

# An XML Solution for Legal Documents

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# Context

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## End User License Agreements (EULA)

- for a number of similar products and different license types
- published in multiple places

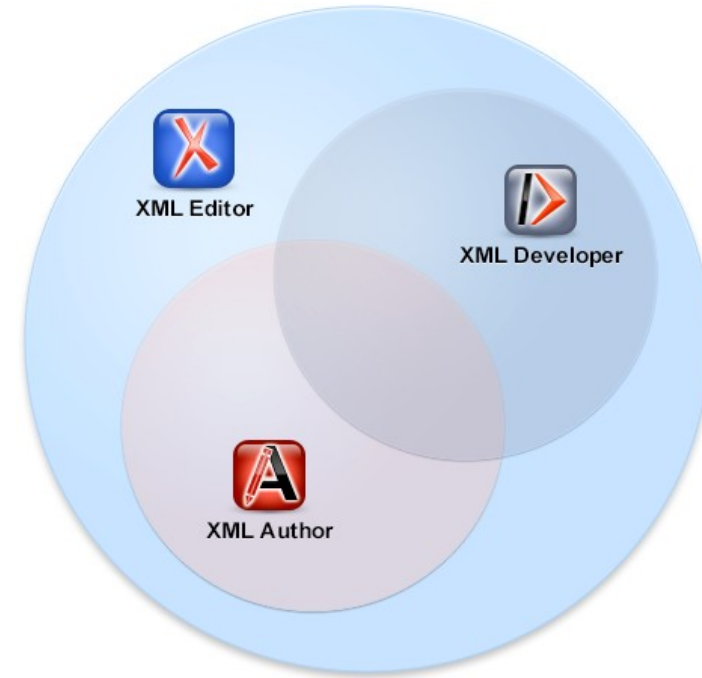
# Context

- oXygen Products

- Author
- Developer
- Editor

- oXygen Editions

- Academic
  - user based, floating, classroom, department, site
- Professional
  - user based, floating
- Enterprise
  - user based, floating, subscriptions



# Context

## EULA made available

- on the product website
- as part of the application

Each license agreement was stored as a Word document and (manually) saved also as a plain text document.

# Problem

# Problem

We maintain duplicate information resulting in

- difficulty of applying changes
- possibility of inconsistent content
- a lot of time time wasted to update the same content in multiple places

# Solution

Use XML instead of a text processor to create a single source solution!



# Main Objectives

- Very simple XML language
- User friendly interface
- Collaboration and review
  - Annotations
  - Change tracking
  - Highlights
- Implement Single-source concepts
  - Conditional content
  - Reuse
- Support for references
- Automate publishing tasks

# Very Simple XML Language

eula

addendum

important

section

info

title

item

list

phrase

ref

@revisionDate

profilingAttributes

- @productName
- @range
- @edition

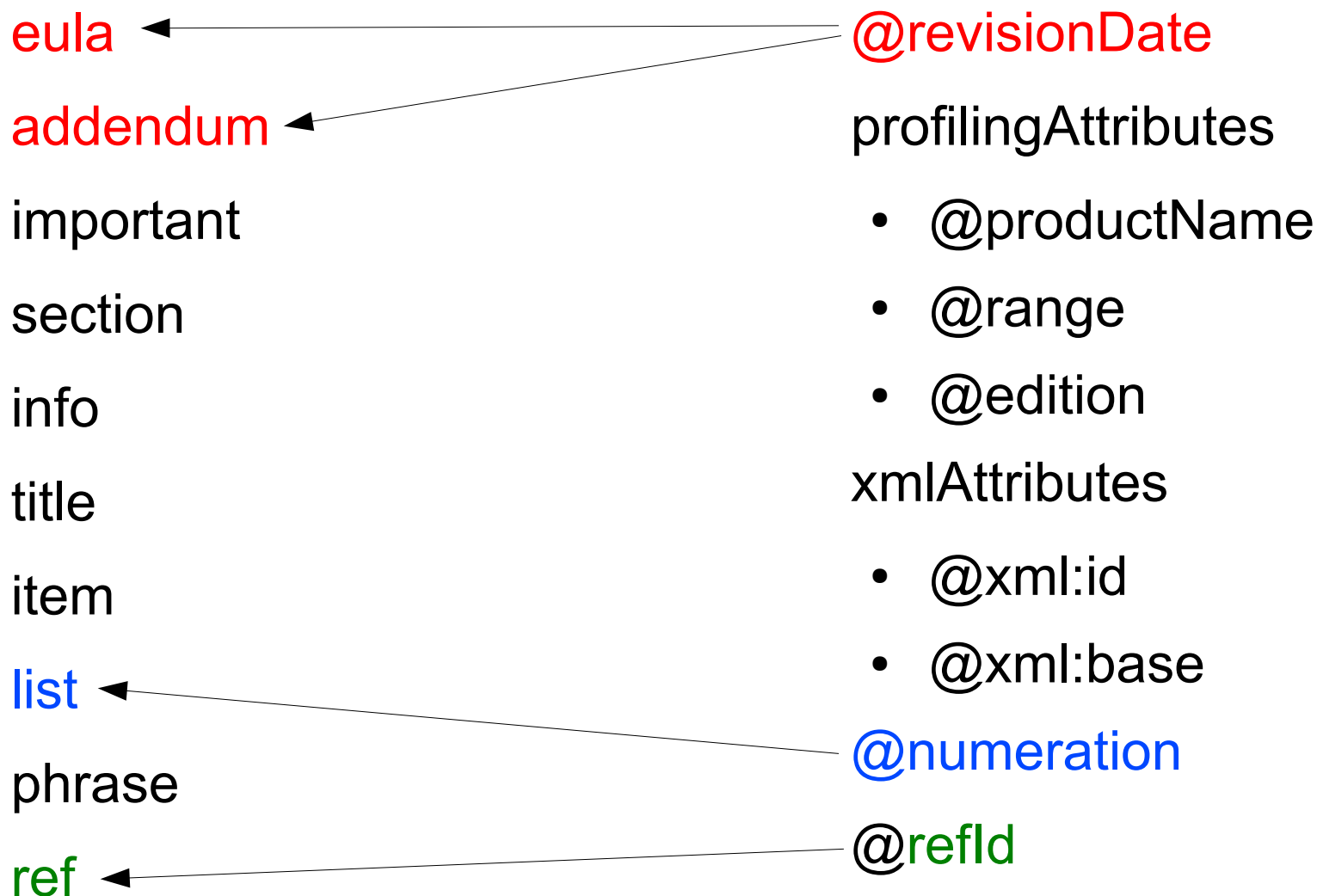
xmlAttributes

- @xml:id
- @xml:base

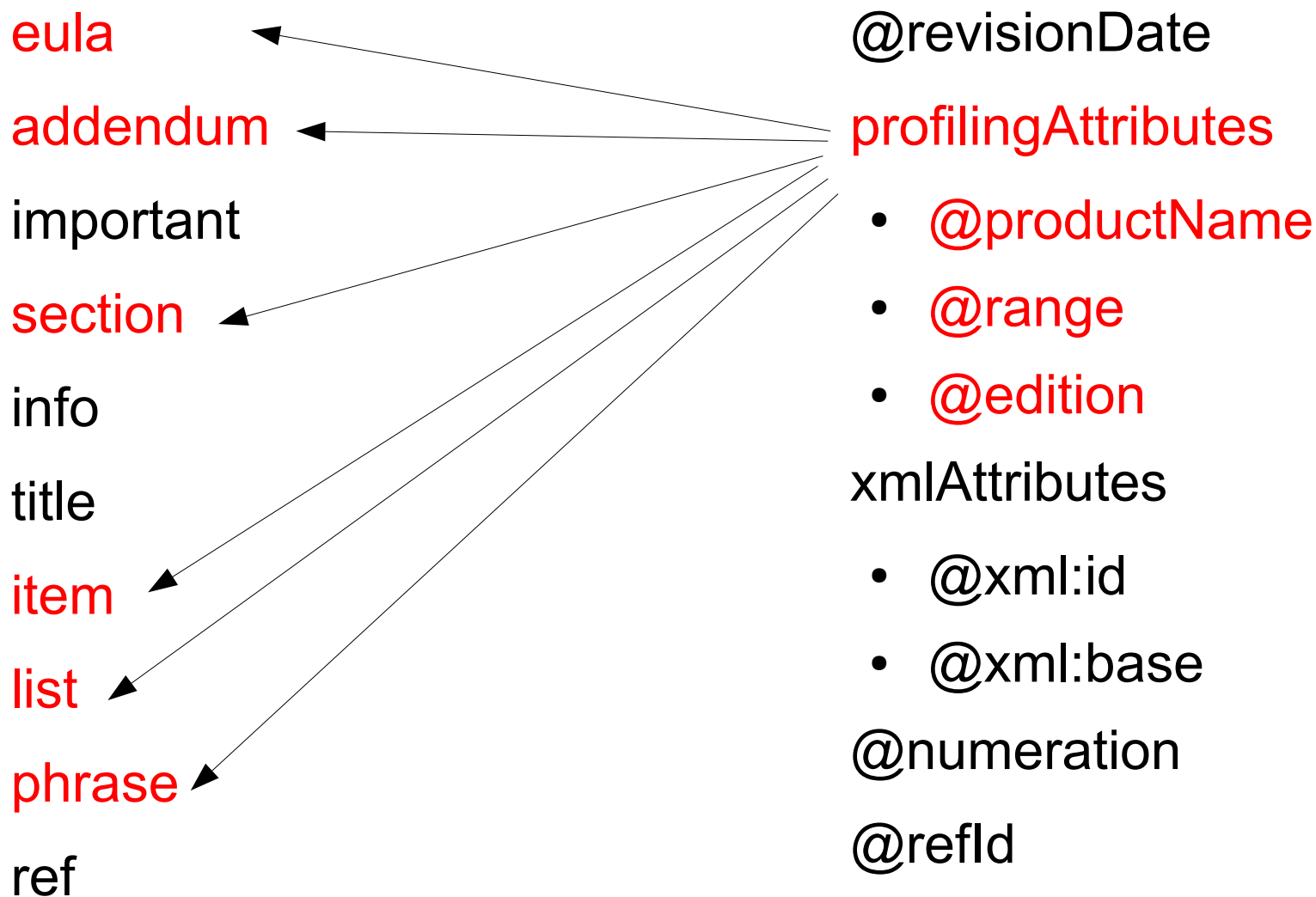
@numeration

@refId

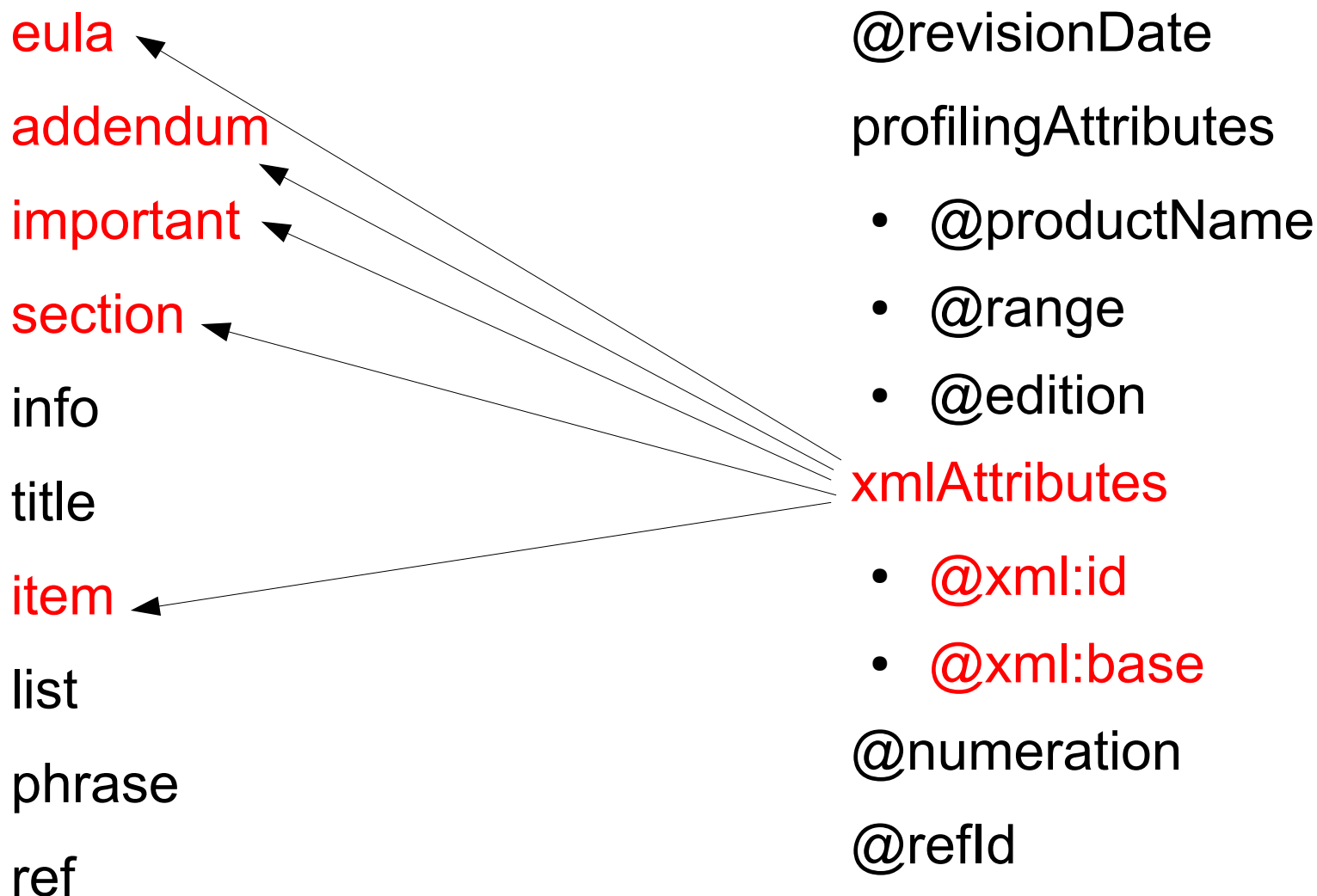
# Very Simple XML Language



# Very Simple XML Language



# Very Simple XML Language



# User-friendly Interface

Use CSS to render the XML document

- Provide multiple CSS styles to focus on different tasks
- Use counters and lists to get a similar rendering as the output

Provide custom actions to simplify common tasks

# Review

- Track changes
- Annotations
- Highlights

All these are based on PIs so they work automatically for any XML language

# Word processor equivalent

Up to here we have a functionality equivalent with what we had, only that the information is in our XML format.

- c. "Named User" is an individual authorized by You to use the Software through the assignment of a single user ID, regardless of whether or not the individual is using the Software at any given time. A non-human operated device is counted as a Named User in addition to all individuals authorized to use the Software, if such device can access the Software.
- d. "License Key" means a unique key-code issued to You by Syncro (or its authorized reseller) to activate and use the Software.
- e. "Maintenance Pack" is a time-limited right to technical support and Software updates and upgrades which you may elect to purchase in addition to your Software license. Technical support only covers issues or questions resulting directly out of the operation of the Software. Syncro will not provide You with generic consultation, assistance, or advice under any other circumstances.

**Commented [stefan]:**  
Same definition as in  
section SUPPORT AND  
MAINTENANCE PACK

*[license\_grants]*

## 2. LICENSE GRANTS

2.1. Trial Period License. You may download and use the Software for free for thirty (30) days after installation ("Trial Period"). During the Trial Period, Syncro grants You a limited, non-exclusive, non-transferable, non-renewable license to copy and use the Software for evaluation purposes only and not for any commercial use. At Syncro discretion, Syncro may provide limited support through email or discussion forums at Syncro web site. The evaluation copy of the Software contains a feature that will automatically disable the Software at the end of Trial Period. Syncro will have no liability to you if this feature disables the Software.



# Reuse

## Two cases

- Build conditional parts
- Reuse an entire fragment (section, item)

# Conditional content

We defined 3 attributes

- @productName
- @range
- @edition

By setting these attributes we mark a specific content to appear only when we generate the deliverables for the matching product, range or edition.

# Conditional text

*[definition]*

## 1. DEFINITION

- a. "Syncro" means Syncro Soft SRL.
- b. "Software" means the executable code of oXygen XML `> Editor< product [EDITOR] >`  
`Author< product [AUTHOR] > Developer< product [DEVELOPER] > Diff< product [`  
`DIFF] (> software program for editing and processing XML documents<), any updates or`  
error corrections provided by Syncro and on-line or electronic documentation.
- c. "Named User" is an individual authorized by You to use the Software through the assignment of a single user ID, regardless of whether or not the individual is using the Software at any given time. A non-human operated device is counted as a Named User in addition to all individuals authorized to use the Software, if such device can access the Software.
- d. "License Key" means a unique key-code issued to You by Syncro (or its authorized reseller) to activate and use the Software.
- e. "Maintenance Pack" is a time-limited right to technical support and Software updates and upgrades which you may elect to purchase in addition to your Software license. Technical support only covers issues or questions resulting directly out of the operation of the Software. Syncro will not provide You with generic consultation, assistance, or advice under any other circumstances.

**Commented [stefan]:**  
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section SUPPORT AND  
MAINTENANCE PACK

# Reuse fragments

- Based on XInclude
- We need to allow xml:base for the elements that can be included
- We allow the following elements to be reused:
  - eula
  - addendum
  - important
  - section
  - item

# Reuse advantages

We do not need to review content that was already reviewed

The sample oXygen SDK agreement includes many sections from the oXygen EULA

# References

- A section or an item may get a different number from a number of reasons

Here it is an example:

11.1 IF YOU ARE A CONSUMER, YOU WILL HAVE A "REFLECTION PERIOD" OF 15 (FIFTEEN) DAYS AFTER DELIVERY DURING WHICH YOU MAY REVOKE YOUR ORDER FOR ANY REASON THROUGH WRITTEN NOTICE TO AVANGATE AS SPECIFIED IN THE CHAPTER 12 - "NOTICE".

...

## 12. Refund process

12.1 To cancel an order placed in the

...

## 14. Notices

14.1 Any notification or any other communication made in connection with Our contract shall be in written form and considered as duly sent or adequately issued if it is sent by mail, fax or email and is addressed to the contact data

source: <http://www.avangate.com/online-payment-solutions/terms.php>

# References

If references are made as text then:

- When a document is updated all reference text need to be manually checked
- The reference text needs to be placed in a fragment and profiled for different deliverables as the numbering may change (for example we can add a new section that applies only for the Academic version)

# References

We solved this problem by adding a ref element that points to an ID defined on the reference target:

- Automatic checking as part of the document validation
- Flexible on document changes
- Flexible on profiling



# Authoring references

An alternate CSS exposes the references as drop downs and the IDs as editable boxes to allow an easy management of IDs and references

# Publishing

- XSLT
  - applies different processing stages like XInclude resolution, profiling, resolving references and conversion to text
- Ant
  - triggers the XSLT processing
  - optionally can trigger also a commit on a versioning system to push the updates on different repositories

# Availability

- Open source project
- Apache 2.0 license
- GitHub

<https://github.com/georgebina/legal>

# Conclusions

- We can have a functionality similar with a word processor for simple XML document types
  - Simple editing (CSS)
  - Change tracking and annotations
- We can easily implement reuse through
  - Conditional text
  - Content references (XInclude)
- References can be made robust adding specific support (IDs and IDREFs)
- We can automate publishing (XSLT)

# Thank You!

## Questions?

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