



# Glossary

## Key Terminology

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## 1.1 Alias

An alternate reference to a field/section/form. The purpose of an alias is to enable data pooling and the operation of autofill features.

## 1.2 Builder

A user who has system access to both build and fill in forms. A builder does the work of developing forms and creating document templates.

## 1.3 Calculation

A field that can use or manipulate entered data and produce additional data or extract data. A calculation can be applied to any type of data and can perform many functions including mathematical calculations and identification of data fragments.

## 1.4 Child Form

A form that depends on a higher-level parent form so that it can share some, most or all of the same data from its questionnaire.

## 1.5 Clone

To make an independent copy of a field, section, form or submission.

## 1.6 Conditional

Having rules or logic applied to control behaviour. Conditional logic relies on an "if" statement and the data that is put into the form to determine the behaviour of the form.

## 1.7 Contact

An entry in the contact address book. A contact may be manually entered into Smarter Drafter or imported from an integrated system.

## 1.8 Contact Mapping

A feature which connects form field labels to contact labels, so that a form can be auto-filled with contact data.

## 1.9 Data pooling

A feature that pulls data from one form to populate fields in another form. It works irrespective of what matter either form belongs to.

## 1.10 Data sharing

Entering data about roles while generating a document and then reusing it in subsequent documents.

## 1.11 Draft

The initial status of a new form is unversioned mode, before it is converted to draft mode. A form will remain in draft until it has been formally published. If a form has been published and released, a builder can amend the form by creating a draft version. The builder can work on the new draft while fillers continue using the current published version to generate documents. When the builder publishes the new draft, fillers will then generate documents using the updated version.

## 1.12 Embedded form

A form created in Smarter Drafter can be placed on another website. This is done by using a script (or embed code) from the Smarter Drafter application to make the form appear to be part of the host website.

## 1.13 Envelope

A container for a form being sent for e-signature.

## 1.14 E-Signature

The digital signing of a document. Forms can be setup with default e-signature functionality within the automation or documents can be prepared and sent manually.

## 1.15 Expression

The written form of code used in logic, named ranges and calculations.

## 1.16 Field

A question or statement within a form.

## 1.17 Filler

A user who only has filler access to forms (cannot build).

## 1.18 Form

A questionnaire to gather required data.

## 1.19 Generate

The process of submitting a form and generating the Word template to produce a custom automation of the form based on the filler's answers.

## 1.20 Global Form

A form that can be used within unlimited other forms but is maintained in its single existence.

## 1.21 Global Template / Dynamic Snippet

A template that can be used by unlimited other forms but is maintained in its single existence.

## 1.22 Group

A set of users with common usage and access requirements. This allows settings to be given to the group, saving the time it would take to make the adjustments per user.

## 1.23 Intake Form

A link to a form that can be sent to an external email for completion and returned to the sender for submission.

## 1.24 Logic

Rules to control behaviour in the form. Logic creates a branch in the direction of the form, showing or hiding fields based on the answers given. For example, if a form filler has been shown a question about whether they are an individual or a company and they select company, a question requesting the company identifier can be shown. If they indicate that they are an individual, the company identifier is irrelevant and the question does not need to be shown.

## 1.25 Master form

Collecting all data about a matter in one 'master' form and updating it as new information comes to hand. A master form would be created for each practice area and serve as the source of the truth for data sharing and data pooling.

## 1.26 Named Range

Named ranges (also referred to as rules) are created to control how the document handles multiple choice answers that the user provides in a form.

## 1.27 Naming Convention

Best practice guidelines for creating labels and tiered structures. Naming conventions are created by the organisation and reflect the organisation's preferences and priorities.

## 1.28 Operator

The controlling factor of a condition, for example: equals, does not equal, greater than.

## 1.29 Option Set

A list of options that are offered to a form filler as radio buttons, drop-down selection lists or checkbox fields.

## 1.30 Parent Form

A high-level form that can share its questionnaire with 'child' forms that require some or all of the same data.



### 1.31 Preview

A testing tool for builders to generate a form.

### 1.32 Published

The current version of a form that a filler can use to generate a document.

### 1.33 Released/Public

Making a form 'live' for form fillers to see and use in the published forms collection. Forms can be published but won't be seen until they are set to public.

### 1.34 Replacement Rule

A set of 'find and replace' rules that are automatically run during the submission of a form and generation of a document. Replacement rules can be created to work across all forms in the organisation and they can be created to apply to one document.

### 1.35 Role

A label that is used to categorise users. The feature can be used to associate data with that 'role', so that it can be reused.

### 1.36 Role Mapping

Using assigned roles to link fields. Connecting fields to roles enables data entered to be auto-populated into other forms where the same role data is required.

### 1.37 Rule

Condition/s applied to control subsequent behaviour.

### 1.38 Section

A container within a form that holds fields.

## 1.39 Submission

A form that has been submitted is stored as a submission in Smarter Drafter. Submissions can be opened and reviewed in the submissions list.

## 1.40 Supporting text

The short helpful hints that sit immediately below fields in the form guiding users on how to respond to the question.

## 1.41 Template

The coded/automated Word document attached to a form. The template is turned into a document when data is added to it through a form submission.

## 1.42 Unversioned

The initial state of a form before it is given either draft or published status.

## 1.43 Upload

The process of attaching a Word template to a Smarter Drafter form.