

Copyright © 2002 by Richard C. Belthoff, Jr.  
426 Shasta Lane  
Charlotte, NC 28211

~?,??? grammatical words

~?,??? typesetter's words (6 chars/word)

Phone: 704.366.7101  
Office: 704.374.7948  
Office Fax: 704.715.4496  
Email: Richard.Belthoff@Wachovia.com

All Rights Reserved

January 7, 2003

## **WordPerfect & Amicus Assembly: Easy Document Assembly from Your Amicus Data**

*by Richard C. Belthoff, Jr.*

### **Introduction to Amicus Assembly**

The latest version of Amicus Assembly Developer Edition, version 1.1, integrates with both Amicus Attorney and WordPerfect so that you can easily create, edit, and assemble template documents in WordPerfect using Amicus Attorney data (version 1.0 did work well with WordPerfect).

Amicus Assembly is a document assembly engine that allows you to create document templates in WordPerfect and then insert data from Amicus Attorney into a template when you “run” the template using Amicus Assembly. Templates are created in .RTF format (so they can also be used with Word, although they will not look exactly the same in Word as they do in WordPerfect).

Data is inserted using “FillPoints”, which are data gathering points that are inserted into a template during creation. When you “run” a template, these “FillPoints” gather information from Amicus Attorney to assemble a document. Templates can also include dialogs to gather information from users prior to document assembly, sophisticated logic statements to further control document creation, and simple FillPoints to prompt for user input.

For general information about Amicus Assembly, view the product details at <http://www.amicusattorney.com/products/assembly.html>. You can also review the information at [www.ghostfill.com](http://www.ghostfill.com) because Amicus Assembly is based on Ghostfill (the list archives are particularly helpful).

### **Accessing Amicus Assembly in WordPerfect**

After you install Amicus Assembly 1.1, and re-start WordPerfect, you should see a new menu named “Amicus Attorney” and several new toolbar icons (see Figure 1).

- **Amicus Assembly Explorer:** This icon starts Amicus Assembly Explorer, the main Amicus Assembly program, so that you can either edit or assemble a template document. By default, it will display the Amicus Assembly End User view to allow you to

- assembly a template (the Developer view includes additional information and features necessary to create or edit templates).
- **Save As:** This option allows you to save an open WordPerfect document as either a template or an assembled document in Amicus Assembly (you can save and manage assembled documents in Amicus Assembly as well as templates).
  - **FillPoint Editor:** You can display the FillPoint Editor (see Figure 2) by clicking this icon. You can insert standard FillPoints from this dialog into your templates. There are FillPoints for just about any type of Amicus Attorney Data (see Figure 2 for some examples). There are also FillPoints for general information like date, time, currency, mathematical operators, and block statements (e.g., “KeepBlockIf” some variable “IsTrue”).
  - **New FillPoint:** This menu item inserts a new, blank FillPoint into your current document (see Figure 3). You can then program the FillPoint by hand if you’re so inclined.
  - **Select FillPoint:** This icon selects a FillPoint if your insertion point is within a FillPoint in your template.
  - **Developer Assistant:** This menu item displays the Amicus Assembly Developer Assistant (see Figure 4). The Developer Assistant allows you to insert commonly used single and multiple FillPoints into your template, such as a set of FillPoints to insert information about a group of contacts on a file, such as name and address (see Figure 5).

## Using Amicus Assembly in WordPerfect

Although Amicus Assembly ships with many pre-programmed templates, you will likely want to create your own. Here is a summary of some simple steps to get you started:

- Open a new, blank document in WordPerfect (select File, New from the menu bar). If you have the “SmartQuotes” option on, turn it off using Tools, QuickCorrect, SmartQuotes. Some FillPoints include quotes, and these quotes must be straight, not curly. You can turn SmartQuotes back on after you finish developing your template.
- Click the Developer Assistant icon to display the Developer Assistant. Click on the “Shell template” tab. Select “Matter” from the “Object Type:” list. Click and drag the “One Matter” FillPoint from the “Description” box into your document. A new FillPoint will appear in your document.
- Select “Contact” from the “Object Type:” list. Click and drag the “One Contact” FillPoint into your document. Close the Developer Assistant.
- The two previous FillPoints must appear in your document prior to any other FillPoints or your template will not run correctly. These two FillPoints advise Amicus Assembly that you’re working with one matter and one contact so that Amicus Assembly can extract the proper information from Amicus Attorney. If you’re working with multiple matters or multiple contacts, there are different FillPoints available to insert (see the Developer Assistant for examples).
- Now, let’s create something simple, like a memo template. At the top of your document, after the initial FillPoints you inserted, type “To:” and press Tab. Click the FillPoint Editor icon (if the FillPoint Editor dialog does not display over your docu-

- ment, switch to it using Alt+Tab). In the FillPoint Editor, click the “+” next to “Amicus”, next to “Contacts”, and next to “Contact” to expand the list of FillPoints available for Contacts. Right-click “Full Name” and click “Send to WordPerfect” on the floating menu. The FillPoint will then appear in your template (see Figure 7). Press Enter twice.
- Type “From:” and press Tab. Display the Developer Assistant again. Select “Amicus” from the “Object Type:” list. In the “Description” box, click and drag “Current User Name” into your template after the Tab. The FillPoint will be formatted as 10-point type. If you’re using a different point size in your document, you’ll need to either reformat the FillPoint to the proper point size or else delete the 10-point type codes in the Reveal Codes window. Press Enter twice.
  - Type “Date:” and press Tab. Switch back to the FillPoint Editor using Alt+Tab and look for the Date and Time Tasks. Right-click “FormatDate” and select “Send to WordPerfect” to insert the date FillPoint into your document. By default, the date is formatted as day, month, and year, but you can change this formatting. The options are discussed in the on-line help for “FormatDate”. Press Enter twice.
  - Type “Subject:” and press Tab. Type “%[Subject]”. This creates a FillPoint that prompts you to type a Subject when you run your template. Your template should now look something like the simple one in Figure 7.
  - Click the “Save As” icon and save the .RTF template file as a Template in one of the Amicus Assembly Applications (templates are saved in separate “Applications”, which are just folders for categorizing templates; make sure you don’t save the Template as a “Document”).
  - Switch to Amicus Attorney. Display the Contacts dialog. Select one of your contacts. From the menus, select CONTACTS, Generate a Document to display the Generate Document dialog. Select “Amicus Assembly” from the drop-down list of Master Documents and click OK to display Amicus Assembly Explorer – User View. Select the appropriate “Application” from the drop-down list on the left and click your new template to run it. A prompt will appear asking for the “Subject”. After you fill in the Subject, and click OK, your completed template will appear in WordPerfect (see Figure 8).

## Conclusion

Amicus Assembly and WordPerfect make an unbeatable combination for assembling your legal documents. With a little practice, you can soon be on your way to create your own, sophisticated Amicus Assembly Templates.

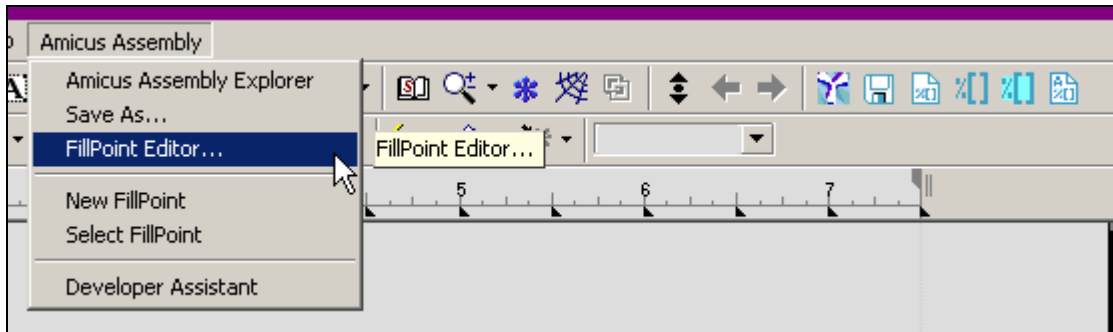


Figure 1. New Menu & Toolbar Icons.

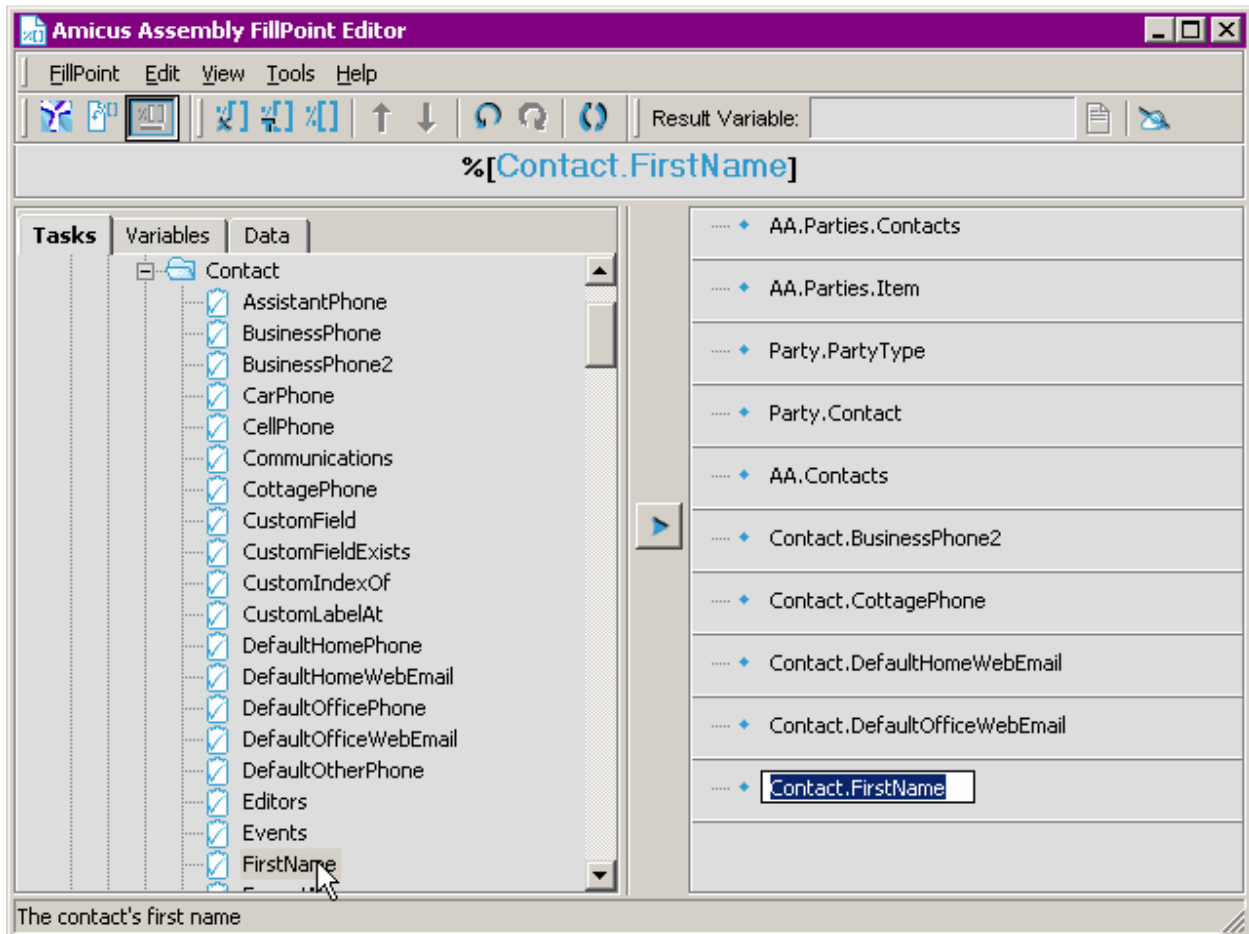


Figure 2. FillPoint Editor.

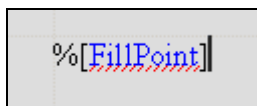


Figure 3. Blank FillPoint in WordPerfect Document.

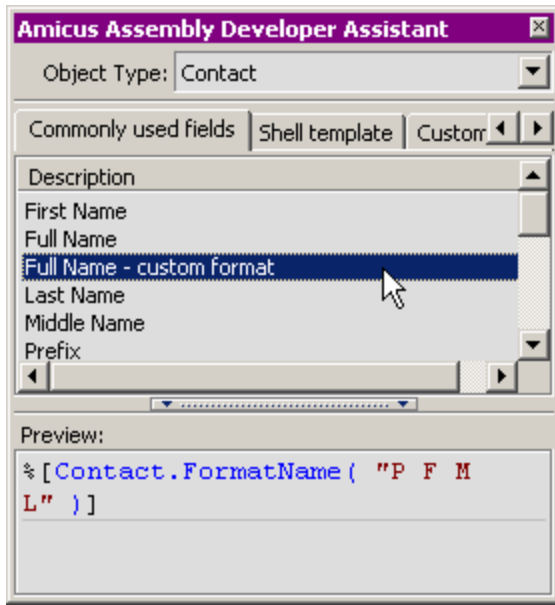


Figure 4. Developer Assistant.

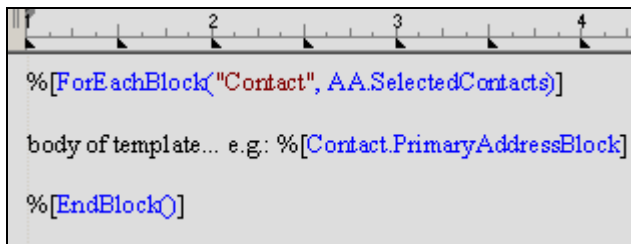
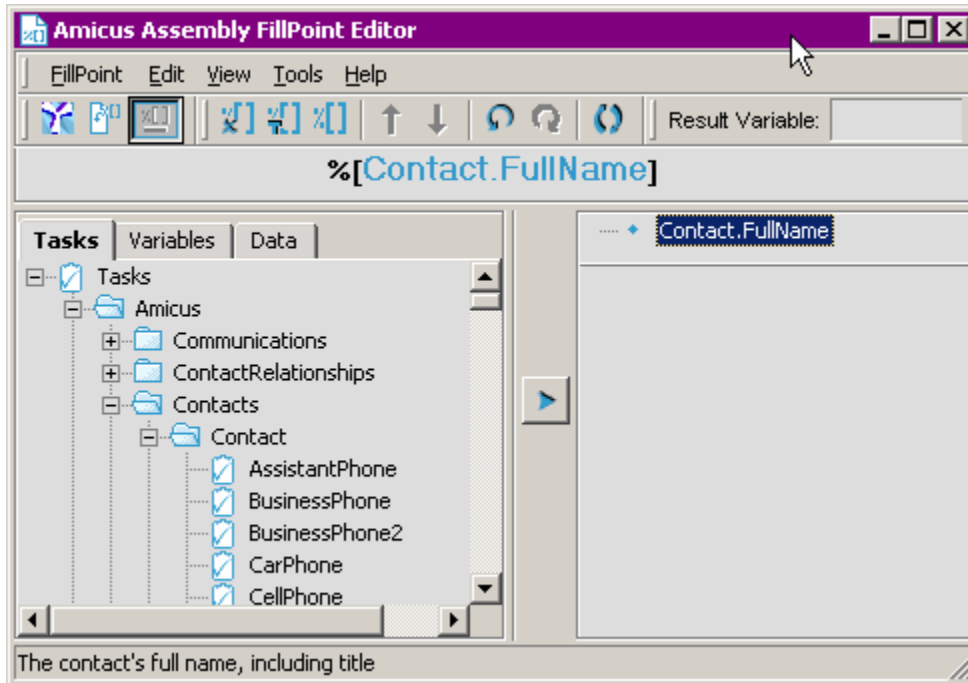
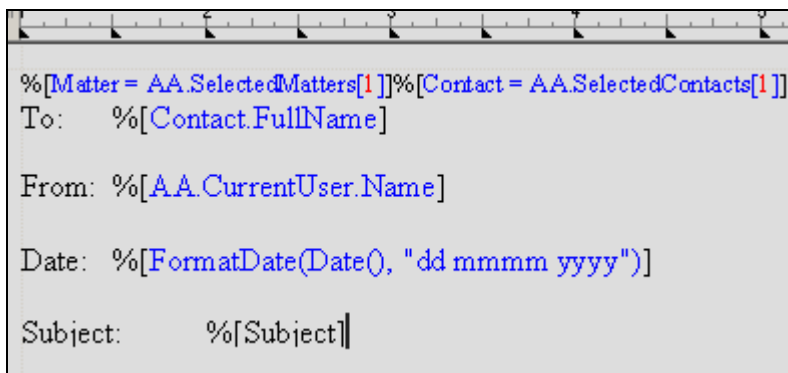


Figure 5. Sample FillPoint Code.



**Figure 6. FillPoint Editor - Inserting FillPoint.**



**Figure 7. Fax Template FillPoints.**