Agiloft Astra

How to Create Screens

What is a Screen?

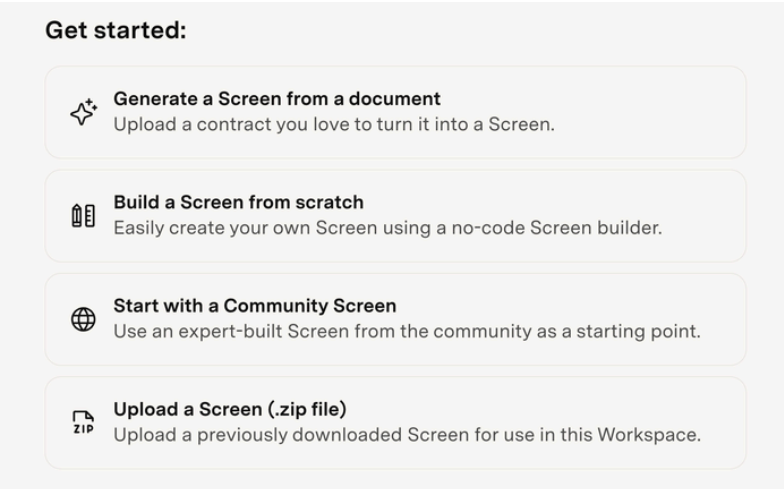
A Screen is a **reusable set of review criteria** that tells Astra what to check in a document. Each Screen includes **standards or questions** Astra uses during the review.

Rather than reviewing each document from a blank slate, you can create a Screen once and reuse it for similar documents. This helps your team **apply the same expectations across reviews, identify gaps faster, and review contract language more consistently**.

Use Case: When reviewing a non-disclosure agreement, you might create a Screen to check whether the agreement includes expected confidentiality protections, disclosure limits, survival periods, breach notice requirements, return or destruction obligations, and other key NDA standards.

There are several ways to use a Screen:

- **Generate a Screen from a document:** Let Astra suggest review criteria based on a contract or template you provide.
- **Build a Screen from scratch:** Build your own Screen when you already know the standards or review criteria Astra should use.
- **Start with a Community Screen:** Use an existing expert-built Screen as a starting point, then adjust it for your review needs.
- **Upload a Screen (.zip file):** Upload a Screen file downloaded from another workspace or shared by another user.



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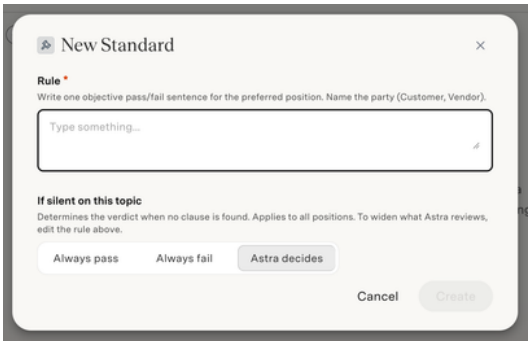
Standards, Questions, and Labels

Standards

Use **standards** when you want Astra to check whether a document **meets a specific requirement**. Standards are best for criteria that can **pass or fail.**

For an NDA review, standards could check whether:

- A purpose clause is included
- Confidential Information is defined
- The confidentiality duration is specified
- A governing law is identified
- A dispute resolution clause is present

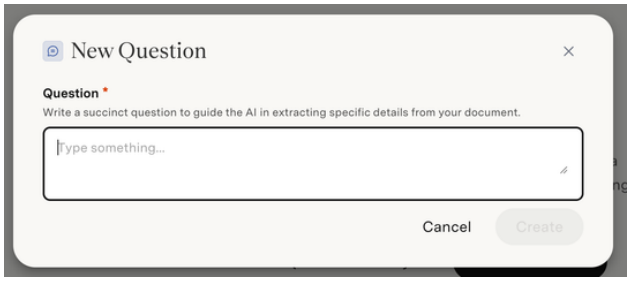


Questions

Use **questions** when you want Astra to **pull information** from the document or **answer something about it**. Questions are best for **informational results**, rather than pass or fail criteria.

For an NDA review, questions could ask:

- What is the stated purpose for disclosing Confidential Information?
- What is the confidentiality term?
- What governing law is specified?
- Which methods of delivering formal notices does the NDA permit?

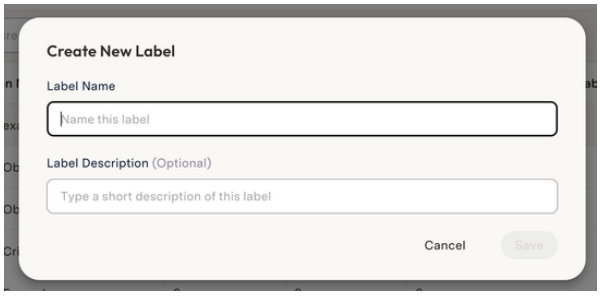


Labels

Use **labels** when you want to **organize Screens so they are easier to find and manage**. Labels are best for **grouping Screens by document type, review area, team, status, or use case.**

For an NDA review, labels could identify:

- NDA review
- Non-disclosure agreements
- Confidentiality
- Pre-signature



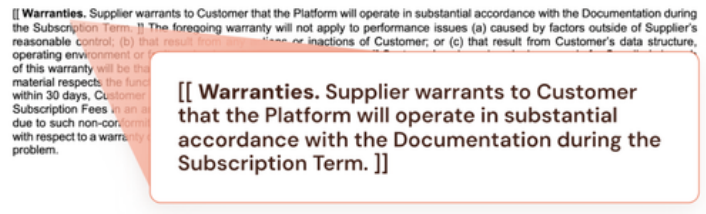
Generate a Screen from a Document

Use Generate a Screen from a document when you have a contract or template that reflects the review criteria you want Astra to use.

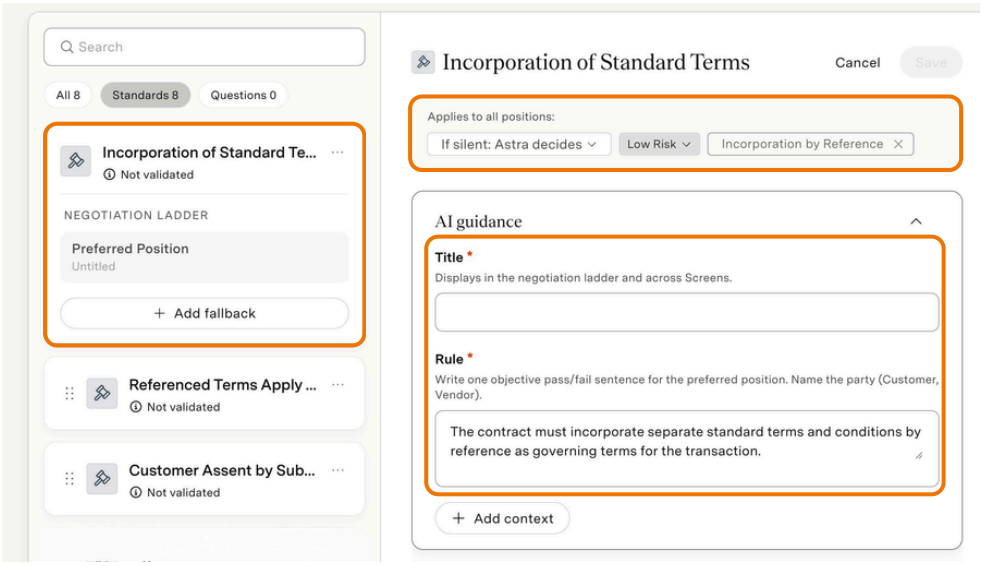
Use Case: When reviewing a non-disclosure agreement, use a template that already includes your preferred confidentiality protections, disclosure limits, or other expected NDA standards.

1. Open the **contract** or **template** you want to use.
2. Add **double brackets** around the text you want Astra to turn into a **standard. Bracket sentences or concepts individually** so each standard reflects a specific issue you want to focus on.
3. Save the document.

Example:



4. Click **Screens** and **Generate a Screen from a document.**
5. Click **Upload Document** and upload the bracketed document.
6. Add optional details, such as the party you represent or custom instructions.
7. Click **Generate Screen**.
8. Review the generated **title, description, and standards.**
9. Click a standard to **edit and refine draft content.**
10. **Click Save**
11. Click **Use This Screen** when you're ready to run it against your contracts.



Build A Screen From Scratch

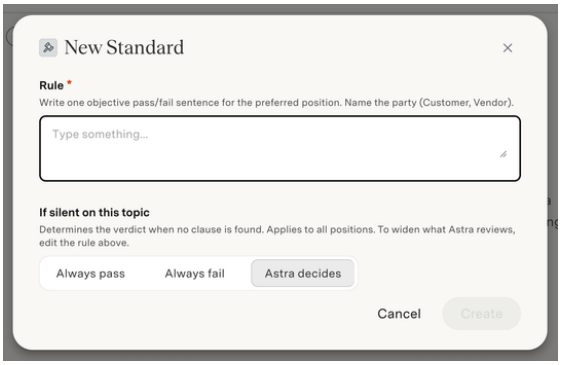
Use Build a Screen from scratch when you already know the standards or questions Astra should use.

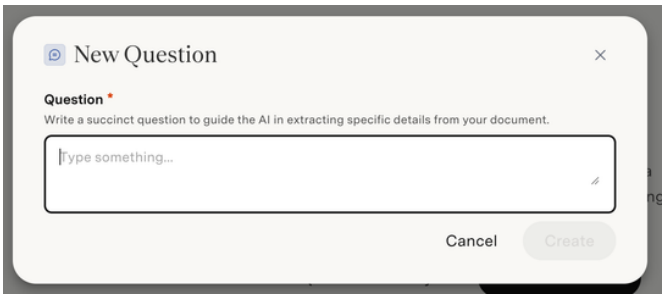
Use Case: When reviewing a non-disclosure agreement, build a Screen from scratch if your team already knows the specific NDA requirements Astra should check, such as confidentiality protections, disclosure limits, breach notice requirements, or return or destruction obligations.

1. Click **Screens** and **Build from Scratch**
2. Add a title and description.
3. Add a **title, description, and labels**
    - **Title**: Name the Screen clearly so users can find it later.
    - **Description**: Explain what the Screen is meant to check.
    - **Labels**: Add labels to help organize and find Screens in your workspace. Labels do not change what Astra checks when the Screen is run.



4. Add **standards and questions** to the Screen.





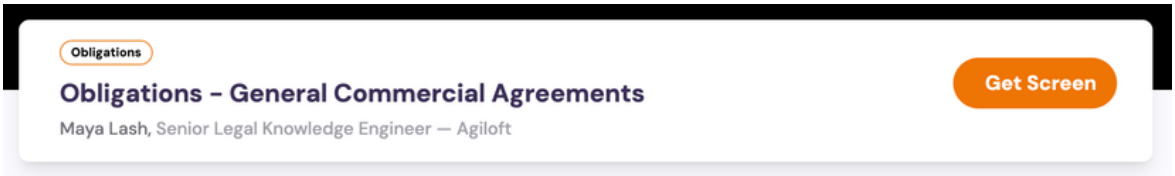
5. **Review** each element.
6. Click **Save**.

Start with a Community Screen

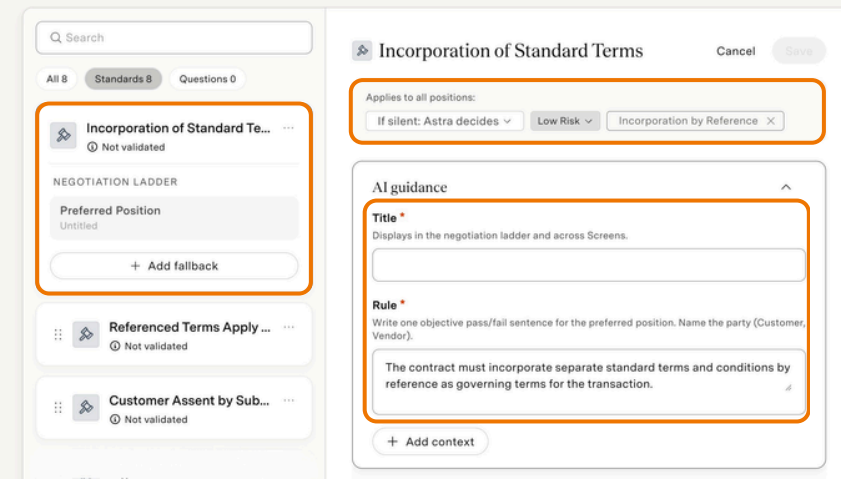
Use Start with a Community Screen when you want to **browse existing expert-built Screens before building your own**. Community Screens can help you **see what review criteria are already available** and whether there is a starting point you can adapt.

Use Case: When reviewing a non-disclosure agreement, browse Community Screens to see whether there is an existing Screen for a similar agreement type, review area, or set of standards. If one is close, you can use it as a starting point and adjust the standards for your team's NDA review needs.

1. Click **Screens** and **Start with a Community Screen**
2. **Browse** or **search** the available Community Screens.
3. Open a Screen to **review its purpose, standards, and questions.**

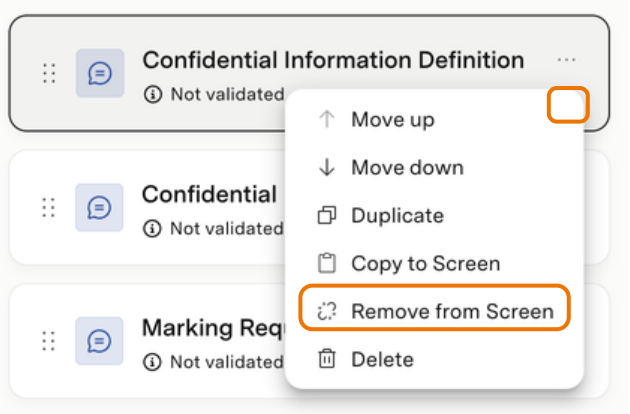


4. Click a standard or question to edit as needed.
5. Save the Screen to your workspace.



To borrow individual standards or questions:

1. Browse the **Community Screens**
2. Click **Get Screen**.
3. Choose a **standard or question.**
4. Click the **three-dot menu**.
5. Click **Copy to Screen**.
6. Select your Screen.
7. Click **Copy to Screen**.



Upload A Screen

Use Upload a Screen (.zip file) when you **already have a downloaded Screen file** from another workspace or user.

Uploading a Screen helps you reuse work that already exists, move Screens between workspaces, or avoid rebuilding standards and questions from scratch.

Use Case: When reviewing a non-disclosure agreement, upload an existing NDA Screen if another workspace or user has already created one.

1. Click **Screens** and **New Screen**.
2. Select **Upload a Screen (.zip file).**
3. **Upload** the Screen file.
4. **Review** the imported Screen.
5. **Confirm** that the standards and questions match your review goal.
6. **Save** the Screen.

