

Getting Started with Amicus Document Assembly

*How great would it be to automatically create legal documents with just a few mouse clicks?
We're going to show you how to do exactly that – and how to get started quickly and easily.*

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Automating documents – the concept

Most legal documents have a lot of standard text, while at the same time there are places in every document that change for each different client matter. “Document assembly” basically involves taking your precedent documents, marking the variables and then automatically filling in those variables when the document is created for each client matter where you use it. It starts as easily as “fill in the blanks”, but as you progress you will find it can apply intelligence that will generate some very sophisticated documents.

Let's get started

Sound complicated? Well it doesn't have to be, and it isn't with Amicus Cloud. Anyone can quickly create their own templates. We'll walk you through how it works.

Basic terminology

Template: Think of this as your precedent for each type of document or part of a document. It contains the standard text along with indicators of where to get variable text from Amicus.

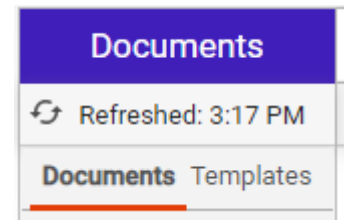
Variable: A placeholder that tells the template to retrieve data from Amicus. Amicus needs to know where in its database to find the variable information, so we give each type of information a name – e.g. Firm.Name for the name of your firm. Amicus also needs to know the difference between standard text and variable text, so we use double square brackets around the name to identify it as a variable. E.g. [[Firm.Name]].

Command: Commands let you create more sophisticated documents. With commands you can insert content from another template such as letterhead or a clause library, change what text is used depending on a condition, create a list of records or specify the formatting of your data.

Adding a template

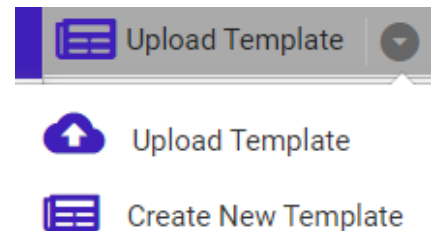
You can add templates to Amicus by using your browser and our online Amicus Editor – for getting started we are going to use that method. (An alternative would be to create and edit the template in Word only, using the Amicus Cloud Office Add-in controls.)

Go to the **Documents** Module and click the “Templates” tab on the control panel.



You will now see a list of the templates you have available for document assembly. We’ve provided several to get you started.

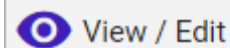
But you could add brand new ones if you like .Go to the Amicus Documents taskbar and select “Update Template”. A dropdown will offer you two options to add a template.



If you choose “Upload Template”, a pop up screen would ask you to find the .docx, .htm, or .html format document you wish to upload to Amicus Editor (or the .docx format document you wish to upload as an Amicus Word template). If you choose “Create New Template”, the Amicus Editor would open to a blank template, ready for you to start typing or pasting in your content.

Opening a template (Amicus Editor)

Let's open the "Basic Letter" template by highlighting it and selecting "View / Edit" from the taskbar (or just double-click it in the list).



This will bring up the template in Amicus Editor. You will notice that the Editor has some special controls that make it easy for you to insert variables or commands, format text and create your template.

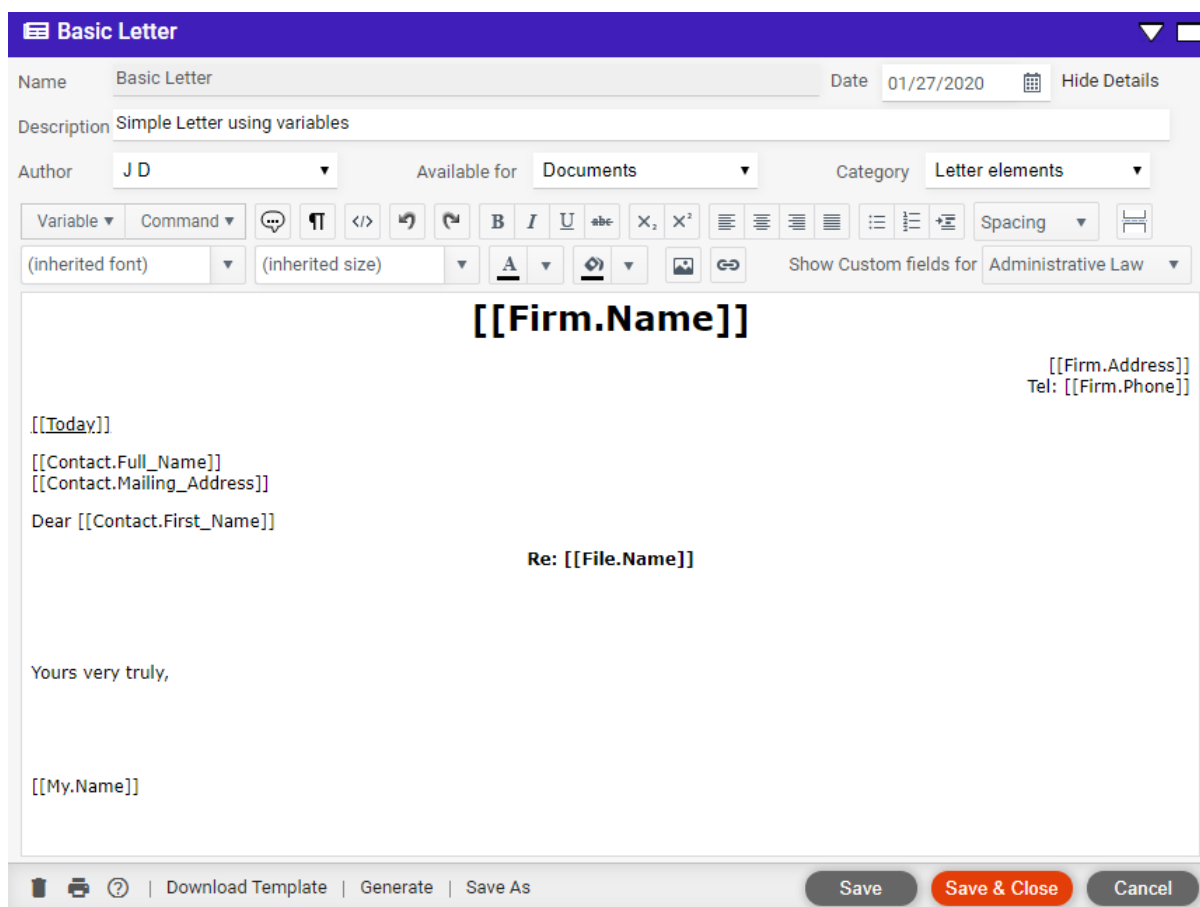
The Editor opens in a small window. If you want more space and more text formatting options, click the maximize button at the top right to expand it.



Basic template - Fill in the blanks (variables)

At the simplest level document assembly just fills in the blanks with file, contact, firm and firm member information. We'll start by looking at how that is done.

When you open the "Basic Letter" template you'll see the following screen:



This template is an example of a simple blank letter that could be used whenever I generate a letter to a contact. Notice we have ordinary text (e.g. "Dear" and "Yours very truly"). This is fixed text that does not change as I generate a letter for different people. We also have variables such as `[[Contact.Full_Name]]`. These variables tell Amicus to fetch data and insert it into the document.

Anatomy of a variable

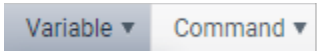
Variable names always begin by first defining the overall area that you wish to get data from – called a “property set” – e.g. File, Contact, or Firm. After the name of the property set, there is a period, and then the name of the data field – e.g. First_Name. Note that we cannot have spaces in variable names, so an underscore is used to join words.

So in the example above we have `[[firm.phone]]`. What does this mean?

[[Indicates this is the beginning of a variable.
Firm	This is the property set I want to get data from.
.	Periods are used to separate property sets and the data fields.
Phone	Is the piece of data on the Firm record that we wish to insert into our document.
]]	Tells Amicus this is the end of the variable.

So this variable is telling Amicus to go and fetch the “Phone” field for the Firm.

How are variables inserted?



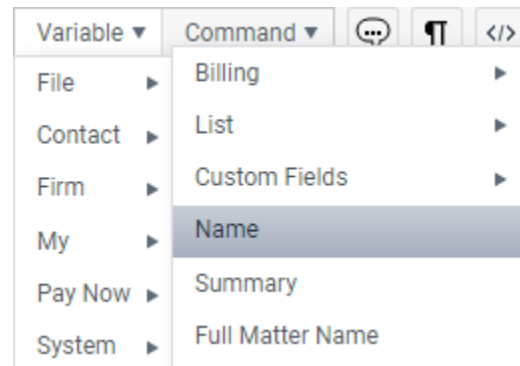
Variables can be typed in if you know the variable names. Or you can simply pick them from the task bar button in the editor.


Since this is a letter we will use for files we probably need to have the name of the file on this letter, so let’s insert it by first placing your cursor in the document template after the word “Re:” and use the menus as depicted below to insert the variable for the file name there.

When you click the Variable button you are provided with an initial list of all the property sets you can select from.

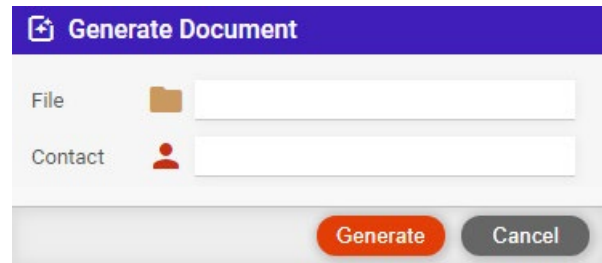
Each of these property sets have data fields that you can select from.

For this example we are going to select **File > Name**. This will insert `[[File.Name]]` into your template where your cursor was.



Click the **Save** button at the bottom of the editor to save your change to the template. If you are working with it in the full-screen view, you’ll now need to shrink it by clicking the  icon at the top right so that more controls appear at the bottom.

Now click “Generate” in the footer to create a document from the template. When you first click Generate, you will be asked to indicate the File and/or Contact you want the document to draw its information from. Do so. Then click Generate. The finished document appears with the variable information being filled in with data from that file and contact. Try it for a different file and you will see the variable output changes.



It's that easy.

Custom fields

Depending on the type of law you practice you probably have lots of custom information specific to each type of file. For example in an insurance defense case, you might have fields for Insurance Claim #, Court Case #, etc. This information is frequently used when generating documents, and it's easy to put it into your templates.

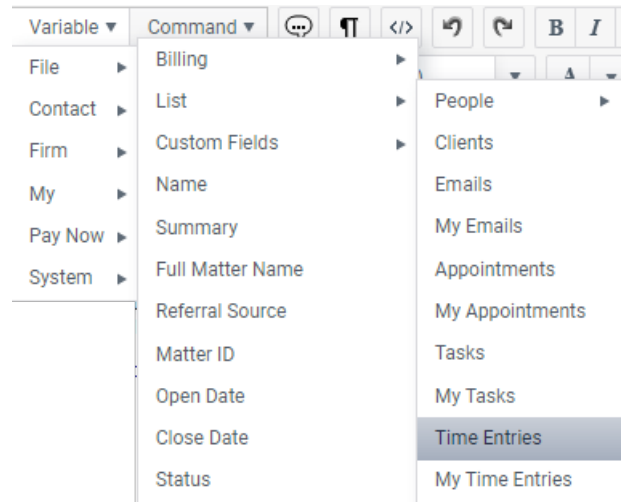
With Amicus you can insert custom fields from your clients and Files into your documents using the same syntax as above. You simply create your custom field and use its name in the variable.

Example: If I create a custom field for my Insurance Defense files called “Claim Number” and I want to insert it into a document I can type in `[[File.Claim_Number]]` or select the file type (next to “Show custom field for”) and simply select the field from the Variable drop-down list. Remember that spaces are not allowed in variable names so “Claim Number” is joined by an underscore and the variable is written out as `Claim_Number`.

Lists

Sometimes you may want to insert a list of items into your documents such as a list of time entries for a file or a list of people on a file.

Amicus makes this easy with list variables. These are inserted in the same way by going to the menu and picking a property set and choosing “Lists”. This will give you all available lists for that property set.




The best way to see how this works is to try it. Let's create a template that will show you all the time entries for a particular File. Add a new template, give it a title and put whatever text you want at the top. Then use the menu to insert the variable **File > List > Time Entries**. The template will now display `[[File.Time_Entries]]`

Now click **Generate**, pick a file and you get a document that shows you all the time entries for your selected File. Lists are preformatted to show the data from the record set that you selected. With some list variables, such as `[[File.People]]`, you can use Commands to change the formatting, or just show selected information for each item in the lists.

Commands

Commands allow you to introduce logic and formatting into your documents. Commands are the magic ingredients that change document assembly from “fill-in-the-blanks” to a powerful tool for generating intelligent legal documents.

Amicus needs to know the difference between fixed text, variables and commands. To distinguish them, commands are always contained within double curly brackets `{{ }}`.

Commands can be inserted using the button in the online editor, or by typing them yourself. Help on the command is included if you first click the  button on the toolbar in Amicus Editor.

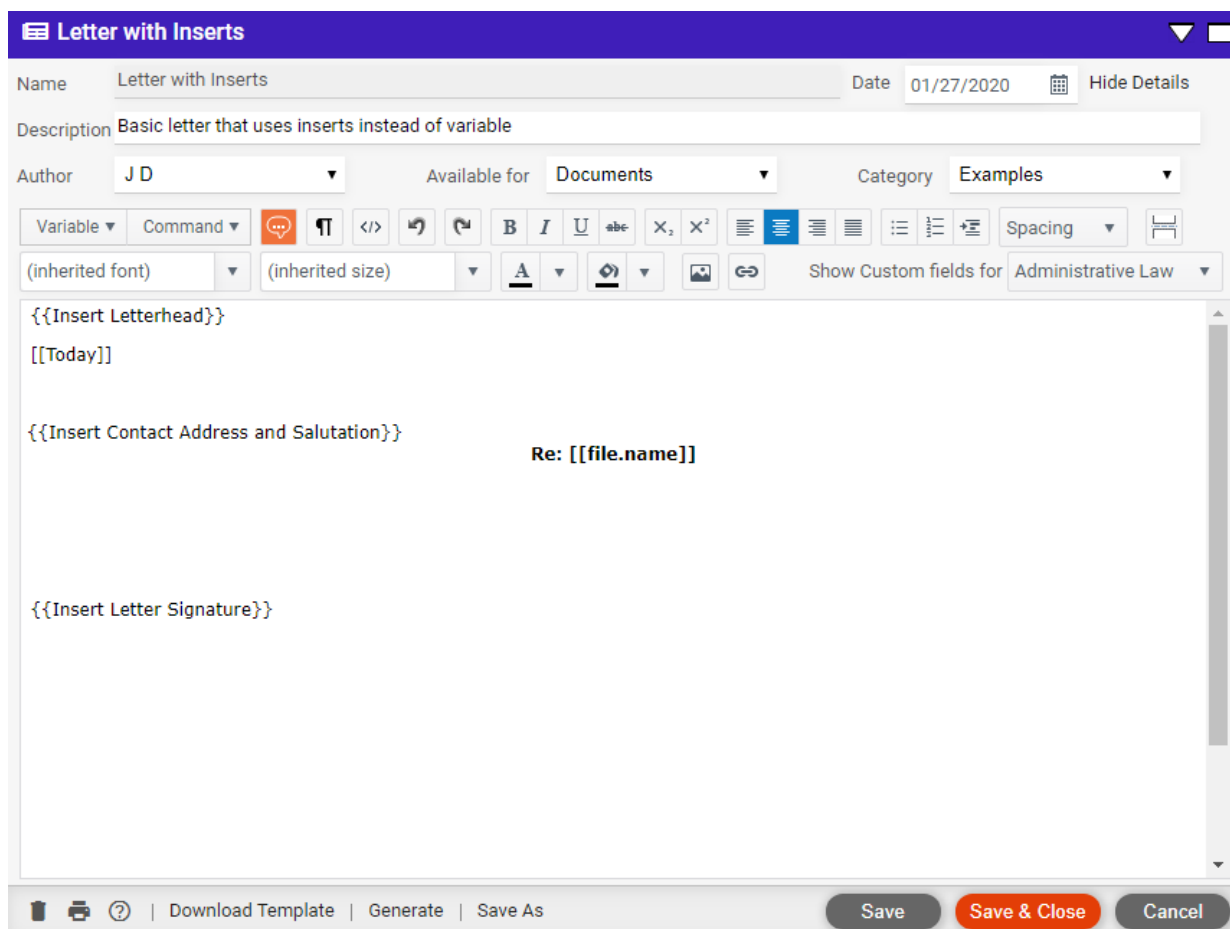
INSERT command

The INSERT command lets me easily insert the contents of another template into the template I am working on. This is great for common elements like letterhead or signature blocks. As you get more advanced, you can build up an entire library of standard legal clauses, each in their own template, and then insert these clauses into documents without having to re-type them. This can get very powerful indeed!

To insert another template, all you need to do is put in the Insert command, and the name of the other template. For example, `{{Insert Letterhead}}`. Note that template names within the Insert command should be put in exactly as you named them, including any spaces in the name. For example, `{{Insert Letter Signature}}`.

Let's see how this works. Open the template “Letter with Inserts” which is similar to the “Basic Letter” template we reviewed earlier. In the “Basic Letter” template we had put the Firm's information and the signature information directly into the main template. But it is much better to do this with insertions. Why? Because by having just one template for letterhead, if your letterhead ever changes, you can change it in just one place rather than in the many different letter templates you will build up.

Here's how it looks:



By using the Insert commands I am telling the template to go and insert the contents of the Letterhead and Letter Signature templates into this letter template. We've given you samples of those inserted templates too. Have a look at them – note that graphics can be included, so things like letterhead can be very professional. Then generate this letter to see how it works. Imagine the power this creates for all your documents!

Header and FOOTER commands

The HEADER and FOOTER commands work exactly like the Insert command, but the HEADER command puts the inserted template at the top of every page (beginning on the 2nd page) and the FOOTER command puts the inserted template at the bottom of every page. The command is written as {{HEADER template name}}.

Note that the header or footer is not shown on the generated results screen, but is included in the Word or PDF document that's saved.

If you were creating and editing an Amicus Word template rather than an Amicus Editor template, you'd create the header and footer simply using Word functions instead of these Amicus commands.

REPEAT command

Earlier we introduced you to list variables, which allow you to put into your documents a group of records for a property set (e.g. Time entries for a file or list of people on a file). REPEAT commands allow you to work with lists, identifying specific records you want in them, or allowing you to specify what information you want from each item and how you want it displayed.

Basically, the REPEAT command will loop through each item in a list, and for that item will put into your document what you want, how you want it. This includes putting in some fixed text, and even other variables, together with all or some of the attributes of the list item. Each time!

For example, I could have a list of people on a file. If I just put the variable `[[File.People]]` into my document, I will get the full list, with no control over what gets displayed or how. It's a useful table, but it might not be what I want. But if I use the REPEAT command, I can go through the list, pick out what information I want displayed, add text, and format it the way I want to.

Because of their power, REPEAT commands take a little more work to set up. The REPEAT command needs to identify for Amicus what list is being gone through, what information is to be used for each item, any fixed text to be inserted each time, and how it is to be formatted. And because all of this is within the `{{}}` of a command, we also need some new markers to show Amicus what text/variables are to be inserted, and separate them from the rest of the command.

Here's how it looks:

```
{{REPEAT [[list_name]] ^^ maybe fixed text [[output_variable]] maybe more text etc ^^ format}}
```

OK, that looks complicated, but relax, we'll explain.

The best way to understand is to try it out. Open the template "File People Repeat Example". You'll see that it is going to show us the same list twice, once without using repeat, and once with a repeat. Have a look at the repeat section:

```
{{REPEAT [[File.People]] ^^[[File.People.Full_Name]] (Role: [[File.People.Role]])^^ Format comma}}
```

It's easy to understand when you break it down into its components.

<code>{{REPEAT</code>	Start of a REPEAT command.
<code>[[File.People]]</code>	The list that I am going to go through, repeating what I do for each item in the list.
<code>^^</code>	This double carat (or eyebrows as we like to call it) tells Amicus this is the beginning of what we want to put into the document for each item in the list (this can include text and other variables).
<code>[[File.People.Full_Name]] (Role: [[File.People.Role]])</code>	Everything between the eyebrows is what will be inserted into the document for each item in the list. Here we are asking for the full name of the person, and then some fixed text (the word Role etc.), then a variable that will show their role on this file.
<code>^^</code>	This second double carat tells Amicus this is the end of what we want to put in the document for this list.
<code>Format comma</code>	This (optional) format instruction tells Amicus how to format the output. There's more about the Format instruction in the "Document Template Design" document we provide separately.
<code>}}</code>	The closing curly brackets denote the end of the command.

Now that you understand what this simple template is doing, generate a document using it. Pick a file with several people on it, and run the template. You will immediately see why REPEATs are so powerful!

Have a look at the File.People Repeat Example template.

Here's a tip: Often when putting lists of items into a document, you want to number them. To make this easy, Amicus has a numbering variable. Just put `[[##]]` into the repeat text, and each item will be numbered for you. This can be used for numbering paragraphs in a document as well!

IF command

The IF Command lets you insert text or variables if a condition is met. It's easy to use, but introduces incredibly powerful potential. Once you can test whether certain facts exist, you can determine what has to go into the document. This allows legal intelligence to be built into the document – so much more than “fill-in-the-blanks”!

Syntax

```
{{IF Condition THEN ^^output^^}}  
{{IF Condition THEN ^^output^^ ELSE ^^alternate output^^}}
```

Conditions

You can check for different conditions such as: is equal to, is not, is greater than, is true is empty etc. You can check against variables (e.g. If the file's Accounts Receivable Balance is greater than \$1,000 or if the client is a corporation).

Example

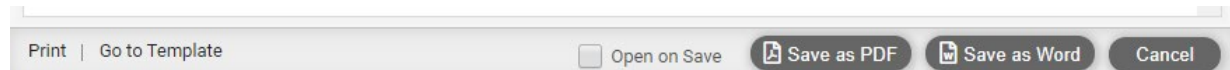
```
{{IF [[File.Primary_Client.Is_Company]] is true then ^^[[File.Primary_Client.Company_Name]]  
[[File.Primary_Client.Mailing_Address]]}}
```

The example above outputs an address. The Command tests if the contact is a corporation, and if so it outputs the company name above the mailing address.

MORE! The IF command can also be used within the Repeat command. This means it can be used to filter the list for only records that meet certain conditions. The potential is limited only by your drafting skills...

I've created my document. Now what?

Once you have generated a document, it appears in your editor. You can make edits to it right there if you want. Then use the controls at the bottom to print it or save it to a file.



When you are ready, save the document in the format you want. You can also print it directly from your web browser if you wish. Alternatively you can print it from Word or Adobe Acrobat/Reader when it is rendered and saved to a file.

When you click “Save as PDF” or “Save as Word” the document will automatically be saved to your file and be found in the Documents tab.

Don't forget email!

Amicus Cloud is unique in having fully integrated email, including being a full email client. You can send emails directly from within Amicus. So of course, you can use document assembly for automating the text for your emails. When you are designing Amicus Editor templates, you can specify that they are only for documents, only for emails, or both. You can use them to create an email from the documents module, or from within any new email. Simply start an email in the usual way, then click “Use Template” to generate the body of the email. This is a great feature for standard communications, or for simple things like inserting your email disclaimer.

Note that email generation is not available from Amicus Word templates.

Can I re-use my existing Word documents?

If you have existing Word documents (PC or Mac versions of Word), you can easily upload them into Amicus after replacing your old Word merge variables with Amicus variables. These will be templates which can be edited only in Word, using the Amicus Cloud Office Add-in controls.

Alternatively you could upload the Word documents to the Amicus Editor, or cut and paste the contents of your Word documents directly into an Amicus Editor template. Open these templates in Amicus and replace your old merge variables with Amicus variables.

More about templates

[Document Template Design](#) reference guide

Details on creating templates

“Document Assembly” Help topics in Amicus Cloud

Instructions on viewing templates, editing templates with the Amicus Editor or Amicus Cloud Office Add-in, and generating documents

Try our templates

Several templates are provided for your inspection and use. Some can be used as is, some illustrate the power of document assembly, and some provide elements that can be included in your working templates.



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