

Introduction

Welcome to the Leaflet™ Document Automation Platform! Here you will find the information you need to log into the system and begin using it. Should you have any questions or need assistance at any point throughout this process, please do not hesitate to contact us.

Below is your login information with a temporary password. Please note that your password is case sensitive. When you log in to Leaflet for the first time, you will be prompted to change your password.

Client Site:	https://sandbox.leafletcorp.com:8923/bl/home.htm
User Name:	
Login:	
Password:	Generated for Each User

Setup Process Summary

To begin using Leaflet, you will need to adjust a few settings on your machine. Leaflet's OCP process will make those changes for you automatically. Please see below for OCP installation instructions.

Contact Information

	Phone	Email
General Information	(888) 489-1800	info@leafletcorp.com
Customer Support (available 24/7)	(888) 489-1800 x100	support@leafletcorp.com

Leaflet User Classification Guide

Publisher – Access to all aspects of the Document Assembly Automation

Leaflet Publisher Users have access and privileges to all areas of the platforms document automation. Users can create, edit and publish templates, as well as clause libraries. They have authorized access to the following areas;

- Template Factory - Template Authoring/Automation of MS Word and Excel Templates
- Live Drafting - Interactive drafting, viewing, editing of MS Word Documents and live content for answering interview questions
- Clause Library - During Template Automation and Live Drafting
- Leaflet Factory - Create and publish Web forms into Portals (Microsites™) and provide access to external clients
- Collaborative and Self Service Drafting
- Signature Package Extraction, eSignature Integrations
- Admin Access to Reports and Configurations
- Email Notifications

Professional – Access to all aspects of the Services including Clause Libraries except for Template and Leaflet Factory

Leaflet Professional Users have access, and privileges to all areas of the platforms document automation except for Template and Leaflet Factory. They have authorized access to the following areas;

- Live Drafting - Interactive drafting, viewing, editing of MS Word Documents and live content for answering interview questions
- Clause Library - During Template Automation and Live Drafting
- Collaborative and Self Service Drafting
- Signature Package Extraction, eSignature Integrations
- Limited Admin Access to Reports and Configurations
- Email Notifications

Business – Access to Microsites and Published Web Forms

Leaflet Business Users have limited access and privileges to the platform's document automation. Users view Leaflets and respond to questions within the web forms and assemble documents in a Self Service or Collaborative mode. They have authorized access to the following areas;

- Collaborative and Self Service Drafting with Guidance via Microsites™
- Ability to create and download MS Word or PDF Documents
- Ability to participate in document creation workflow
- eSignature Integrations
- Email Notifications

Leaflet OCP Installation Guide

INTRODUCTION

This guide will show you how to publish Leaflet's Installation Application with one click publishing. One click publishing is a Microsoft process, which allows you to publish Windows-based applications to a web server for simplified installation.

TECHNIQUES USED

We are using visual studio for publishing and updating the application.

REQUIRED SYSTEM CONFIGURATION TO RUN OCP (ONE CLICK PUBLISHING)

The Leaflet Initializer OCP requires the following system configuration to operate:-

- Windows : Windows 7, Windows 8, or Windows 10 supporting 32bit or 64 bit OS.
- MS Office : Office 2007, Office 2010, Office 2013, Office 2016 supporting 32 bit.
- Browser : Internet Explorer(IE), Chrome

The Leaflet Initializer OCP with MSI operates in Microsoft .net framework 4.5(x86, x64). If your system does not support this environment use the below link to download and install.

<https://www.microsoft.com/en-us/download/details.aspx?id=30653>

CLICK ONE APPLICATIONS (OCP)

A click one application can be installed on end-user's computer and run locally even when the computer is offline.

It will ask for the following:

1. Fresh Installation

A fresh OCP installation will:

- a. Install required components. (For this we use MSIs (Edraw/Native word) which are kept in the corresponding Server URLs and run silently).
- b. Display a summary with installation status.
- c. Prompt for SSO (Single Sign-On) or Browser Application Login and redirect according to the user's choice.

While conducting a Fresh OCP installation, OCP will check if the user has administrative privileges. If the user does not have admin rights, a message will be displayed and the installation process will be terminated.

2. On Going Installation

This installation is going to be the default for most users. It will:

- a. Check all the required components and settings to verify whether they are already installed in the system. If the user has more than one components (Edraw, Native word) a message will prompt the user to select which one they want to use.
- b. If there is an error, display an installation status summary, with error information.

- c. If something fails, a radio button will appear on the Leaflet Initializer Page allowing a user to run or install settings. If MSIs are not installed, a notification will appear. Clicking on install button will download the MSIs in the background.
- d. Display the summary with an updated status.
- e. Prompt for SSO or Application Login and redirect according to the user's choice.

3. Repair Installation

Repair Installation will:

- a. Search for existing components installed on the system. Display a prompt showing components found (Edraw, Native Word 32-bit, Native Word 64-bit), and ask if the user wants to proceed.
- b. Re-install selected components. (For this you can use MSIs which are kept in the corresponding Server URLs which will run in the background)
- c. Display summary with status.
- d. Prompt for SSO or Application Login and redirect according to the user's choice.

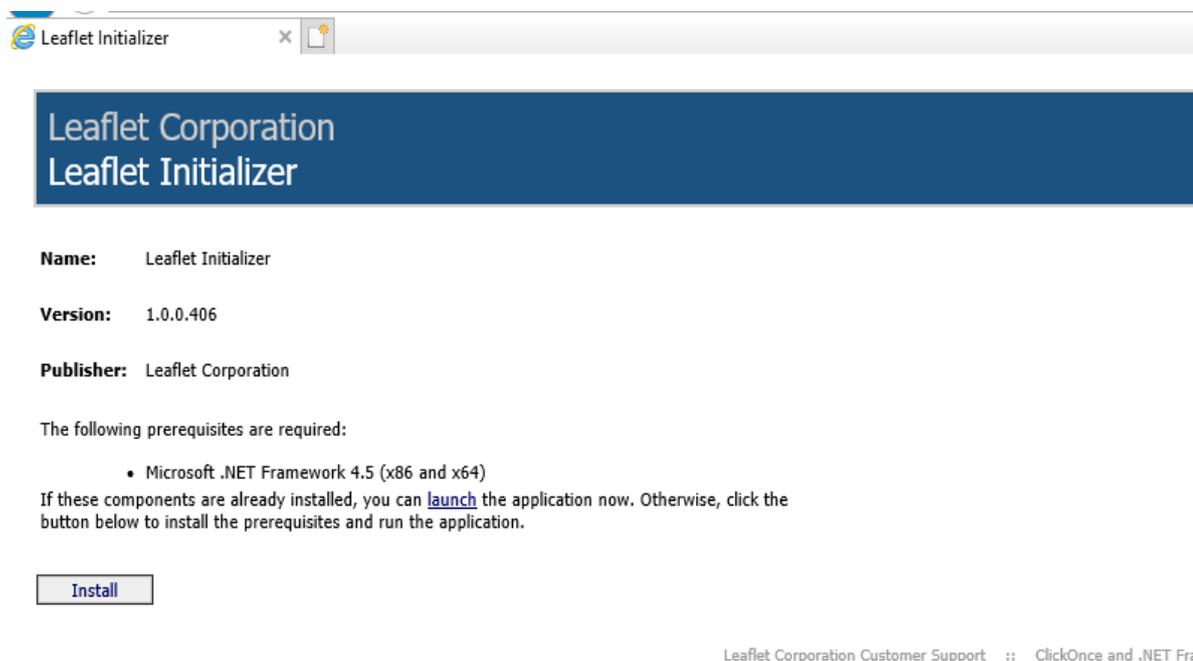
In Repair Installation, we will check if the user is an admin or not. If the user hasn't got admin rights, a message will be displayed and the process will be terminated.

INSTALLATION VIA OCP

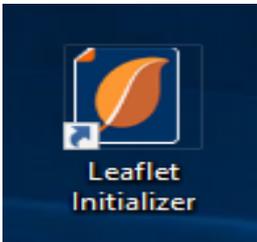
When user wants to run OCP on their local computer they connect go through the link provided for the OCP:

1. Type following URL into your browser.

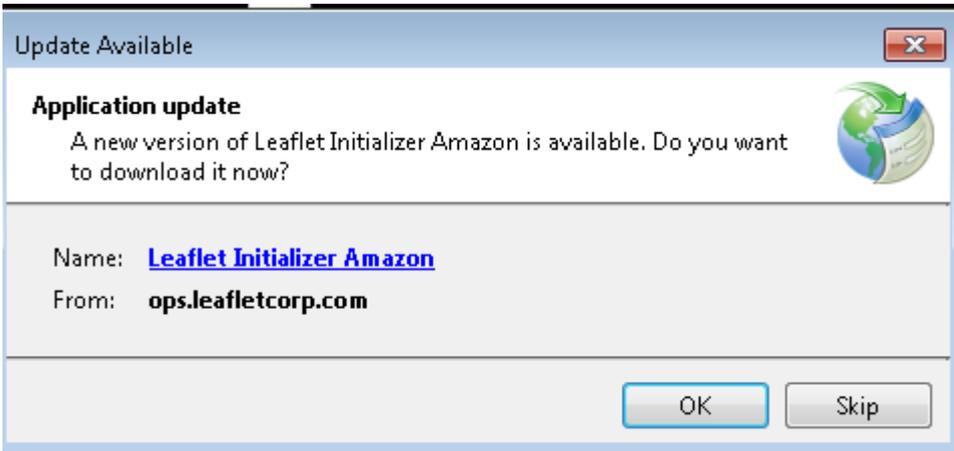
<https://sandbox.leafletcorp.com:8923/bl/analyzer/ocp/index.html>



This URL will install OCP in your local temp folder and create a desktop shortcut named "Leaflet Initializer" and an icon in the start menu.

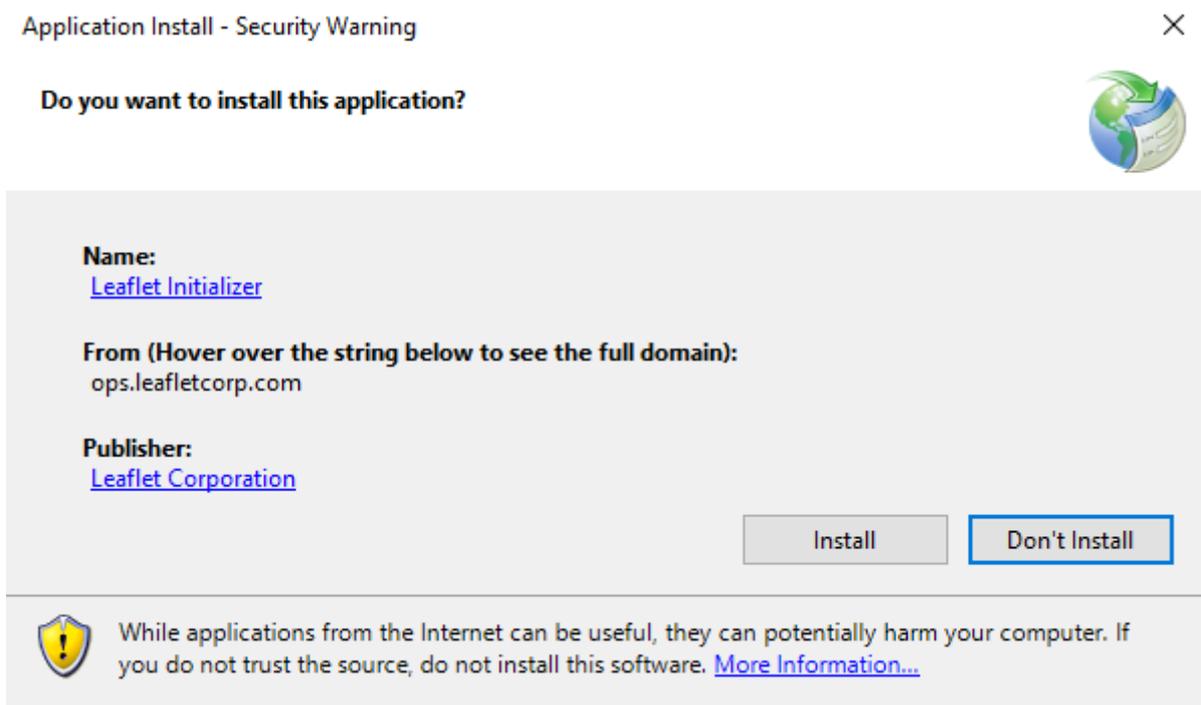


2. Clicking on this icon will first check the server for updates to the application i.e. whether a newer version is deployed to server.



Click on "Ok" to install the latest OCP version.

3. When prompted by the pop-up to Run/Save setup.exe from "ops.leafletcorp.com", the following application installation page will appear :

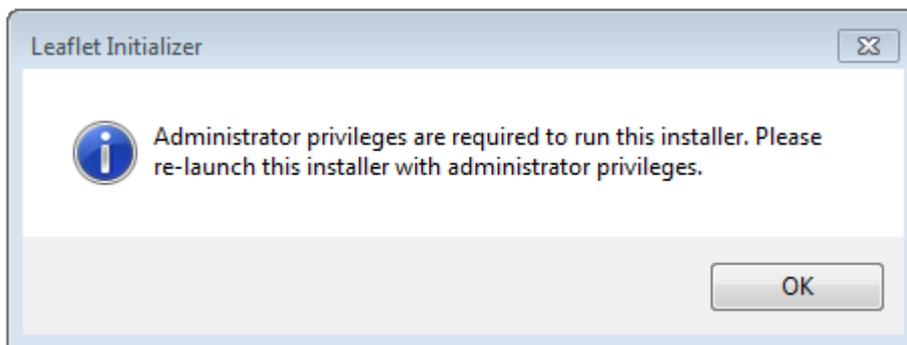


4. Click on install to start the application installation process on your system.

5. Next a “Select your installation Choice” page will appear. Select the required option, and the installation will redirect according to user’s selection.

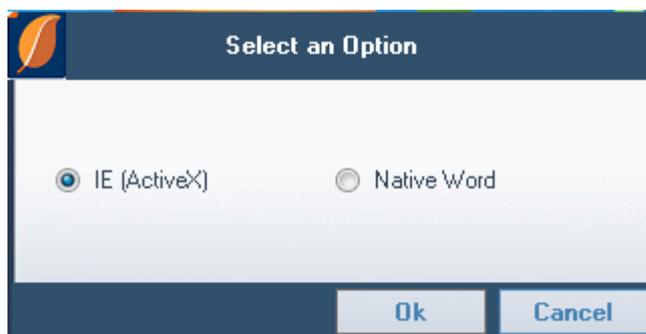


Fresh: After clicking on OK with ‘Fresh’ option selected, the installation will check if the user has administrative privileges. If the user does not then notification below will appear and normal users will be unable to proceed to the next step. If user is an admin, the installation process will continue as normal.



6. The next pop-up “Select an option” will appear. The user is asked to identify the Leaflet workspace, either Edraw (ActiveX) or Native word. Selecting an option will install corresponding components. (For this we use MSIs which are running silently in the corresponding Server URLs).

- (a) **IE (ActiveX):** After clicking on “OK”, Edraw MSI setup will be silently installed, all necessary settings in word will be modified and the trusted sites and office plugins will be validated. Now, it will ask for SOAP SDK installation.



After the installation of the SOAP SDK, the “Leaflet Initializer” page will appear:



Leaflet Initializer

Initializing...

Operating System :	Microsoft Windows 7 Professional (32-bit)	
Office Version:	2010 (32-bit)	
Internet Explorer :	11.0.9600.19155	
Internet Explorer Settings :	Done	
Microsoft Office Settings :	Done	
Office Viewer :	Installed	
Microsoft Soap SDK :	Not installed	Install Microsoft
Validate Trusted Site :	Done	
Validate Office Plugins :	Done	
Workspace Cleanup :	Cleaned	
Office Plugins :	Office Plugins are downloaded	

[RUN AGAIN](#)

[CANCEL](#)

please contact to administrator



Click on “Install Microsoft” button and complete the installation process.



Leaflet Initializer

Installing...

Operating System :	Microsoft Windows 7 Professional (32-bit)
Office Version:	2010 (32-bit)
Internet Explorer :	11.0.9600.19155
Internet Explorer Settings :	Done
Microsoft Office Settings :	Done
Office Viewer :	Installed
Microsoft Soap SDK :	Installed
Install Microsoft	
Validate Trusted Site :	Done
Validate Office Plugins :	Done
Workspace Cleanup :	Cleaned
Office Plugins :	Office Plugins are downloaded

SOAP is successfully installed

[RUN AGAIN](#)

[CANCEL](#)

[please contact to administrator](#)

Click on "Run Again".



Leaflet Initializer

Installing...

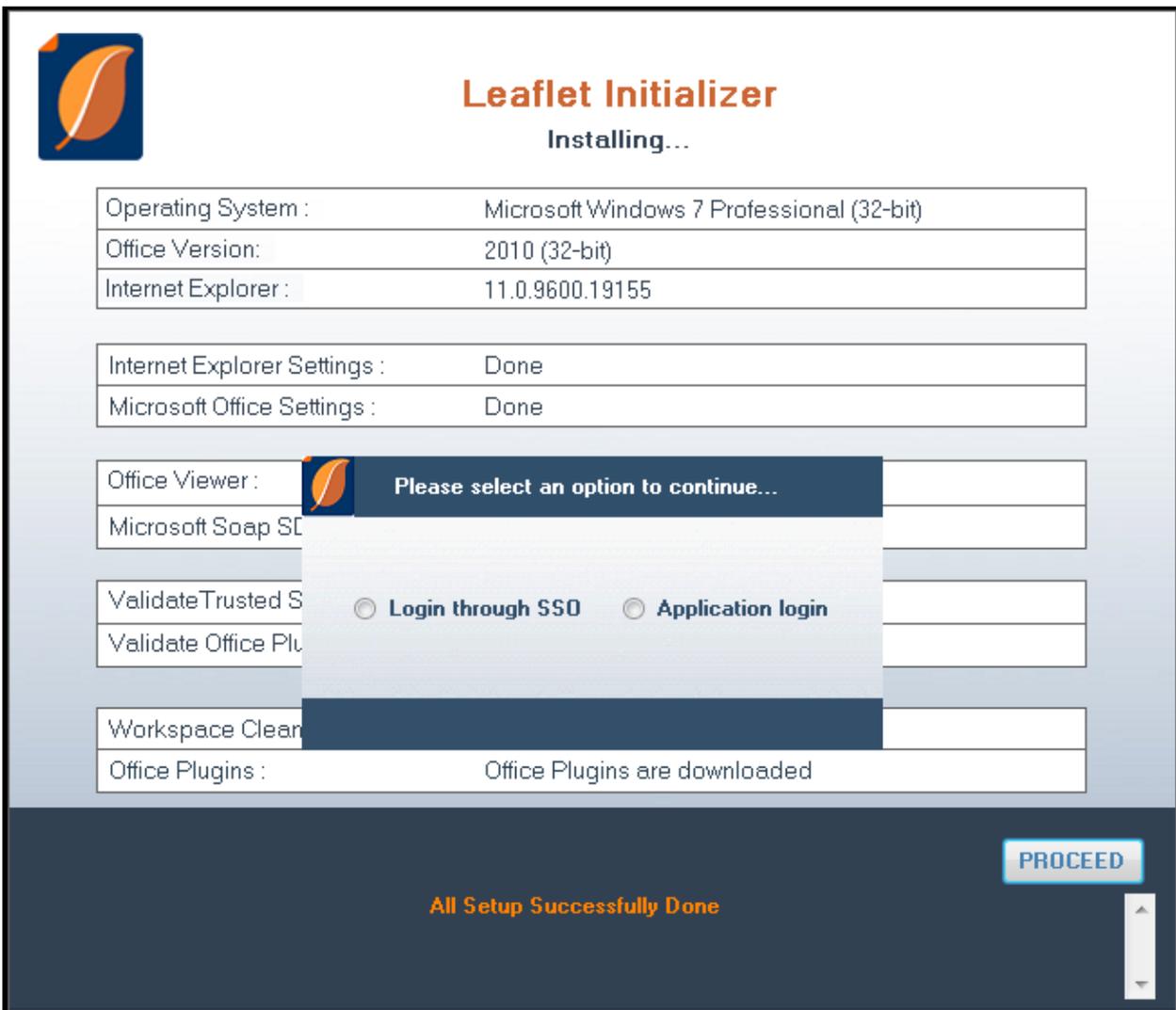
Operating System :	Microsoft Windows 7 Professional (32-bit)
Office Version:	2010 (32-bit)
Internet Explorer :	11.0.9600.19155
Internet Explorer Settings :	Done
Microsoft Office Settings :	Done
Office Viewer :	Installed
Microsoft Soap SDK :	Installed
ValidateTrusted Site :	Done
Validate Office Plugins :	Done
Workspace Cleanup :	Cleaned
Office Plugins :	Office Plugins are downloaded

PROCEED

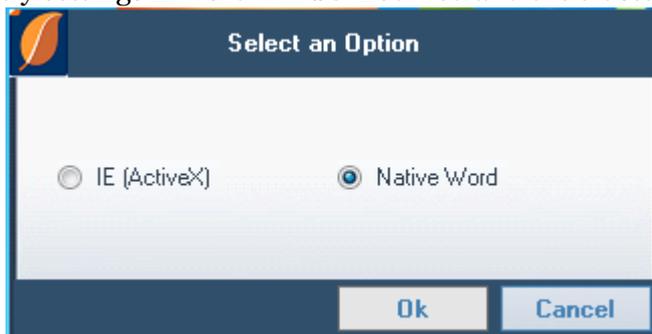
All Setup Successfully Done



Click on proceed button.



(b) **Native Word:** After clicking on “OK”, the Native Word MSI setup will be silently installed, all necessary settings in word will be modified and the trusted sites and office plugins will be validated.



Now, the “Leaflet Initializer” page will appear:



Leaflet Initializer

Initializing...

Operating System :	Microsoft Windows 7 Professional (32-bit)
Office Version:	2010 (32-bit)
Internet Explorer :	11.0.9600.19155

Microsoft Office Settings :	Not Completed	Run Settings Again
Microsoft Soap SDK :	Not installed	Install Microsoft

Leaflet Launcher	Not Installed	Install Launcher
Word Add-In	Inprogress	
Excel Add-In	Inprogress	

Workspace Cleanup :	Cleaned
Office Plugins :	Office Plugins are downloaded

Message: Leaflet is unable to install Microsoft Soap SDK. Please click on "Install Microsoft Soap SDK" button to install.

RUN AGAIN

CANCEL

please contact to administrator



Click on "Install Microsoft" button and complete the installation process.



Leaflet Initializer

Installing...

Operating System :	Microsoft Windows 7 Professional (32-bit)
Office Version:	2010 (32-bit)
Internet Explorer :	11.0.9600.19155

Microsoft Office Settings :	Not Completed	Run Settings Again
Microsoft Soap SDK :	Installed	Install Microsoft

Leaflet Launcher	Not Installed	Install Launcher
Word Add-In	Inprogress	
Excel Add-In	Inprogress	

Workspace Cleanup :	Cleaned
Office Plugins :	Office Plugins are downloaded

SOAP is successfully installed

RUN AGAIN

CANCEL

please contact to administrator



Click on "Install Launcher" button.



Leaflet Initializer

Installing...

Operating System :	Microsoft Windows 7 Professional (32-bit)
Office Version:	2010 (32-bit)
Internet Explorer :	11.0.9600.19155

Microsoft Office Settings :	Not Completed	Run Settings Again
Microsoft Soap SDK :	Installed	Install Microsoft

Leaflet Launcher	Installed	Install Launcher
Word Add-In	Installed	
Excel Add-In	Installed	

Workspace Cleanup :	Cleaned
Office Plugins :	Office Plugins are downloaded

Word Addins are successfully installed

RUN AGAIN

CANCEL

please contact to administrator

Now, click on “Run Settings Again”.



Leaflet Initializer

Launching...

Operating System :	Microsoft Windows 7 Professional (32-bit)
Office Version:	2010 (32-bit)
Internet Explorer :	11.0.9600.19155

Microsoft Office Settings :	Done
Microsoft Soap SDK :	Installed

Leaflet Launcher	Installed
Word Add-In	Installed
Excel Add-In	Installed

Workspace Cleanup :	Cleaned
Office Plugins :	Office Plugins are downloaded

PROCEED

All Setup Successfully Done



Once all set up is done, click on “Proceed” button.



Leaflet Initializer

Launching...

Operating System :	Microsoft Windows 7 Professional (32-bit)
Office Version:	2010 (32-bit)
Internet Explorer :	11.0.9600.19155

Microsoft Office Settings :	Done
Microsoft Soap SDK :	Installed

Leaflet Launcher	 Please select an option to continue...	
Word Add-In		
Excel Add-In		

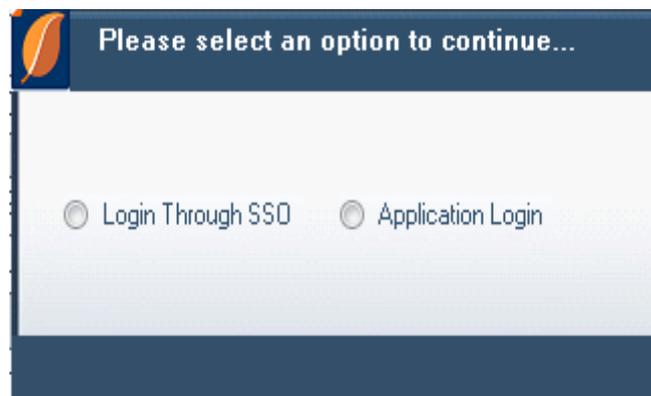
Workspace Clean		
Office Plugins :		

Login through SSO Application login

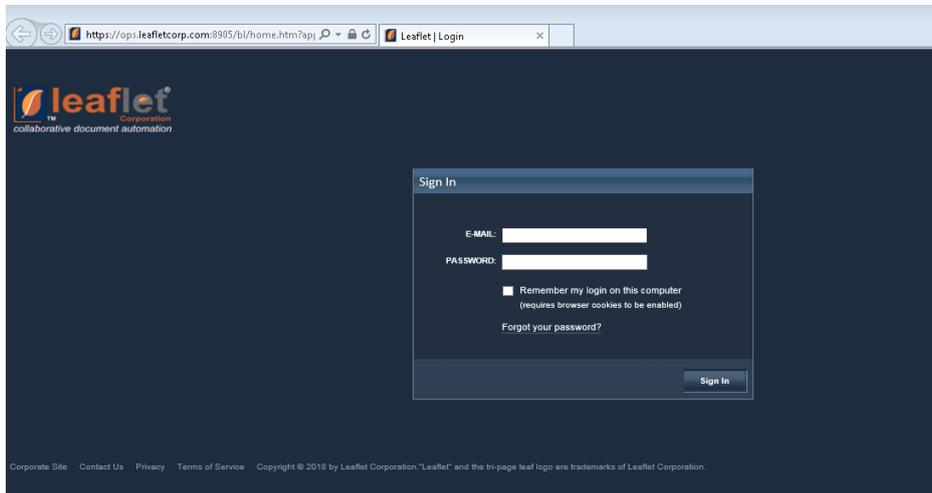
PROCEED

All Setup Successfully Done

7. Next, a prompt for SSO or Application Login will appear and the user will be redirected according to the user's choice.



- Clicking on “Login through SSO” will redirect to SSO login page.
- Clicking on “Application login” will redirect to Application login page as shown below.



A similar process will be followed with the “On Going” and “Repair” options as well.

Note: Please note that while running OCP, OCP requests system details like OS version, Office Version and IE version. If these details do not match Leaflet requirements, OCP installation will not proceed.

1. OCP will modify all necessary settings in IE and Microsoft Office using Leaflet Initializer. If the modifying the settings fails, the Initializer will prompt the user to “RUN AGAIN”.
2. OCP then cleans the temp file (Brightleaf folder).
3. OCP checks whether or not Office Viewer is installed on the system. If not, a button titled “Install Office Viewer” appears for the user. If it is already installed, the OCP installation proceeds further. In parallel, OCP downloads the macros for Word into the temp folder.
4. Now, OCP will check whether Microsoft Soap SDK is installed in system. If not, a button titled “Install SOAP” for installing SOAP appears.
5. After modifying all the settings for IE, OCP validates trusted site and macros.
6. Next, OCP redirects user to the home page of application.

Leaflet OCP Environment Changes

Leaflet Settings

In this section we'll list the environment settings that Leaflet's Installer will configure/setup in your local machine during the onboarding process. You only need to run Installer the first time you access Leaflet Platform. After that, Leaflet will automatically check your system configuration each time you start work in Leaflet.

In order for Leaflet Platform to function properly on the client machines, we do the following:

We run a tool called Leaflet Config when you access [OCP](#) URL. All the settings modified by this tool, for Office as well as Internet Explorer, are listed below.

In addition to the adjust settings mentioned, we also install an IE plug-in called Edraw Office Viewer Component (an ActiveX control). In order to install and register this component on the client machine, we need Administrator privileges.

The Settings:

Settings modified by the setup tool.

1. Add Leaflet Macro to Trusted Publisher List [System level change]
2. Disable all macros except digitally signed macros [once Leaflet platform certificate is added into trusted publisher list then application will work with "Enable all macros" also. Note: Leaflet platform certificate can be added to trusted publisher list through "Add to Trusted Publisher doc" when disable all macros except digitally signed macros is checked]
3. Trust access to Visual Basic project
4. Install Microsoft SoapSDK 3.0
5. Clean Control Information Cache File (.exd) only, if available

Internet Explorer settings done by setup tool:

1. Add Leafletcorp to pop up blocker Exception List
2. Add Leafletcorp to Trusted site List

Internet Zone

Set Active scripting to Enable for Internet Zone

Settings modified in the Trusted Sites Zone:

1. Set Binary and script behaviors to Enable for Trusted Sites Zone
2. Set Run ActiveX controls and plug-ins to Enable for Trusted sites Zone

3. Set Script ActiveX controls marked as safe to Enable for scripting for Trusted sites Zone
4. Set Automatic prompting for file downloads to Enable for Trusted sites Zone
5. Set Active scripting to Enable for Trusted sites Zone
6. Set Enable File download for Trusted sites Zone
7. Set Enable Download signed ActiveX controls for Trusted sites Zone

Minimum Customer Requirements:

The System by which the Customer accesses the Leaflet System must be comprised of one of each of the following:

- a. Operating System: Microsoft Windows 7, Microsoft Windows 8.1, Microsoft Windows 10
- b. Word Processor: Microsoft Word 2010; Microsoft Word 2013 (32-bit)
- c. Internet Browser: Internet Explorer 9; Internet Explorer 10; Internet Explorer 11
- d. Connectivity and Permissions: Broadband (at least 6 MB/sec upload and download) required.
- e. SPECIAL NOTE: Each client machine must allow privileges to install and run certain Internet Explorer plugin(s) and associated component(s) on an ongoing basis.
- f. Where applicable, each of the items above shall be configured in accordance with the Documentation.
- g. Leaflet may from time to time during the Term and upon notice to Customer amend the Minimum Customer Requirements above as Customer's third-party suppliers (for example, Microsoft Corporation) remove support from or update or replace older versions of those components (see section (e) above).

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