1. Introduction.....  | 3 |
| 2. Preparation.....   | 3 |
| 3. Agenda.....  | 3 |
| 2.1 Session 1: Introduction and Basics .....                  | 3 |
| 2.2 Session 2: Advanced Functionality and Features .....      | 4 |
| 2.3 Session Three: Document Review and Further Learning ..... | 4 |
| 2.3 Topics Covered .....                                      | 5 |
| 4. Contacts.....  | 5 |
| 5. Resources .....  | 6 |

### 1. Introduction

This training course is designed to cover the core elements of automation in Contract Express. It includes 3 sessions, each two hours in length that cover the major automation topics. It is not an exhaustive run through, and may be tailored on request to cover certain topics if you feel they are particularly relevant.

### 2. Preparation

To allow participants to immediately reinforce the lessons and practice the topics covered, we recommend that they have the following in place in advance—:

1. Candidate automation documents for practice
2. Contract Express Author Installed
3. A Contract Express account with the role of either Admin or Author configured

### 3. Agenda

#### 2.1 Session 1: Introduction and Basics

1. Introductions & Agenda

- a. How to initiate your template
  - b. Basics of a template, creating the right document format and adding profiling information for the users.
2. Variable basics
  - a. How to create questions
  - b. Place answers in documents
  - c. Create different types of variables
3. Spans
  - a. Creating areas of optional text
  - b. Different type of variables that can control spans
4. Questionnaire Design
  - a. Creating groups and pages
  - b. Organising questions
  - c. Reviewing questionnaire relevancy
  - d. Making templates live and sharing
5. Wrap up
  - a. Review of coverage
  - b. Topics for next session

## 2.2 Session 2: Advanced Functionality and Features

6. Session 1 refresher and questions
7. Variable formatting and Punctuation
  - a. Formatting variables in the questionnaire
8. Entities
  - a. Creating entity variables
  - b. Linking entity variable to Companies House or Post code look ups
9. External Dictionaries
  - a. Creating a shared dictionary
  - b. Copying a dictionary
  - c. Server vs Local dictionaries
10. Using multiple Documents
  - a. Creating a suite of documents
  - b. Using shared content for multiple documents
11. Further learning introduction
  - a. Repeats – creating multiples of questions
  - b. Lookups – using inbuilt data sources
  - c. Alerts – warning users of conditions in questionnaires
12. Wrap up
  - a. Review of coverage
  - b. Questions

## 2.3 Session Three: Document Review and Further Learning

13. Review of the document work carried out by the trainees so far
  - a. Answer any questions
  - b. Provide guidance and advice on sections
14. Launch Preparation
  - a. Final review on template configuration
  - b. Adding users and sharing the documents
  - c. Preparing the environment for launch
15. Further Learning Application (remaining time)

## 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.                 |
| <b>Entities (optional)</b>    | How to create Entity type variables for use with Contacts and Post Code/Company Look ups.  |

## 4. Contacts

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

## 5. 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).