CONTRACT EXPRESS

How to

Create Expertise Automation questionnaires

Overview

In Contract Express 8.5, new Expertise Automation capabilities were introduced.

This guide provides a brief introduction to Expertise Automation and explains how to author and manage flowchart templates.

Introducing Expertise Automation

Like document automation, users complete an online questionnaire but instead of generating a document as the output the user will be presented with a bespoke final screen containing guidance relevant to their answers.
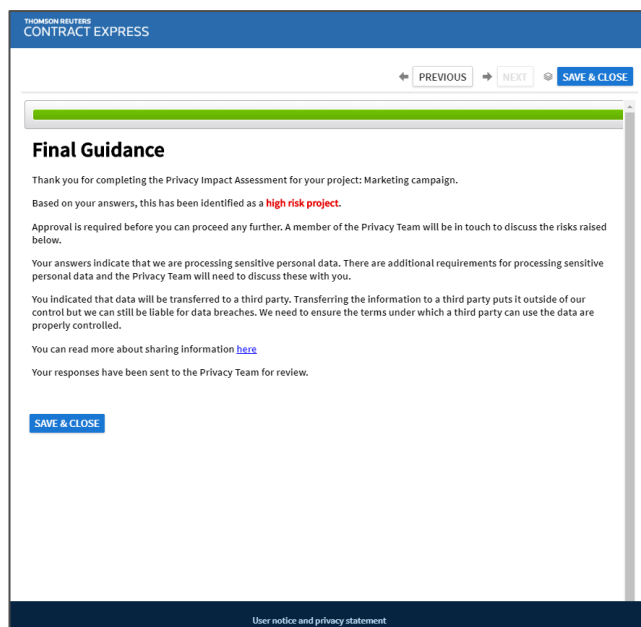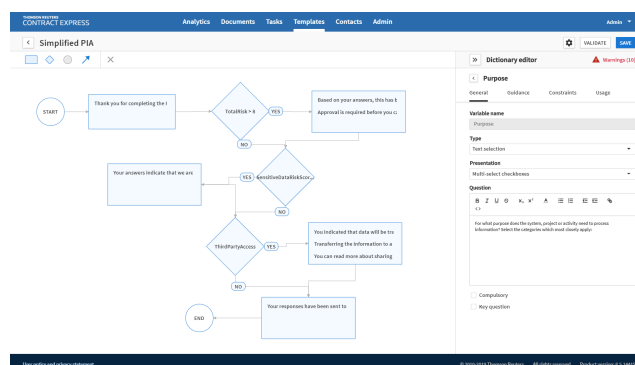

Authoring flowchart templates

Expertise Automation questionnaires and their outputs are created using a **new flowchart template type**.

Flowchart templates are created via an online authoring tool that contains two core elements:
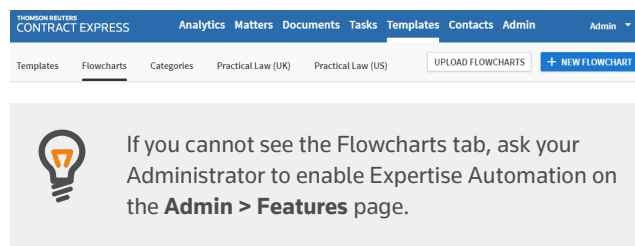
- **Flowchart builder** – to visualise the questionnaire logic and outputs.

- **Dictionary editor** – to define and order the questionnaire elements.

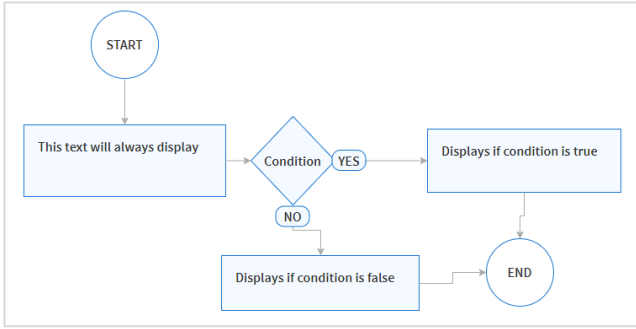## Creating a template

To create a new flowchart template:

1. Go to the **Templates** page.

2. Select the **Flowcharts** tab and click the blue **New Flowchart** button.

If you cannot see the Flowcharts tab, ask your Administrator to enable Expertise Automation on the **Admin > Features** page.

Using the flowchart builder

The flowchart builder is used to define the rules that determine what will display on the questionnaire's final guidance page, and to author that guidance.

The flowchart builder uses four shapes.

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- **Rectangles** contain guidance text.

- **Diamonds** define the rule or condition that determines when guidance will be displayed.

- **Circles** are the Start and End shapes.

- **Arrows** are used to connect two shapes.

Adding shapes to the flowchart area

Drag the shape from the toolbar and drop it at the desired position in the flowchart area.
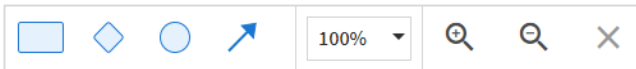
To attach an outgoing **connector arrow** to an existing shape, select the shape in the flowchart area and click on the arrow icon in the toolbar.

To attach the end of a connector arrow to another shape, click on the arrow, select the grab point at the relevant end and drag it towards a shape. When the connector is in position, the shape's border will turn green.

Adding text to shapes

Double click on a shape to add or edit text.

You can use active text (i.e. variables) within a shape to display the questionnaire answer in the final guidance. For example:

Thank you for completing a Privacy Impact Assessment for {ProductName}.

When you add active text to a shape, a corresponding variable will be added to the dictionary, if it is not already there.

When editing a **guidance rectangle**, a rich text editor opens on the toolbar to enable formatting the text.
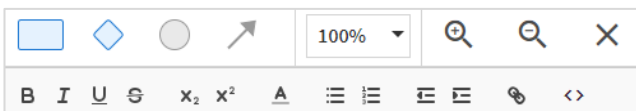
When adding a rule to a **condition diamond**, you should use the same business rule expressions as you would for spans in Word-based templates.

For example, a business rule based on the answer to a text selection variable might look like:

VariableName is "Answer A"

For more information about business rule expressions, see the *Contract Express Author Getting Started Manual*.

Condition diamonds are boolean. When attaching the outgoing connector arrows, you will need to click on the arrow in the toolbar twice to add the 'Yes' and 'No' connectors in turn.

Contract Express validates the flowchart in real time as you build it. If an error is identified, the relevant shape will turn red until the error has been corrected.

You can also see a list of all unresolved errors by clicking on the **Warnings** link above the dictionary editor.

Using the dictionary editor

The dictionary editor is used to define and manage the template variables and organize the questionnaire pages. Access this through the double arrows next to the 'Dictionary Editor' heading on the right.

Adding variables

Click on **New variable** to manually add a variable to the dictionary. Variables are also added automatically to the dictionary when active text is used within a shape.


Editing variables

Click on the **cog** next to the variable name to edit its attributes. For more detail about variable attributes, see the *Contract Express Author Getting Started Manual*.
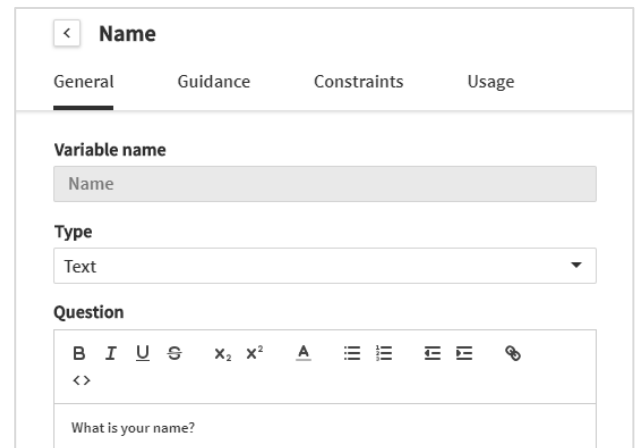
Organizing the questionnaire pages

Use the dropdown at the top of the dictionary editor to switch between editing the variables and organizing the questionnaire pages.

To add pages and groups to the questionnaire, click on **New page** or **New group** as appropriate. Click on the corresponding **cog** to edit the attributes.
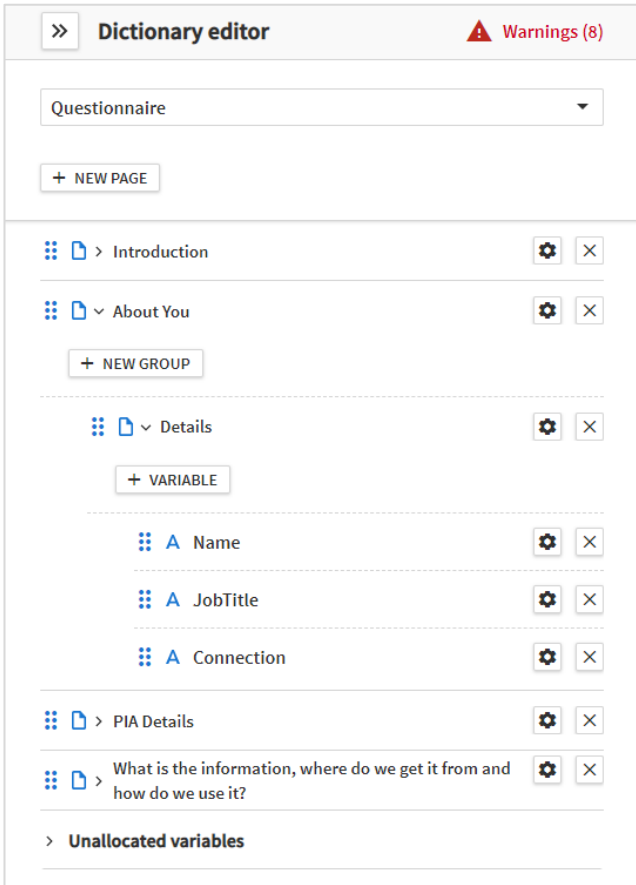

To add a variable to a group, select **+ Variable** and start typing the name of the desired variable. Click on the blue tick to add the selected variable.
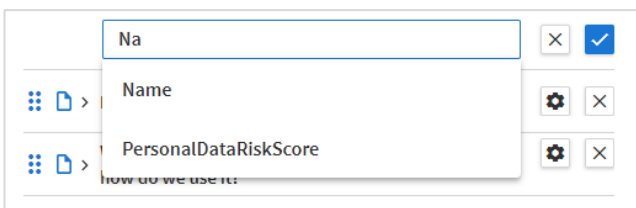
You can change the order of pages, groups and variables by selecting the blue dots ⠿ and dragging the item to the desired location.

Setting the template properties

To set the template properties, click on the **cog** above the dictionary editor.
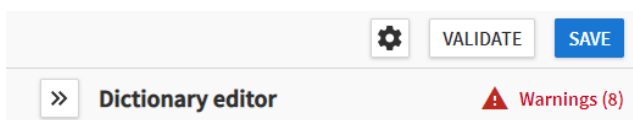
Enter details as appropriate:

- **Generated document name** (mandatory) – the name that will be given to each completed questionnaire on the Documents page. For example:

    PIA response from {Name} for {ProductName}

- **Version** (optional) – used to identify different versions of a template; if left blank, the 'save' timestamp will be used.

- **Description** (optional) – displayed on the Templates page and when selecting a template to launch a new questionnaire.

Managing flowchart templates

Flowchart templates are managed in the same manner as Word-based templates. You can add alerts, assign profiles and configure other properties.

This section covers the profile settings that are specific to flowchart templates and Expertise Automation.

For standard template actions, see the *Contract Express Admin Manual*.

Assigning a profile

When Expertise Automation is enabled, a profile titled *ExpertiseApp* will be added automatically to your license space.

This profile contains our recommended configuration for flowchart templates. You can edit or clone the profile and apply it to your flowchart templates as desired.

Final Guidance

A new Final Guidance section has been added to Profiles. It contains three settings that can be enabled to test your questionnaire logic.

Include unresolved guidance messages on the final guidance page

When enabled, a Provisional Guidance page will display in place of the Final Guidance page, if any questions that determine relevance have not been answered.
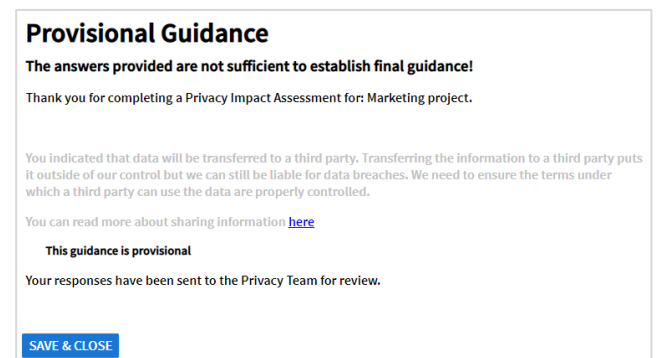
Include irrelevant guidance messages on the final guidance page

When enabled, all guidance will display on the final guidance page, with the irrelevant guidance struck through.

Show those values that contribute towards each guidance message

When enabled, the questions and answers that determined a specific guidance message to be relevant are displayed below that guidance.

Generating an answer document

When Expertise Automation is enabled, a Word template titled *ExpertiseAppGuidance* will be added automatically to your license space.

You can add this template to your Expertise Automation profile to generate a Word or PDF document of the final guidance, in addition to displaying it as the final page of the questionnaire.

You can edit the template as needed to change the layout and formatting or to add your company logo, for example.

To add an answer template to a profile:

1. Go to **Admin > Profiles**

2. Select the profile

3. Search for **Template reference of answer document(s)**

4. Add the Template Reference (template name)

5. Apply a Guest restriction, if desired

6. **Save**

Further information

For further information about Expertise Automation and flowchart templates, please see the *Contract Express Admin Manual*.

If you require any assistance, please contact our support team at contractexpress-support@tr.com.