

# Document Assembly

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Presented by:

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# Why Document Assembly?

- Reason for Practice Management
  - Better management of time
  - Capture lost billings
  - Increased profit margin
- Reason for Document Assembly
  - Work smarter, better, faster
  - People multiplier: do more with less
  - Handle more clients, more work, same staff



## Who Am I?

- New kid on the block in the CC program
- Many of you already know me
  - Technolawyer contributor
  - HotDocs listserver
  - Document Assembly (and Case Management) blog – <http://bashasys.info>
  - The “other” practice management system
- Basha Systems specializes in everything document assembly & workflow



## Agenda

- The Nuts & Bolts
  - Amicus Macros in Word and WordPerfect
  - Document Assembly on Demo Machine
  - Understanding Mapped Files
  - Managing Premium Edition Custom Fields
  - Using Word Mail Merge commands
  - Template File Location



# Agenda

- The Fun Stuff (HotDocs)
  - Why HotDocs?
  - Supported formats and features
  - Basic HotDocs merge
  - Use of Master Component Files
  - HotDocs Database Connection



# Microsoft Word Macros

## Small Firm Edition

- Amicus.dot – called by each Template for Merging and Inserting fields (in shared macro).
- Aatasks.dot – displays toolbar and performs “Attach to File” and “Add to Library” functions (in Word startup).
- SaveToBrad.dot – called by HotDocs word templates to perform Add to Amicus function (in Word startup).

## Premium Edition

- Amicus7.dot – used for Merging and Inserting fields (in Word startup)
- Amicus.dot – used for backward compatibility with Small Firm Edition and earlier (back to Amicus 4) (in Word startup)
- “Add to Amicus” feature requires Amicus Tasks Toolbar (Word Add In) to be installed.



# WordPerfect Macros

## Small Firm Edition

- AABrad.wcm – performs “Save and Add to Amicus” function after Merge
- AAfield.wcm – performs the Insert Field function
- AAwpmerg.wcm – performs the Merge process, and calls AABrad.wcm
- AALibrary.wcm and AASaveToBrad.wcm perform user initiated Add to Amicus function from WP Toolbar.

## Premium Edition

- AAfields7.wcm used for inserting merge fields into templates
- AAmerge7.wcm performs the merge function
- AAtasks7.wcm performs “Save and Add to Amicus” function. This requires the Amicus Tasks Toolbar to be installed



# Further Thoughts

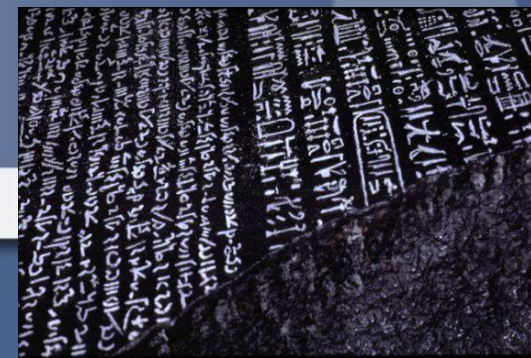
- Each template has “embedded macros” and a toolbar.
- Use caution when customizing Amicus Macros – **MAY AFFECT UPGRADES!**
- Affected Templates “will” need to be tested and “may” need to be tweaked on upgrade
- If you used “custom fields” in Small Firm Edition, you “will” need to be fixed



# Demo Machines

Small Firm Edition & Premium Edition

- Hosting both Small Firm Edition and Premium Edition has complications for document assembly
- To Avoid these complications:
  - Registry Change: HKLM\Software\Gavel & Gown\Amicus\Paths\Merge Path – should point to C:\Amimerge
  - To get SFE “Save and Add to Amicus” dialog, must remove the Amicus.dot from the Word Startup Path



## Map Files

- Key to document assembly
  - Know your data
  - Know where it is
  - Know how it is structured (single/repeat)
  - Know what it is called (naming conventions)
- Types of map files
  - Shipping
  - Custom

Map Files:

## Small Firm Edition

- Small Firm Edition is limited
- Default Map outputs:
  - Firm Info
  - Main Record Types
    - Contacts
    - Files
  - Related Records and Custom Fields
    - For more than 5 parties on File, use Extended Parties
    - 50 File/20 Contact Custom Fields
    - Events
    - Time

Map Files:

# Premium Edition

- Ships with 3 Maps
  - V and Below Map:
    - Outputs as noted above mapped to the Premium Edition Field
    - Assigned on Conversion from Amicus V / Small Firm
  - Default Amicus Map:
    - Outputs all Premium Edition Fields
  - Combination Map:
    - Outputs data noted above TWICE
    - Once for Amicus V and Below variables
    - Once for Premium Edition variables

Map Files:

## Premium Edition

- Custom Field Conversion Issues
  - On conversion the “Field Name/Prompt” is merged with the “File Type” name
  - Spaces are converted to underscores
- Template Specific Output
  - New in 2010
  - Only the data required by the template itself is output.
  - Existing templates can be adjusted to use this model.

Premium Edition

# Tips for Using Custom Fields

- Custom Pages and Records
  - Use short descriptive field names
  - Can “reuse” field names across multiple file types
  - Use a “prefix” to self-organize fields
  - Use a “suffix” to indicate data type

Premium Edition

# Tips for Using Custom Fields

- Resulting names are TOO LONG for merges
  - On conversions from Small Firm Edition, custom field names included the File Type + Field Name resulting in excessively long custom field names
  - Danger of long field names is that on “Merge” field names are truncated
  - Rename your fields
- Field data across multiple file types needs to be “merged”
  - Use *Move Data in Custom Field* feature to reduce and merge fields
  - Custom Pages and Records -> [File Type] -> [Page] -> Actions -> Move Data in Field
  - Replace This Custom Field [     ] -> With this Custom Field [     ]



## Microsoft Word

# Merge commands

- How to insert Word Merge Fields for additional logic
- Show Field Codes:  
Word menu -> Tools -> Options -> View
- IF statements embedded in Word Mail Merge fields execute FIRST during Document Assembly
- Templates may contain embedded Amicus variables
- Standard Merge vs. Directory
  - Standard Merge – Inserts page breaks between records
  - Directory – Repeats data in one section
  - Use Word custom headers for column heads

Premium Edition

# People on File (POF) Variables

- <People on File Names>
  - comma delimited list
  - *E.g. John G. Forester, Stephen Normandy, ACME Manufacturing*
- <People on File Mail List>
  - address blocks
  - Mr. John G. Forester  
151 West 32<sup>nd</sup> Street  
New York, NY 12345*
  - Stephen Normandy  
ACME Manufacturing  
President  
45 East 53<sup>rd</sup> Street  
New York, NY 14689*

Premium Edition

## Template File Location

- Default location for Document Templates:  
\\Amicus Attorney PE Server\DocumentAssemblyTemplates
- Different computer within same network
  - User -> Preferences -> Document Assembly
  - Firm Settings -> Document Management
  - Set permissions on template folder to Full Control for “Everyone”
  - Exempt folder from Anti-Virus and Firewall

The Fun Stuff

# HOTDOCS AND BEYOND

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## Why HotDocs?

- Merges are good for “mass assembly”
- HotDocs is great for “precise” assembly
- Rule driven assembly that mirrors the way a lawyer thinks
- Rule driven interview that asks ONLY what is relevant
- Powerful tool to reach ALL the data in Amicus

# Using HotDocs with Amicus

Small Firm Edition	Support for: .DOT and .HFT
Premium Edition	Support for: .DOT, .HFT and .HPT
Limitations in Small Firm Edition	<ul style="list-style-type: none"><li>- Assembly with multiple data records (from Index)</li><li>- .RTF format</li></ul>
Limitations in Premium Edition	<ul style="list-style-type: none"><li>- Same as above</li></ul>

# The Basic HotDocs Merge

- Model templates that you can copy and customize off the base
- Pre-seeded HotDocs component file that contains fields in the Map File
- Ability to create additional questions to “use and dispose”



# Persistent Answer File

- Option to use the HotDocs answer file
  - Alternate data entry option (rule based)
  - Ability to carry data across the life of the file
  - Need to manage the answer file naming and location

## The Tricky Stuff

# Pre-Existing Templates

- Option 1: Variable Conversion
  - Create new template in Amicus
  - Copy in text of template
  - Replace all variables with Amicus equivalent
  - Under component manager to transfer unmatched fields
- Option 2: Custom Map File
  - Create the Map File
  - Copy the DOT and CMP file into the template folder

## The Tricky Stuff

# Master Component Files

- “Not supported”
  - For good reasons
  - But ... you can, and SHOULD use them
- To work with them
  - Create a new HotDocs template
  - Modify field prompts, group into dialogs, add new dialogs, create interview
  - Use CMP manager to transfer fields.
  - Use <<INSERT “master.dot”>> command at top of template

HotDocs:

## Database Connection

- Ability to “reach back” and get the rest of the data
- Ultimate report tool
- Access to custom fields for People On File
- Access to custom records

HotDocs:

# Database Connection

- Single Table Navigation
  - Define link to SQL Server
  - Select Table & Define Filter
  - Map Amicus Fields to HotDocs Variables
  - Choose Single Record or Multi-Record

HotDocs:

# Database Connection

- Multi-Table Query
  - Define the SQL Query
  - Can include HotDocs Variables in the filter
  - Sample

```
SELECT
dbo.People.Id,FirstName,MiddleName,LastName,Name,dbo.People2File.Id,db
o.People2File.PeopleId,dbo.WebAddress.Id,dbo.WebAddress.PeopleId,dbo.W
ebAddress.Value,dbo.WebAddress.MasterWebAddressId
FROM dbo.People, dbo.People2File, dbo.WebAddress
WHERE dbo.People2File.PeopleID=dbo.People.ID
AND dbo.People.ID = dbo.WebAddress.PeopleId
AND dbo.People2File.FileId=«db File ID NU»
```

# Questions?

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