DocMoto – Document Assembly

Building Letters

CHL Software
www.docmoto.com

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Introduction

This document is designed to guide you through the process of creating document masters (templates). Specifically, document masters (templates) which work in conjunction with DocMoto's document assembly module. The examples illustrated in this document deal with letter creation.

Creating a document master (template)

The first stage to creating a document which is compatible with DocMoto's document assembly module is to either import or create a document within the **"Master Documents"** section in the **"DocMotoConfig/MasterDocuments/"** folder.

Prerequisites:

To access the **"DocMotoConfig"** area users must have administrative rights. However, it is possible to give certain users specialist privileges to access the **"MasterDocument"** folders so administrators can allocate a user to maintain the master (template) documents within the system.

Please refer to this video tutorial for more information – Restricting Access to Master Documents

Please refer to this video tutorial for Creating a master document template.

The next section covers amending document masters (templates) to work in conjunction with DocMoto's document assembly module.

Amending a document master (template)

The example in section is based upon a letter being created in DocMoto and DocMoto has subsequently assembled the letter per the tag rules set.

Event Sequence – amending document master (template)

1. Open the document master (template) in edit mode – double click on the document and select the **"Open to Edit"** option. DocMoto will **"Check Out"** the document and open the appropriate application to edit (MS Word). Fig. Document master (template)
2. Select the **"Tag Manager"** from the **"Admin"** menu. This will enable the administrator to create the specialist **"Merge"** tags required.
3. Bring the document master (template) opened in **step 1** into view.
4. Assess the parts of the document master (template) which could be deemed variable.
5. Create placeholders (or variables) within the document template ensuring there is an equivalent **"Merge"** tag created within the **"Tag Manager"**.

Note: "Merge" tags and subsequently placeholders (or variables) are delimited by the specialist characters **"{}"**. For example: **"{client_name}"**. All **"Merge"** groups and tags **MUST** be created within the **"Merge"** tags group – Fig. Merge Group. If the document master (template) requires personalization i.e. a letter is created and personalized per the logged in user, then **"Merge"** tags must be created in the following format **"{myNameofTag}"** and preferably in the **"myMergeFields"** group – Fig. myMergeFields.

6. Once the document master (template) has been amended to include the placeholders (or variables) - save and close the document and subsequently select the **"Check In"** option from either:
    a. The **"File"** menu.
    b. The **"Toolbar"**.
    c. By right mouse clicking on the document and selecting from the popup menu.
    d. The **"shift + cmd + i"** shortcut.
7. Select the **"Close"** button (bottom right hand corner of dialog) in the **"Tag Manager"**. The **"Tag Manager"** will prompt the administrator on whether they want to save the changes – select **"Yes"** to confirm changes**.**

Please refer to this video tutorial for Introduction to using Tags.

Fig. Document master (template)

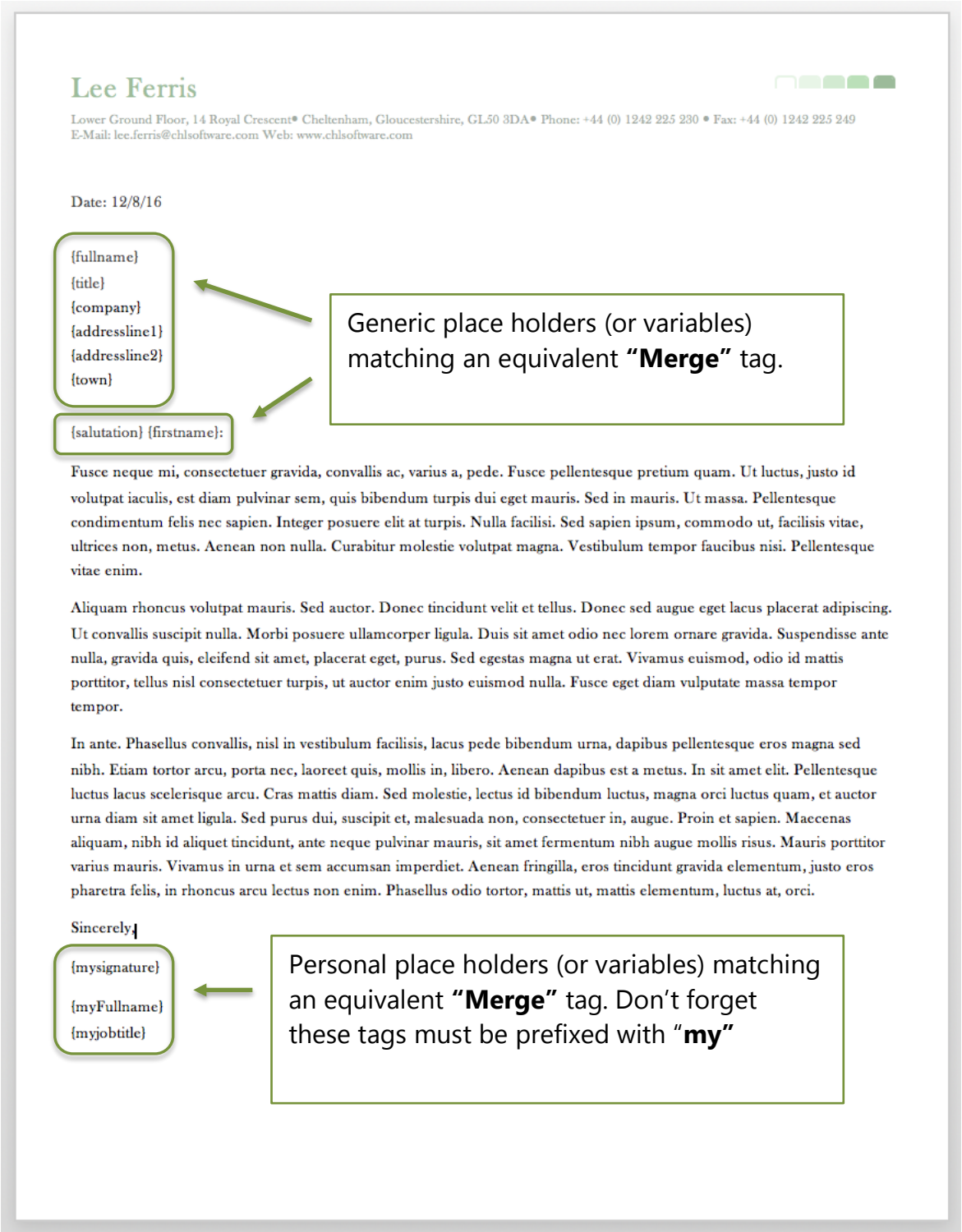
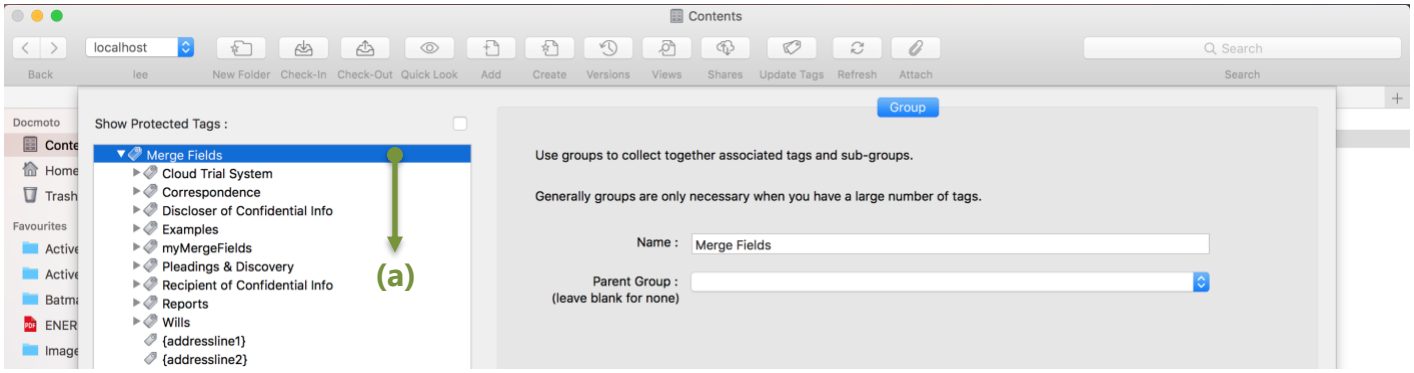
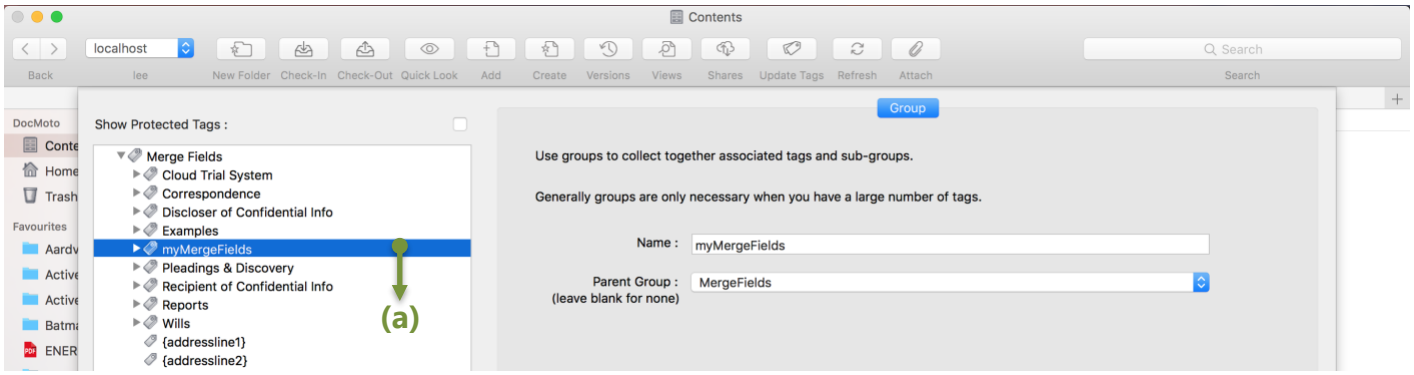


Fig. Merge Group



(a) Merge group – all **Merge** groups and tags **MUST** be created under this group.

Fig. myMergeFields



(a) myMergeFields – merge tags and groups specific to an individual.

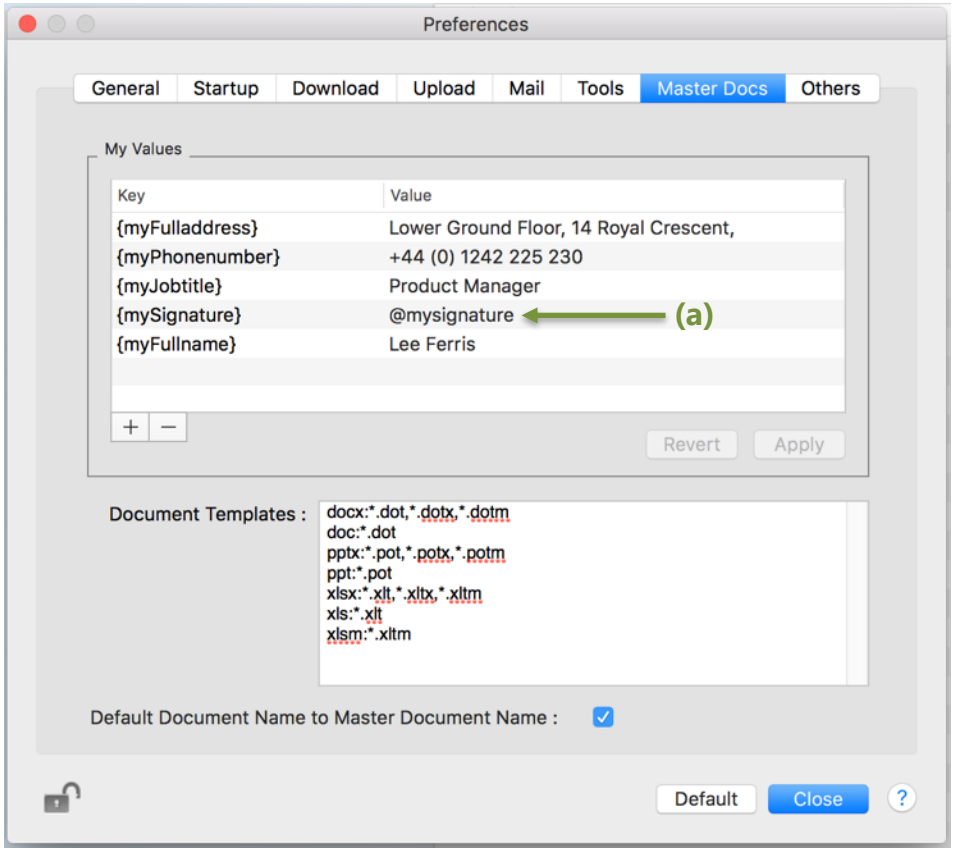
DocMoto Client Preferences

This section covers amending the user's DocMoto Client Preferences to include specialist "**Merge"** tags tied to the user's profile – personalization. This ensures the document assembly module will use these specialist "**Merge"** tags when personalising a document on creation.

Event Sequence – amending DocMoto Client Preferences

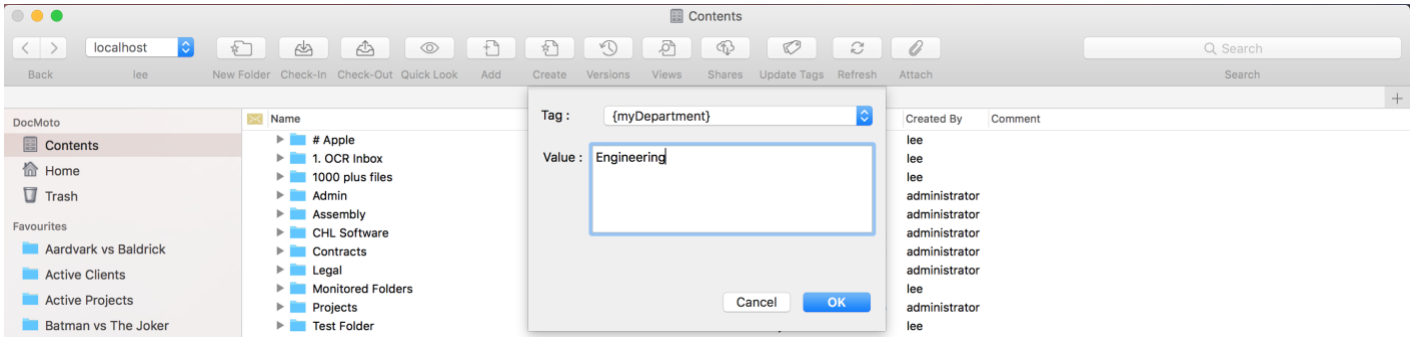
1. Select the **"Preferences"** option from the **"DocMotoClient"** menu. A DocMoto Client Preferences dialog is presented.
2. Select the **"Master Docs"** tab – Fig. Master Docs tab
3. In the section labelled **"My Values"**, select the **"+"** button to add values. A Tag dialog is presented, enabling the user to add the **"Merge"** tags and set values – Fig. Add tag dialog
4. Add the required **"Merge"** tags.
5. Select the **"Apply"** button to confirm.

Fig. Master Docs tab



1. Please refer to Adding a personalised snippet (later in this document)

Fig. Add tag dialog



Adding a personalised snippet

This section covers users adding a personalised snippet containing their credentials to be used in conjunction with the document assembly module.

Event Sequence – adding a personalised snippet

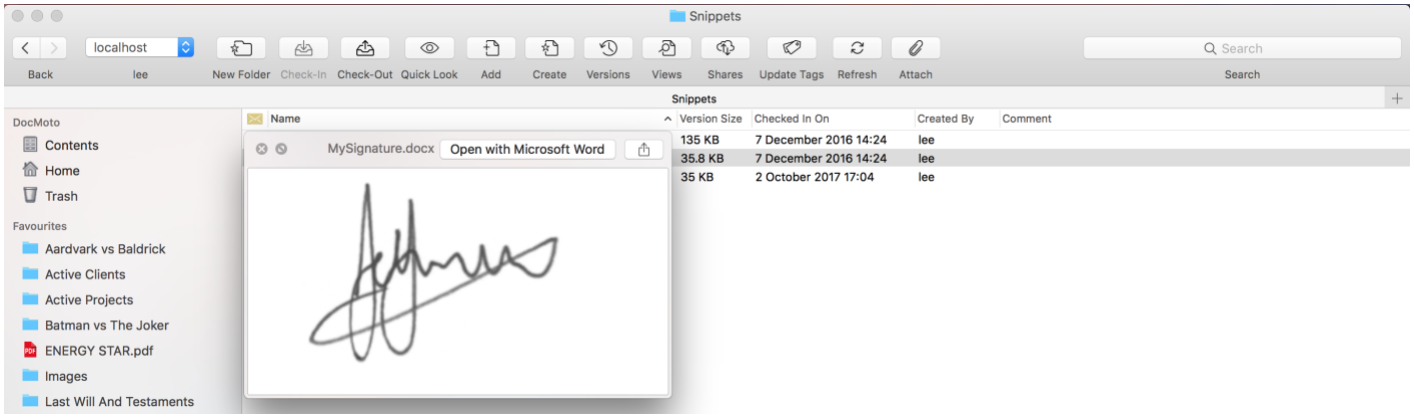
1. Select and expand the **"Home"** folder in the tree-view (left hand side of user interface). The user should see their user name listed underneath the **"Home"** folder. Select the user name folder.
2. Select the **"New Folder"** option from:
    a. The **"File"** menu.
    b. The **"Toolbar"**.
    c. By right mouse clicking on the document and selecting from the popup menu.
    d. The **"shift + cmd + n"** shortcut.
3. A new folder dialog will be presented. Insert **"Snippets"** as the folder name and select the **"OK"** button to confirm.
4. Select the **"Snippets"** folder created in **step 3**.
5. Create (or Import) a blank (empty) MS Word document into the **"Snippets"** folder. The document must be in edit mode to amend. In this example the document has been labelled **"mySignature.docx"** – please refer to:
    a. Fig. Master Docs tab **(a)**
    b. Fig. mySignature.docx

Note: The document name in **step 5** must be the same as any of the "**My Values"** set within the **"Master Docs"** tab – in this example **@mySignature** value has been set against the tag **"{mySignature}"**.

6. Insert into the document created in **step 5** the credentials required. This could be:
    a. A simple list of:
        i. Name
        ii. Position
        iii. Company
        iv. Company Address
        v. Email
        vi. Contact Details
        vii. Etc
    b. A digital signature (this example)
7. Save the amended document. DocMoto will notify the user of the change, confirm changes when prompted.

At this stage the document master (template) is ready for use in conjunction with folders configured to run the document assembly module. The next section covers configuring folders for document assembly.

Fig. mySignature.docx



Configuring Folders – for document assembly

DocMoto folders can have rules associated to them in the form of tags. The document assembly tags can be set at a folder level or requested when importing or creating a document.

Document assembly tags should be set at a folder, if:

- The data is likely to be static – i.e. not subject to change, once set. For example – a clients' credentials (name, title, company, address, etc).
- The data could be used by sub folders. Folder tags and values in DocMoto are inherited making them available through hierarchical folder structures.

Document assembly tags should be requested when importing or creating a document, if:

- The data is likely to be dynamic – i.e. subject to change. For example – a specific folder which holds all clients last will and testaments post document assembly (testator, executor, spouses name & sex, etc).
- The data is not required elsewhere.

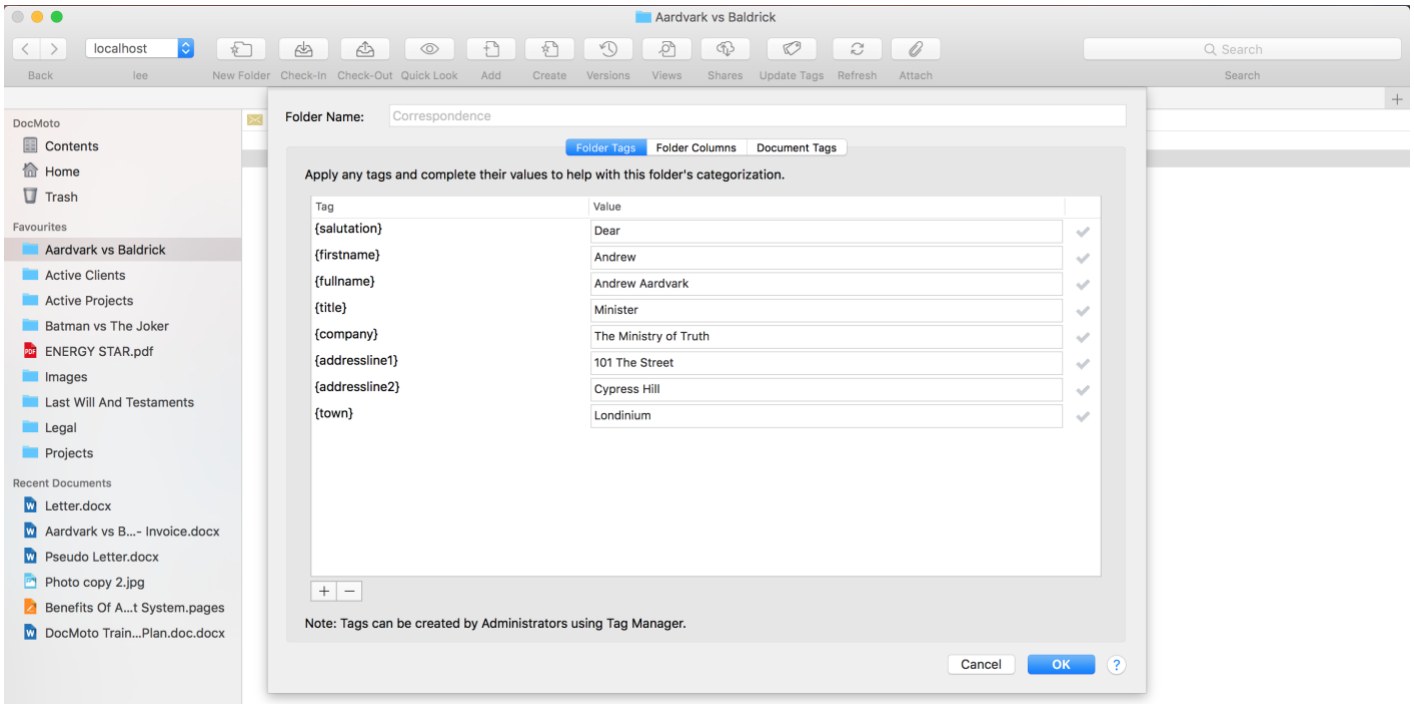
Event Sequence – configuring folders for document assembly

1. Select the folder to register the "**Merge"** document assembly tags. **Note:** This can be done to an existing folder or a folder within a folder template. Folder templates will enable administrators to push out new **Merge** tags retrospectively – please refer to these articles for more details:
    a. Creating Folder Templates (video tutorial)
    b. Retrospectively applying a folder template (video tutorial)
    c. Retrospectively applying templates (rules) (tech article)
2. Select the **"Edit Folder Properties**" from:
    a. The **"File"** menu.

b. By right mouse clicking on the document and selecting from the popup menu.
c. The **"shift + cmd + e"** shortcut

3. Select either the **"Folder Tags"** or **"Document Tags"** tab depending on requirements (see notes above). In this example, the **"Folder Tags"** tab has been selected. Fig. Edit Folder Properties
4. Select the **"+"** button (bottom left hand corner) to add tags. A **"Tags Requested on Check-In."** dialog is presented.
5. Select the tags required and confirm by selecting the **"OK"** button. **Tip:** If the user knows which tags are required they can type the tag name and the tag dialog will locate said tag.
6. Select the **"OK"** button (bottom right hand corner) of **"Edit Folder Properties"** dialog to confirm changes.

Fig. Edit Folder Properties



At this stage, everything is placed to test the newly created document master (template). The next section covers testing the document assembly.

Testing the newly created document template (master)

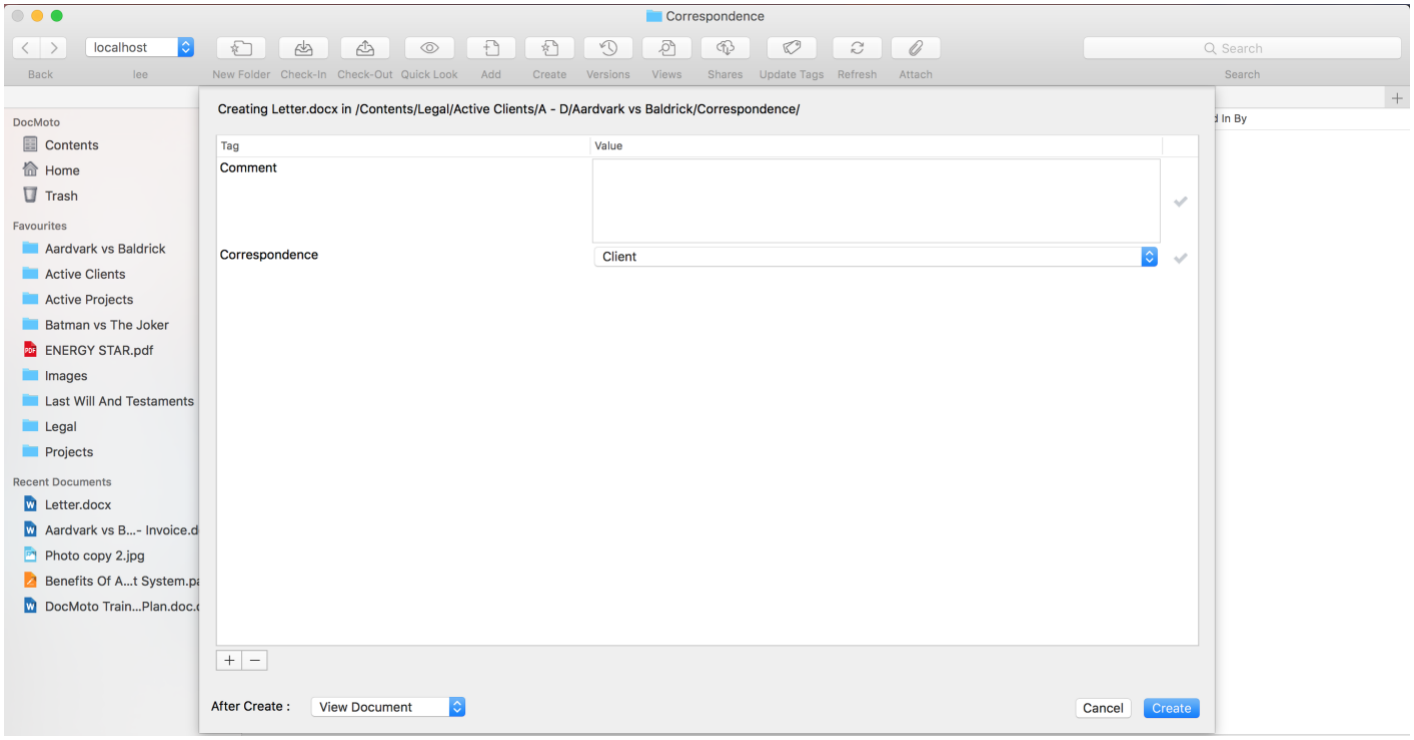
This section illustrates how to test all the steps covered in this document.

Event Sequence – testing

1. Select the **"Create Document from Master"** from:
    a. The **"File"** menu.
    b. The **"Toolbar"**.
    c. By right mouse clicking on the document and selecting from the popup menu.
    d. The **"shift + cmd + c"** shortcut.
2. A document masters dialog is presented enabling the user to select a document master (template). Select the document master (template), in this example **"Letter.docx"**.
3. Name the document (bottom left hand corner) and select the **"Next"** button. **Note:** Users can amend their DocMoto Client Preferences so that DocMoto will name documents per the user's selection.
4. A dialog is presented enabling the user set any required tags and the action DocMoto should take post document creation. In this example, the user has chosen to view the document post creation. Fig. Form pre-doc creation.
5. Select the **"Create"** button to create the document.

The document will be created per the rules set and saved automatically to the location where the process started.

Fig. Form pre-doc creation



The Results

Fig. Assembled document

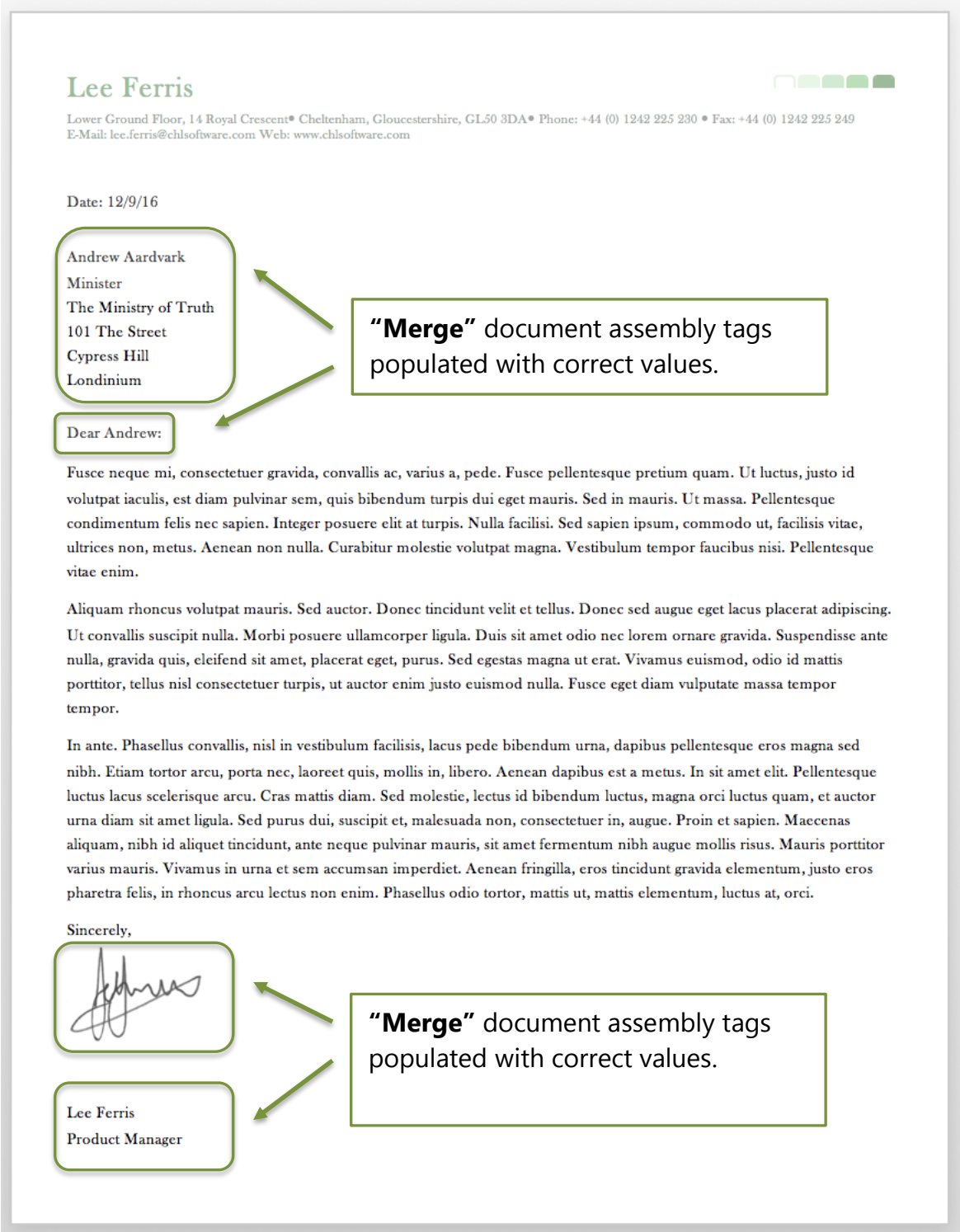
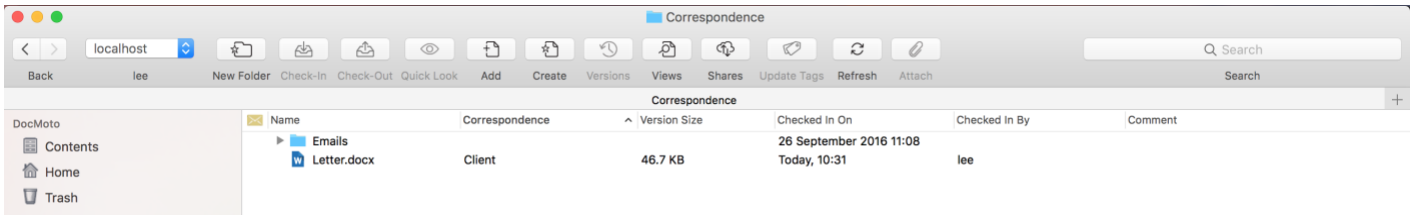



Fig. Assembled document created and saved