

Docs<sup>®</sup>ENGINE

Powering Online Document Production

# AccuDraft DocsEngine Portal End User Manual

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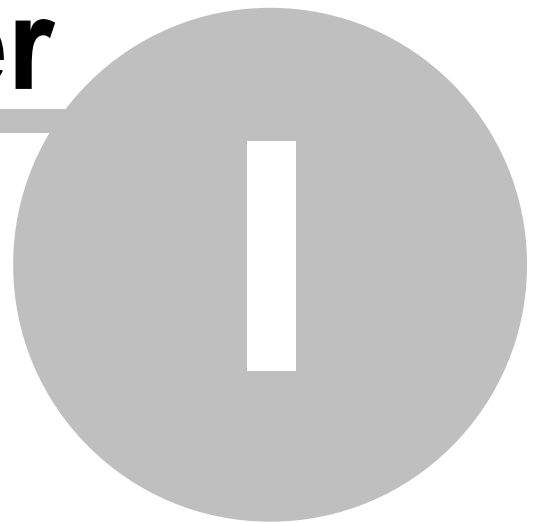
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**System Overview**

## 1.1 General System Overview

Welcome to the DocsEngine Portal System. DocsEngine is the industry leading online document creation and management tool. This manual will cover all of the great features that DocsEngine has to offer, and apply those features in a real world environment. Translation: You will not only be finding out everything that DocsEngine has to offer, but also how it relates to your day-to-day operations.

DocsEngine gives you the flexibility to effectively create and manage documents from anywhere at anytime all you need is access to the internet. Because DocsEngine is a completely internet based system there is never any software to install on your computer. This means that there is nothing for you to maintain or update. The final document output is either a Microsoft Word (.doc) or Adobe Acrobat (.pdf) document. Since the output of the system is the two most widely accepted document formats any type of compatibility issues are eliminated. DocsEngine is the answer When The Words Matter.

## 1.2 Your Role as the End User

You are the system End User, so what does that really mean? It means that you are the person who is in charge of creating and/or managing documents in the field. Essentially you are the person who this system was designed to help. There is nothing more frustrating then being at a client site or out in the field and not having the tools to "close the deal". DocsEngine Portal gives you the ability to author documents while sitting in front of your client thus eliminating the need to scratch down notes, go back to the office to draft a document and then sending your client a draft days later. DocsEngine allows you to complete this process in real time at the clients site with the clients input.

About now you are probably asking yourself this question: "If I am the end user than what do I do if I have a problem on the system or if I don't understand something with the system or don't have see what I expected?". The answer to this question is more simple than you think. You company has at least one and potentially more DocsEngine Portal System Administrators that can assist you. This person or persons has received additional training to earn the title the role as the System Administrator and is qualified to assist you if you have a problem. In the event that your System Administrator cannot help you, AccuDraft is always just a phone call away.

## 1.3 Getting Started

### 1.3.1 System Access

As previously stated the DocsEngine Portal system is completely web based. As long as you have a computer and internet access you have the capabilities to draft and manage documents. All you have to do is open a web browser and go to <http://docsengine.accudraft.com> and you will arrive at the system login page.

### 1.3.2 Logon Procedure

The Logon Procedure is a universally accepted and secure logon process. Your User ID is an email address and your password will be assigned to you by your System Administrator. After specifying your email address and assigned password the system will verify your identity and take you directly to your Document Main Console.



*Note: It is recommended that you do not allow Microsoft Windows to remember you login information as this could allow another individual incorrect access to your DocsEngine Portal Account.*

### 1.3.3 Main Menu Overview

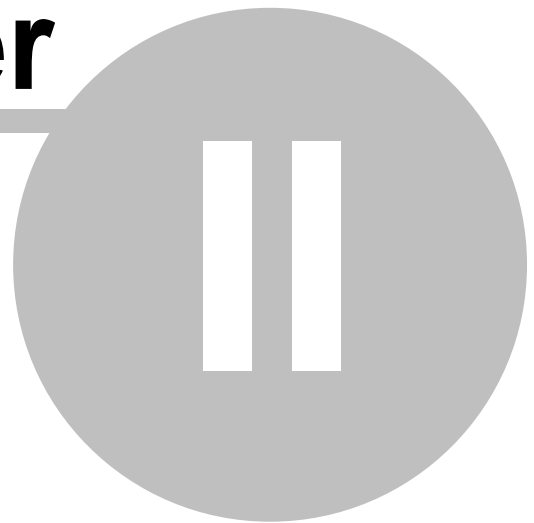
After your login information is verified you will be taken to the Document Main Console. On the left hand side of the screen you will see the main menu. This is the central navigation panel that you will use to navigate your way through the DocsEngine System. A description of each Main Menu option is as follows:

- **Document Main Console:** This link will take you to the Document Main Console from any other location in the system. If you are in the middle of entering data for a document and click the Document Main Console link you will lose any data since the last time you completed a save operation.
- **Create Document:** This link will take you to the Create Document screen from any other location in the system. As the name implies this is the link that you will complete when you intend to start a new document. A detailed explanation of this screen can be found beginning with the "Document Group(s)" section of this manual.
- **Create Pattern:** This link will take to the Create Pattern screen from any other location in the system. The look and feel of this screen is very similar to that of the Create Document screen, however the two screens create two very different results. A detailed explanation of this screen can be found in the "Creating Patterns" section of this manual.
- **Document Search:** This link will open the Document Search window from any location in the system. Once your search is concluded you will be automatically returned to the Search Results screen of the Document Main Console. Please be advised that if you execute a document search when you are in the middle of entering data for a document, you will lose any data since the last time you completed a save operation. A detailed explanation of this window can be found in the "Document Search" section of this manual.
- **Upload Answers:** This link will take you to the Upload Answers screen from any other location in the system. This screen is used to upload an offline HotDocs answer file (.ans or .anx) to the DocsEngine Portal System. This is truly an advanced option and will only be used in the event that you have valid offline HotDocs answer file(s). For a detailed explanation of the functionality of this screen please contact your System Administrator or AccuDraft Technical Support.
- **Logout:** This link will log you out of the system from any other location. Once you click on this link the logout command will immediately be executed and you will lose any data since the last time you completed a save operation. Once logged out of the system the only way to regain access is to log back in. A detailed explanation of regaining system access can be found in the "Logon Procedure" section of this manual.

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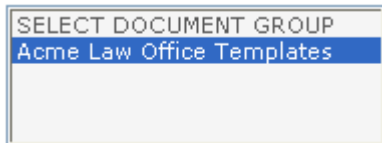
**New Document Creation**

## 2.1 Document Group(s)

The creation of a new document begins at the completion of logging on to the system. The purpose of the End User's access to the DocsEngine Portal system is either Document Creation or Document Management or some combination thereof. We are going to start off by making the assumption that you are logging on to the system to create a new document.

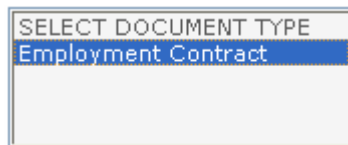
With that being said you just logged into the system and find yourself at the Document Main Console screen. You are probably asking yourself: So what do I do now? Well you made the first right choice by consulting this manual. At first glance the Document Main Console screen is very overwhelming, but not to worry because this manual will guide you through the process. To begin document creation, click Create Document from the Main Menu.

Once arriving at the Create Document screen you will immediately be asked a question. That question will be: What kind of Document? Before you even have the chance to figure out what you are being asked you will notice a command telling you to Select Document Group. Now the logical thing to ask yourself is what is a document group? A Document Group is a logical set of documents lumped together. Your document group will be <your company name> Templates. So for example if the name of your company is Acme Law Office, the name of your document group will be Acme Law Office Templates.



## 2.2 Document Type(s)

Now that you have made your initial decision of the Document Group you are required to make another decision of a Document Type. So exactly what is a Document Type? A Document Type is the specific type of document you want to create. For instance in the previous section you chose a Document Group of Acme Law Office Templates and you know that Acme Law Office has many different types of documents so the Document Type would be the exact type of document that you want to create. That could be anything ranging from a sales contract for real estate or computer software to an employment agreement between Acme Law Office and a new employee.



## 2.3 Client and Document Association

Now that successfully specified the document that you wish to create it is time to associate this document with a client. You have two options, you can either select to create this document for a new client or select to create this document for an existing client. If you do not see any entries in the existing client dialog box then you must select to create this document for a new client. To create this document for a new client click the button next to For a new client and then type the name of the client in the field to the right.

Alternatively, you have the option of creating this document for an existing client because we know that there are times when you may want to create more than one document for a single client. In the case of sales contracts you may want to sell the same client multiple items which would create multiple sales contracts. To create this document for an existing client, click the button next to For an existing client and then select the client name from the list provided to the right.

**For which client?**

For a new client  (Enter name to create new client)

For an existing client

## 2.4 Document Name

After the Document Group, Document Type and Client Association are all specified it is time for you to give this document a name. Based on the options set by your System Administrator you either will or will not see a default document name when you look at the Name Your Document dialog box. If your System Administrator has chosen to let the system default a document name, as in the illustration below, you will see that the name is a combination of the client name - document type. So for instance if you are creating an Employment Contract where John Smith is specified as the client and Employment Contract is specified as the document type, the default name will be John Smith - Employment Contract. Even though there is a default name specified, it is completely at your option to change it. Please check with your System Administrator for help identifying the naming convention used by your organization.

If your System Administrator has chosen not to let the system default a document name you will see a blank field when you look at the Name Your Document dialog box. In this case it is up to you to specify a meaningful name for this document. The system will not allow you to continue until you specify a name for the document that you are creating. Please check with your System Administrator for help identifying the naming convention used by your organization.

Now that this document has a name you are ready begin answering the questions that will create the final document. Click Proceed to Interview and you will be able taken the document interview to begin answering these questions.

**Name your document**

## 2.5 The Interview

### 2.5.1 Dynamic Interview Overview

The questions that you will answer in order to assemble a document are arranged in what is called a dynamic interview. This means that there is a very real possibility that each time you create a document, the questions you answer may be slightly different. The reason behind this is that questions will be added to or removed from the interview based on the answers you specify. This is what makes DocsEngine Portal such a versatile system, you can change the language of a document by just changing one answer in the interview. For a more detailed explanation on this concept please consult your System Administrator.

### 2.5.2 Interview Navigation

There are several different navigation tools contained within the document interview. Each navigation tool is explained in detail below.

- **Next Button:** When you click Next, you will see the next dialog screen in the interview. A dialog screen contains one to many questions to be answered in the document creation process.



- **Previous Button:** When you click Previous, you will see the previous dialog screen in the interview.



- **"Jump-to-Question" Drop Down:** When you click the "Jump-to-Question" drop down you have the ability to select any valid dialog in the interview. This feature saves you from having to click Next through each dialog to get to a specific dialog contained toward the end of the interview.

- **Single Page/Question-by-Question Button:** Located to the right of the "Jump-to-Question" drop down list is an icon that resembles a piece of paper, this is the single page/question-by-question button. When you click single page/question-by-question button the interview will change from question-by-question meaning that you will have to use Next and Previous to navigate between dialogs, to a full page mode meaning that all question will be listed in one long list and you will use your web browser scroll bar(s) for navigation.

### 2.5.3 Answer Preservation

We have all had an experience of being in the middle of a project and losing hours worth of work because the system crashed and we forgot to save our work. This certainly is one of the most troublesome things that could happen and potentially cost you a lot of time and money. AccuDraft has built into the DocsEngine system two ways to save your work to prevent this from happening to you. The two answer preservation options are as follows:

- **Save and Continue:** When you click Save and Continue, all answers that you have specified are saved on to the DocsEngine system. The system will execute the save command and leave you at the same interview dialog. This is synonymous to the save function in your average Microsoft Windows based application.



- **Save and Exit:** When you click Save and Exit, all answers that you have specified are saved on to the DocsEngine system and you are taken back to the Document Main Console. This is synonymous to answering yes you want to save your work when exiting an average Microsoft Windows based application.

Save & Exit

## 2.5.4 Answer Validation and Document Generation

The questions have all been answered and you are ready to create the document, but how do you do that and what happens if there is a question out there that isn't answered that could upset the validity of your document? The DocsEngine Portal System has you covered as it will not allow you to complete an invalid document. When you feel that you are ready to create the final document click Submit in the bottom right hand corner of the interview dialog. As soon as you click that button a chain reaction starts behind the scenes and a fury of document validation is underway. The DocsEngine Portal System runs numerous validation checks on your submitted interview to ensure that the document you are creating will be valid. In the event that the system finds questions that were left unanswered, they will be displayed above the interview dialog window, and the question in the interview will be outlined in red for easy identification.

Correct any questions that the system has identified as unanswered and click Submit again. Once again the system will begin a fury of document validation and assuming all the checks pass you will be returned to the Document Main Console so that you can access your completed document. In the event that the system did not find any unanswered questions the first time it ran the validation, you would be returned to the Document Main Console so that you can access your completed document.

### During your interview, you left questions unanswered.

If you leave questions unanswered, your resulting document will not be correct. Please answer the questions marked in red in the interview below.

- **Monthly Salary**
- **Number of Vacation Days**

#### Salary and Benefits

Monthly Salary \$

Number of Vacation Days

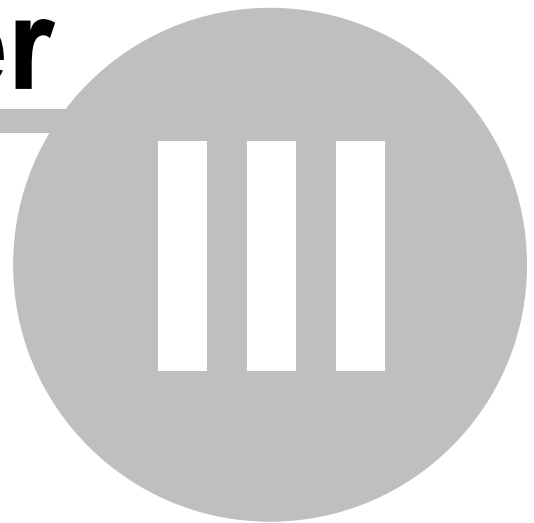
Paid Seminar Days

Trial Period

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## **Document Viewing**

### 3.1 Document Main Console

#### 3.1.1 Navigation

The Main Menu of the Document Main Console was covered in the "Main Menu Overview" section of this manual, but there are other navigation options that were not addressed. These different Navigation options will assist in document management in the DocsEngine Portal System. A description of each Navigation option is as follows:

- Active Documents Tab:** Located at the top of the Document Main Console you will see a series of three tabs one of which is the Active Documents tab. This is the default selected tab when you log into the system and the tab you will spend most of your time on. The is the tab that document set(s) will show up after they are drafted and the tab that they will remain on so long as you wish to have these documents edit able. In short these are the most current document set(s) on the system.


Document Name	Client	View/Save	Type	Created By	Date ▲	Status	Actions
<a href="#">John Smith - Employment Contract</a> <a href="#">Redraft</a>	John Smith	<ul style="list-style-type: none"> <li>Employment Agreement</li> <li><a href="#">Word PDF</a></li> </ul>	Employment Contract	John David	11/8/2004	None	<input type="checkbox"/>

Records per page 5 ⏪ ⏩ Page 1 of 1

- Archived Documents Tab:** When you click this tab you will be able to see any document set(s) that have been archived or preserved on the system for later use. It is important to remember that these document set(s) are not removed from the system, but placed in a different view for long term storage. Also, when a document set is moved to the Archived Documents Tab the ability to change or modify the document set is removed until it is re-activated. By re-activating the document set it will display back on the Active Documents tab and again become edit able.


Active Documents Archived Documents Search Results

Document Name	Client	View/Save	Type	Created By	Date	Status	Actions
<a href="#">Robert Jones - Employment Contract (5241)</a>	Robert Jones	Not Complete	Employment Contract	John David	11/8/2004	None	<input type="checkbox"/>

Records per page 5  Page 1 of 1

- Search Results Tab:** When you click this tab most likely you will see a plain white screen. The only time that you will see document set(s) displayed on this tab is if you have conducted a document search since logging into the system. If you conducted a document search on your previous system login, then you will not see any document set(s) displayed. For a detailed description of conducting a document search please see the "Document Search" section of this manual.

Active Documents Archived Documents Search Results

Records per page 5  Page 1 of 1

- Records Per Page:** On the bottom left of the document main console you will see the Records per page drop down list. This drop down as it implies controls the number of document set(s) displayed per page on the Document Main Console. The options contained within this drop down list are 5, 10

or 15 records or document sets per page. By default the number is set to 5 document sets per page. To change this number click the drop down list and choose a different number. The system will then display the corresponding number of document sets per page. In the event that you select a number greater than the number of document sets you currently have on the system, you will see all of your document sets displayed. For instance if you choose to display 15 document sets per page and you only have 11 on the system then you will see all 11 displayed on one page.



- **First Page Button:** To the right of the Records per page drop down list you will see a series of 4 buttons. The first button in the series is the First Page button, and when you click it the first page in your list will be displayed. This button will be available assuming that you are not already on page 1.



- **Previous Page Button:** The second button in the series is the Previous Page button, and when you click it you will be taken to the previous page in the list. This button will be available assuming that you are not already on page 1.



- **Next Page Button:** The third button in the series is the Next Page button, and when you click it you will be taken to the next page in the list. This button will be available assuming that you have created enough active document sets on the system that the number of records you chose to display on the system has caused more than one page of active documents to be created.



- **Last Page Button** <screen shot last page button>: The final button in the series is the Last Page button, and when you click it you will be taken to the final page in the list. This button will be available assuming that you have created enough active document sets on the system that the number of records you chose to display on the system has caused more than one page of active documents to be created.



*Note: If all of these buttons are grayed out that means that you only have one page of document sets to display. The buttons will automatically become active when you have more than one page of document sets to be displayed.*

### 3.1.2 Document Sets: Why You See What You See

You may notice that you see only the document set(s) you created, or if this is the first time you logged in you see no document set(s) or you may see many documents created by many different people. So what determines who sees what document set(s)? The document set(s) that you see are dependent on your security level as specified by your System Administrator. At the basic level you will only be able to see document set(s) that you have created, and consequently if this is the first time you have logged you will see no documents listed in your Document Main Console.

The next security level would be that you not only see the document set(s) that you have created, but any document set(s) created by a person in your User Group. A User Group is a group of people categorized together for a specific reason. For instance, a good example of a User Group setup would be if your company has multiple shifts. Your System Administrator may setup a First Shift User Group, Second Shift User Group and Third Shift User Group. Only people who work on the corresponding shift

would be part of that user group, and would only be able to see document set(s) created by users in that group.

The highest security level would be that you could not only see the document set(s) that you have created, document created by other users in your User Group, but any document set created by any user in your organization. This means you have the ability to see it all. Again, your specific security level will be determined and administered by your System Administrator.

### 3.1.3 Document Set Sorting

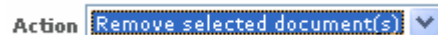
You have the ability to sort the documents you can see in the Document Main Console in either ascending or descending order by clicking any of the column titles with the exception of the Action and Status columns. By default all of the documents are sorted by the date with the most recently created document displayed first. Each time you log in to the DocsEngine Portal System, your documents will re-sort by date. Because there are so many different sorting options DocsEngine Portal allows you to quickly and effectively view like documents together which saves you the time and hassle of going through every document that you have ever created or can view on the system.

### 3.1.4 Document Set Removal

In "Document Set Sorting" you were informed that you were not able to sort document sets by the action column. The action column is the last column you see on the Document Main Console and it contains a check box. By placing a check in this box, you are notifying the system that you want to do something with that particular document set or sets.

<a href="#">Robert Jones - Employment Contract</a>	Robert Jones	Not Complete	Employment Contract	John David	11/8/2004	None	<input checked="" type="checkbox"/>
<input type="button" value="Continue"/>							

In the bottom right hand corner of the document main console is the Action drop down. To remove the checked document set(s), select Remove selected document(s) and click Go.



The system will ask you to verify your action and if you are sure that you wish to delete the selected document(s) click OK, otherwise click cancel.



Once you click OK the checked document set(s) will be removed from the system. If in the future after deleting a document set you develop a need to once again gain access to that particular document please contact AccuDraft.

### 3.1.5 Document Set Archiving

In "Document Set Sorting" you were informed that you were not able to sort document sets by the action column. The action column is the last column you see on the Document Main Console and it contains a check box. By placing a check in this box, you are notifying the system that you want to do something with that particular document set or sets.

<a href="#">Robert Jones - Employment Contract</a>	Robert Jones	Not Complete	Employment Contract	John David	11/8/2004	None	<input checked="" type="checkbox"/>
<input type="button" value="Continue"/>							

In the bottom right hand corner of the document main console is the Action drop down. To archive the checked document set(s), select Archive selected document(s) and click Go.

Action  ▾

The system will ask you to verify your action and if you are sure that you wish to archive the selected document(s) click OK, otherwise click cancel.



Once you click OK the checked document set(s) will be moved to the Archived Documents tab and will no longer be edit able. You will notice that the Edit or Continue button are no longer available once a document has been archived.

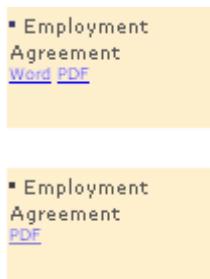
<a href="#">Robert Jones - Employment Contract (5241)</a>	Robert Jones	Not Complete	Employment Contract	John David	11/8/2004	None	<input type="checkbox"/>
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The idea behind an archived document is that you want to keep the document, but don't necessarily want to look at it for a while. Should you develop the need to modify or change an archived document, you must first activate that document which will move it back to the Active Documents tab. The process of activating a document is identical to that of archiving a document, accept it is done on the Archived Document tab and you will select Activate selected document(s) from the Action drop down list.

## 3.2 Viewing Completed Documents

### 3.2.1 Document View Format

Now that you have completed and assembled your document you will obviously want to view it. Under the View/Save column you see will the link(s) to access your document. You will see a link or set of links for each document in your document set. Based on your Security Level as specified by you System Administrator, you will either see a link to access the Microsoft Word (.doc) version of the document and a link to access the Adobe Acrobat (.pdf) version of the document or you will only see a link to access the Adobe Acrobat (.pdf) version of the document.



When you click the link for the desired document format a new window will appear with instructions to either view or save a copy of the assembled document. Repeat this process for each document in your document set and/or for each document in another document set.

### 3.2.2 View Document from System Copy

The first option that you have is to view the assembled document from the copy that is stored on the DocsEngine Portal server. In the new window that appeared when you clicked the document format link you will see the View Document link at the top of the window. Click View Document and the system will display you a copy of the document in the selected format. For instance if you clicked the Word link and then click View Document the system will display the assembled document in Microsoft Word.



**Note:** To view the Microsoft Word version of the assembled document you must first have Microsoft Word installed on your local computer and to view the PDF version of the assembled document you must first have either Adobe Acrobat or Adobe Acrobat Reader installed on your local computer.

#### Viewing Your Document

To view your finished document (without saving it to your hard drive), **LEFT CLICK** the link below.

[View Document](#)

### 3.2.3 View Document from Local Copy

The second option that you have is to view the assembled document by downloading a copy to your local computer. In the new window that appeared when you clicked the document format link you will see the Save Document link at the bottom of the window. Click Save Document and the system will display a dialog box that asks you if you would like to save the assembled document. Click Save, specify a file name and location and click Save. You may view the saved copy of the assembled document by navigating to its location using My computer, Windows Explorer, Microsoft Word if you selected the Word format or Adobe Acrobat if you selected the PDF format.



**Note:** To view the Microsoft Word version of the assembled document you must first have Microsoft Word installed on your local computer and to view the PDF version of the assembled document you must first have either Adobe Acrobat or Adobe Acrobat Reader installed on your local computer.

#### Saving Your Document

To save your document to your hard drive:

- **RIGHT CLICK** the link below.
- Select "**Save Target As...**" from the pop-down list.
- The default File Name will be a system-assigned identifier for the document.
- You can give your document any name you want by typing it into the File Name box.

[Save Document](#)

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**IV**

**Document Management**

## 4.1 Document Set Details

You probably have noticed that the name of your document in the Document Name column is a link. Click the document name and a window appears that contains a lot of useful document management information. This information is called the Document Set Details.

### Rename Document Set

The first option that you see within the Document Set Details is the ability to change the name of this document set. In most cases when you initially create the document the system automatically assigns a default name to your document set and you realize later that the name the system assigned is not necessarily the most descriptive name. For this reason we have given you the ability to change the name of the document set after its completion. Please keep in mind by changing the name of the document you DO NOT affect the content of the assembled document(s) in anyway. You are effectively only changing the display name. Please consult your System Administrator before changing the name to ensure compliance with your organization's naming convention.

### Document Set ID

Directly below the Rename Document Set link you will see Document Set ID. You are probably asking yourself what is the Document Set ID? The Document Set ID is a unique ID that is assigned to each document set when it is created on the DocsEngine Portal System. This ID will be of no use to you on your normal day-to-day use, but can be very helpful should you ever need to contact AccuDraft Technical Support. By supplying your Technical Support Representative with the Document Set ID it will greatly assist him or her in isolating your technical issue, and increase the speed at which your technical issue is resolved.

### Documents in Set

Under the heading Documents in Set you will see that you have the ability to email one or all of the completed documents in the document set to anyone directly from the system. Next to the list of each document in the set is a link that says Email. Click this link and the Email Document Set window appears with fields for you to type the recipient's email address, subject and body. At the bottom of that window you will see an area to specify the document format. Depending on your security level you may have the ability to email the Microsoft Word (.doc) and Adobe Acrobat (.pdf) version of the document, or only the ability to email the Adobe Acrobat version (.pdf). Please keep in mind if you do not wish for the recipient to attain an edit able copy of the document(s) being emailed you should only send them the Adobe Acrobat (.pdf) version. Once you have specified all of the required information click Send and the email is on its way.

An alternative to using the Email link next to each document in the document set would be to email the entire document set at once. You will see another link directly below the Documents in Set heading that says Email Document Set. Click this link and the same window will appear with the same options that are described above, but instead of only emailing one document out of the set, the system emails the entire document set to the recipient. Regardless of which option you choose the document(s) will be delivered to the recipients as an attachment to a standard email.

### Document History and Notes

The last item on the Document Set Details screen is probably the first thing that caught your eye. There is a large table at the bottom of the screen that automatically records events as they happen with this document set. This is called the Document History table. This table is broken up into the Activity, Date, User and Note columns. Some of the different activities that you may see listed are: Interview Started, Interview Edited, Interview Completed, Document Created, Document Redrafted or Note. All of the previously listed activities are system generated with the exception of the Note activity. The Note activity is a brief message that is entered into the system by the user for communication with other users about this document set. To enter a note into the system click Add History Note and type your message in the Add History Note window that appears. Once you have completed your note click Add Note and your note will be added to the Document History table. The system will automatically capture the time and the user who entered the note and display that in the table as well.

**John Smith - Employment Contract**[Close Window](#)[Rename Document Set](#)

<b>Document Set ID:</b>	5240
<b>Document Type:</b>	Employment Contract
<b>Documents in Set:</b>	• Employment Agreement
	<a href="#">Email document</a>
<b>Remaining Redrafts:</b>	2
<b>Workflow Status:</b>	No Status
	<a href="#">Change Status</a>
<b>Answer File:</b>	
	<a href="#">View Answer File For This Document Set</a> (to download Right Click and select Save Target As)
<b>Document History:</b>	
	<a href="#">Add History Note</a>

<a href="#">Activity</a>	<a href="#">Date</a>	<a href="#">User</a>	<a href="#">Notes</a>
Document Created	11/8/2004 10:48:18 AM	John David	
Interview Completed	11/8/2004 10:16:36 AM	John David	
Interview Started	11/8/2004 10:02:10 AM	John David	

## 4.2 Document Search

Probably one of the most compelling feature of the DocsEngine Portal system is the ability to keyword search your document set(s). Now this is not something that you would necessarily use with a small number of document sets on the system, however; if you can imagine having 1500 document sets on your active documents tab which translates into 100 pages at 15 document sets per page you can quickly see how useful this tool is. To complete a document search follow these steps:

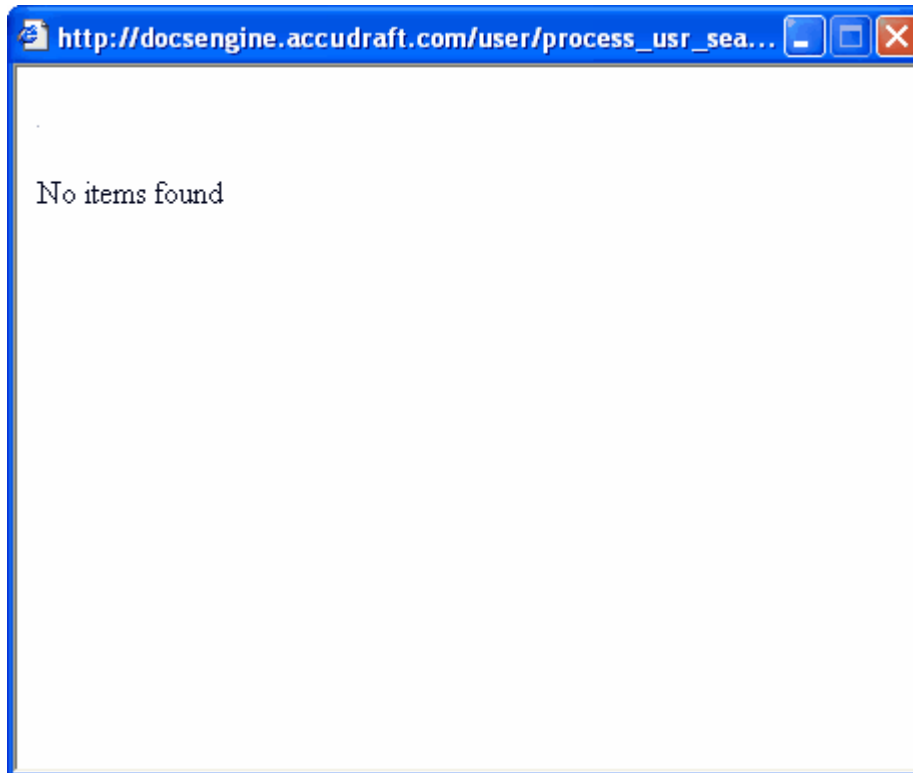
1. Click Document Search on the Main Menu.
2. Type a keyword in the Enter Keyword field.
3. Click Search.

**Document Search**  
**By Keyword**  
Enter Keyword

Upon completion of the search the system will automatically close the document search window and display the results on the Search Results Tab.

Document Name	Client	View/Save	Type	Created By	Date ▲	Status	Actions
<a href="#">John Smith - Employment Contract</a> <a href="#">Redraft</a>	John Smith	<ul style="list-style-type: none"> <li>▪ <a href="#">Employment Agreement</a></li> <li>▪ <a href="#">Word</a> <a href="#">PDF</a></li> </ul>	Employment Contract	John David	11/8/2004	None	<input type="checkbox"/>

In the event that your document search does not return any results the system will display No Items Found in the document search window. To close this window and start another search click the X in the top right hand corner of the window and repeat the 3 step process outlined above.



### 4.3 Document Set Workflow

There is nothing more bothersome and frankly annoying that not being able to figure out the status of a time sensitive project. This was one of the driving factors kept in mind when building the DocsEngine Portal System. To assist in this never ending quest for project status we have incorporated Document Set Workflow in the system. Document Set Workflow is a list of phases that are specified by your System Administrator that identify the different steps or milestones that a Document Set could currently be in. An example list of Document Set Workflow may be:

- Document Drafted
- In Review
- Sent to Client
- Signed by Client
- Approved

The status column on the Document Main Console displays the current Workflow Status of a particular document set. If no Workflow Status has been specified for that document set, the status column will display None. It is up to you as the end user to specify a Workflow Status for each document set created, however; depending on your security level you may not have the ability to set Workflow Status for a document set. Please consult your system administrator concerning this function.

Assuming you do have the proper security clearance to assign Workflow to a document set follow

these steps:

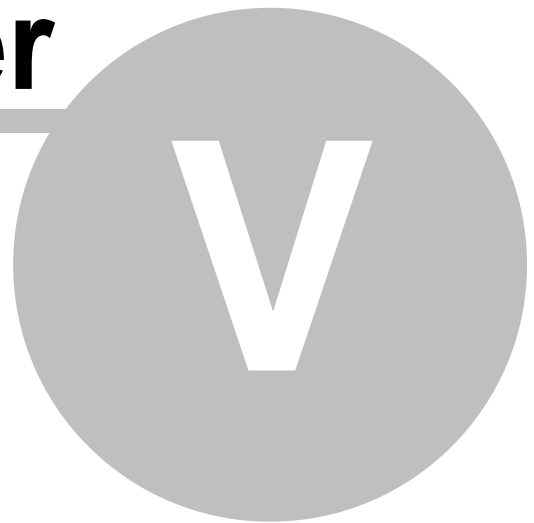
1. Open the Document Set Details by clicking your document name.
2. Click Change Status
3. Select a status from the Status Drop Down List.
4. Click Change.

The change status window will close and you will see that your status change has been reflected on the document main console. Again, keep in mind that it is up to you to change the status throughout the life of the document set, the system will NOT change the status automatically each time you change the document set.

**AccuDraft  
DocsEngine Portal**

**Chapter**

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**Advanced Document Creation**

## 5.1 Creating Patterns

Now that you have a general sense of how the DocsEngine Portal System functions and the capabilities contained within it, it is time to introduce you to the advanced document creation options. The DocsEngine Portal System has many advanced options that will assist you in your document creation process. We all realize that time is money and if you can create more documents in less time you have saved not only time, but assisted your organization is making more money.

The first advanced document creation option covered in this manual is a document pattern. To give you a little background the concept of a pattern comes from the popular HotDocs document assembly platform which is the platform used by DocsEngine. A pattern file is a file that is created with the intentions of answering certain questions in a document interview that will remain constant for a long period of time. A time when a pattern file may be created would be in a situation where you have 5000 documents to create for the same client. All 5000 times this client will have the same name, address, telephone number, social security number, etc. and it would be a lot of work to input the same information 5000 times, so with a pattern file you can input the constant information one time and create your 5000 unique documents based off of the one pattern file. Each time you choose to create a document based off of the pattern file any data that you have pre-specified will automatically be merged into the document interview.

Creation of a Pattern file is very similar to new document creation. From the main menu click Create Pattern. Once arriving at the Create Pattern screen you will be asked to select a Document Group and Document Type just as if you were creating a new document. For a detailed description of a Document Group please see the "Document Group(s)" section of this manual and for a detailed description of a Document Type please see the "Document Type(s)" section in the "New Document Creation" chapter.

After making your selections you will be asked how you would like to create this pattern. Most times you will choose that to create this pattern from scratch, however; occasionally you may want to create this pattern based on another pattern or a previous set of answers. If you choose one of these two options any answers that were specified in either the selected pattern file or previous answer set will be pre-filled in this interview.

After you make your creation selections type a name for your pattern file and click Proceed to Interview. The interview load and you can begin inputting data for this pattern file. The biggest difference between creating a pattern file and creating a new document set is that there is NO validation in the pattern interview. When creating a new document set the system will not allow you to assemble if there are questions that have been left unanswered, however; in a pattern interview the system knows that you probably don't want to answer all of the questions and will allow you to submit with as many or as few answers specified as you wish.

## 5.2 Creating Documents from a Pattern

Now that you have successfully created a pattern file it would probably be helpful to figure out how to use it. You have probably noticed that pattern file you created displays in the Document Main Console similar to a document set, but in the View/Save column instead of seeing document access links it just says Pattern. This is the way that you determine a pattern file from a document set.

To create Document(s) from a Pattern click Create Document and begin supplying the appropriate information as described in the "New Document Creation" chapter of this manual. Down toward the bottom of the Create Document screen you will notice a section of Advanced Options.

## Advanced Options

### How do you want to create this document?

- From scratch
- From a pattern
- From another set of answers

SELECT PATTERN NAME

First Pattern

SELECT ANSWER SET

John Smith - Employment Contract - Employment

Robert Jones - Employment Contract - Employmen

Proceed to interview

To create this document based on your pattern click the button next to From a Pattern and then select the pattern name from the list provided to the right.

- From a pattern

SELECT PATTERN NAME

First Pattern

Click Proceed to Interview and the document interview will load with any pre-input data that is specified in the pattern plan you selected. After reviewing that the correct information has been loaded continue by specifying all of the additional information needed to create the document.

## 5.3 Creating Documents from Another Answer Set

Creating documents from another answer set is very similar to the concept of creating documents from a pattern. The difference is that creating documents from another answer set means that you are creating this document based on a previously created document in stead of a pattern file. An example of when you would use this may be if you have one client who you sold a computer system to and you also sold the same client a office security system. All of the personal information for that client would be the same so you can create the office security system contract based on the computer system contract and changes the parameters to reflect office security system instead of computer system. The biggest difference between this and a pattern file is that when you create a document based on another answer set, ALL of the answers will be transferred over when as with a pattern file only certain questions are pre-answered.

To create Document(s) from a Pattern click Create Document and begin supplying the appropriate information as described in the "New Document Creation" chapter of this manual. Down toward the bottom of the Create Document screen you will notice a section of Advanced Options.

### Advanced Options

How do you want to create this document?

- From scratch
- From a pattern
- From another set of answers

SELECT PATTERN NAME  
 First Pattern

SELECT ANSWER SET  
 John Smith - Employment Contract - Employment  
 Robert Jones - Employment Contract - Employmen

Proceed to interview

To create this document based on another answer set click the button next to From another set of answers and then select the document set name from the list provided to the right.

- From another set of answers

SELECT ANSWER SET  
 John Smith - Employment Contract - Employment  
 Robert Jones - Employment Contract - Employmen

Click Proceed to Interview and the document interview will load with all the data that is contained in the answer set you selected. After reviewing that the correct information has been loaded continue by changing any information that requires attention to create a new document.

## 5.4 Editing Patterns

You have created a pattern but now realize that you need to change a question or add more information to it, but how do you do that? You have probably noticed that pattern file you created displays in the Document Main Console similar to a document set, but in the View/Save column instead of seeing document access links it just says Pattern. Below the pattern name you see an Edit Button. Click Edit to make changes to the pattern file.

First Pattern	Pattern	Employment Contract	John David	11/8/2004	None	<input type="checkbox"/>
<input type="button" value="Edit"/>						

The system will load the pattern interview and allow you to make any changes or additions that you deem necessary. Once you are satisfied with the modifications you have made to your pattern click Submit and your changes will be saved. The next time you create a document based on this pattern any modification you have made will be reflected. For additional information on the concept of a document pattern, please see the "Creating Patterns" section of this manual.

## 5.5 Modifying Existing Document Set(s)

You have created a document set but now realize that you need to change a question or add more information to it, but how do you do that? Below the document set name you see either a Continue or Redraft Button. If the document set has been completed and you have access to the assembled document(s) the button will say Redraft, on the other hand if the document set is not complete in which case the View/Save column will say not complete the button will say Continue. In either case to modify the document set click the button that is directly below the document set name.

<a href="#">Robert Jones - Employment Contract</a> <a href="#">Continue</a>	Robert Jones	Not Complete	Employment Contract	John David	11/8/2004	None	<input type="checkbox"/>
<a href="#">John Smith - Employment Contract</a> <a href="#">Redraft</a>	John Smith	▪ Employment Agreement <a href="#">Word PDF</a>	Employment Contract	John David	11/8/2004	None	<input type="checkbox"/>

The system will load the document set interview and allow you to make any changes or additions that you deem necessary. Once you are satisfied with the modifications you have made to your document set click Submit and your changes will be saved and the assembled document will also be updated with these changes.