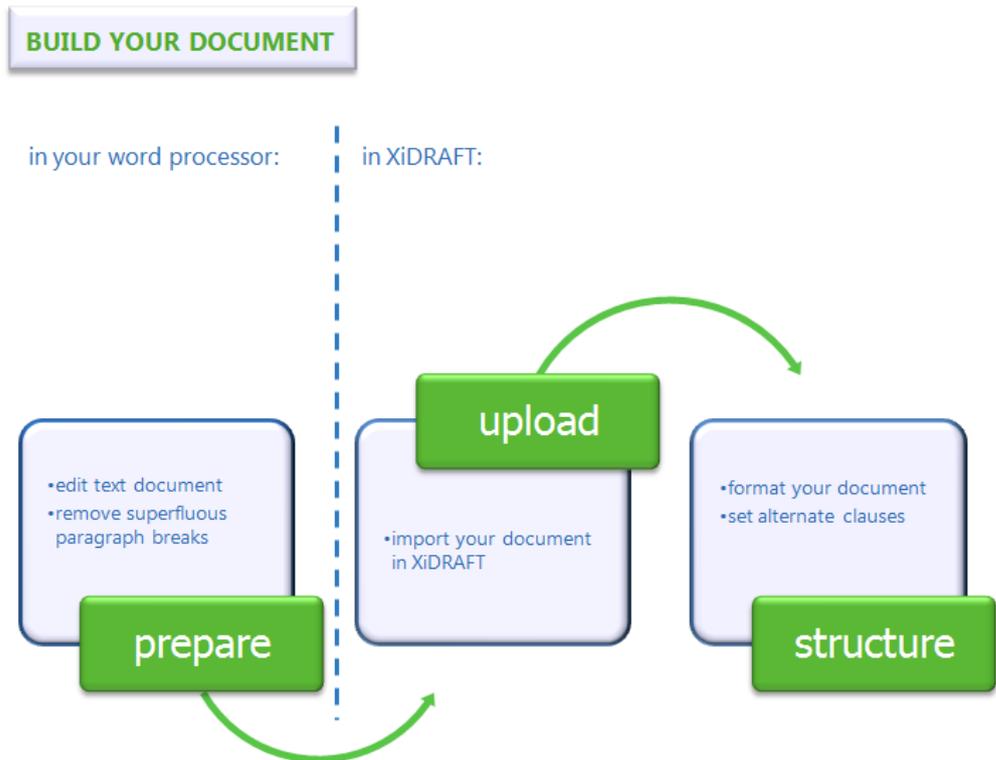


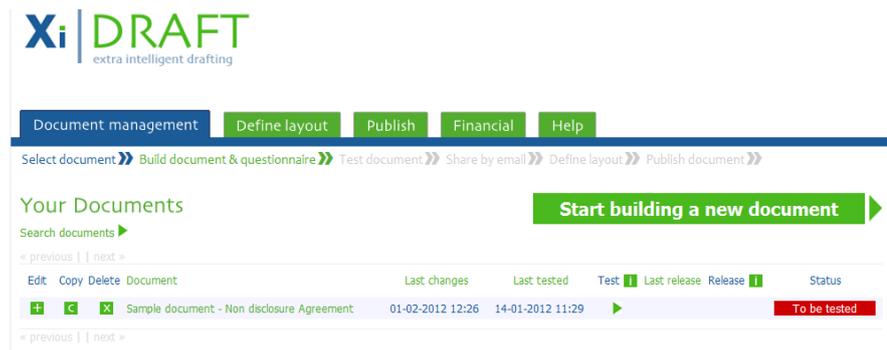


**GETTING STARTED: BUILDING
AND PUBLISHING YOUR
DOCUMENT IN 3X3 EASY STEPS**

Overview



- **Prepare** the document you wish to import: you can import any of your existing documents by copying and pasting its text in XiDRAFT.
 - ✓ **Edit the text of your document:** we recommend that you select a document that is suitable for use as a master document (such as a document that already contains a number of alternate options). Of course you can always further edit your document with the XiDRAFT editor.
 - ✓ **Remove superfluous paragraph breaks:** the text which you import in XiDRAFT will be split up into paragraphs. Each hard return (paragraph break) in your document is interpreted by the system to mean that a new paragraph should be started. Check that your document does not contain any undesired paragraph breaks.
- **Upload** your document:
 - ✓ **Import your document in XiDRAFT:** in the document management section click on the button "Start building a new document":

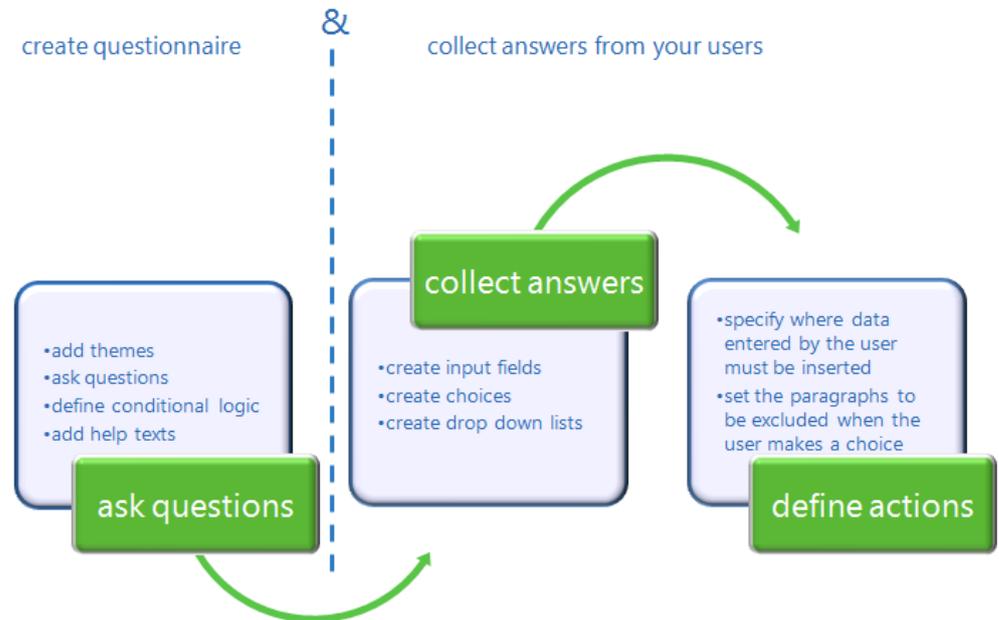


- ✓ **Copy and paste the text of your new document:** name your document and then copy the text of the document you wish to import and paste it in the designated box; then click on "go".
- **Structure** your document: now you can format your document in the XiDRAFT editor; the way you format your document determines the layout of the document downloaded by your end users.
- ✓ **Set paragraph numbers:** the document will be imported into the XiDRAFT system's database paragraph by paragraph and these paragraphs will be automatically numbered. It is easy to re-set the paragraph numbering in the XiDRAFT editor.
- ✓ **Set layout document:** in the XiDRAFT editor you can also change other layout aspects of your document.
- ✓ **Include alternate clauses:** your document may have one or more alternate versions of a clause in which case you want your user to choose between those versions (in the questionnaire you will specify which paragraphs should be deleted by the document assembler when a particular option is selected by your user).

FOR MORE INFORMATION SEE OUR TUTORIALS:

» PART 1 – BUILD YOUR DOCUMENT

BUILD YOUR QUESTIONNAIRE

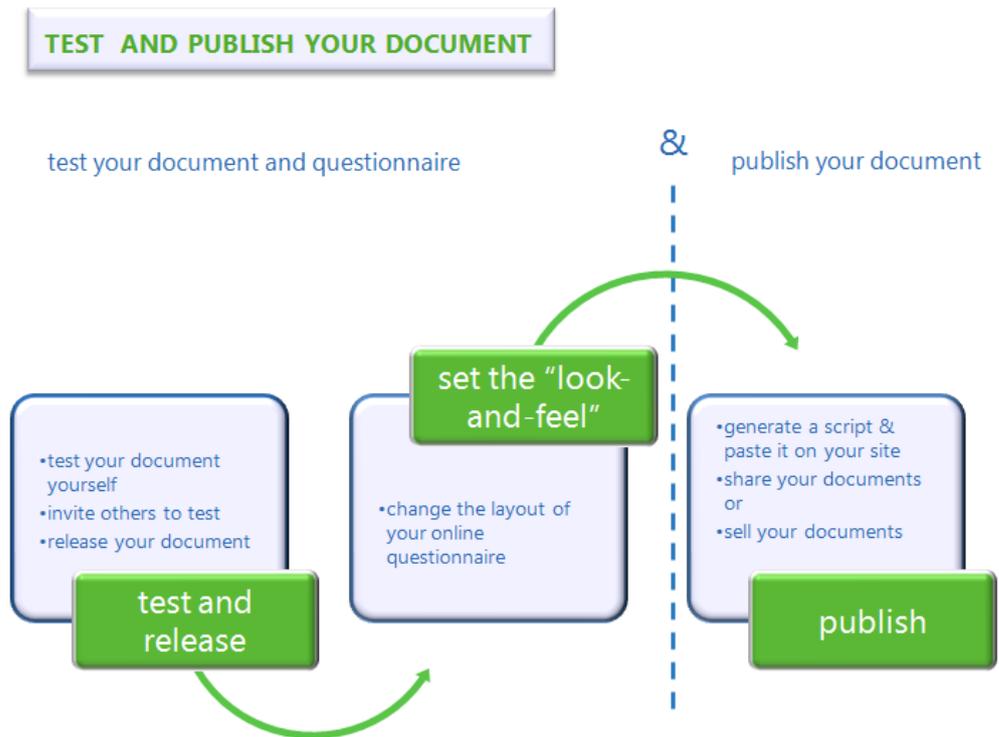


- **Ask questions:** remember that you are building this questionnaire to get answers from the visitors of your website who wish to download your document (your users); those answers will be used by the document assembler to compile a custom-made document for them.
 - ✓ **Add themes:** the questions in the online questionnaire which your users complete are grouped in themes. Each theme deals with a certain subject.
 - ✓ **Ask questions:** when you have added a theme you can start entering one or more questions in that theme.
 - ✓ **Define conditional logic:** conditional logic allows you to show or hide follow-up questions based on what a user selects in a previous question in the questionnaire.
 - ✓ **Add help texts:** for each question you can draft a help text for your user so as to assist her/him with completing the questionnaire.
- **Collect answers:** the answers of your user are the data which the document assembler needs to compile the document. After you have entered one or more questions you can specify the type of answer for each question. There are two types of answers: input fields (where your user must enter data or select a value from a drop down list) and choices (where your user must select an option).

- ✓ **Create input fields:** input field answers are answers requiring your user to enter data in the online questionnaire. There are questions where the end user needs to enter a single answer (e.g. just a name) and questions where the end user must enter multiple answers (e.g. a name as well as address details).
- ✓ **Create choices:** choice answers are answers requiring the end user to select an option (e.g. whether or not to include a confidentiality clause in a contract). In the questionnaire choice answers have radio buttons preceding them: the end user can only select one of the available options.
- ✓ **Create drop down lists:** alternatively you can require the end user to select a value from a drop down list created by you (e.g. a drop down list with the names of the months).
- **Define actions:** now you are ready to define actions by specifying what the document assembler must do with the data and answers collected from your user upon completion of the questionnaire.
- ✓ **Set the locations in your document where your user's answers must be inserted:** the data entered by your user in input field answers (such as the name of a party or an amount) or selected by your user from a drop down list must be inserted in the proper location in your document. With the XiDRAFT editor you can insert placeholders in your document specifying the locations where those data must be inserted by the document assembler.
- ✓ **Set the paragraphs to be excluded when the user makes a choice:** the options selected by your user in choice answers are used by the document assembler to include or exclude paragraphs from the document. With the XiDRAFT editor you can specify for an option which paragraph(s) must be taken out by the document assembler when your user selects that option.

FOR MORE INFORMATION SEE OUR TUTORIALS:

» PART 2 – BUILD YOUR QUESTIONNAIRE



■ **Test and release** your document:

- ✓ **Test your document:** while you are preparing your document and questionnaire you can test it on the fly. In the test environment you can complete the questionnaire as if you are an end user and download the document when you are ready.
- ✓ **Invite others to test:** once you have finished testing your document and are comfortable about sharing it, you can invite your friends or colleagues to participate in the test by sending them an email containing a "one-off" link to the online questionnaire for your document.
- ✓ **Release your document:** when you have created and tested your document, you can release it for publication.

■ **Set the "look-and-feel"** of your document:

- ✓ **Change the layout of your online questionnaire:** by default the online questionnaire will have the appearance of the XiDRAFT website. You can change the colors and upload a logo to change that. By doing so the online questionnaire can be seamlessly integrated into your own website.

■ **Publish** your document:

- ✓ **Generate a script:** a document is published by generating a script, copying this script and pasting it on your website.
- ✓ **Share your documents and grant access:** you can share documents with your staff or with the members of your professional association or trade organization. As these are the documents of your company, firm or organization they should not be available to the public at large. Therefore, your users will be required to provide login details which details you can distribute to them.
- ✓ **Share your documents with clients or customers:** it is also possible to share documents with clients or customers (you may for example provide forms as a courtesy to your clients or customers or as a way to attract new clients or customers). In this case it concerns public documents that everyone should be able to download.
- ✓ **Sell your documents:** you can also sell documents to members of your professional association or trade organization or to your clients or customers. When you sell a document, your users pay for the document that they download. Such payments are processed and collected by XiDRAFT.

FOR MORE INFORMATION SEE OUR TUTORIALS:

»» [PART 3 – TEST AND PUBLISH](#)