

# DocXpress Quick Guide

The image shows the DocXpress ribbon with the following sections and their functions:

- Questionnaire:**
  - Launch:** Launch a new questionnaire and generate documents
  - Layout:** The layout of the questionnaire
  - Default Locale:** The default locale used in the questionnaire
  - Using Locales:** Any other locales referenced in the template
- Markup:**
  - Edit:** Edit the selected markup
  - Insert:** Insert new markup by type
  - Delete:** Delete the selected markup but retain its contents
  - Go To / Walk To / Go Back:** Go back to the previous selection; Select markup relative to the current selection; Select markup by its type and label
- Dictionary:**
  - Add:** Add a new dictionary table
  - Insert:** Insert a dictionary component at the current selection point
  - Rename:** Rename a component
  - Go Back:** Go back to the previous selection
  - Types:** Select a component by its type and name
- Help:**
  - Examples / Columns / Types:** Add an example of a dictionary table
  - Operators / Functions:** Choose and popup the definition of a built-in function; Choose and popup the definition of a built-in operator
  - Types:** Choose and popup the definition of a DocXpress type
  - Columns:** Choose and popup the definition of a column in a dictionary table
- Options:**
  - Color:** Color the markup and dictionary components
  - DOCX / DOC / PDF:** Generated document format
  - Auto Save:** Automatically save the template prior to launching a questionnaire
  - Author Note:** Include an author note column when adding new dictionary tables
  - Menu Size:** The maximum number of names in a dropdown menu before they are partitioned by their initial letters
- Foreign:**
  - Contract Express:** Detect a Contract Express template and transform it into a DocXpress template

# DocXpress Markup

Markup within the template document is identified by color-coded<sup>12</sup> Microsoft Word® content controls (henceforth referred to informally as “lozenges”):

Agreement date ( )

*A (formatted) text value that is inserted into the assembled document*

There is one other party ( )

*Conditional content that is only included in the assembled document if the condition holds*

« For each category » For each category »

*Repetitious content that is included zero or more times in the assembled document*

« Attach letter to other party » Attach letter to other party »

*Content that is assembled as a separate attachment document*

« Oxford Comma » Oxford Comma »

*Apply punctuation to the content within*

« Mark » Mark »

*The point where the punctuation mark is inserted*

« Termination Clause » Termination Clause »

*The name of a clause (paragraph)*

« Termination Reference » Termination Reference »

*A cross-reference to a named clause*


« Base Risk Figure » Base Risk Figure »

*Risk figures which are aggregated together*

« Claim Risk Factor » Claim Risk Factor »

*A risk factor which is applied to the aggregated risk figures*

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<sup>1</sup> The colors of markup elements can be changed using the  button in the Options group.

<sup>2</sup> A content control lozenge generally has a solid background when it occurs within a paragraph, and a white background when it spans one or more paragraphs.

# DocXpress Author Manual

## Table of Contents

1	Questionnaire .....	5
1.1	Launch .....	5
1.2	Layout.....	5
1.3	Default Locale .....	6
1.4	Using Locales.....	6
2	Markup.....	7
2.1	Edit .....	8
2.2	Insert .....	9
2.3	Delete.....	9
2.4	Go To.....	9
2.5	Walk To .....	9
2.6	Go Back .....	9
3	Dictionary.....	10
3.1	Add .....	11
3.2	Insert .....	11
3.3	Go To.....	12
3.4	Go Back .....	12
4	Help.....	13
4.1	Examples .....	13
4.2	Columns .....	13

- 4.3 Types ..... 13
- 4.4 Operators ..... 13
- 4.5 Functions..... 13
- 5 Options..... 14
  - 5.1 Color ..... 14
  - 5.2 DOCX, DOC, PDF ..... 14
  - 5.3 Auto Save ..... 14
  - 5.4 Author Note ..... 14
  - 5.5 Menu Size..... 15
- 6 Foreign ..... 16
  - 6.1 Contract Express ..... 16
  - 6.2 Import Responses ..... **Error! Bookmark not defined.**

## 1 Questionnaire

The questionnaire group supports the launching of an in-situ questionnaire and the generation of instance documents<sup>3</sup> based upon the template wording and the answers given.

Launch	<i>Launch an in-situ questionnaire</i>
Layout	<i>Choose the layout of the questionnaire</i>
Default Locale	<i>Choose the default locale of the questionnaire</i>
Using Locales	<i>Choose any other locales referenced in the template</i>

### 1.1 Launch

Launch a questionnaire in the chosen layout and with the chosen default locale and any other using locales.

### 1.2 Layout

Choose the layout in which the questionnaire is launched.

The built-in layouts are:

- Standard *The layout is divided into 3 columns containing the sections, the questions for the current section, and the document wording*
- Tablet *The layout is divided into 2 columns containing the sections with in-situ questions for the current section, and the document wording*
- Mobile *The layout is a single column containing the sections with in-situ questions for the current section*

The layout can be overridden (baked into the template itself) by adding a Dictionary > Add > Configuration > Layout table to the dictionary.

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<sup>3</sup> The file type of the generated documents is determined by the chosen file type in the Options group.

### 1.3 Default Locale

Choose the default locale for the questionnaire.

The built-in locales are:

- English (United States)
- English (United Kingdom)
- German (Germany)
- Spanish (Spain)
- French (France)

The default locale can be overridden (baked into the template itself) by adding a `Dictionary > Add > Configuration > Locale` table to the dictionary.

### 1.4 Using Locales

Choose one or more other locales that are referenced in the template.

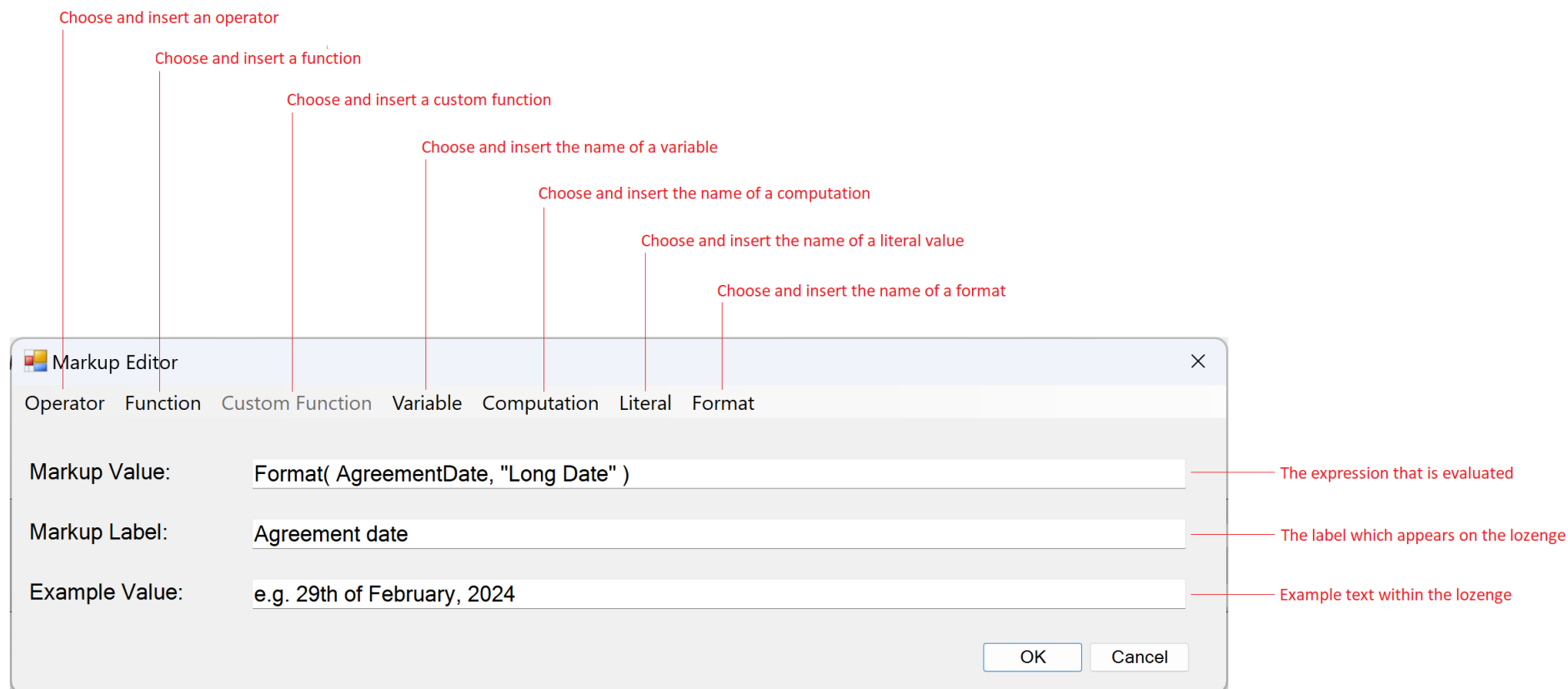
## 2 Markup

The markup group supports the creation and management of markup within the template wording.

Edit	<i>Edit the selected markup</i>
Insert	<i>Insert a new markup</i>
Delete	<i>Delete the selected markup</i>
Go To	<i>Go to some markup chosen by its type and label</i>
Walk To	<i>Go to some markup relative to the current selection</i>
Go Back	<i>Go back to the previous selection</i>

## 2.1 Edit<sup>4</sup>

The editor pops up for the selected markup.



The Markup Editor dialog box is shown with the following annotations:

- Operator**: Choose and insert an operator
- Function**: Choose and insert a function
- Custom Function**: Choose and insert a custom function
- Variable**: Choose and insert the name of a variable
- Computation**: Choose and insert the name of a computation
- Literal**: Choose and insert the name of a literal value
- Format**: Choose and insert the name of a format

The dialog box contains the following fields:

- Markup Value:** `Format( AgreementDate, "Long Date" )` (The expression that is evaluated)
- Markup Label:** `Agreement date` (The label which appears on the lozenge)
- Example Value:** `e.g. 29th of February, 2024` (Example text within the lozenge)

Buttons: OK, Cancel



## 2.2 Insert

Insert a new markup at the current selection point<sup>5</sup>.

Value, Punctuation Mark, Clause Label, Clause Reference, Risk Figure and Risk Factor markups occupy a singleton point in the template document.

Conditional, Repeat By, Punctuation, and Attach markups occupy a range in the template document.

## 2.3 Delete

Remove a Conditional, Repeat By, Punctuation, or Attach markup without destroying its content.

## 2.4 Go To

Select a markup by its type (Value, Repeat By, etc.) and its label (e.g. Agreement date, For each other party, etc.).

Alternatively, select a markup that contains a named variable, computation, or literal value.

Note that if there are multiple occurrences in the template document then the next occurrence is selected.

## 2.5 Walk To

Select a markup relative (parent, first child, next sibling, etc.) to the current selection.

## 2.6 Go Back

Go back to the previously selected markup.

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<sup>4</sup> The `Edit` button can also be used to change the name of a searchable table.

<sup>5</sup> Subject to Microsoft Word rules on the positioning of Content Controls.

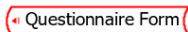
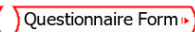


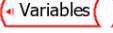
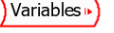
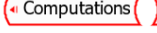
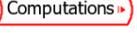


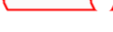







### 3 Dictionary

The dictionary group supports the creation and management of the dictionary.

Add	<i>Add a new table to the dictionary</i>
Insert	<i>Insert a textual value into a table cell</i>
Go To	<i>Go to the definition of a dictionary component</i>
Go Back	<i>Go back to the previous selection</i>
Rename	<i>Rename a dictionary component</i>

Unlike most other authoring environments the dictionary (or its equivalent) is not hidden behind a user interface, but is a series of Microsoft Word tables. As such, the dictionary can be read, edited, and printed just like any other part of the document.

The components of the dictionary are identified by Microsoft Word content controls:

 Questionnaire Form 	<i>The arrangement of (repetitious) sections and questions that form the questionnaire</i>
 Notifications 	<i>Notification messages that can be raised against the answers on the questionnaire</i>
 Variables 	<i>The variables whose values are collected on the questionnaire</i>
 Computations 	<i>Named computations over the variables</i>
 Literals 	<i>Named literal values</i>
 Formats 	<i>Named formats that can be applied to values</i>
 Entities 	<i>Complex entities that have numerous properties</i>
 Artefacts 	<i>Static entity instances that can be chosen</i>
 Searchable Tables 	<i>Searchable tables from which cell texts can be selected (SQL-like)</i>



*Custom functions that supplement the built-in functions*



*Configuration of the questionnaire that is baked-into the template*



*An author note that will not be included in the assembled document*

### 3.1 Add

If the dictionary content control (variables, computations, etc.) does not exist then a new content control is inserted at the end of the template document.

Add a new table at the end of the dictionary content control.

### 3.2 Insert

Insert some textual value into a dictionary table.

In particular, `Dictionary > Insert > By Context` uses the selected table cell to make suggestions.

For example, a cell in the `Input` column of a `Variables` table will suggest the different types of input that can be used to collect a data value.

For example, a cell in the `Mode` column of a `Variables` table will suggest the different modes for that particular type of input.

### 3.3 Go To

Select a table row that defines a named dictionary component.

### 3.4 Go Back

Go back to the previously selected dictionary component.

## 4 Help

The help group on the ribbon contains buttons that assist the author.

Examples	<i>Insert examples of tables that collectively define the dictionary</i>
Columns	<i>The meaning of each column in the dictionary tables</i>
Types	<i>The types of entries in the dictionary tables</i>
Operators	<i>The built-in operators</i>
Functions	<i>The built-in functions</i>

### 4.1 Examples

Add, at the selection point, an `Author Note` content control containing an example dictionary table.

### 4.2 Columns

Popup the definition of a column in a dictionary table.

### 4.3 Types

Popup the definition of a DocXpress type that is used in the dictionary.

### 4.4 Operators

Popup the definition of a built-in operator.

### 4.5 Functions

Popup the definition of a built-in function.

## 5 Options

The options group on the ribbon contains buttons that configure the authoring environment.

Color	<i>Change the color theme for the content control lozenges or names that occur in the dictionary</i>
DOCX, DOC, PDF	<i>The Microsoft Word format of the generated documents</i>
Auto Save	<i>Automatically save the template document, if necessary, prior to launching the questionnaire</i>
Author Note	<i>Add an author note column when adding new tables to the dictionary</i>
Menu Size	<i>Determines the maximum menu size for dictionary names before they are partitioned (A-Z)</i>

### 5.1 Color

Change the color of the content control lozenges, or change the color of the names of dictionary components such as variables, computations, etc..

### 5.2 DOCX, DOC, PDF

DOCX	Instance documents are generated in DOCX format
DOC	Instance documents are generated in DOC format
PDF	Instance documents are generated in PDF format

### 5.3 Auto Save

Selected	The document is automatically saved, if necessary, prior to launching the questionnaire
Deselected	The author is prompted to save the document, if necessary, prior to launching the questionnaire

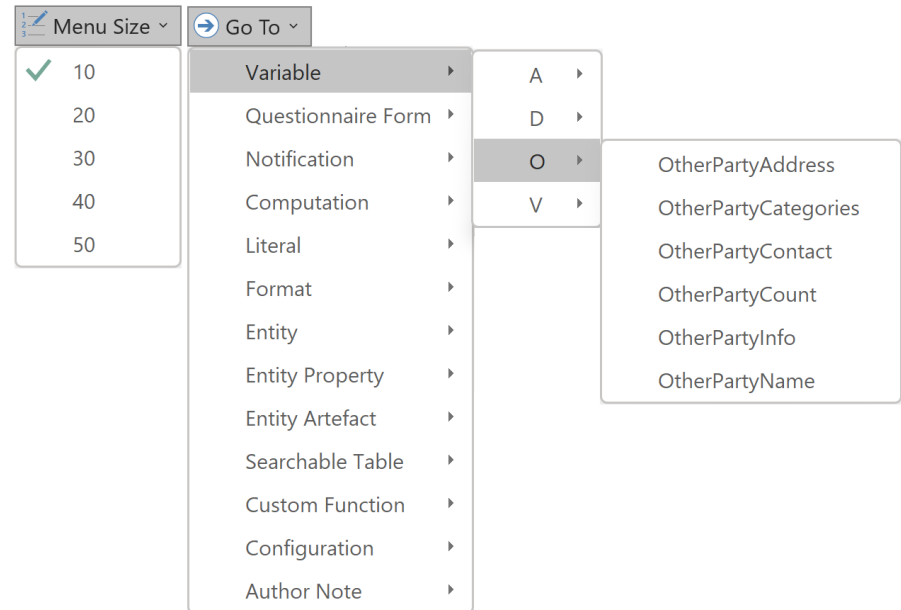
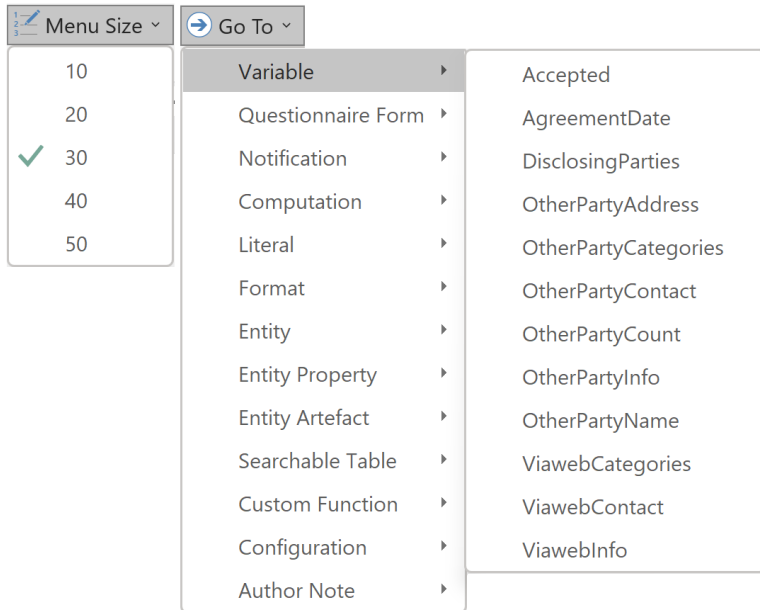
### 5.4 Author Note

Selected	An author note column is included whenever a new table is added to the dictionary
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Deselected Author note columns are not added

### 5.5 Menu Size

This button determines the maximum number of names in a dropdown menu beyond which the names are partitioned by their initial letter (A-Z).



## 6 Foreign

The foreign group on the ribbon helps authors integrate foreign documents and data.

### 6.1 Contract Express

The steps taken to transform a Contract Express template into a DocXpress template are:

Detect	<i>detect the presence of a hidden Contract Express dictionary</i>
Find markup fields	<i>find the locations of fields taking the form {expression}</i>
Transform markup fields	<i>transcribe the expressions and replace with DocXpress markup content controls</i>
Find markup spans	<i>find the locations of spans taking the form [<sup>expression</sup>...]</i>
Transform markup spans	<i>transcribe the expressions and replace with DocXpress markup content controls</i>
Transform dictionary	<i>transcribe the dictionary expressions and insert DocXpress dictionary content controls</i>
Edit transcriptions	<i>edit any expressions that were not successfully transcribed</i>