Document Assembly Manual

This manual is designed to help you and your team use the document assembly functionality in OneLaw.

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Introduction

OneLaw offers a number of capabilities to deliver a comprehensive document assembly and precedents system. Each firm can use as few or as many of the features available to increase efficiency.

NOTE: OneLaw document assembly was previously known as OneAuthor. OneAuthor was historically delivered as some simple field capabilities in OneLaw along with a VBA solution customised for each customer.

As OneLaw has moved away from VBA, we have also moved away from the OneAuthor branding. OneAuthor is now known as document assembly, and the old VBA functionality is known as legacy OneAuthor. Please also note, there is still some OneAuthor branding within the product at this time; this will be removed in due course.

The capabilities that comprise OneLaw document assembly are outlined in the table below:

Feature	Capabilities
Signatures	+ Store signatures on the user record + Define signature delegation rules + Sign documents directly in Word + Create signature placeholders in precedents + Handles multi-signing scenarios
Stationery – Headers & Footers	+ Store letterhead in OneLaw + Define firm default letterhead + Supports multiple letterhead options + Manually apply letterhead to documents, or automatically apply default letterhead when running precedents
Stationery – StyleSheets	+ Define StyleSheets containing firm styles for various use cases (letter, court, deed/agreement etc.) + Apply StyleSheet styles to documents
Fields	+ Includes OneLaw data in documents using fields + Supports both content controls and merge fields in Word + Access to a wide range of built-in fields, as well as custom fields via InfoSheets
InfoSheets	+ Define InfoSheets containing related sets of custom fields + Attach InfoSheets to matters with relevant fee types, or show as a dialog box when running a precedent or inserting a clause/fragment + Supports a wide range of field types
Clauses & Fragments	+ Define and manage small pieces of content to be inserted into documents, either manually or automatically when running precedents + Associate Clause Libraries with fee types and make them available to insert in relevant documents
Precedent Libraries	+ Define named libraries of precedents associated with particular fee types + Run precedents from within OneLaw and automatically populate with correct client/matter information
Email Precedents	+ Create precedents containing common email content + Automatically populate emails with OneLaw built-in and InfoSheet fields

There are a number of other OneLaw features closely related to document assembly that are mentioned but not specifically covered in this manual. These include:

- Document management (formerly OneDesktop)
- Statement templates

VBA

While there are still firms using legacy OneAuthor with VBA, this manual specifically does not cover VBA. For assistance with VBA-based functionality, please contact OneLaw support: support@onelaw.co.nz or 03 339 5032.

Create Mode vs Edit Mode Functions

When working with documents, OneLaw document assembly capabilities can be divided into Create Mode capabilities and Edit Mode capabilities:

- **Create mode capabilities:** These capabilities occur during the process of creating a document from a precedent – generally called "running a precedent" or "executing a precedent"
- **Edit mode capabilities:** These capabilities are available when editing a document. Many of these capabilities are available for any document, but some are only available for certain documents created from precedents

Specific capabilities and which modes they are available for are outlined in the table below.

Capability	Create mode	Edit mode
Sign document		✓
Manually apply header/footer		✓
Auto-apply default header/footer	✓	
Apply StyleSheet styles		✓
Fill document fields	✓	
Manually insert clause/fragment		✓
Auto-insert clause/fragment	✓	
Display Prompt InfoSheet	✓	
Display Fragment/Clause InfoSheet	✓	✓

User Interface

See the instructions and figures below for the key User Interface entry points for users, administrators and template authors.

Users

In Word

1. Run an internally stored precedent/template
2. Show the Signature dialog to insert a signature
3. Access the Stationery menu to access to header & footers and StyleSheets
4. Access the Fragments/Clauses menu to insert a predefined Fragment or Clause

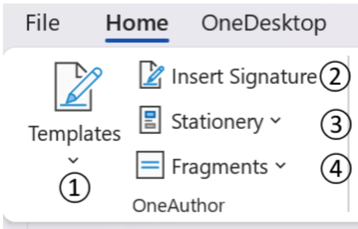


Figure 1

In OneLaw – Home tab, matter view

1. View/edit InfoSheets available for this matter
2. View/run precedents available for this matter

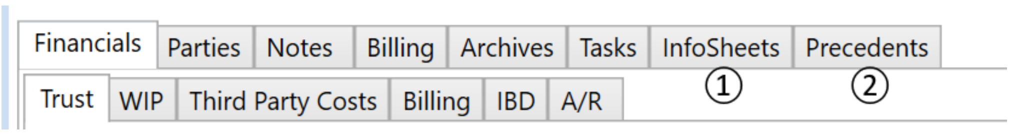


Figure 2

In OneLaw – Documents tab

View/run precedents available for this party/matter.

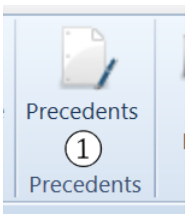


Figure 3

Administrators

In Word

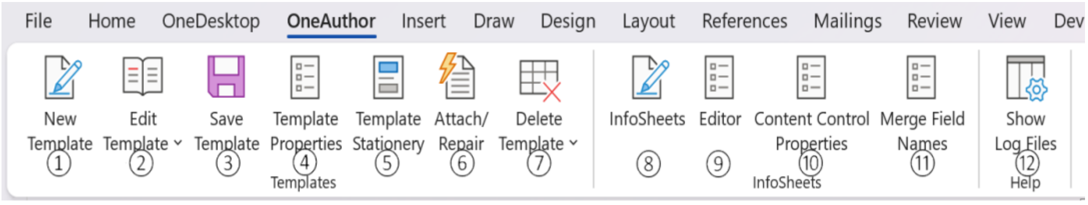


Figure 4

1. Create a new template/precedent
2. Edit an existing internally stored template
3. Save the currently open template/precedent to the internal template store
4. Show the template settings for the currently open template/precedent
5. Show the stationery settings for the currently open template/precedent
6. Open the Attach/Repair dialog
7. Delete a template from the internal template store
8. Open the attached InfoSheets dialog for the currently open template/precedent
9. Show the built-in/InfoSheet fields in the currently open template/precedent, allowing drag-drop insertion of content control fields
10. Show the current XML data binding of the selected content control
11. Open a list of available merge fields in a new Word document
12. Show the log files directory (when requested by OneLaw Support)

In OneLaw – Administration tab

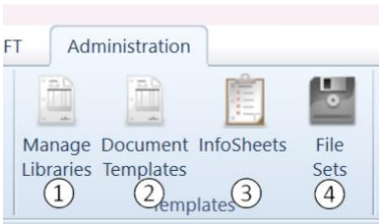


Figure 5

1. Manage Precedent Libraries and Clause Libraries
2. Manage various templates, including:
    a. Headers & footers
    b. StyleSheets
    c. Fragments
3. Manage InfoSheets
4. Manage File Sets (NOTE: File Sets are a supporting function for the legacy OneAuthor, and as such are not covered in this manual)

Licencing and Permissions

Licencing and Settings Managed by OneLaw

Document assembly is now included with all OneLaw implementations, however historically, document assembly was an optional add-on. When document assembly is not licenced, a number of features described in this manual are not available.

Some other features described in this manual are enabled for all new OneLaw customers, but not available by default for existing OneLaw customers (with document assembly licenced) due to the change management process required to switch from the legacy OneAuthor functionality.

The table below indicates which features are always available, which features require document assembly licencing to be enabled and which features need to be enabled by OneLaw as part of a change management process for customers using the legacy OneAuthor.

Feature	Always available	Needs document assembly licence	Needs document assembly licence and additional configuration
InfoSheets	✓		
Precedents and Templates		✓	
Precedent Libraries		✓	
Email Precedents		✓	
Clauses & Fragments			✓
Signatures			✓
Stationery – Headers & Footers			✓
Stationery – StyleSheets			✓
Bidirectional Data Flow			✓

If your firm is not licenced for document assembly and would like access to the above features, or your firm is licenced for document assembly, but you don't yet have access to the features above, then please reach out to OneLaw support in the first instance.

Template Administrator Permission/Role

Certain functions used to administer or author templates/precedents and related capabilities are controlled by a Template Administrator permission. This includes access to the Templates section on the Administration tab, and the entire OneAuthor tab in Word.

Figure 6

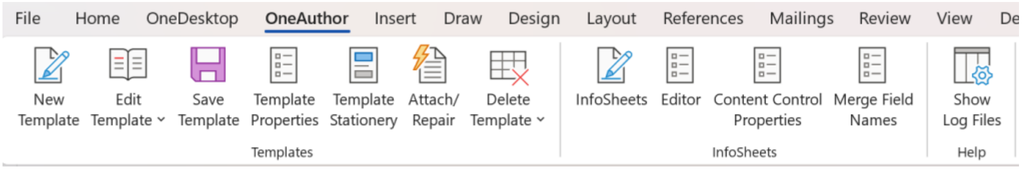


Figure 7

It is possible to give users access to the Templates section in OneLaw without providing access to all other admin functions. In this case, the Administration tab is replaced with a Templates tab, which contains only the Templates section.

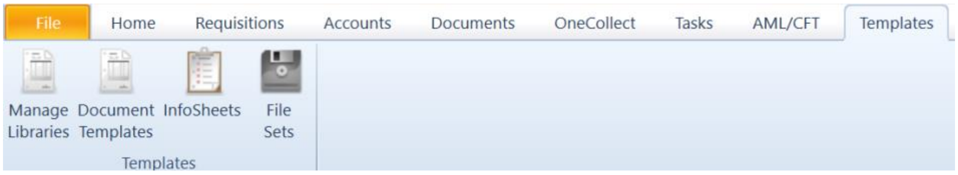


Figure 8

Adding a Template Administrator Role

It is recommended to add a Template Administrator role, which includes the Template Administrator permission. This provides access to template authoring functions without providing access to general firm administration functions. To do this, open OneLaw and navigate to the Administration tab. Select Roles and click on the green plus (+) to add a new role.

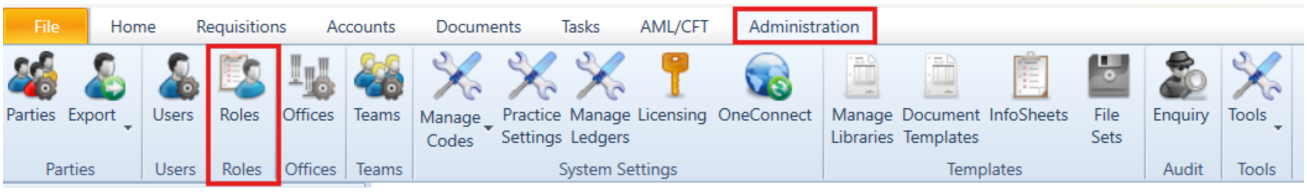


Figure 9

Fill in the Name and Description fields with Template Administrator, then select Choose Permissions. Scroll down the permissions list to the heading Administration. At the end of this section, check the box for Template Administrator. Click OK, then Save & Close.

Figure 10

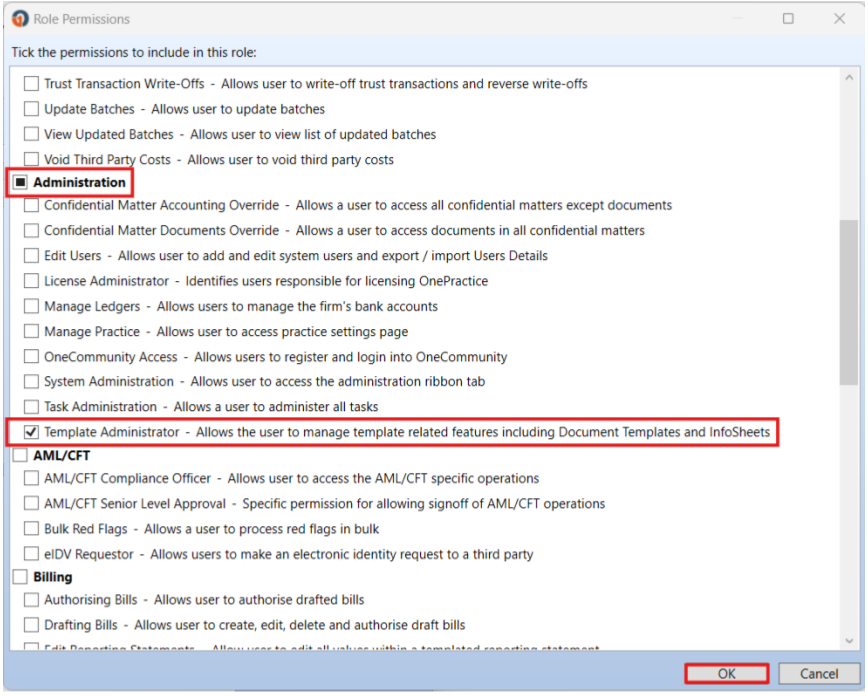


Figure 11

Open the Maintain Staff dialog by clicking Users on the Administration tab.

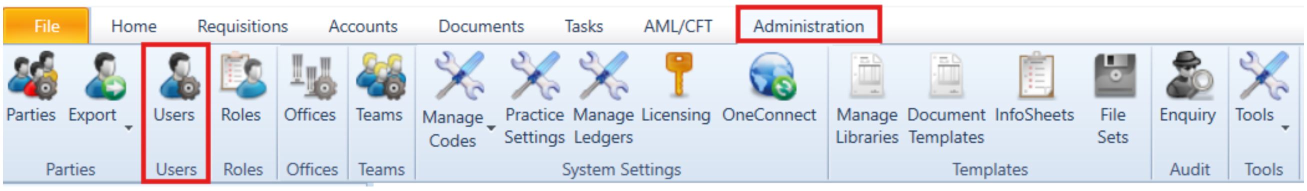


Figure 12

For each user that needs the Template Administrator role, open the user profile and under Roles, check the box for Template Administrator. Click Save & Close.

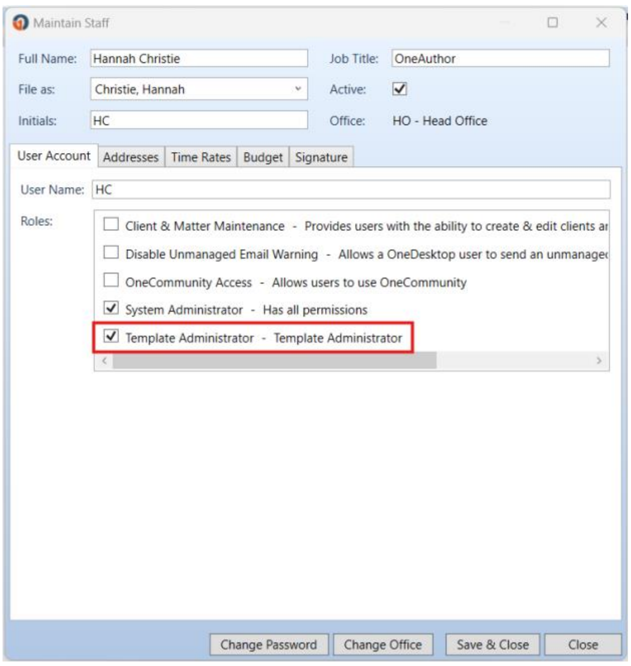


Figure 13

Documents & Precedents

Introduction

OneLaw defines multiple types of templates and precedents. The three types covered in this manual are:

- Document templates and precedents – covered in this section
- Email precedents – covered in the Email Precedents section of this manual
- Statement templates – covered in the Statements Manual, but overlaps with content in this manual, as statement templates can also use built-in and InfoSheet fields

This section covers document templates and precedents.

Terms:

- **Template:** Document used to create other documents, containing reusable layout, styles and automation. Typically, does not include IP
- **Precedent:** Document or template containing re-usable content (IP), with or without automation, used to generate a document
- **Document:** Any document, either created from scratch, a template, precedent or received from another party

In OneLaw terms, the flow generally goes as follows:

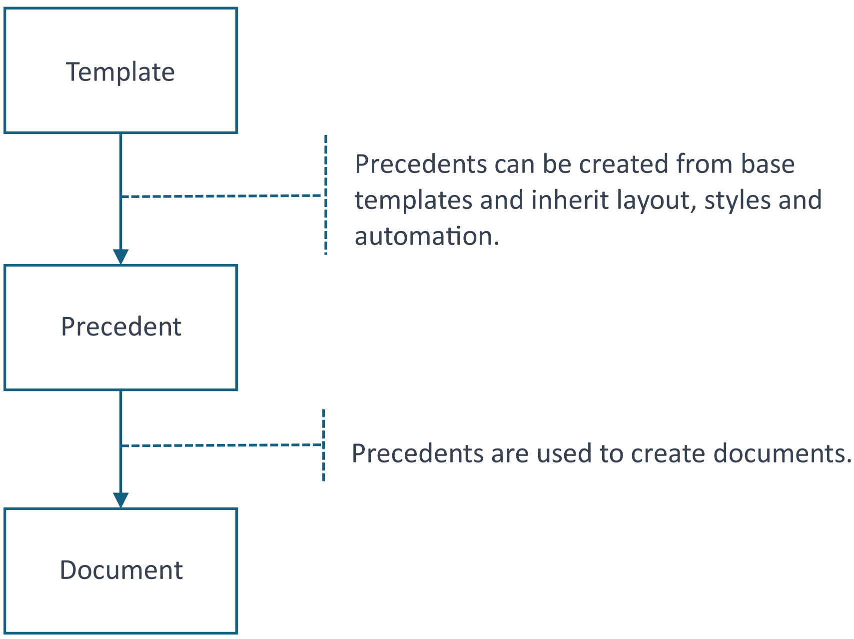


Figure 14

Precedent Automation Types

There are three types of precedent automation in OneLaw:

+ **None:** Just a document. Any document containing content that is made available in OneLaw as a precedent but does not use any document assembly features such as fields, clauses or InfoSheets. Can be in Word document or template (.docx, .docm, .dotx, .dotm) format
+ **Partial:** A precedent with automation in a Word document (.docx or .docm) format. These precedents support limited create mode features – only field mapping into content control fields. Fields can come from built-in fields or Matter InfoSheets. Does not support merge fields, Clauses/Fragments, Prompt InfoSheets
+ **Full:** A precedent in Word template (.dotx or .dotm) format. These support all create mode features, such as merge fields, Clauses, Fragments and Prompt InfoSheets

NOTE: Word templates (.dotx, .dotm) require correct settings to enable all features of full automation. Specifically, the setting "Template uses MergeFields" must be enabled. For more details, see the Template/Precedent Settings section below.

The following table outlines which OneLaw document assembly capabilities are available for each precedent automation type. Where "None" is ticked under precedent automation type, these capabilities can be used with any document.

		Precedent automation type		
Capability	**Mode**	**None**	**Partial**	**Full**
Fields				
Built-In fields	Create		✓	✓
InfoSheet fields	Create		✓	✓
Populate content control fields	Create		✓	✓
Populate merge fields	Create			✓*
InfoSheets				
Prompt InfoSheets	Create			✓
Clause/Fragment InfoSheets (on run precedent)	Create			✓
Clause/Fragment InfoSheets (manually from menu)	Edit	✓	✓	✓
Clauses/Fragments				
Insert clause (chosen in InfoSheet)	Create			✓*
Insert Clause (OA INCLUDE)	Create			✓*
Insert clause (x picker)	Edit			✓
Insert clause (manually from menu)	Edit	✓	✓	✓
Signatures				
Insert signature at cursor	Edit	✓	✓	✓
Insert signature at placeholder	Edit		✓	✓
Stationery – Header & Footer				
Apply default stationery (on run precedent)	Create		✓	✓
Apply or clear stationery (manually from menu)	Edit	✓	✓	✓
Stationery – StyleSheets				
Apply styles from StyleSheet	Edit	✓	✓	✓

* The asterisked features in the table above require the "Template uses MergeFields" setting to be enabled in the precedent.

Precedent Execution

“Precedent Execution,” or “Running a Precedent,” are terms used to describe the process of generating a document from a precedent. This is a similar concept to generating a Word document from a Word template, where double-clicking the Word template does not edit the template, but instead creates a new document based on the template.

OneLaw is designed to create new documents from precedents that are both Word documents (.docx, .docm) and Word templates (.dotx, .dotm). This process always creates a new document which contains the content of the precedent and associates the document with a party and/or matter in OneLaw.

Exactly how this works depends on the automation type of the precedent and where the precedent is executed from. Precedents can be executed from 3 locations:

+ **Internal template library:** This is the legacy OneAuthor template location, where templates/precedents are stored in the OneLaw document management system and cached onto each PC
+ **Precedent Library:** These are precedents stored in folders outside of OneLaw, typically a shared drive or SharePoint. Precedent Libraries allow these precedents to be executed from within OneLaw
+ **External access via folder:** Full automation precedents can be configured to be able to run directly from an external folder, by double-clicking in Windows Explorer, without requiring access via a precedent library. For more details, see Template/Precedent Settings below

The following table shows which precedent automation types are supported by the different precedent locations:

	Precedent automation type		
Precedent execution location	**None**	**Partial**	**Full**
Internal template library		✓	✓
Precedent Libraries	✓	✓	✓
External access via folder			✓

NOTE: Precedent Libraries can be configured for the type of precedent automation they support. See the section on Precedent Libraries for details.

Base Templates

Base templates are Word templates used to create precedents. They are typically used to allow shared styles, layouts, etc. to be reused. Base templates are created and managed like precedents in an internal template library. When saving a template/precedent to the internal library, there is an option to specify it as a Base Template. When selected, the following rules apply:

+ The template cannot be executed directly to create a document, i.e. it does not appear to end users as a precedent in the internal template library
+ When creating a new precedent, it can be based on a base template. When this is done, all styles and content from the base template are pulled into the new precedent

Base templates support all the same features as precedents, and new precedents created from base templates will inherit any automation from the base template.

Template/Precedent Settings

Several settings control how precedents are executed:

1. **Template Uses MergeFields:** On a full automation precedent, this specifies whether merge fields will be processed/populated. There is a small performance penalty for processing merge fields, so if a .dotx/.dotm precedent does not use merge fields, this can be disabled to speed up execution.
2. **Flatten Fields After Merge:** When merge fields have been processed, this setting specifies whether to ‘flatten’ any IF fields in the body of the document. This effectively removes the IF field objects and leaves behind just the resulting text. This can be used if it is not desirable to leave complex IF fields behind after running the precedent. NOTE: This process only affects the body of the document; it does not modify fields in the Header/footer.
3. **Execute on New Document Creation:** For full automation precedents stored in an external folder, this setting specifies whether to execute the precedent automation when a new document is created from the Word template, even when this happens outside of OneLaw (e.g. by double-clicking the precedent file in the file explorer). This setting is very useful to precedent authors working on precedents locally before publishing them in a Precedent Library.

These settings can be accessed in several places. Settings 1 and 2 can be set when first creating a template/precedent in the New Template dialog, accessible from the New Template button in the OneAuthor ribbon:

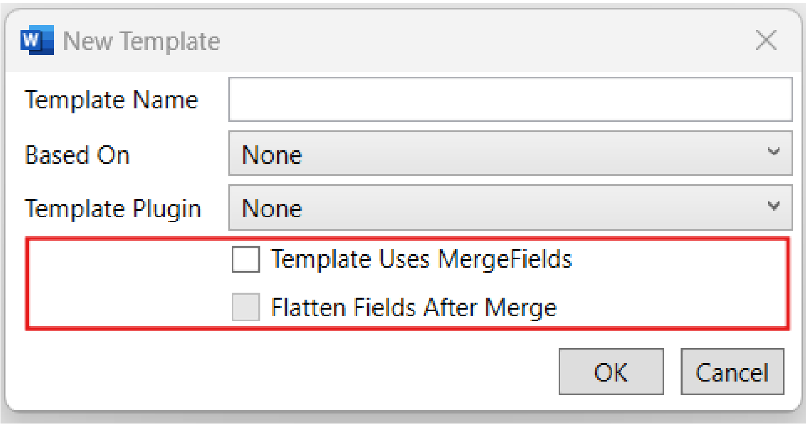


Figure 15

They can also be set in the Template Properties dialog, accessible from the Template Properties button on the OneAuthor ribbon:

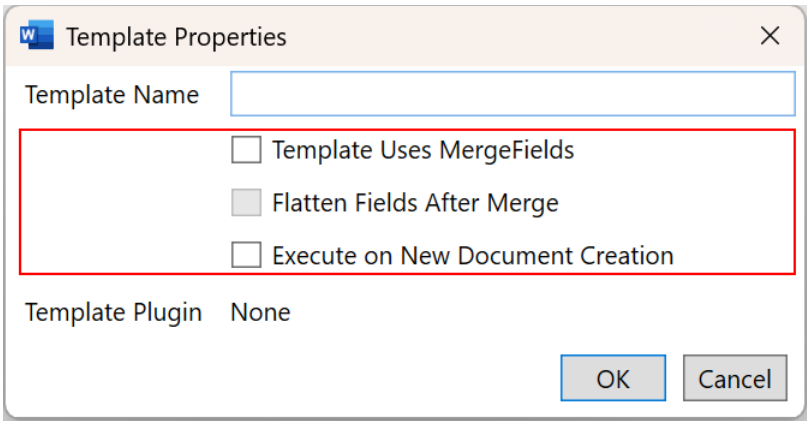


Figure 16

Or:

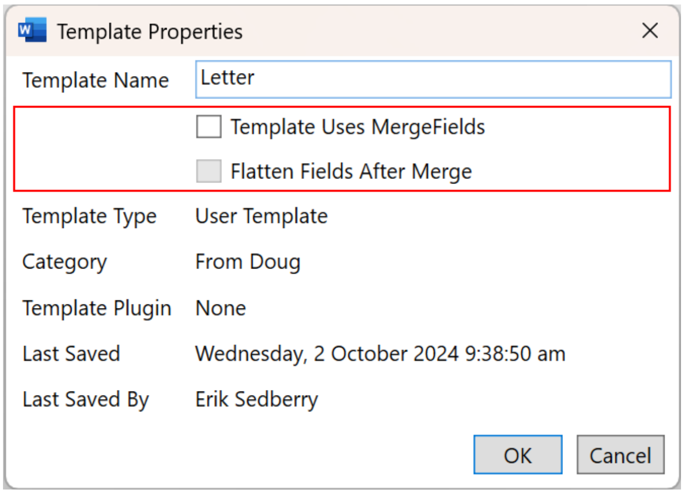

Template Properties
Template Name
Letter
Template Uses MergeFields
Flatten Fields After Merge
Template Type
User Template
Category
From Doug
Template Plugin
None
Last Saved
Wednesday, 2 October 2024 9:38:50 am
Last Saved By
Erik Sedberry
OK
Cancel

Figure 17

How To – Base Templates

Users with the Template Administrator permission can create base templates. To create a base template, open Word and navigate to the OneAuthor tab. Select New Template.

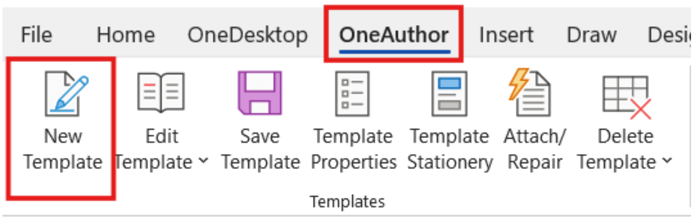


Figure 18

A New Template dialog will open and provide the following options for the template:

- **Template Name:** Enter an appropriate name for the template
- **Based On:** Leave this as None, as this precedent will become a base template
- **Template Plugin:** Leave this as None, as this field is to support legacy VBA solutions

If the base template uses merge fields, then tick Template Uses MergeFields. It is recommended that the Flatten Fields After Merge remains unticked. Refer to the above Template/Precedent Settings section for more details on this.

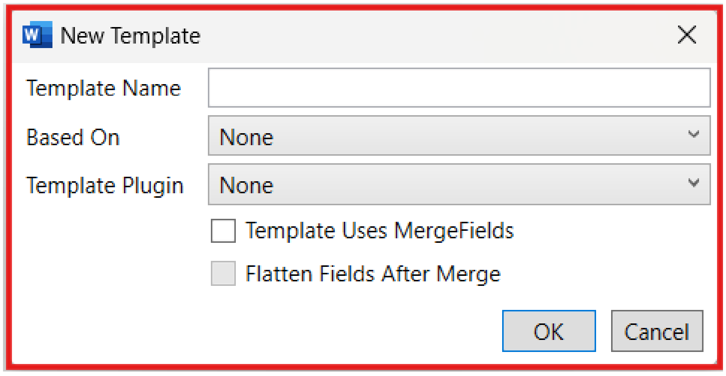


Figure 19

Once the New Template properties have been filled in, click OK.

If the base template should include your firm's default header & footer from OneLaw, you can click the Template Stationery button.

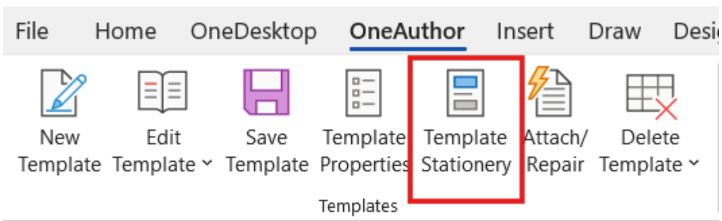


Figure 20

A Default Stationery Settings dialog will open and provide the option to only apply stationery to the first page of the base template or to automatically apply the default stationery to the base template upon execution of any precedents based on this base template.

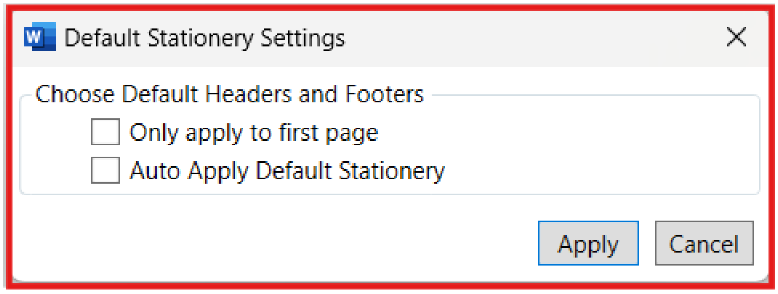


Figure 21

InfoSheets can be attached to base templates by selecting the InfoSheets button in the InfoSheets tab. Refer to the InfoSheets section of this manual for more information.

Insert content for the base template.

Once the base template is finalised and ready to be saved, select Save Template. A Save Template dialog will open and provide the following options for the base template:

- **Template Name:** This will automatically populate with the template name preset in the above step to set up a New Template. This can be overridden at this point
- **Template Type:** This allows for the precedent to be either a User Precedent or a Base Template. For base templates, select Base Template from the dropdown box
- **Category:** As this is a base template, this option won't be available

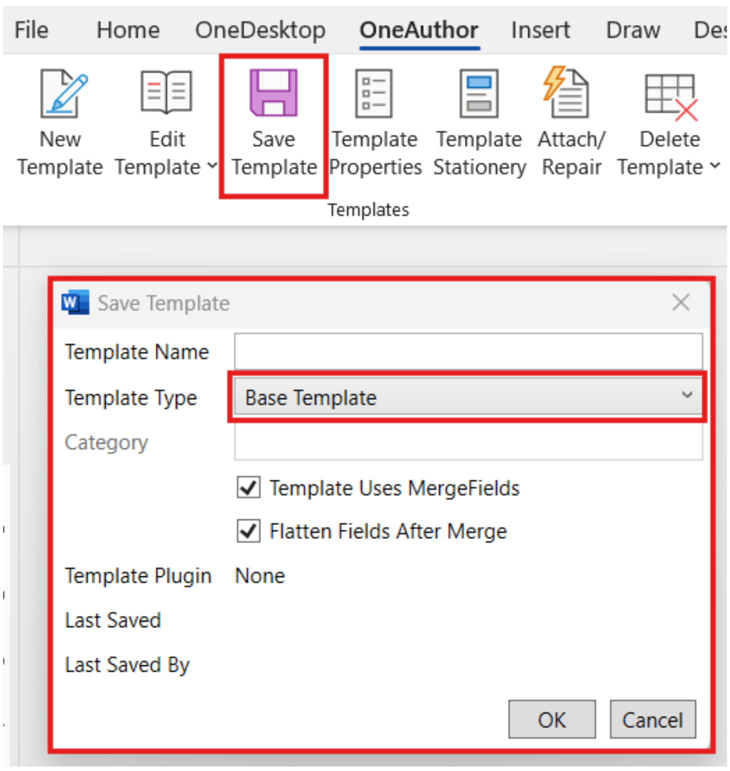


Figure 22

Once a base template has been saved, if amendments need to be made, select the Edit Template button on the OneAuthor tab. The dropdown will show Base Templates first, with a sidebar showing all base templates. Click on the base template that requires editing, and it will open in a new window. After all amendments have been made, save the base template by selecting the Save Template button.

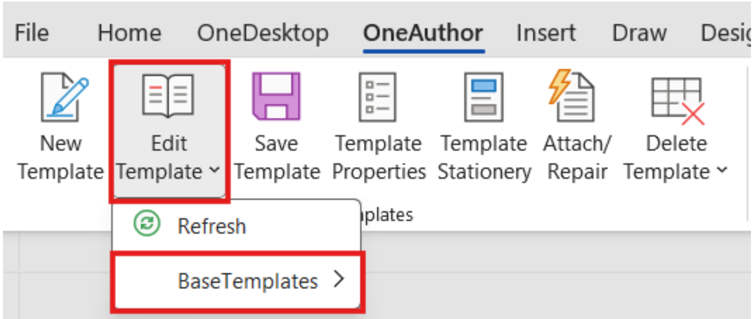


Figure 23

How To – Internal Precedent

Users with the Template Administrator Role have permission to create internal precedents. The process to create internal precedents is the same as creating base templates, with a small change for how to save the document, as noted further down this section.

To create an internal precedent, open Word and navigate to the OneAuthor tab. Select New Template.

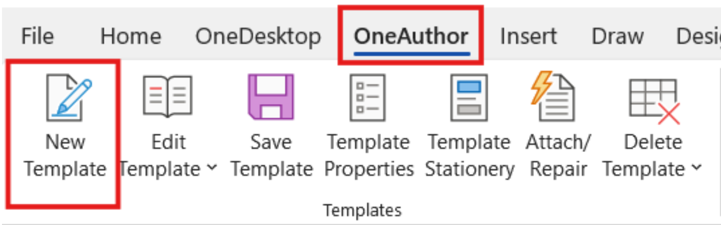


Figure 24

A New Template dialog will open and provide the following options for the internal precedent:

+ **Template Name:** This is what will prepopulate in the Document Name when users run the precedent from within OneLaw
+ **Based On:** There is the option to base the new precedent on an existing one. The dropdown will give all available base templates to use
+ **Template Plugin:** Leave this as None as this field is to support legacy VBA solutions
+ If the new precedent will be using merge fields then check the Template Uses MergeFields box. It is recommended that the Flatten Fields After Merge remains unticked. Refer to the above Template Properties section for more detail on this

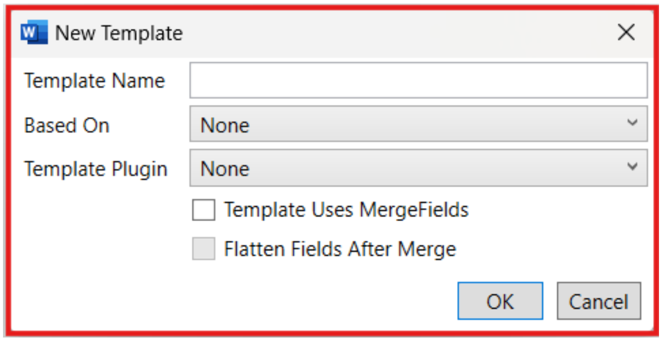


Figure 25

Once the New Template properties have been filled in, click OK.

If the internal precedent should include your firm's default header & footer from OneLaw, you can click the Template Stationery button.

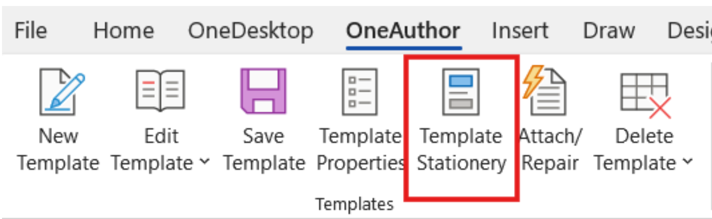


Figure 26

A Default Stationery Settings dialog will open and provide the option to either only apply stationery to the first page of the internal precedent or to automatically apply the default stationery to the internal precedent upon execution of the internal precedent.

Both these check boxes can be ticked if the internal precedent should use both options. If the internal precedent is based on a base template that uses Template Stationery, then the Auto Apply Default Stationery will already be prepopulated. This can be overridden and deselected at this point.

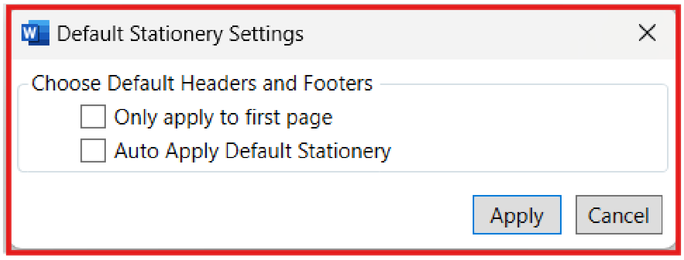


Figure 27

InfoSheets can be attached to the internal precedent by selecting the InfoSheets button in the InfoSheets tab. Refer to the InfoSheets section of this manual for more information.

The next step is to insert the content required for the internal precedent. This could be starting from scratch or simply copying and pasting the content from another document.

Once the internal precedent is finalised and ready to be saved, select Save Template. A Save Template dialog will open and provide the following options for the internal precedent:

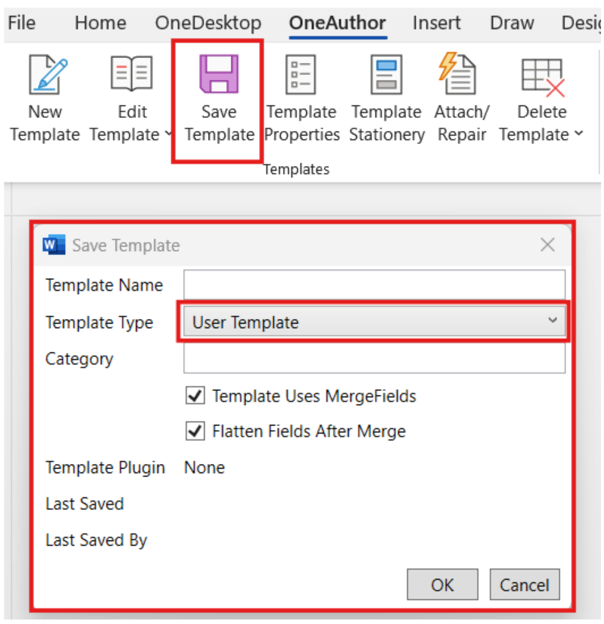


Figure 28

- **Template Name:** This will automatically populate with the template name preset in the above step to set up a New Template
- **Template Type:** This allows for the precedent to be either a User Precedent or a Base Template. For internal precedents, select User Template from the dropdown box

- **Category:** For internal precedents, Categories act like a folder structure where there can be a main folder followed by subfolders of internal precedents. For the example below, in the Category field type: Bex Templates > Client Information – the Test template #3 would be located in this subcategory once saved

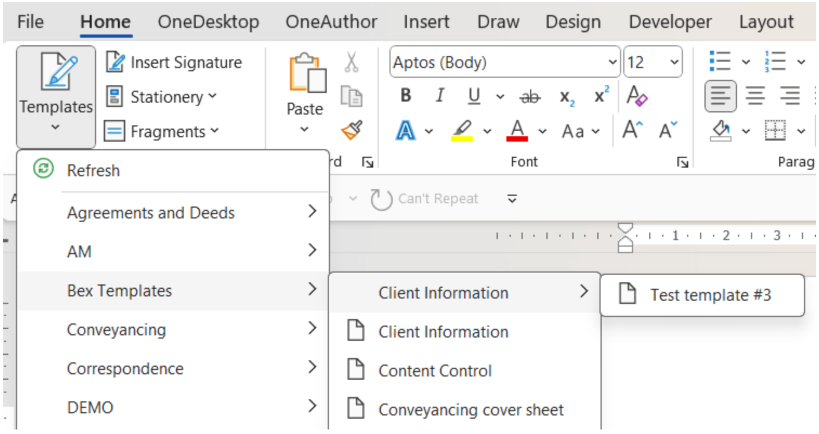


Figure 29

Once an internal precedent has been saved, if amendments need to be made, select the Edit Template button. The dropdown will show Base Templates first and then all internal precedents. Click on the internal precedent that requires editing, and it will open up in a new window. After all amendments have been made, save the internal precedent by selecting the Save Template button.

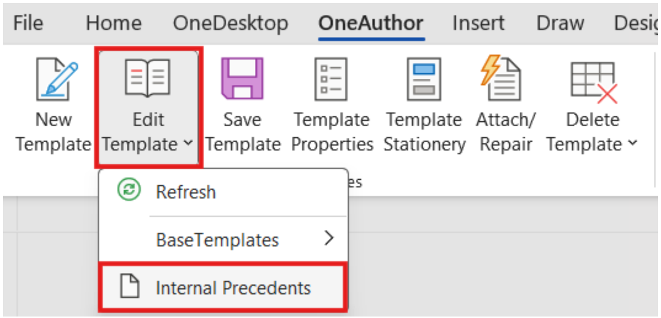


Figure 30

How To – External Precedent

Users with the Template Administrator permission can create external precedents. There are two ways to create an external precedent, with each being appropriate for different solutions. In both cases, once the precedent is created, it gets saved to an external location rather than the internal templates area.

Method 1 – New Template Button

This method is best when a brand-new precedent is required, or a precedent based on a Base Template.

This process starts exactly the same as when creating an internal precedent, but rather than saving to the internal templates area, it instead saves to an external location.

Follow the instructions in the How To – Internal Precedent section up until the precedent is saved. Then, instead of using the Save Template button, use the built-in Word save function to save the precedent to an external location.

Method 2 – Attach/Repair Existing Document

This method is best if you have an existing document (e.g. a precedent from another system) that you wish to turn into a OneLaw precedent.

To convert a document to an external OneLaw precedent, open the document in Word and navigate to the OneAuthor tab. Select Attach/Repair > Current Document > Attach/Repair. This will link the document to OneLaw as a precedent. See the Attach/Repair

Attach/section in this manual for more information.

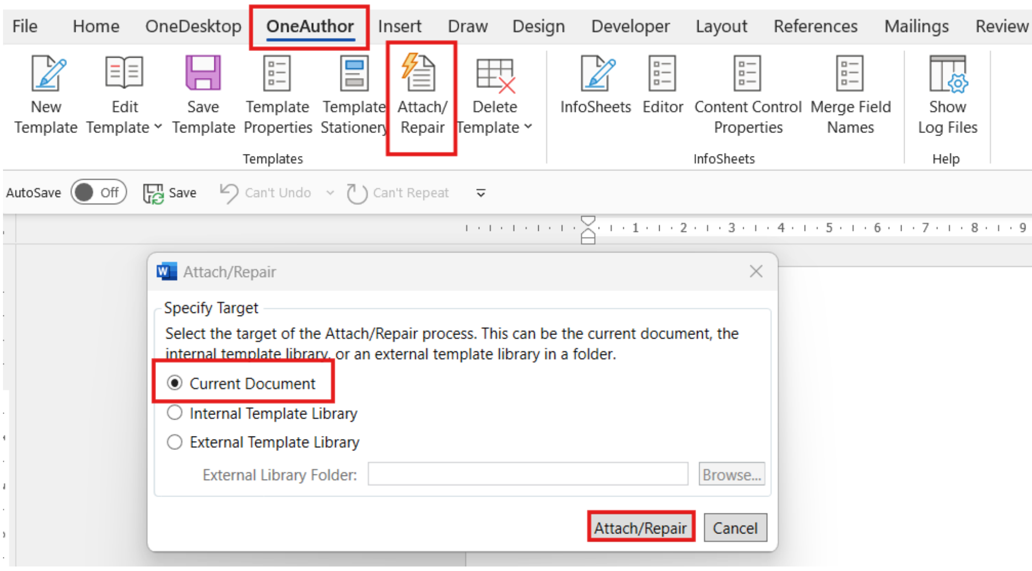


Figure 31

Once that has been done, select Template Properties, which will open the following dialog and provide the following options for the external precedent:

+ **Template Name:** This is what will pre-populate the document name when users run the precedent from within OneLaw
+ If the new precedent will be using merge fields, check the Template Uses MergeFields box. It is recommended that the Flatten Fields After Merge remains unticked. Refer to the above Template/Precedent Settings section for more detail on this
+ **Execute on New Document Creation:** Ensure this box is checked and click OK

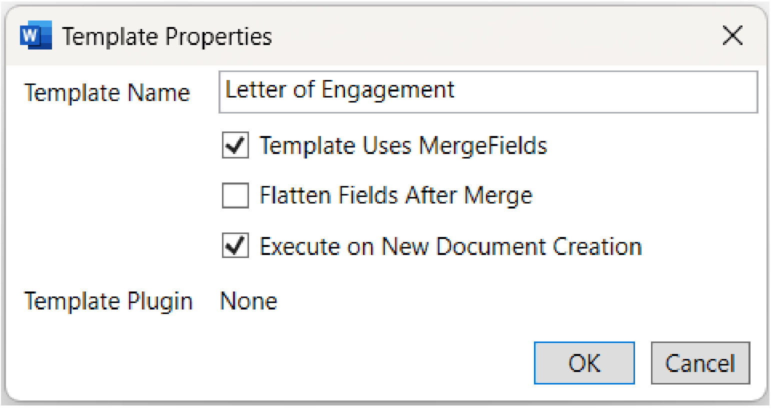


Figure 32

Use the Template Stationery tool if the external precedent should include the default header and footer from OneLaw.

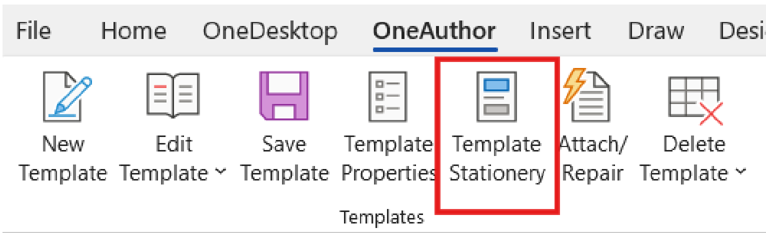


Figure 33

The Default Stationery Settings dialog will open and provide the option to only apply stationery to the first page of the external precedent or to automatically apply the default stationery to the external precedent upon execution.

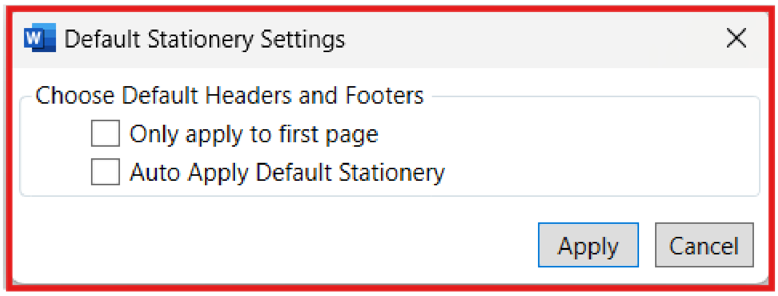


Figure 34

InfoSheets can be attached to the external precedent by selecting the InfoSheets button in the InfoSheets tab. Refer to the InfoSheets section of this manual for more information.

The next step is to insert the content required for the external precedent. This could be starting from scratch or by simply copying and pasting the content from another document. Once the internal precedent is finalised and ready to be saved, navigate to the File tab, click Save As and save to the firm's external precedent library folders as either:

+ A Word document (.docx file) if the external precedent contains no automation; or
+ A Word template (.dotx file) if the external precedent contains automation, including the use of merge fields and/or content controls

Refer to the Managing Precedent Libraries section of this manual for more information.

Editing External Precedents

Updates to external precedents referenced in Precedent Libraries will update in OneLaw in real time. See the Precedent Libraries section for more information.

When working with external precedents, it is generally best to edit local copies of the precedents rather than the live copies located in the Precedent Libraries. This is particularly important in a SharePoint environment to avoid sync issues or conflicts. Once the precedent is ready, it can then be saved back to the live location.

To edit a precedent from within an external folder:

1. Copy the precedent to a location on the local hard drive
2. Open the precedent in Word
   NOTE: To correctly open the original document, right-click on the precedent in the external folder and scroll down to open. Double-clicking on the document will open up a "copy" of the precedent.
3. Edit the precedent as required
4. Test by double-clicking the edited precedent. This should trigger the document assembly process and show the New Document dialog. If this doesn't happen, confirm "Execute on New Document Creation" is checked in Template Properties (see Figure 32)
5. When the precedent is ready, copy it back to the live location
6. Changes to precedents from within these external folders will copy down to the Precedent Libraries within OneLaw and will be available to all users in real-time

Attach/Repair

Attach/Repair is like a Swiss army knife of tools, which collectively provide the following key functions:

1. Attaching precedents from other sources to the current firm's precedent library. These could be:
   a. Documents that we want to use as precedents
   b. Precedents from another system
   c. OneLaw precedents attached to a different firm (e.g. a sandbox)
2. Repairing issues with precedents attached to the current firm, such as:
   a. Compatibility mode
   b. Missing base schema XML Part
   c. InfoSheet not matching the latest InfoSheet definition
3. Bulk application of template/precedent settings, as outlined in the Template/Precedent Settings section of this manual

Attach/Repair can be run on a single document/precedent, or in bulk on a folder of documents/precedents or the internal precedent library. Attach/Repair performs the following functions:

Feature	Optional	Single	Bulk - internal	Bulk - folder
Take document out of Word 'Compatibility Mode'		✓	✓	✓
Convert document to OneLaw Precedent		✓	✓	✓
Embed XML Part for Build-In fields (Base schema)		✓	✓	✓
Set Firm ID to current Firm		✓	✓	✓
Update any known InfoSheets to latest version		✓	✓	✓
Set template/precedent settings in bulk for the following settings: + Template Uses MergeFields + Flatten Fields After Merge + Execute on New Document Creation	✓		✓	✓
Save as .dotx/.dotm. (convert Word document to Word template)	✓			✓
Re-map fields from other system to OneLaw merge fields. This includes other system merge fields and DocVariable Fields. See the Re-Mapping Fields section for more information.	✓			✓

Logs and Dry Runs

Every time Attach/Repair is executed, it creates a Log file in the OneLaw logs folder. This folder can be accessed by clicking "Show Log Files" on the OneDesktop tab. Log files are named: AttachRepair_[date]_[time].log, e.g. AttachRepair_20250626_164306.log where [date] is 26 June 2025, and [time] is 4:43:06 pm.

If there are any errors or warnings generated by the Attach/Repair process, the log file will be opened automatically at the end of the process.

For bulk Attach/Repair runs, it's possible to perform a dry run. When a dry run is performed, the full process is executed, but the resulting changes to the files are not saved. This is to allow logs to be reviewed for any issues prior to actually making any changes.

NOTE: It is highly recommended to perform a dry run and review the log prior to running Attach/Repair on the internal precedent library, as the changes cannot easily be undone.

Using Attach/Repair

Attach/Repair can be accessed from the OneAuthor tab in Word:

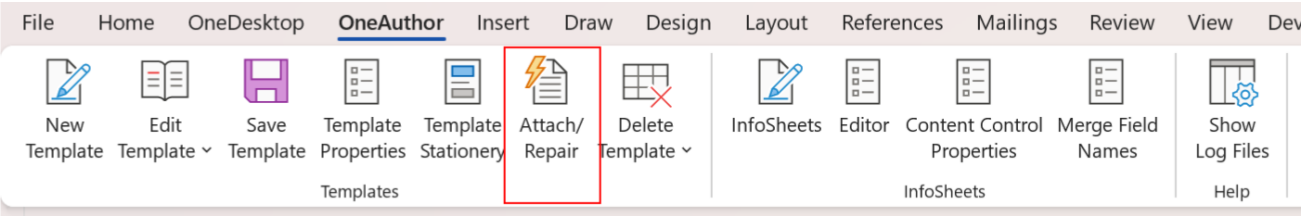


Figure 35

This shows the Attach/Repair dialog:

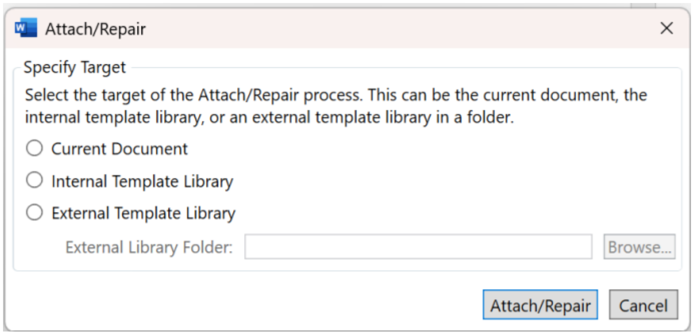


Figure 36

NOTE: The Attach/Repair user interface refers to precedents as templates. A future user interface tidy-up will standardise terminology per the definitions at the beginning of this document.

Single Document

To run the Attach/Repair process on a single document, open the document, and then run the Attach/Repair on the Current Document, per the dialog above. When the process is run, the processes marked as “Single” in the table above will be run against the currently active document. If there are any warnings or errors, the log file will be displayed.

Bulk – Internal Precedent Library

To run the Attach/Repair process on all templates/precedents in the internal precedent library, select Internal Template Library in the Attach/Repair dialog. It will then present some further options:

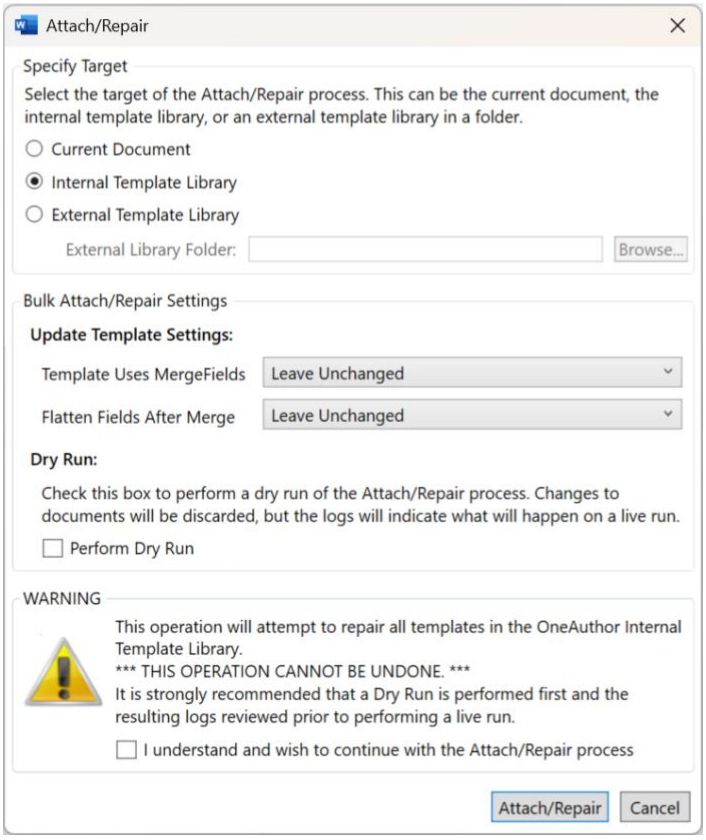


Figure 37

There are options to update settings in bulk for all precedents in the internal library, perform a dry run and a checkbox to confirm that the warning has been read and understood.

When Attach/Repair is run by clicking the Attach/Repair button, the processes marked as “Bulk - Internal” in the table above will be run against every precedent in the internal precedent store. If Perform Dry Run is selected, then the documents will not actually be saved, but the log file will still reflect the entire process.

If there are any warnings or errors, the log file will be displayed.

Bulk – External Precedent Library

To run the Attach/Repair process on all Documents/Precedents in a folder, select External Template Library in the Attach/Repair dialog. It will then present some further options:

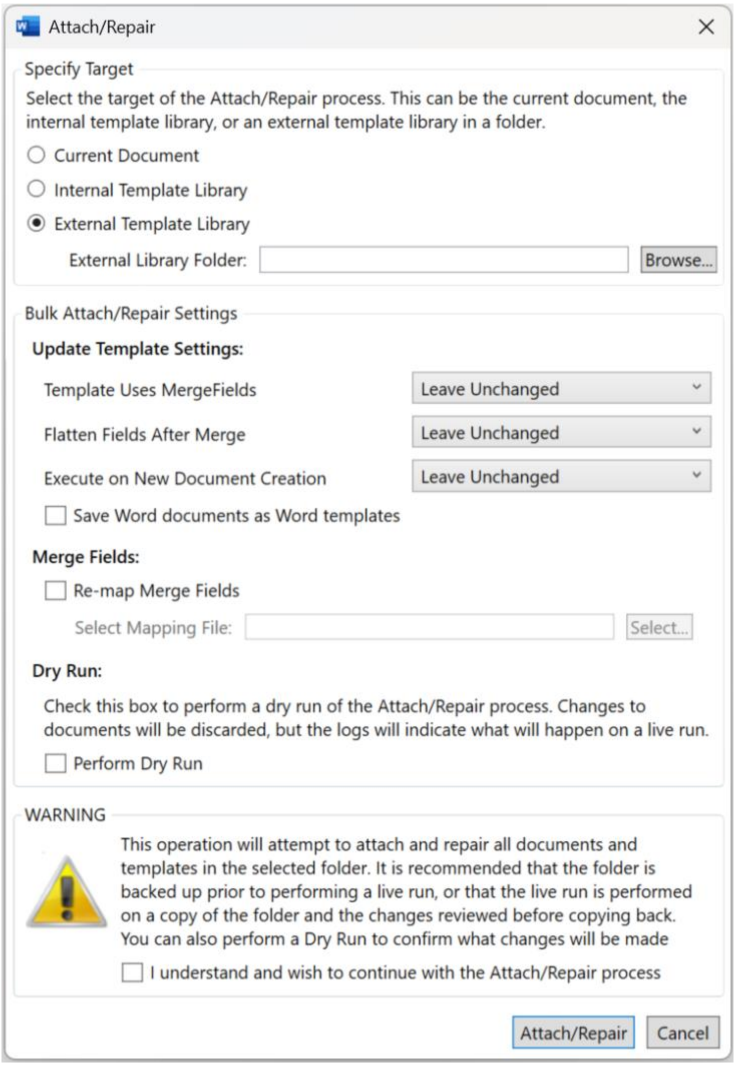


Figure 38

In this case choose the folder containing the precedents to run the process over.

There are options to update settings in bulk for all precedents in a folder, to save all files as Word templates, to remap merge fields and DocVariable fields to OneLaw merge fields, to perform a dry run and a checkbox to confirm that the warning has been read and understood.

The setting "Template Uses MergeFields" along with "Save Word documents as Word templates" allows precedents to be converted from Partial Automation to Full Automation in bulk. See the Precedent Automation Types section for more information.

For more information on re-mapping fields, see the Re-Mapping Fields section below.

When Attach/Repair is run by clicking the Attach/Repair button, the processes marked as "Bulk - External" in the table above will be run against every precedent in the folder and any sub-folders. If Perform Dry Run is selected, then the documents will not actually be saved, but the log file will still reflect the entire process.

If there are any warnings or errors, the log file will be displayed.

Re-Mapping Fields

Fields can be re-mapped by providing a CSV with the before and after fieldnames. This should be a simple 2 column CSV file, for example:

	A	B
1	Will.Full-Name	NewWill.Full-Name
2	Will.Executor-Type	NewWill.Executor-Type
3	DOCVARIABLE:DVNAME	NewWill-DvName
4		

Figure 39

Column A contains the From fieldname. If the field is a DocVariable field, then prefix with “DOCVARIABLE:” per the example.

This process allows:

+ Bulk mapping from one InfoSheet definition to another – for example when the InfoSheet prefix has changed. Lines 1 and 2 in the example above show this, where the InfoSheet prefix is being changed from “Will” to “NewWill”
+ Bulk mapping of another system’s merge fields to OneLaw merge fields
+ Bulk mapping of another system’s DocVariable fields to OneLaw merge fields (using the “DOCVARIABLE:” prefix, per line 3 in the example above)

When this process is run, the log file will list all mappable fields in the source documents and what they have been mapped to (if anything). This means that the process can be run in dry run mode with an empty CSV file to simply produce a log file containing all mappable fields in the source precedents.

Precedent Libraries

Introduction

Precedent Libraries are a feature within OneLaw where administrators can set up and map external folders that users can access and execute precedents from. Precedent Libraries contain firms' precedent documents. Precedent Libraries can support automated and non-automated Word document precedents and email precedents.

Executing Precedents

There are two areas within OneLaw for users to execute precedents, on a matter or within the Documents tab.

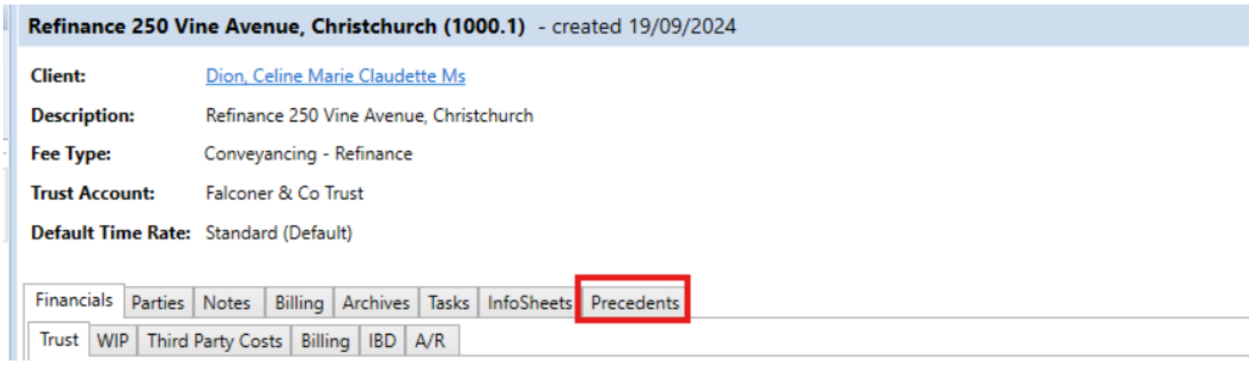


Figure 40

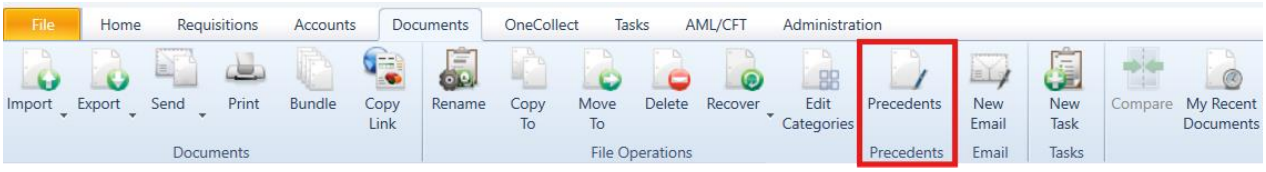


Figure 41

To execute a precedent, double-click on the desired precedent or select the precedent and click on Open Precedent in the bottom right corner.

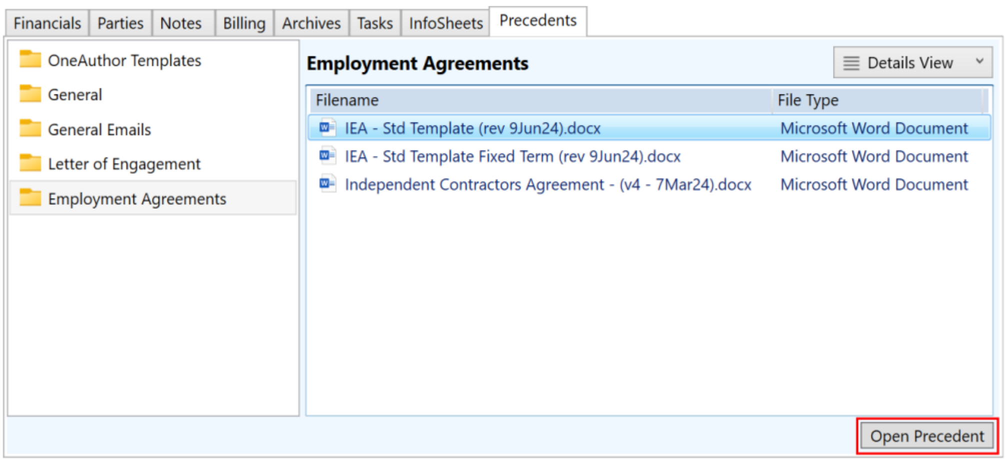


Figure 42

OneAuthor Templates

For those on an older version of OneLaw (prior to version 4.2.2), firms will have legacy OneAuthor Templates. Existing OneAuthor Templates are available in Word.

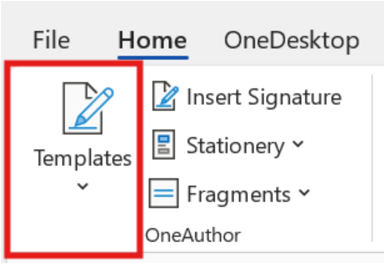


Figure 43

Existing OneAuthor Templates can also be accessed and executed from the Precedents area within OneLaw. These documents appear under the OneAuthor Templates folder:

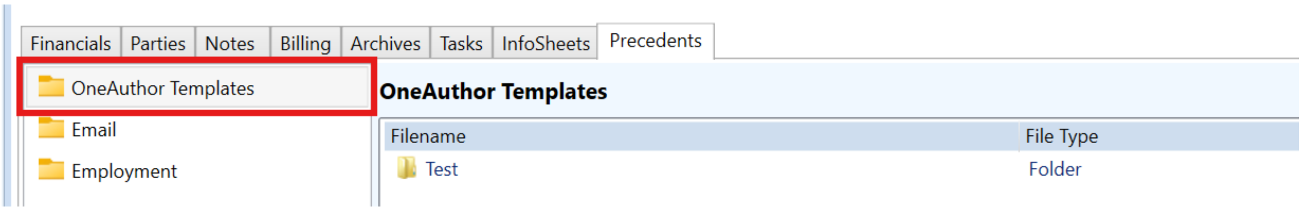


Figure 44

Managing Precedent Libraries

This section is for System Administrators and/or Template Administrators.

Navigate to the Administration tab (or Templates tab) in OneLaw. Select Manage Libraries.

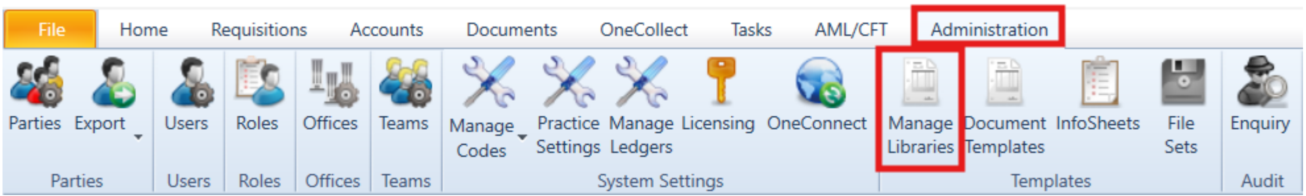
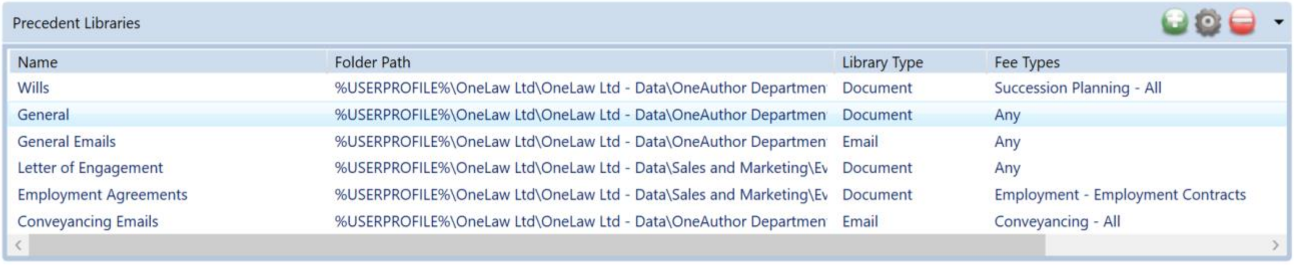


Figure 45

This is where administrators can see the Precedent Libraries set up:



Precedent Libraries

Name	Folder Path	Library Type	Fee Types
Wills	%USERPROFILE%\OneLaw Ltd\OneLaw Ltd - Data\OneAuthor Departmen	Document	Succession Planning - All
General	%USERPROFILE%\OneLaw Ltd\OneLaw Ltd - Data\OneAuthor Departmen	Document	Any
General Emails	%USERPROFILE%\OneLaw Ltd\OneLaw Ltd - Data\OneAuthor Departmen	Email	Any
Letter of Engagement	%USERPROFILE%\OneLaw Ltd\OneLaw Ltd - Data\Sales and Marketing\Ev	Document	Any
Employment Agreements	%USERPROFILE%\OneLaw Ltd\OneLaw Ltd - Data\Sales and Marketing\Ev	Document	Employment - Employment Contracts
Conveyancing Emails	%USERPROFILE%\OneLaw Ltd\OneLaw Ltd - Data\OneAuthor Departmen	Email	Conveyancing - All

Figure 46

To create a Precedent Library:

1. Click the green Plus (+) icon. The following dialog will present:

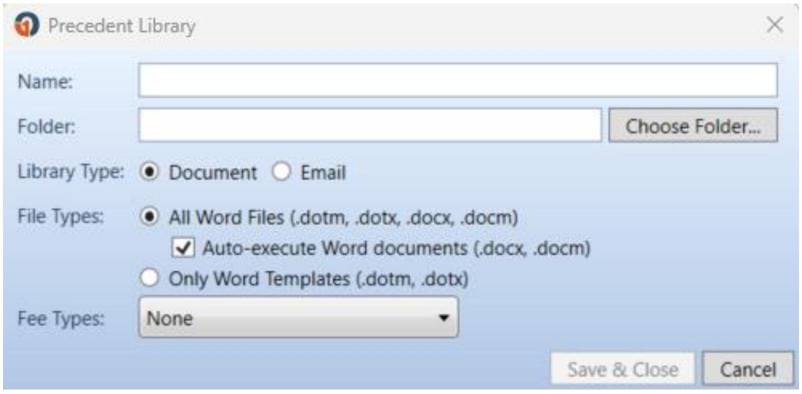


Figure 47

2. Fill in the following fields:

   + **Name:** Specify the name of the Precedent Library. This will be the name visible in the Precedents tab for users.
   + **Folder:** Choose the external folder that contains the precedents for this Library. This can contain subfolders, which will be available in the Precedents tab. If the folder is a SharePoint location, it will be mapped to the user profile of each user. In this case, use **%USERPROFILE%** so it's not pointing to your user profile on your PC. To do this, instead of C:\Users\a.user\OneLaw\Precedents, specify %USERPROFILE%\OneLaw\Precedents. The %USERPROFILE% tag will resolve to each users correct user profile path on their PC.

- **Library Type:** Specify whether this Precedent Library will contain Document or Email precedents. The rest of these instructions focus on Document precedents. For details on setting up Email Precedents, see the
-

Email Precedents

- section.
- **File Types:** Specify what types of Document Precedent will be available in this Precedent Library. If all precedents will be *Full Automation* (see the Precedent Automation Types section for more information), then choose "Only Word templates…" If there will be some legacy OneAuthor Partial Automation precedents, or some plain Word documents, choose "All Word Files…" Generally, when "All Word Files" is selected, "Auto-execute Word documents…" should also be selected. The exception is when there are legacy OneAuthor precedents with macros that display the Edit Document dialog.
- **Fee Types:** Precedent Libraries can be set to only be visible for matters with certain fee types. Specify one or more fee types and/or sub fee types for the Precedent Library. If the Precedent Library should be visible for all Matters, select "Any."

3. Save and close the folder

The new Precedent Library will now appear in the list.

Organise the precedent libraries in a way that best suits the firm's workflow. Here is an example of how this can look:

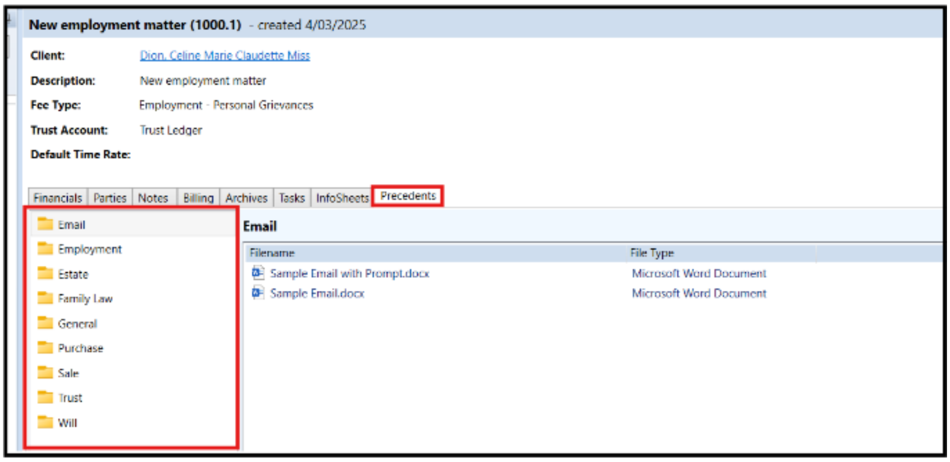


Figure 48

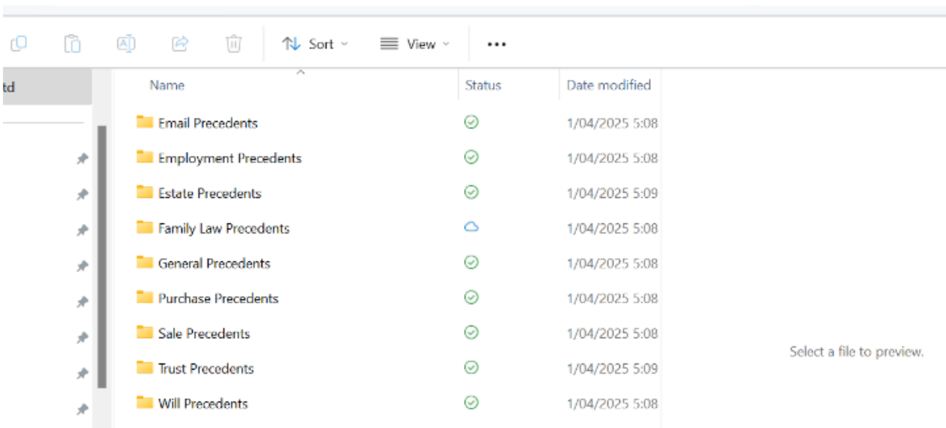


Figure 49

Email Precedents

Introduction

Email precedents are a special type of precedent that create emails (via Outlook) rather than documents. The precedents themselves are simply Word documents (.docx) that sit in a precedent library configured to contain email precedents – see the Precedent Libraries section for details on how to do this.

Email precedents support many but not all of the create mode capabilities of document precedents, but none of the edit mode capabilities. The following table shows which capabilities are supported:

		Precedent type	
Capability	**Mode**	**Email**	**Document**
Fields			
Built-in fields	Create	✓	✓
InfoSheet fields	Create	✓	✓
Populate content control fields	Create		✓
Populate merge fields	Create	✓	✓
InfoSheets			
Prompt InfoSheets	Create	✓	✓
Clause/Fragment InfoSheets (on run precedent)	Create		✓
Clause/Fragment InfoSheets (manually insert clause)	Edit		✓
Clauses/Fragments			
Insert clause (chosen in InfoSheet)	Create		✓
Insert clause (OA INCLUDE)	Create		✓
Insert clause (inline picker)	Edit		✓
Insert clause (manually from menu)	Edit		✓
Remove paragraph (OA REMOVE)	Create		✓
Signatures			
Insert signature at cursor	Edit		✓
Insert signature at placeholder	Edit		✓
Stationery – Headers & Footers			
Apply default stationery (on run precedent)	Create		✓
Apply or clear stationery (manually from menu)	Edit		✓
Stationery – StyleSheets			
Apply styles from StyleSheet	Edit		✓

Email Precedents have a couple of additional email-specific capabilities:

+ **Salutation field**: Special merge field that takes the salutation from the New Email dialog
+ **Subject block**: Ability to specify that the first paragraph of the precedent is to be used as the subject of the email

Executing Email Precedents

There are two key scenarios:

- **Select precedent before email creation:** This is done via the New Email dialog

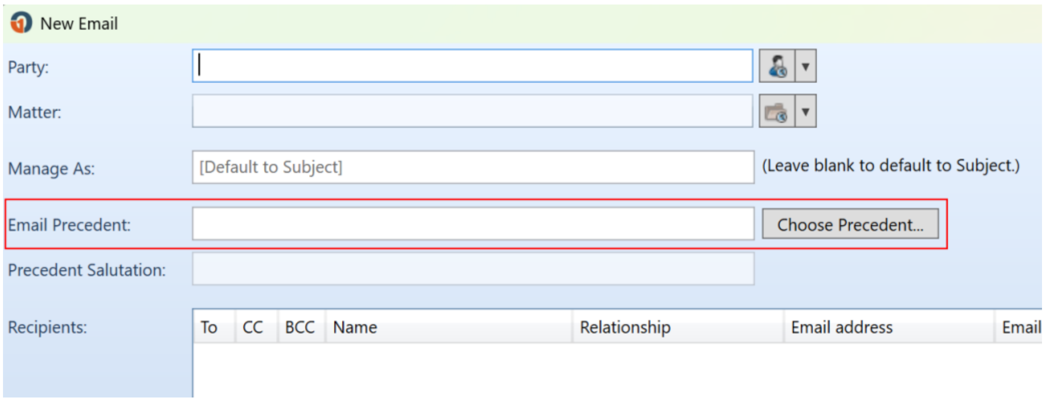


Figure 50

- **Select precedent after email creation:** This will be the case when responding to an existing email. This is done via the "Insert Precedent" menu item in the email message window

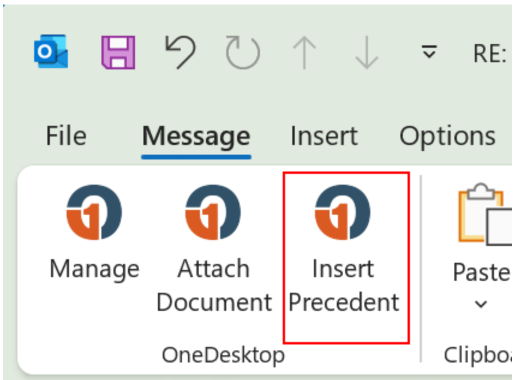


Figure 51

Both methods will display a precedent selection dialog that shows email precedent libraries relevant to the selected party/matter. If no matter is currently selected, email precedent libraries configured for all fee types will be shown. If a matter is selected, then email precedent libraries configured for the fee type of the matter will also be shown.

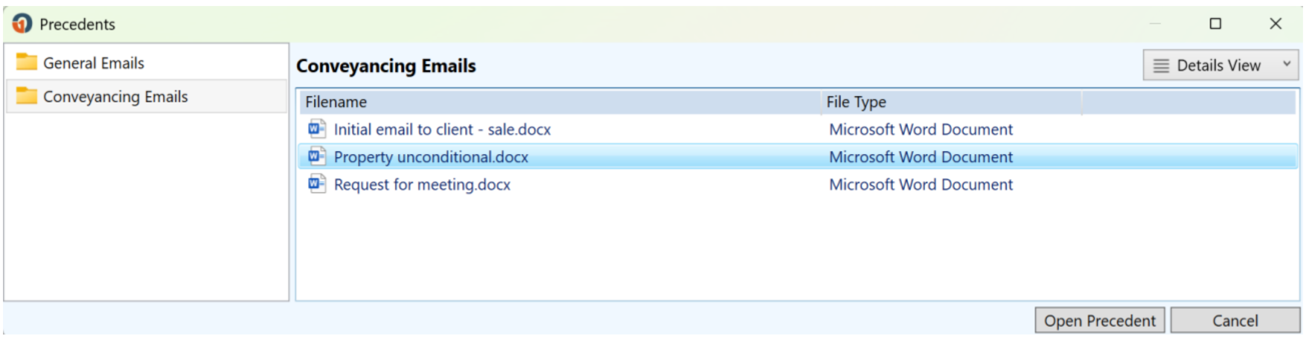


Figure 52

The precedent is selected by double-clicking, or selecting in the list and clicking “Open Precedent.”

+ When using the “New Email” dialog, the selected precedent will populate into the “Email Precedent” field and will populate into the new email body when “Create Email” is clicked
+ When using the “Insert Precedent” menu item in the Outlook message window, the selected precedent will immediately be inserted at the cursor

Managing Email Precedents

Email precedents are .docx files stored in the file system externally to OneLaw and exposed to OneLaw via Precedent Libraries.

Precedent Libraries containing email precedents are configured by setting the Library Type to “Email” in the Precedent Library configuration:

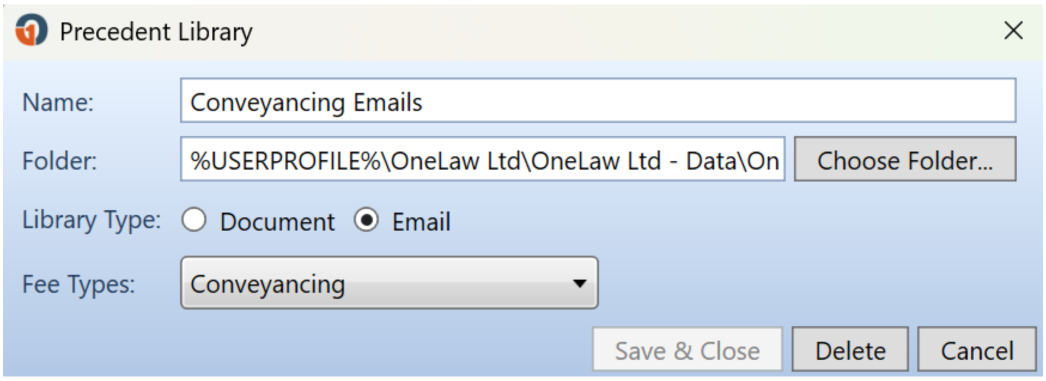


Figure 53

For all other settings and a general overview of Precedent Libraries, see the Precedent Libraries section in this manual.

Building Email Precedents

Email precedents are stored as .docx files. They can optionally contain merge fields for built-in or InfoSheet fields, for both Matter and Prompt InfoSheets (see the InfoSheets section for more details).

Creating a Simple Email Precedent

At their simplest, email precedents don’t need to contain any fields or automation. They can just be a Word file whose contents will be copied into the body of the email when the precedent is run.

To create a simple email precedent, create a document with Microsoft Word, insert the content that should be able to copy into an email, and save it as a .docx file to a folder referenced by an Email Precedent Library. The document shouldn’t contain headers/footers, sections, footnotes or other elements that aren’t supported by email.

Once saved to the folder referenced by the precedent library, the precedent will appear in the Precedent Library in OneLaw and Outlook, and when executed, will copy the content of the document into the email.

Adding Fields

Email precedents support merge fields and support most of the same merge fields as document precedents. See the Fields & Data section for more information about fields in general, and Document Field Differences by Precedent/Template Type for more information about exactly which fields are supported by email precedents. For more information about adding merge fields to a precedent, see Working with Merge Fields.

If merge fields are to be used for an email precedent, follow the following steps:

1. Ensure the precedent is attached to the firm's OneLaw store. Do this by:
    a. With the precedent open, on the OneAuthor tab, click Attach/Repair
    b. Select Current Document
    c. Click the Attach/Repair button
    NOTE: This step only needs to be done once per precedent
2. If InfoSheet fields are to be included, attach the InfoSheets to the document. For details on how to do this, see

3. Attaching InfoSheets to Documents. Both Matter InfoSheets and Prompt InfoSheets are supported
4. On the OneAuthor tab, click Merge Field Names. This will open a new Word document containing merge fields for all the available built-in and InfoSheet fields
5. Copy and paste the required merge fields from the Merge Field Names document into the precedent

Including a Subject Line

An email precedent can define what the contents of the email subject should be. To specify a subject, start the first paragraph of the precedent document with “Subject:”. This identifies the first paragraph as specifying the subject.

NOTE: The subject line will only be used when creating new emails with the New Email button. When adding a precedent to a response email (reply/forward), by using the Insert Precedent button in Outlook, any subject defined in the precedent will be ignored, and the existing subject of the email chain will be retained.

InfoSheets

Introduction

InfoSheets are designed to store specific or additional information in OneLaw and to be used for document assembly. The purpose of InfoSheets is to save time and assist with consistency across matters and their related documents.

Examples where these can be useful include:

+ Storing key dates and information for conveyancing matters
+ Store details of estates or trusts
+ Store clause details for will creation
+ Act as an electronic checklist for specific fee types

Within each of these examples, these details can then be pulled into precedents or templates.

There are three types of InfoSheets available in OneLaw: Matter, Prompt and Fragment/Clause.

+ **Matter InfoSheets:** Capture and store matter specific data and are located on a matter in OneLaw. Matter InfoSheets can be assigned to a gee type or to "ANY" matters. There is also a check box option to automatically attach the Matter InfoSheet when creating matters with a matching fee type
+ **Prompt InfoSheets:** Capture document-specific data and prompt users with a dialog when executing a precedent
+ **Fragment/Clause InfoSheets:** Capture fragment/clause-specific data and prompt users with a dialog when inserting a fragment/clause into a precedent

InfoSheet Field Types

The below explains what each field type is in an InfoSheet and gives examples of what the user will see when filling out an InfoSheet, whether it be a Matter, Prompt or Fragment/Clause InfoSheet.

+ **Heading:** Headings are shown in bold and can be used to separate fields and outline sections. The Figure below shows the user's view

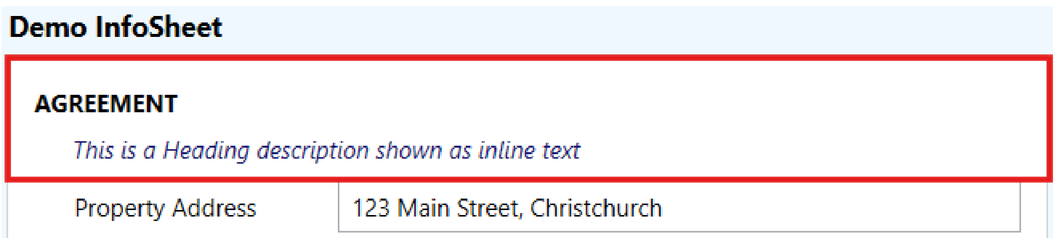


Figure 54

- **Single Line Text:** Users type the relevant information into the text box. The Figure below shows the user's view

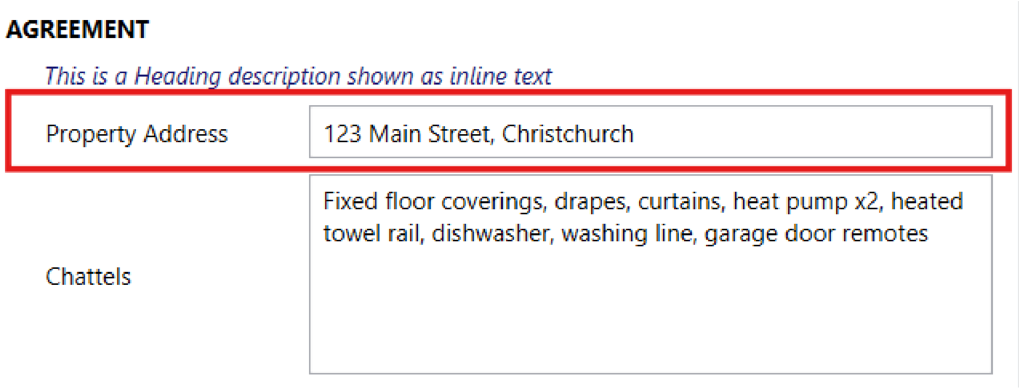


Figure 55

- **Multi Line Text.** Users type the relevant information into the text box. The Figure below shows the user's view

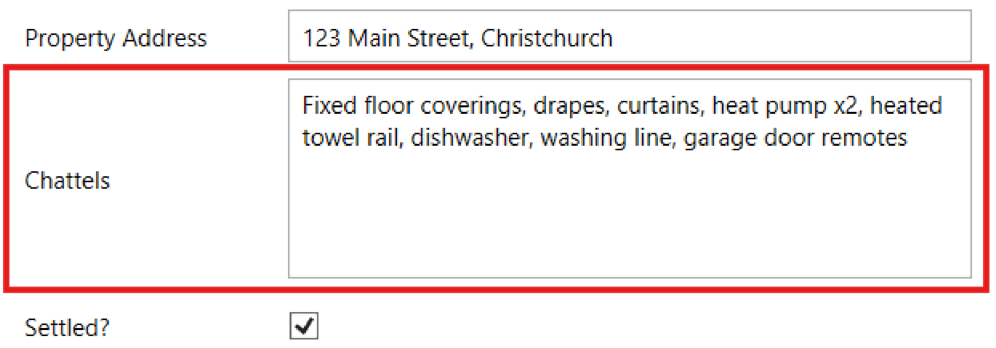


Figure 56

- **Check Box:** Users check the box if and when it's required to be ticked. The Figure below shows the user's view

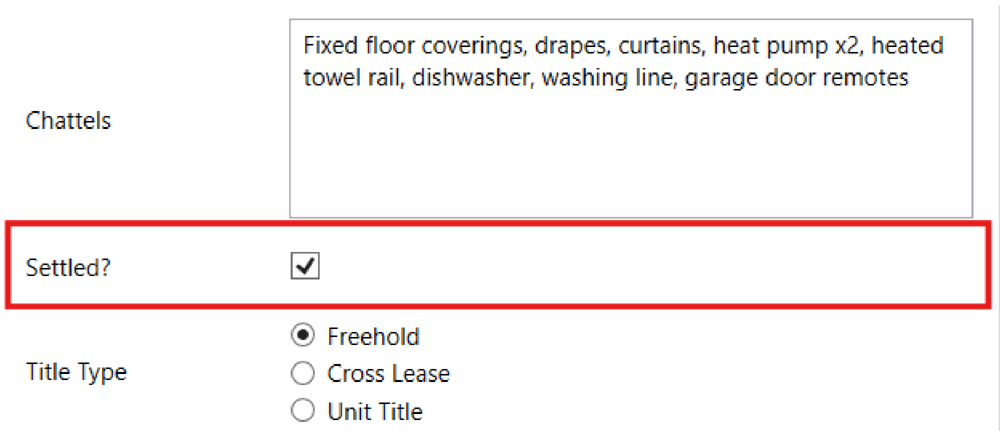


Figure 57

- **Choice List:** Users select the appropriate choice from the options provided. The Figures below show the user's view

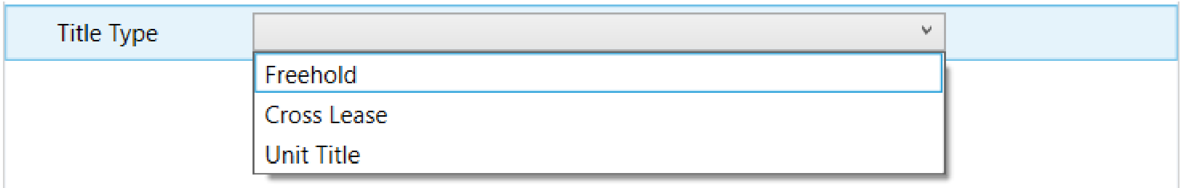


Figure 58 – Choice List Field as a drop down list

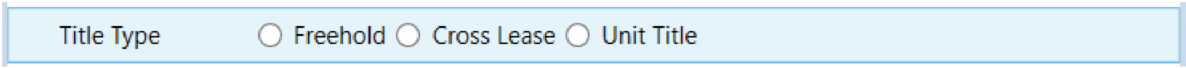


Figure 59 – Choice List Field as horizontal radio buttons

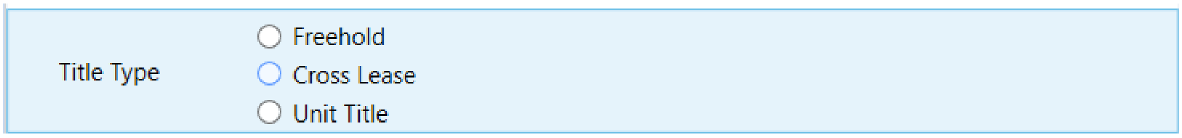


Figure 60 – Choice List Field as vertical radio buttons

- **Date:** Users choose a date from the date selector. The Figure below shows the user's view

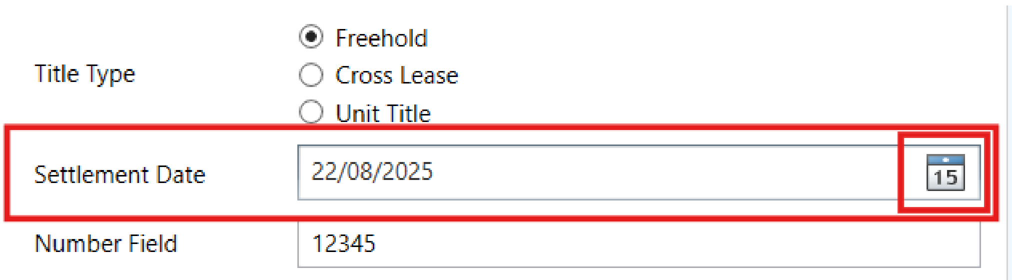


Figure 61

- **Number:** Users type the relevant numbers into the text box. The Figure below shows the user's view

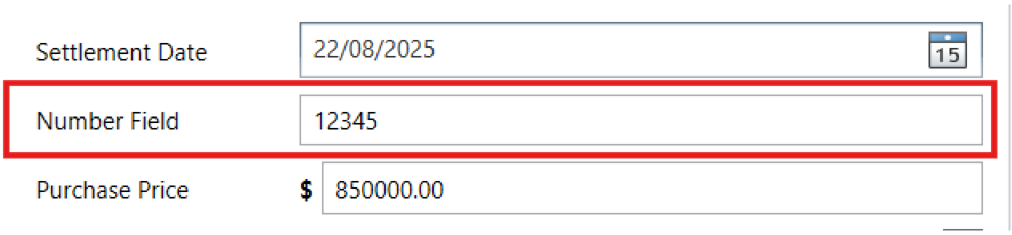


Figure 62

- **Money:** Users type the relevant dollar amount into the text box. The Figure below shows the user's view

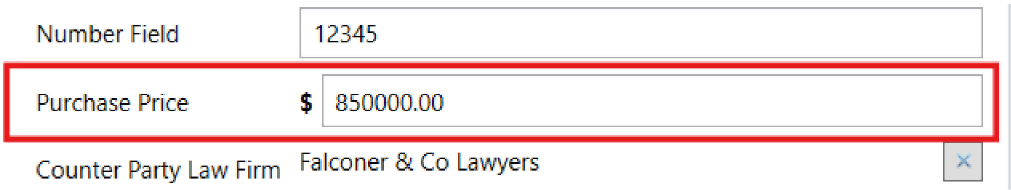


Figure 63

- **Party Selector:** Users select a client or non-client party from the Party Selector which is searchable across all parties in OneLaw. The Figure below shows the user's view

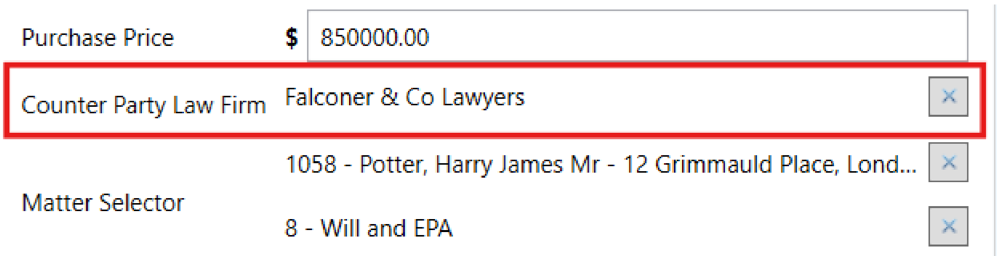


Figure 64

- **Matter Selector:** Users select a matter from the Matter Selector which is searchable across all parties in OneLaw. The Figure below shows the user's view

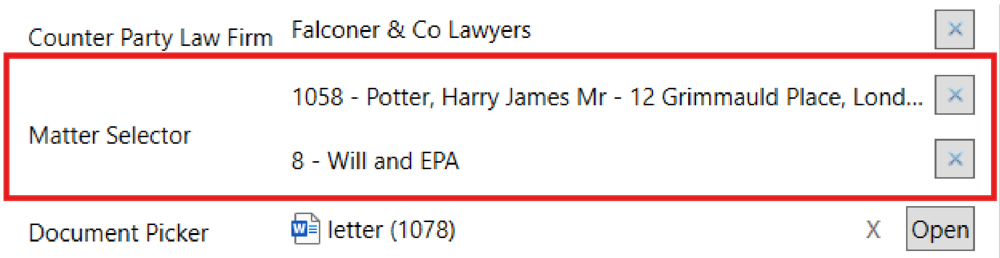


Figure 65

- **Document Selector:** Users can select a document which keeps a copy of that document on the InfoSheet. This Document Selector is searchable across all documents in OneLaw. The Figure below shows the user's view

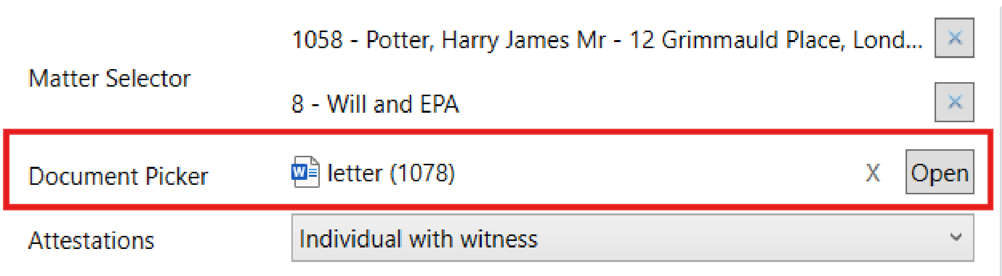


Figure 66

- **Fragment Selector:** Users select the appropriate fragment or clause from the options provided, for inclusion in a precedent. The Figure below shows the user's view

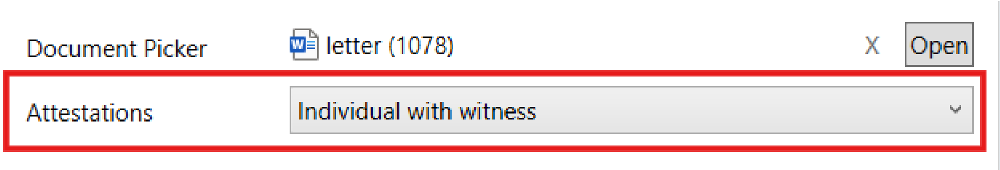


Figure 67

Applying InfoSheets to a Matter

When setting up a matter, InfoSheets can be automatically attached to a matter if the InfoSheet has been set up to do so, or users can attach InfoSheets manually. To attach an InfoSheet manually, simply select the InfoSheet tab in the Edit Matter screen and check the InfoSheet required to be attached to the new matter. Once the matter has been saved, the InfoSheet will be displayed in the InfoSheet tab on the matter.

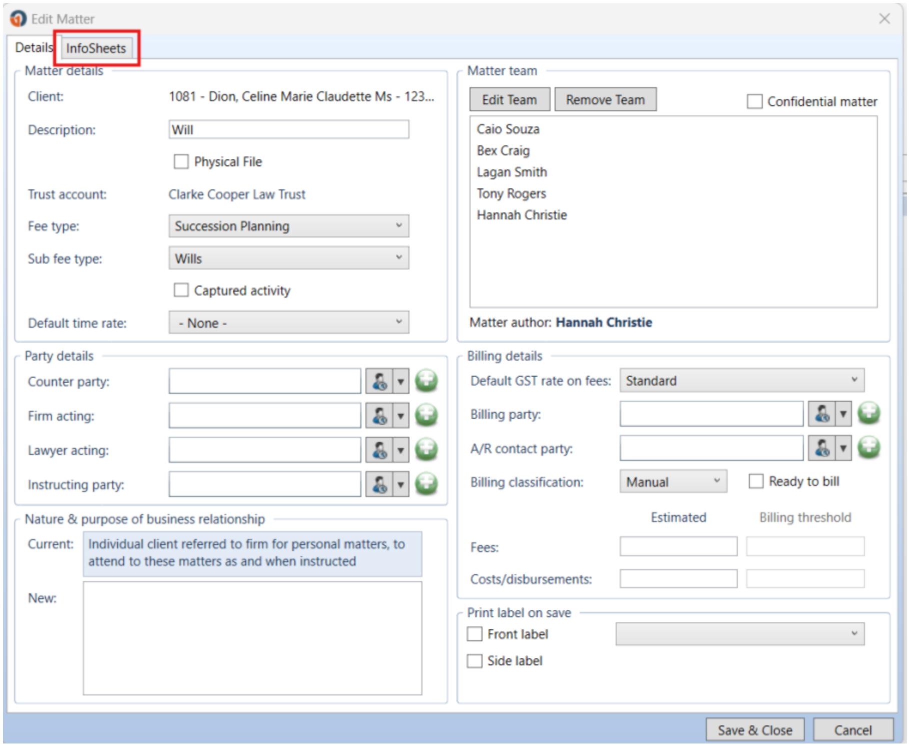


Figure 68

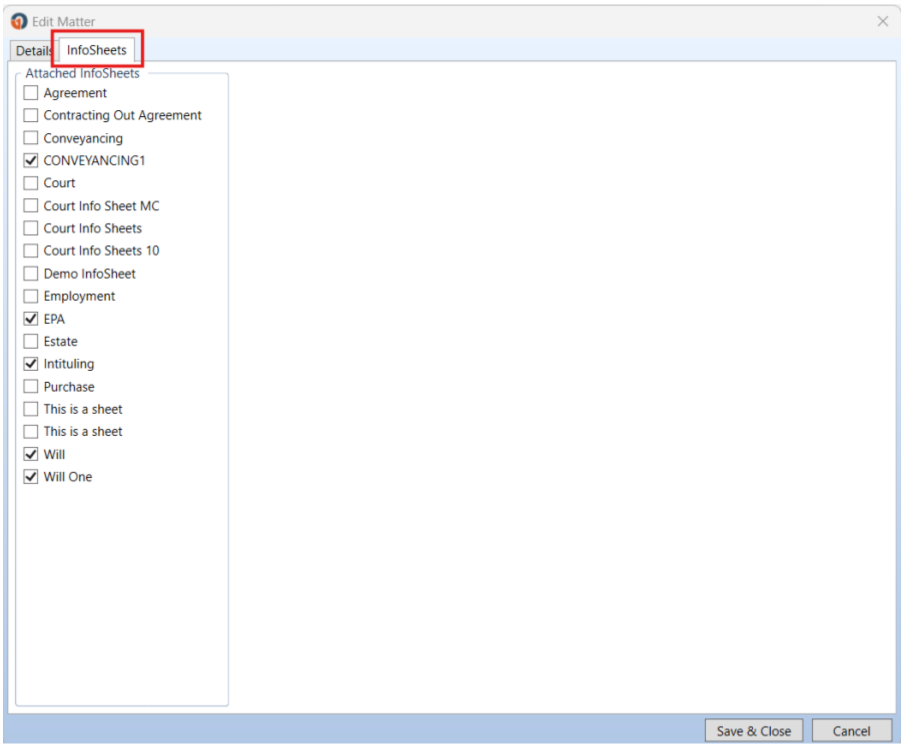


Figure 69

Editing InfoSheet on a Matter

Users need to enter relevant information into an InfoSheet once the InfoSheet is attached to a matter. To do this, either double-click on the InfoSheet or select the Edit button in the InfoSheets tab. Users will then be able to enter the relevant information into the fields and save these by clicking Save & Close.

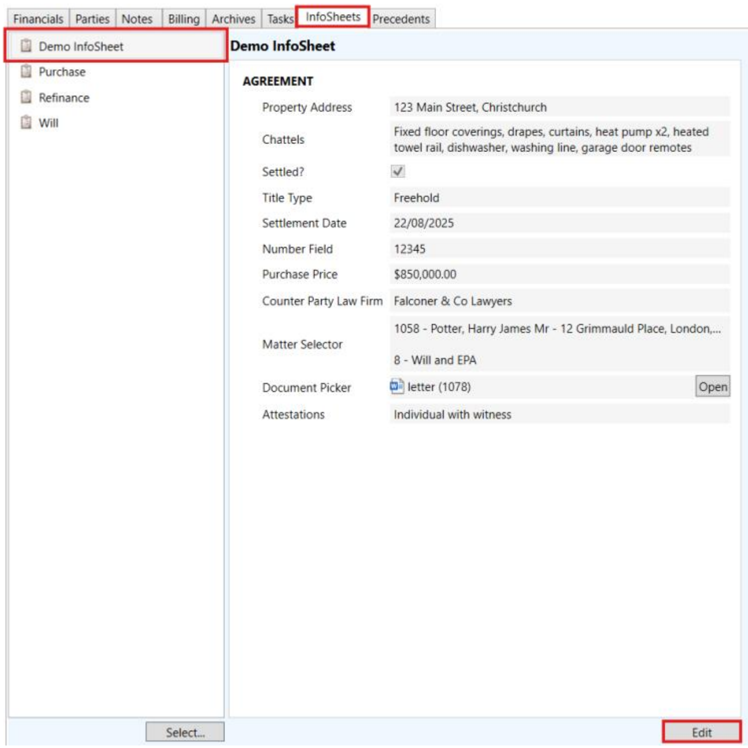


Figure 70

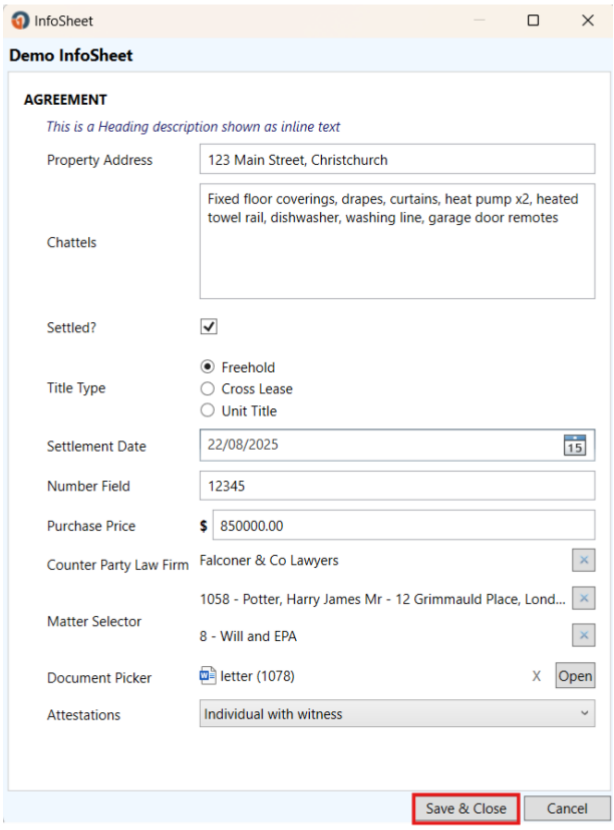


Figure 71

Adding and Removing InfoSheets

InfoSheets can be added or removed from a matter at any time by clicking Select under the InfoSheets tab at the matter level. Users can also remove InfoSheets from a matter by unticking the InfoSheet in the Edit Matter screen. If an InfoSheet is removed from a matter, any associated data that has been entered into the InfoSheet will be deleted and is not recoverable.

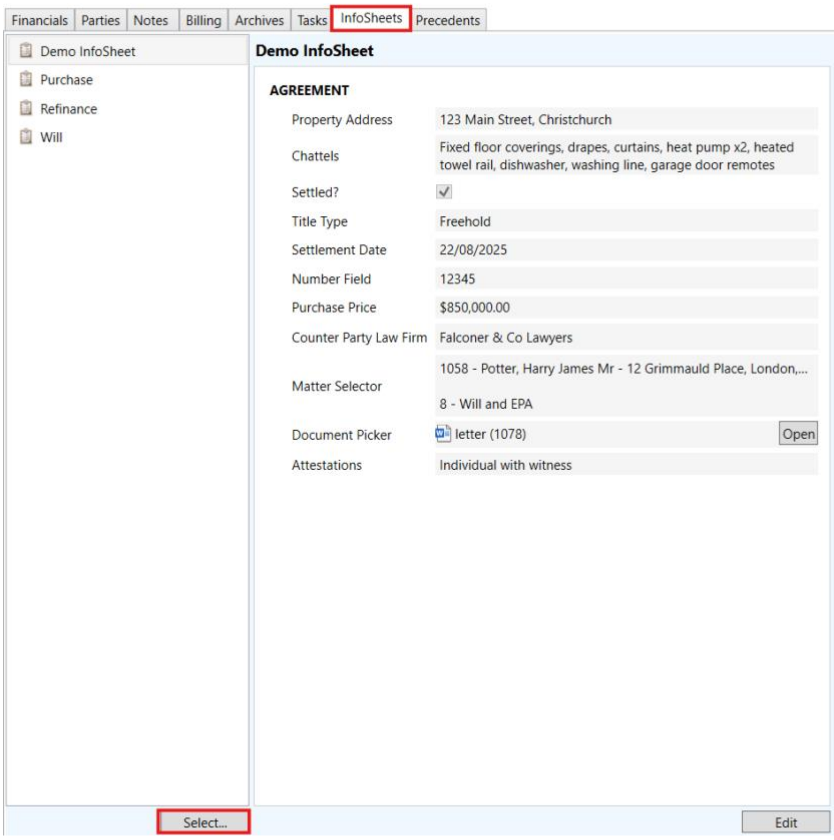


Figure 72

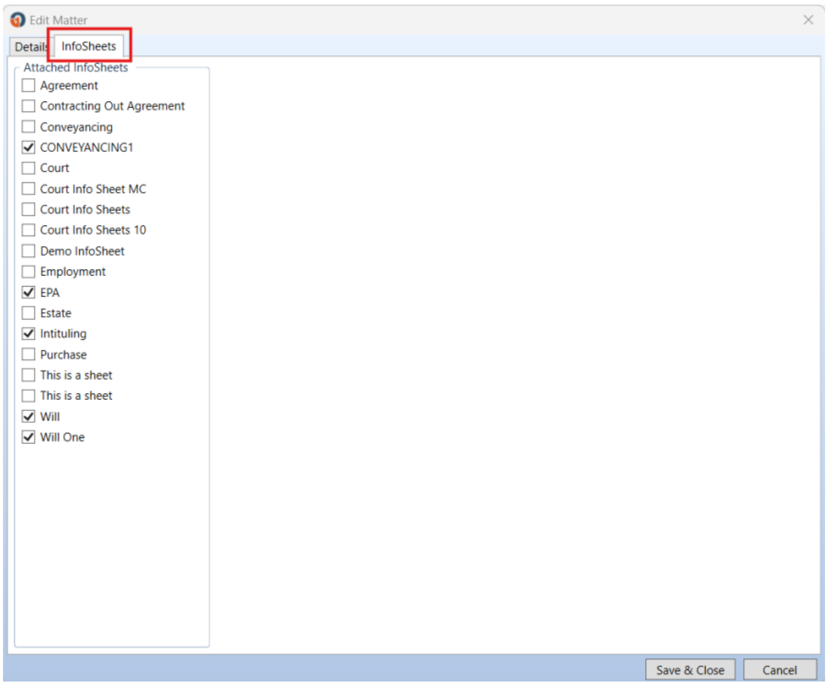


Figure 73

Creating and Editing InfoSheets

When selecting InfoSheets from the Administration tab in OneLaw, administrators can edit existing InfoSheets or create new InfoSheets. When editing an existing InfoSheet, simply double-click on the InfoSheet or highlight the InfoSheet in the list and click on the grey cog in the top right corner.

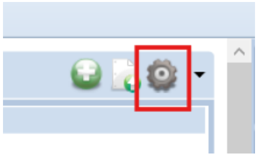


Figure 74

When creating a new InfoSheet, administrators can select the green plus icon.

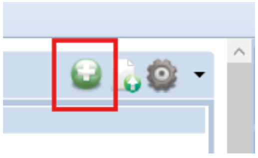


Figure 75

Administrators will be presented with the Create InfoSheet dialog (see Figure below) with the following fields to complete:

- **Name:** Enter the name of the InfoSheet e.g. Purchase, Sale, Will etc
- **Field Code Prefix:** This will auto-fill with the name given to the InfoSheet
- **InfoSheet Type:** There are three types of InfoSheets available:
    - **Matter:** These will show at the matter level under a new tab called InfoSheets where these can be viewed and/or edited
    - **Prompt:** These types of InfoSheets can be attached to a document template and act as a questionnaire. Using this type will prompt users when creating a document from a OneAuthor template to complete fields, which details will then follow into the document
    - **Clause/Fragment:** These types of InfoSheets can be attached to a clause or fragment document and act as a questionnaire. Using this type will prompt users when inserting a clause or fragment into a document to complete additional fields, which details will then follow into the document
- **Fee Types:** Users can select None, Any or multiple fee types for any InfoSheet, together with the option to automatically attach these when a matter with a matching fee type is created

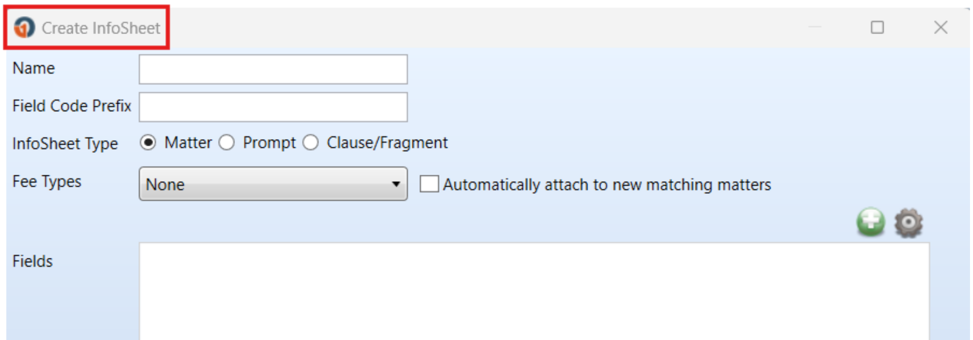


Figure 76

Adding Fields to InfoSheets

Administrators can add fields by selecting the green plus icon.

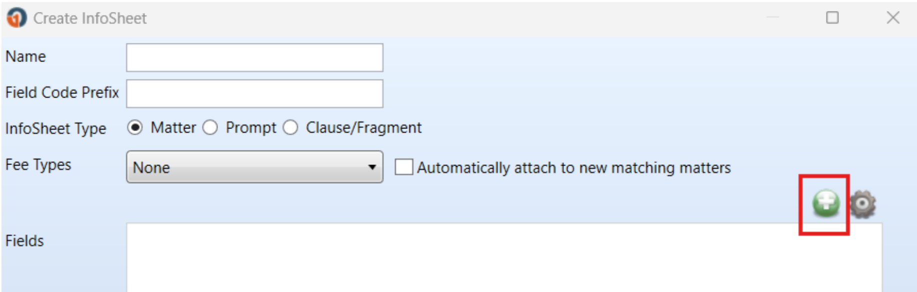


Figure 77

When this is selected, administrators will be presented with the New Field dialog. The following fields are available:

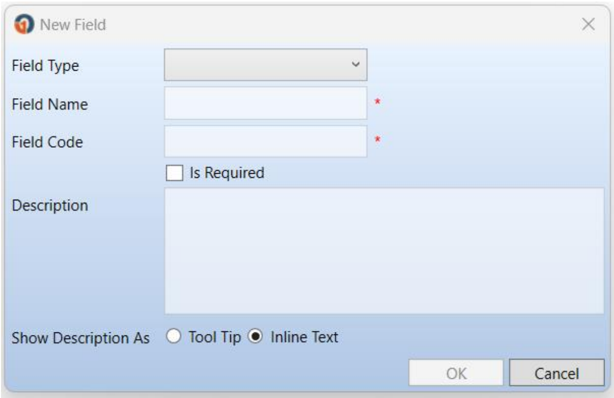


Figure 78

- **Field Type:** Select the type of field
- **Field Name:** Name this what the firm would like displayed for users to complete e.g. Property Address
- **Field Code:** This will automatically populate with the details from the Field Name above
- **Is Required:** Selecting this tick box will make this required to be completed by users
- **Description:** This multi-line text box will allow users to include large portions of text
- **Show Description As:** This option is to show the description as either a Tool Tip (when a user hovers over the field the description will show) or as inline text (the description will show in line with the field)

Figure 79

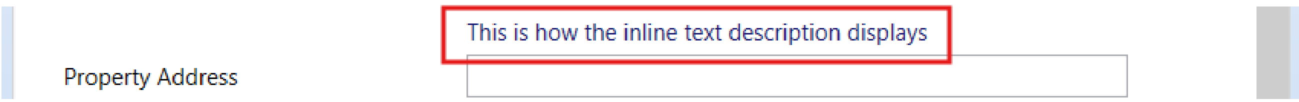


Figure 80

NOTE: When using the inline text option for headings, the description will show below the heading.

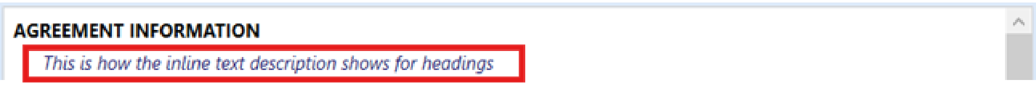


Figure 81

Field Types for Administrators

The below explains what each field type is and gives examples of how it can be used in the InfoSheet.

- **Heading:** Headings are shown in bold and can be used to separate fields and outline sections. The Figure below shows the admin creation of a Heading

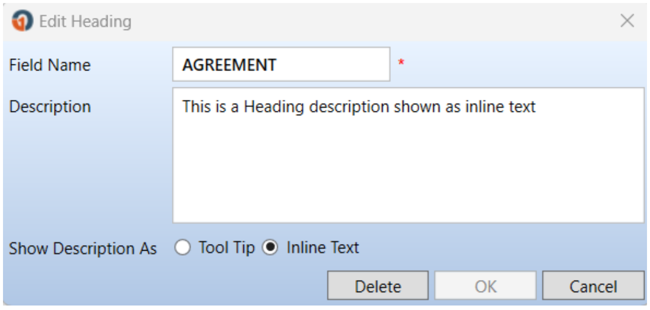


Figure 82

- **Single Line Text:** We suggest using this field for short text information such as a property address or email address. Administrators can also provide predefined choice options for users. These predefined options will appear as a drop-down list. The Figure below shows the admin creation of a Single Line Text Field

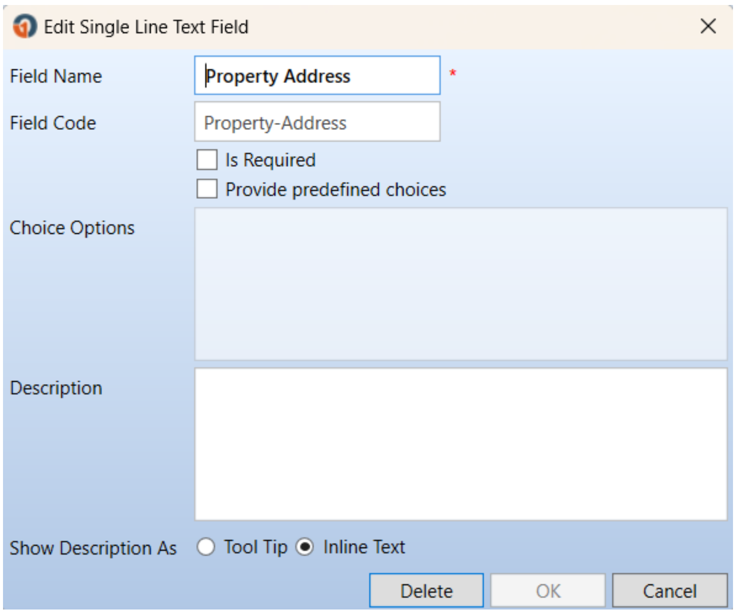


Figure 83

- **Multi Line Text:** A suggestion is to use this field for longer pieces of information such as a chattels list or entering full clauses as required. The Figure below shows the admin creation of a Multi Line Text Field

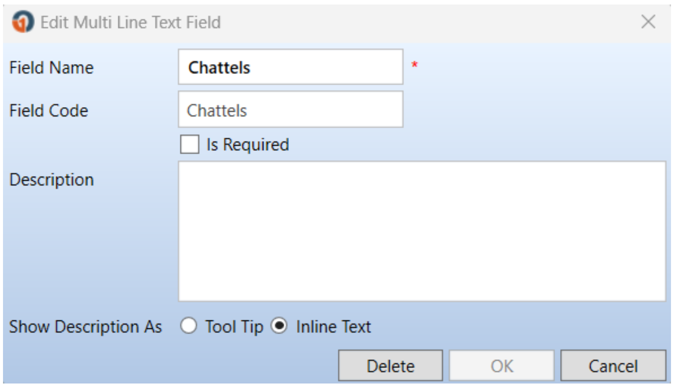


Figure 84

- **Check Box:** This field can be used for questions of a yes or no nature. The Figure below shows the admin creation of a Check Box

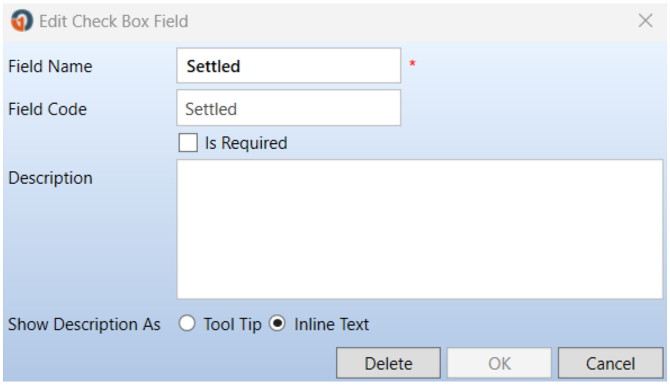


Figure 85

- **Choice List:** This field has several layout options, including drop-down selection lists and radio buttons. We would suggest using this field type in a scenario where there are multiple options for a question to be answered e.g. the age beneficiaries will receive their inheritance: 18,21, 25 etc.

  Choice Lists can also have up to 5 additional values per choice. Useful examples of this would be if users wanted to include gender words (ie. for Female use have she, her, herself) or if users wanted to include different clauses. NOTE: if users want to include clauses in these values, users need to use OA INCLUDE and then the file location path (ie. OA INCLUDE C:\OneAuthor\Clauses).

The first two Figures below show the admin creation of a Choice List, and the following three Figures show the different views available for the Choice Lists.

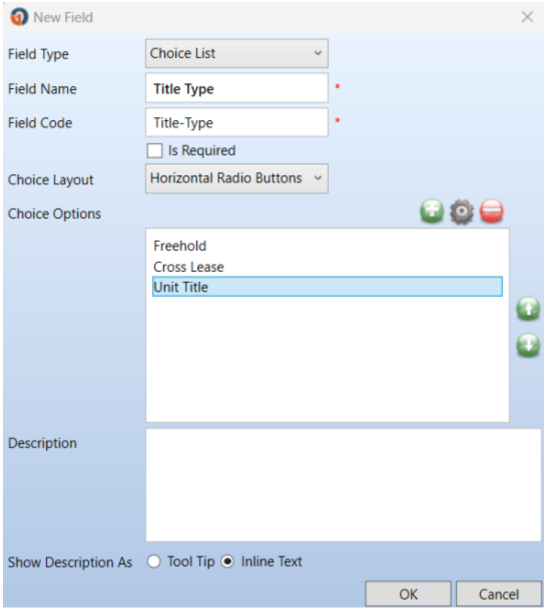


Figure 86

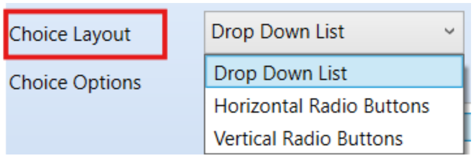


Figure 87

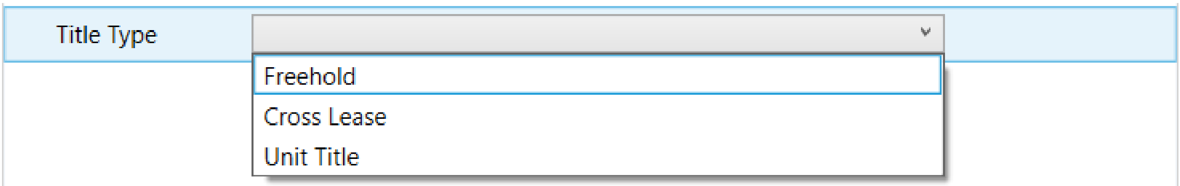


Figure 88 – Choice List field as a drop-down list

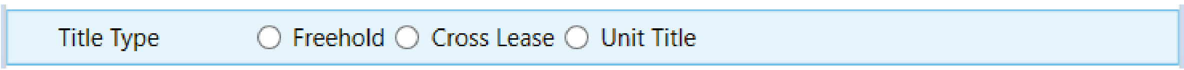


Figure 89 – Choice List field as horizontal radio buttons

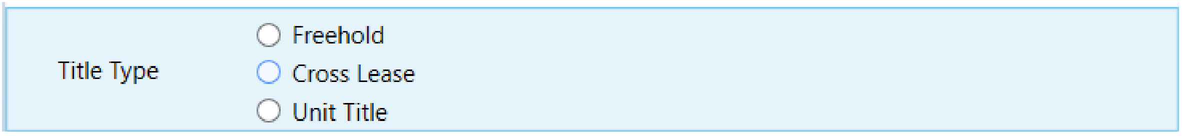


Figure 90 - Choice List field as vertical radio buttons

+ **Date:** This will create a date selector. The Figure below shows the admin creation of a Date Field

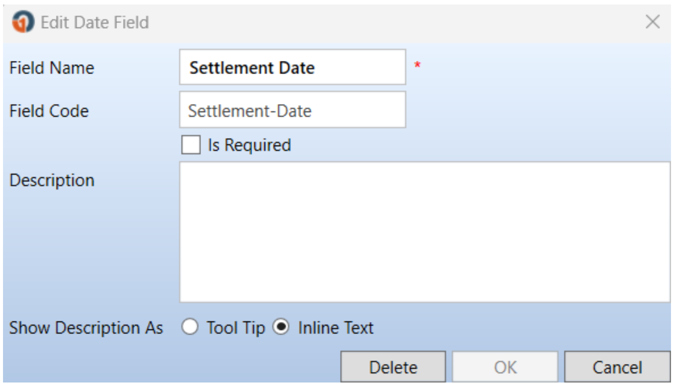


Figure 91

+ **Number:** This field can be used for numbers, such as the late interest amount on a contract. The Figure below shows the admin creation of a Number Field

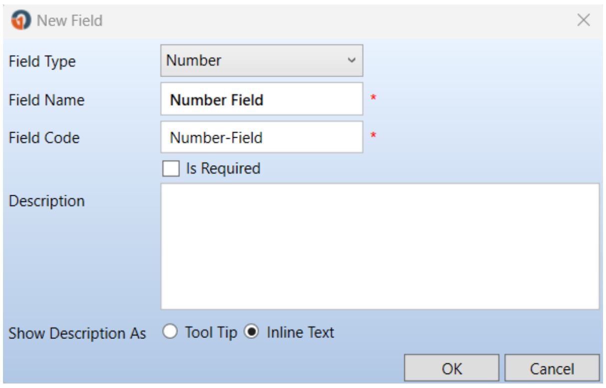


Figure 92

+ **Money:** This field will populate with a dollar sign, allowing for fields such as purchase price and deposit to be displayed as a dollar amount. The Figure below shows the admin creation of a Money Field

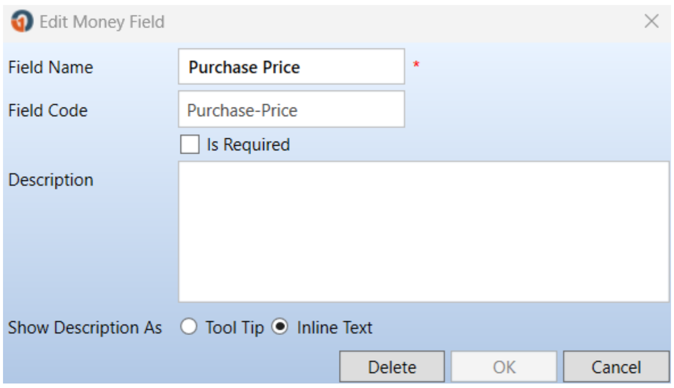


Figure 93

+ **Party Selector:** This will create a party selector which is searchable across all parties in OneLaw. The Figure below shows the admin creation of a Party Selector

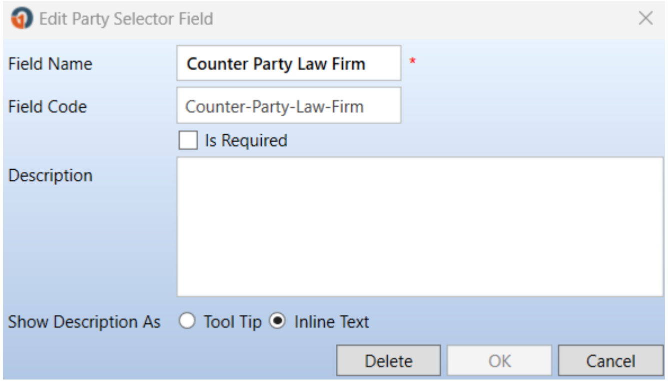


Figure 94

- **Matter Selector:** This will create a Matter Selector which is searchable across all matters in OneLaw. The Figure below shows the admin creation of a Matter Selector

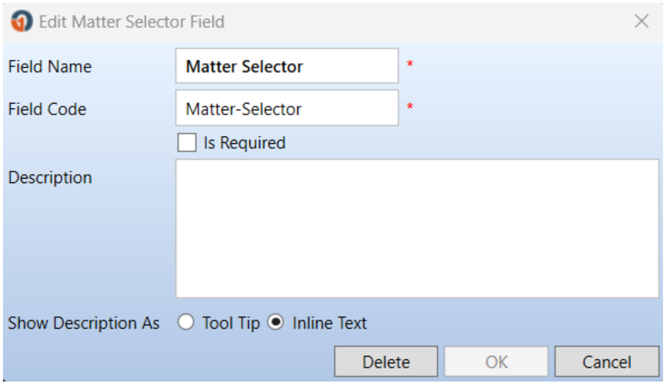


Figure 95

- **Document Selector:** This will create a document selector which is searchable across all documents in OneLaw. The Figure below shows the admin creation of a Document Selector

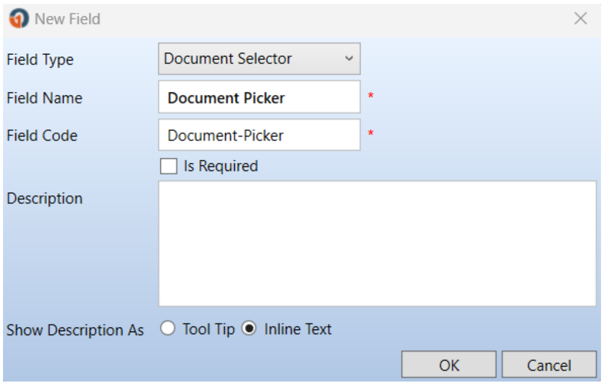


Figure 96

- **Fragment Selector:** This will create a Fragment Selector that will support a selection of clauses and fragments to include in a Precedent. For more information see the InfoSheet Fragment Selector section. The Figure below shows the admin creation of a Fragment Selector

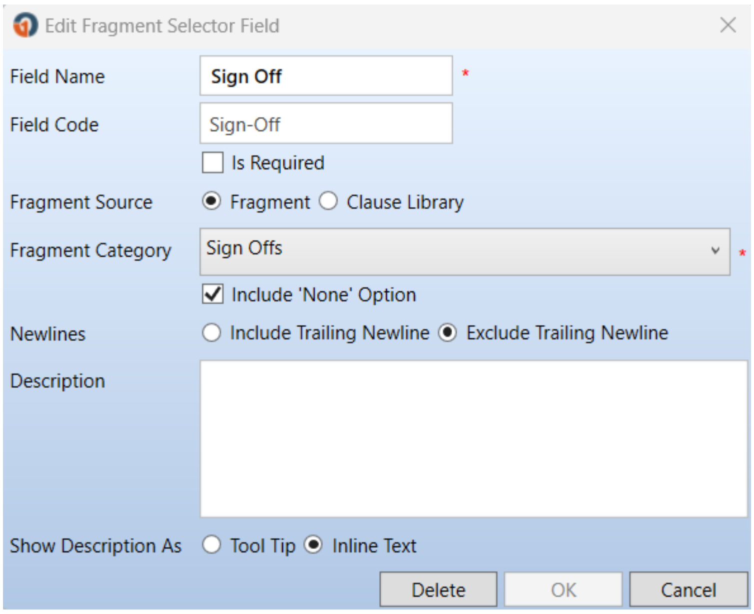


Figure 97

Order of Fields

Fields can be re-ordered by using the green arrows to the right of the Edit InfoSheet dialog box, or simply drag and drop the fields to re-order them.

Right-click Menu

There is a menu available for making edits when right-clicking on a field. The following options are available:

- Edit
- Insert New Field Above
- Insert New Field Below
- Delete

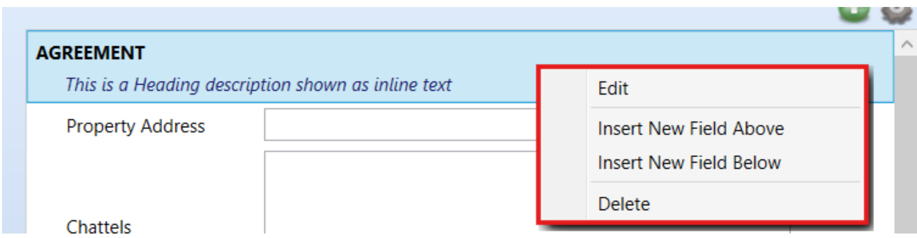


Figure 98

Attaching InfoSheets to Documents

Adding InfoSheets to Existing Templates

To add an InfoSheet to an existing template, select the OneAuthor tab in Word and edit the existing template. Once in edit mode, under the OneAuthor tab, click on InfoSheets and select the InfoSheet that needs to be attached. Please note that multiple InfoSheets can be attached to the template.

Once the InfoSheet has been added to the template, you will need to map the fields as per existing templates.

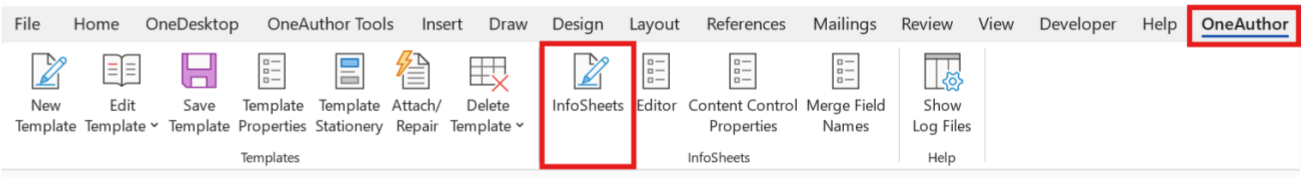


Figure 99

Adding InfoSheets to New Templates and Precedents

You can add InfoSheets to new templates, precedents and clauses and fragments in the same way that you would an existing template. Once you have created a new document, navigate to the OneAuthor tab and select InfoSheets. Click on the green plus and select the InfoSheets you want to add to the document. As per above, you can add multiple InfoSheets to a single document.

NOTE: Matter and Prompt InfoSheets can only be added to documents already configured as OneLaw templates/precedents – see Documents & Precedents for more information.

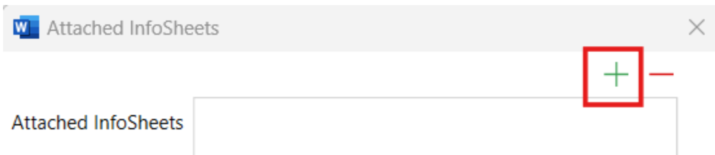


Figure 100

Removing InfoSheets from Documents

To remove an InfoSheet from a document, navigate to the OneAuthor tab in Word and select InfoSheets. Click the red minus and remove the desired InfoSheet.

Figure 101

Using Prompt InfoSheets

Prompt InfoSheets are attached directly to a precedent (not at matter level) and intended to be used like a questionnaire or interview for the document itself. This prompts users to enter document specific information.

To create a Prompt InfoSheet, do this the same way as you would a matter level InfoSheet.

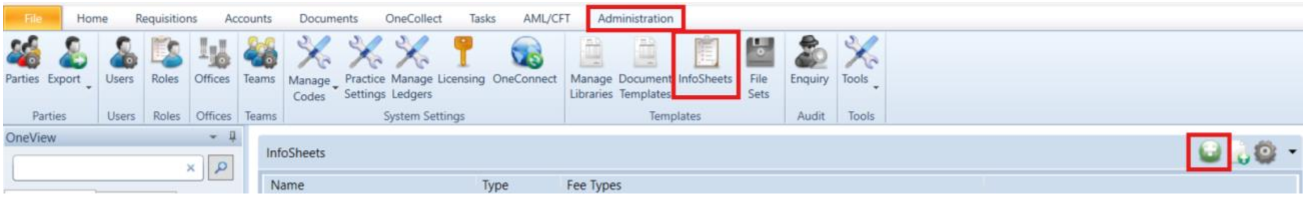


Figure 102

You will need to choose Prompt for the InfoSheet Type.

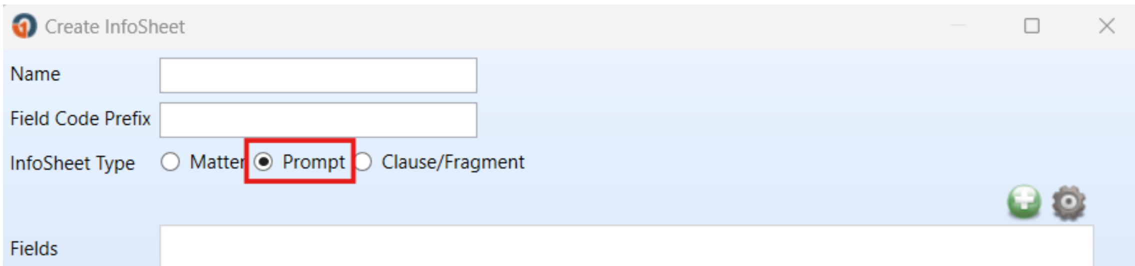


Figure 103

After you have created and saved your prompt InfoSheet in OneLaw, you can now add this to the precedent it was designed for. This can be done in the same way as any other type of InfoSheet.

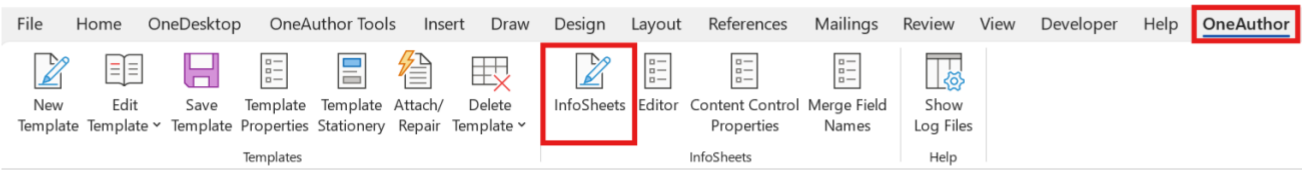


Figure 104

Once the InfoSheet has been added to the precedent or template, the fields will be available to be added as merge fields or content controls. For more information, see the Working with Merge Fields and Working with Content Controls sections.

Using Clause/Fragment InfoSheets

Clause/Fragment InfoSheets are attached directly to a clause or fragment document and intended to be used like a questionnaire or interview for the clause or fragment itself. This prompts users for document specific information.

To create a Clause/Fragment InfoSheet, complete the same steps used when creating a matter level InfoSheet and select Clause/Fragment for the InfoSheet type.

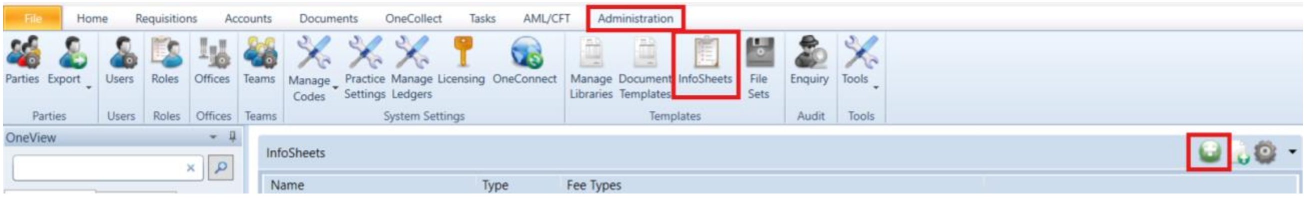


Figure 105

Figure 106

After the Clause/Fragment InfoSheet has been created and saved in OneLaw, this can be added to the clause or fragment document it was designed for. This can be done in the same way as any other type of InfoSheet.

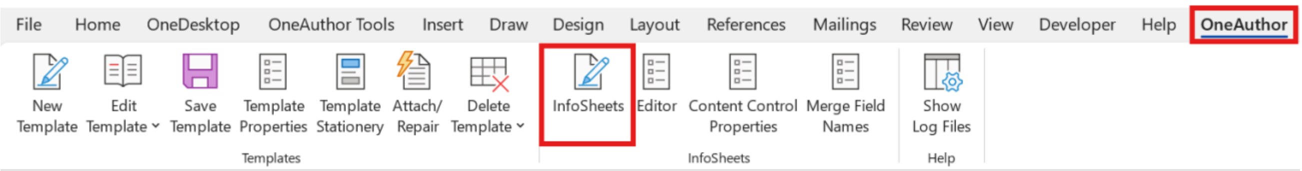


Figure 107

Once you have added the InfoSheet to the clause or fragment document, the fields need to be mapped.

Mapping Fields

Mapping OneLaw and InfoSheet fields can be done in two ways: either by using merge fields or by using content controls.

Mapping Fields using Merge Fields

Navigate to the OneAuthor tab in Word and select Merge Field Names. A new Word document will open with all the available merge fields that can be added to the document. All OneLaw fields will show first with the prefix "OP.". All InfoSheet fields available for this document will show last with the prefix of the InfoSheet.

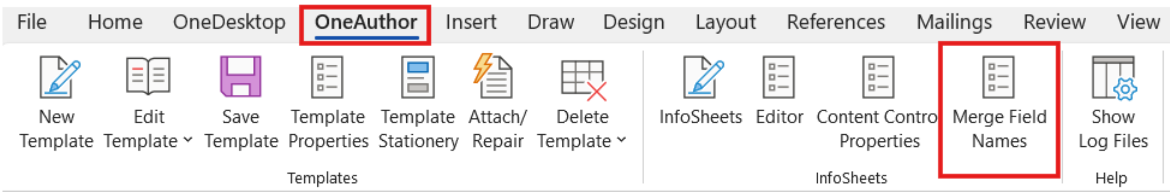


Figure 108

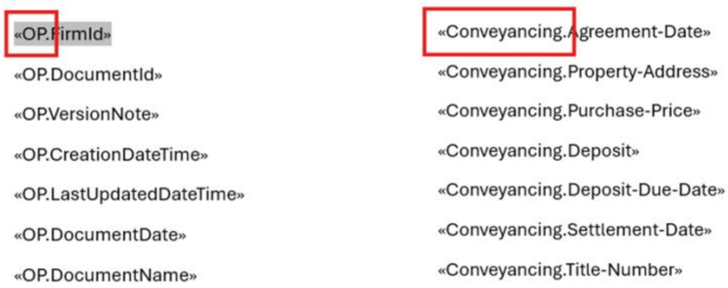


Figure 109

Copy and paste the fields necessary into the document.

For more information, see the Working with Merge Fields section below.

Mapping Fields using Content Controls

Navigate to the OneAuthor tab in Word and select Editor. Once selected, the XML Mapping menu will appear on the right side of the screen. Use the drop-down list to choose either OneLaw fields or InfoSheet fields that may be attached to the document.

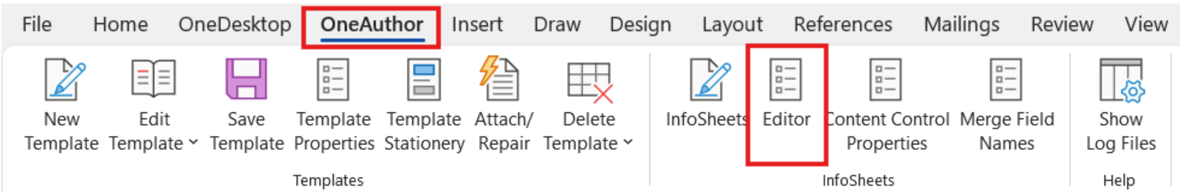


Figure 110

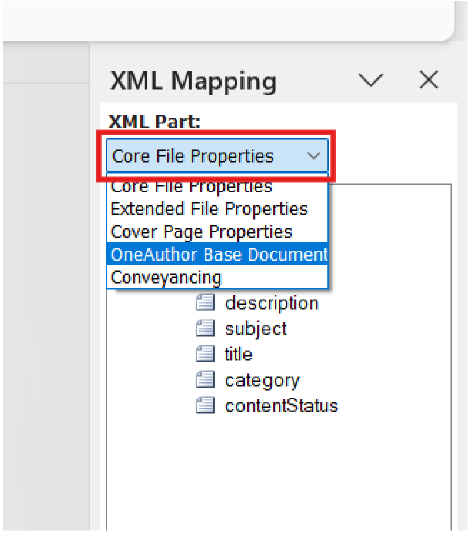


Figure 111

Next, drag and drop the content control field into the document.

For more information, see the Working with Content Controls section below.

Fields & Data

Introduction

Fields are placeholders in documents that get replaced/populated with values from OneLaw, or Fragments/Clauses, upon document assembly.

OneLaw supports two types of fields:

+ **Content controls**: These are rich in-document objects that bind on to data embedded into the document. They come in multiple types, including plain text and date pickers. When the value in a content control is updated, the underlying data is also updated, and any other content controls bound to the same data field also update immediately. The underlying data is stored in the document as "Custom XML Parts," which is a Microsoft technology for embedding data into documents
+ **Merge fields:** These are field codes that get replaced by content during the document assembly process, leaving just the resulting text in the document

Key differences between content controls and merge fields are as follows:

Aspect	Content controls	Merge fields
Basic principle	Binds on to data embedded in the document	Replaced by data during document assembly process
Lifecycle	Remain in document after document assembly process	Only resulting text remains after document assembly fields are removed
Formatting	Content controls support formatting including specifying date format	Merge fields support formatting including specifying date format
Editing in finished document	Modifying contents of a content control updates the underlying embedded data, which in turn updates any other content controls bound onto the same data field	Only resulting text remains in document, so editing the text is like editing any other text
Data support	Supports built-In and InfoSheet data fields, does **not** support InfoSheet fragment/clause fields	Supports built-In and InfoSheet data and fragment/clause fields
Automation support	Supported in Partial Automation (Word document) and Full Automation (Word template) precedents	Only supported in Full Automation (Word template) precedents with the "Template uses MergeFields" setting enabled
Word field code support	Cannot interact with Word field codes (e.g. IF fields)	Can be combined with other Word field codes (e.g. IF fields), allowing simple programmability within the precedent

Field data can come from the following field sources:

+ **Built-in:** This is data from the party, patter and user records in OneLaw, as linked to the document via party, matter, recipient,oOffice, operator and author fields on the document. Built-in fields are described in the next section, Built-In Field Data
+ **InfoSheets**: This is data from custom fields defined on InfoSheets, either attached to a matter or displayed as a dialog when assembling a document. InfoSheets are described in the InfoSheets section

Built-In Field Data

There is a comprehensive set of built-in fields available for mapping into precedents. It is also possible to define custom fields via InfoSheets, described in the

InfoSheets section.

The key types of data objects available via built-in fields are:

+ Document
+ Party
+ Matter
+ User
+ Address

The available fields for these are outlined below.

NOTE: Where a type is asterisked *, this means it refers to another data object type outlined in this section.

Document

This is the root data object for built-in data within any OneLaw precedent.

Field Name	Type	Note
FirmId	Guid	The firms' unique identifier
DocumentId	Text (ID)	The Id of the document in OneLaw, including the version number
VersionNote	Text	The user entered note when creating a new version of a document
CreationDateTime	DateTime	The date and time the precedent was executed, or the document was managed into OneLaw
LastUpDatedDateTime	DateTime	The date and time the document was last managed to OneLaw
DocumentDate	Date	The date the precedent was executed, or the document was managed into OneLaw
DocumentName	Text	The user provided name for the document
DocumentType	Text	Word document or Word template
TemplateId	Guid	(Legacy – ignore)
Operator	User*	The user logged into OneLaw who executed the precedent or managed the document
Author	User*	The user selected Author for the document
Office	Party*	The user selected Office for the document
Client	Party*	The user selected Party or Client. Can be a non-client party
Matter	Matter*	The user selected Matter for the document, can be not populated if the document is to be managed to the Party
Recipient	Party*	The user selected document recipient
Categories	CategoryList	A list of selected categories on the document. NOTE: This is work in progress and not fully functioning

Party

This data object represents a client or party, including users and offices (special types of parties in OneLaw).

Field Name	Type	Note
PartyId	Text (ID)	Internal Id, do not use
FullName	Text	
MailingName	Text	
Salutation	Text	
IsPerson	True/False	True if the party type is *Natural*, false if it is any other type (e.g. multi, legal, office)
Title	Text	
FirstName	Text	
MiddleNames	Text	
LastName	Text	
Suffix	Text	
KnownAsName	Text	
Occupation	Text	
Employer	Text	
ClientId	Text (ID)	Internal Id, do not use
ClientNumber	Text	
PhysicalAddress	Address*	
PostalAddress	Address*	
BillingAddress	Address*	
DXAddress	Address*	
RegisteredOfficeAddress	Address*	
OverseasAddress	Address*	
Email	Text	
AREmail	Text	
Phone	Text	
Mobile	Text	
Fax	Text	
IsTaxResident	True/False	
GstNumber	Text	
BankAccountNumber	Text	
BankAccountName	Text	
IsInactiveClient	True/False	
IsCreditStopped	True/False	
IsCDDRequired	True/False	
DateOfBirth	Date	
DateOfDeath	Date	
DateOfProbate	Date	
ClientAuthor	User*	The ‘Supervising Author’ configured on the client

Matter

This data object represents a matter in OneLaw.

Field Name	Type	Note
PartyId	Text (ID)	Internal Id, do not use
ClientId	Text (ID)	Internal Id, do not use
MatterId	Text (ID)	Internal Id, do not use
Name	Text	
ClientNumber	Text	
MatterNumber	Integer	
IsConfidential	True/False	
EstimatedFees	Money	
EstimatedCostsAndDisbursements	Money	
CounterParty	Party*	
CounterPartyFirmActing	Party*	
CounterPartyLawyerActing	Party*	
InstructingParty	Party*	
BillingParty	Party*	
ARContact	Party*	
IsActive	True/False	
IsCapturedActivity	True/False	
MatterAuthor	User*	The 'Supervising Author' configured on the matter

User

This data object represents a OneLaw user, used for Operator and Author on the document.

Field Name	Type	Note
UserId	Text (ID)	Internal Id, do not use
Party	Party*	The Party record for the user – most information is here
UserName	Text	
Initials	Text	
OfficePartyId	Text (ID)	Internal Id, do not use
OfficeName	Text	
AuthorRole	Text	

Address

This data object represents an address in OneLaw.

Field Name	Type	Note
Line	Text	
MultiLine	Text	
Line1	Text	
Line2	Text	
Line3	Text	
Line4	Text	
Line5	Text	
Line6	Text	
Line7	Text	
Line8	Text	
Line9	Text	
SingleLine	Text	
SingleLineCsv	Text	
PostCode	Text	

Document Field Differences by Precedent/Template Type

The built-In fields are used for multiple Precedent types:

+ Document precedents
+ Email precedents
+ Invoice/Statement templates

Exactly which fields are populated varies by precedent type. The table below outlines which document fields are populated by precedent type.

Field Name	Document Precedent	Email Precedent	Invoice/Statement Template
FirmId	✓		
DocumentId	✓		
VersionNote	✓		
CreationDateTime	✓		
LastUpDatedDateTime	✓		
DocumentDate	✓		
DocumentName	✓		
DocumentType	✓		
TemplateId	✓		
Operator	✓	✓	✓
Author	✓	(Set to Operator)	(Set to Operator)
Office	✓	(Set to Office of Operator)	(Set to Office of Operator)
Client	✓	✓	✓
Matter	✓	✓	✓
Recipient	✓		
Categories	✓		

Working with Content Controls

Content controls are rich in-document objects that bind to data embedded into the document. They come in multiple types, including plain text and date pickers. When the value in a content control is updated, the underlying data is also updated, and any other content controls bound to the same data field also update immediately.

The underlying data is stored in the document as “Custom XML Parts,” which is a Microsoft technology for embedding data into documents. The OneLaw software provides a set of tools to view the Custom XML Parts, insert content controls into a precedent that are bound to fields in the Custom XML Parts and check and repair the data binding on the content controls.

Viewing OneLaw Fields in Custom XML Parts

To view the Custom XML Parts, on the OneAuthor tab, click Editor:

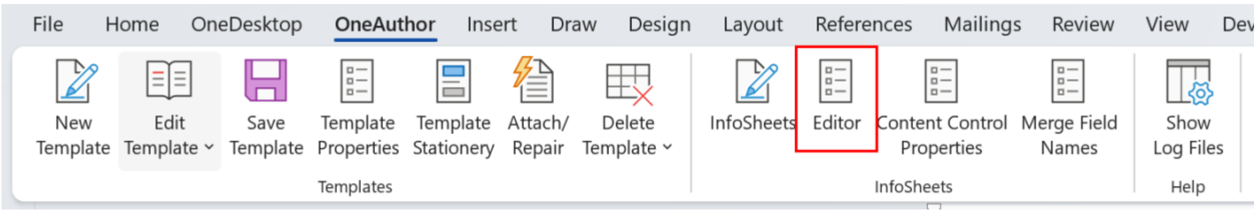


Figure 112

This will show the XML Mapping pane docked to the right-hand side of the Word window:

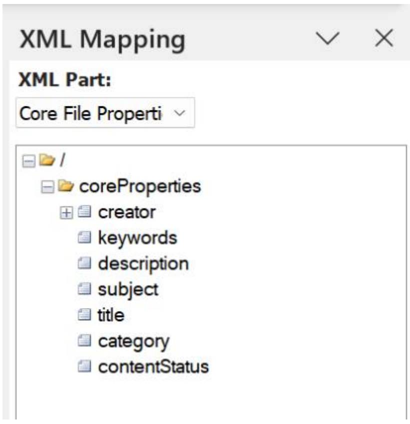


Figure 113

The Custom XML Parts in the document are available in the XML Part drop-down list. This includes some Word built-in XML Parts that have no relevance for OneLaw, the OneAuthor Base Document Schema, which contains all the OneLaw built-in fields, and XML Parts for any InfoSheets attached to the document containing any InfoSheet fields:

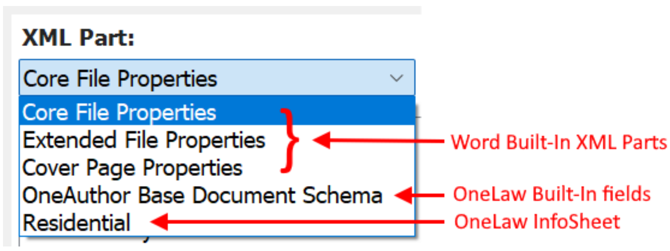


Figure 114

By selecting OneAuthor Base Document Schema, a tree containing all available OneLaw built-in fields will be shown. It is possible to drill down into this tree to get to fields on linked data, i.e. fields on the client or matter relating to the document.

By selecting an InfoSheet, the fields for that InfoSheet will be available to use. Again, when the InfoSheet fields are links to parties, clients or matters, it is possible to drill down on those fields on the tree to access the fields on the linked data. For more information on InfoSheets, see the InfoSheets section.

Below are examples showing the OneAuthor Base Document Schema and an example InfoSheet:

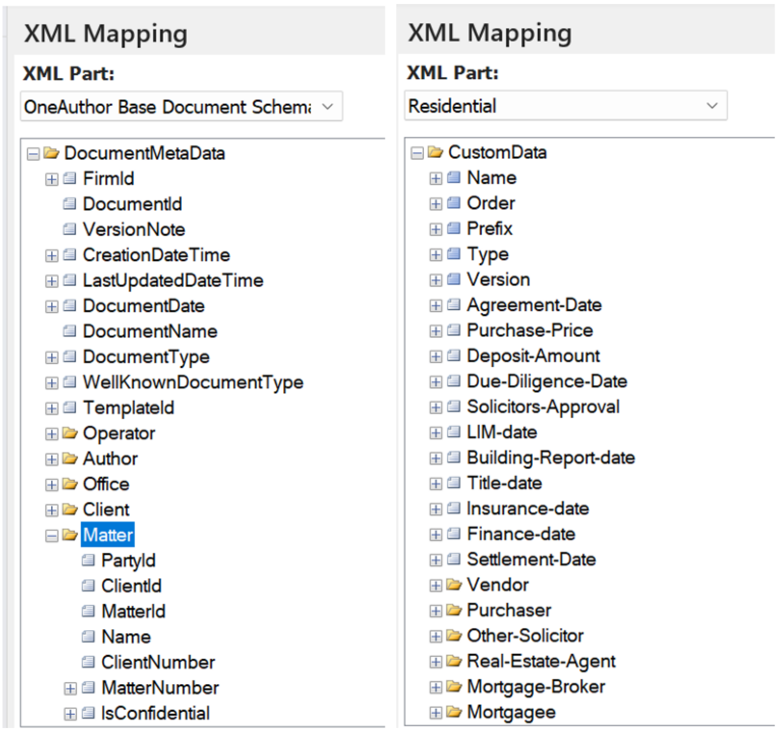


Figure 115

NOTE:

- The root (first) node in the tree for built-in fields will always be "DocumentMetaData." The root (first) node for InfoSheets will always be "CustomData." If the tree does not start with one of those items, then you are not looking at OneLaw fields as covered in this manual
- When authoring a template, the fields in the trees may contain dummy data or no data. This is replaced with real data when a precedent is executed

Inserting Content Controls

Inserting content controls for OneLaw fields is done with a drag-drop operation, by dragging a field from the XML Mapping area to the body of the document. The insertable fields have the white icon, not the yellow folder icon.

For example, drag:

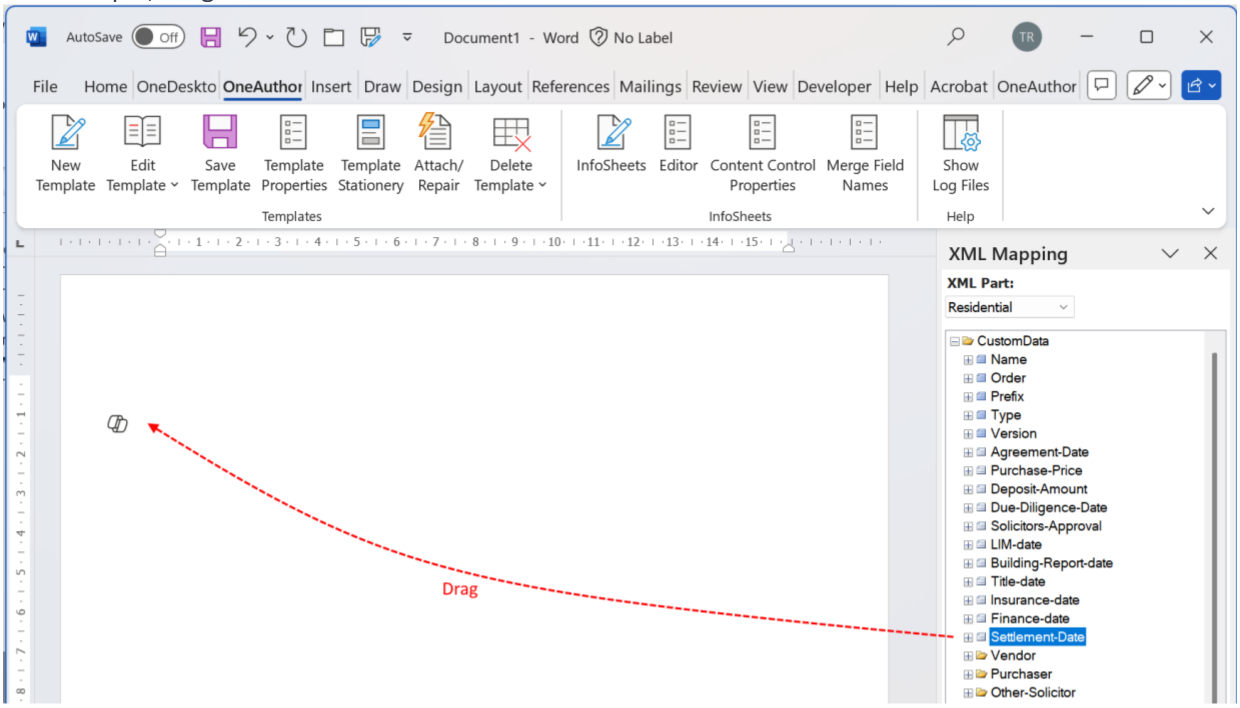


Figure 116

Drop:

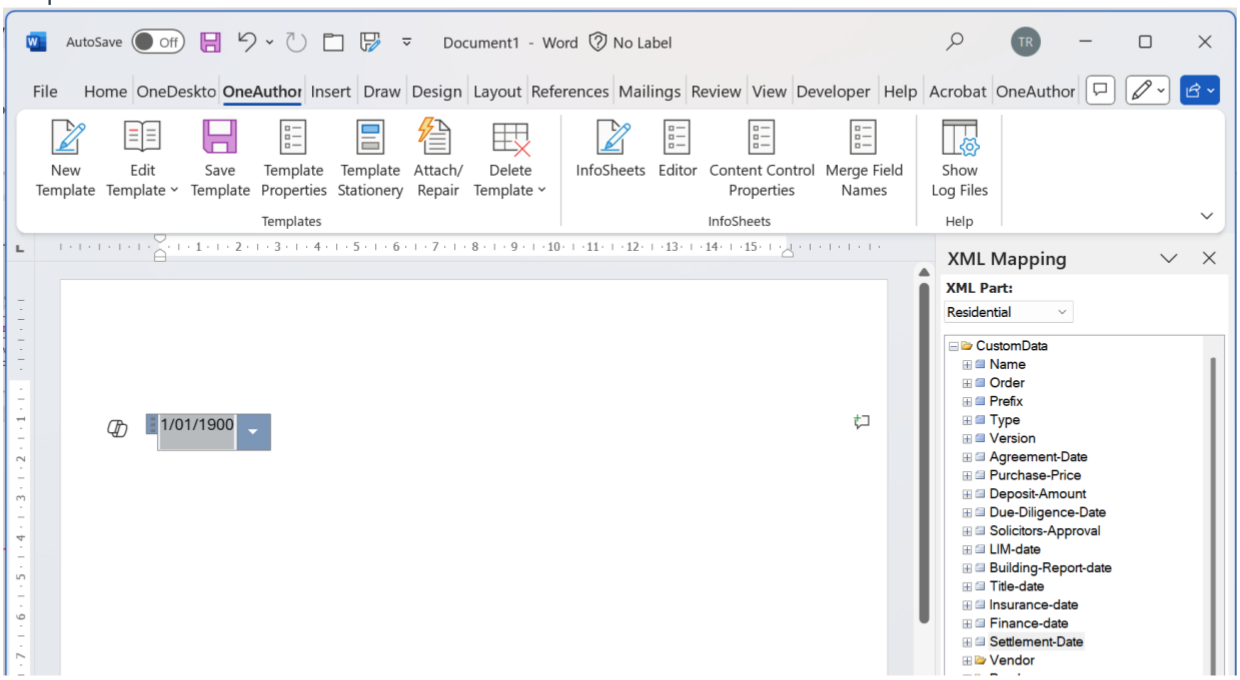


Figure 117

We now have a date content control in the document bound to the Settlement Date field in the Residential InfoSheet. As it is a precedent, it will show dummy data.

Checking and Relinking Content Controls

The easiest way to check that a content control is correctly linked to the desired OneLaw field is to click on it with the XML Mapping pane open. If the content control is linked to a field, it will switch to the correct XML Part (built-in or InfoSheet) and highlight the field the content control is linked to. If this does not happen, the field is not linked correctly. See the Viewing OneLaw Fields in Custom XML Parts section for information on how to show the XML Mapping pane.

Another way to check is to click on the content control, then click the Content Control Properties button within the OneAuthor tab:

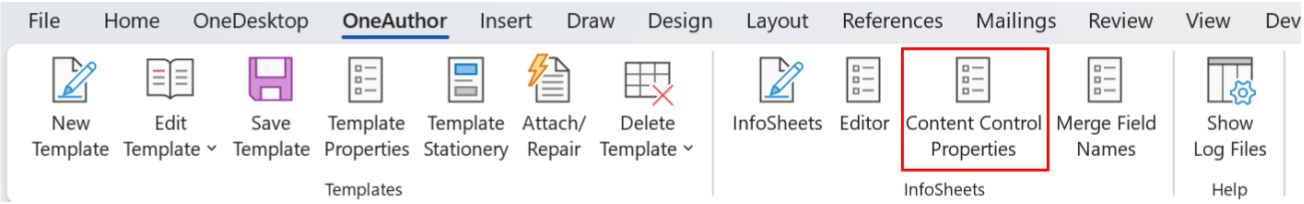


Figure 118

This will display a message that either shows a mapping to the XML Part (via an 'XPath' expression) or that the content control is not mapped. For example, a correctly linked content control will produce a message such as:

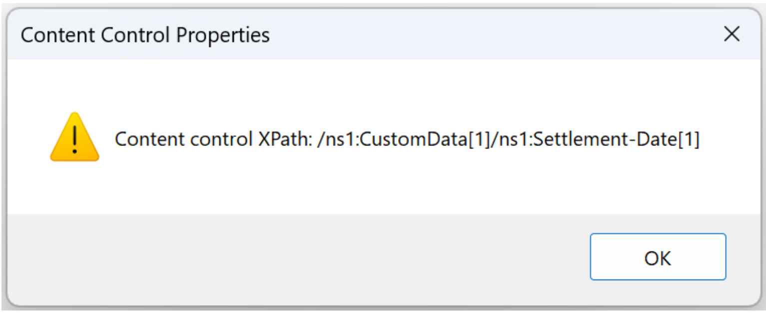


Figure 119

A content control that is not correctly linked will produce a message such as:

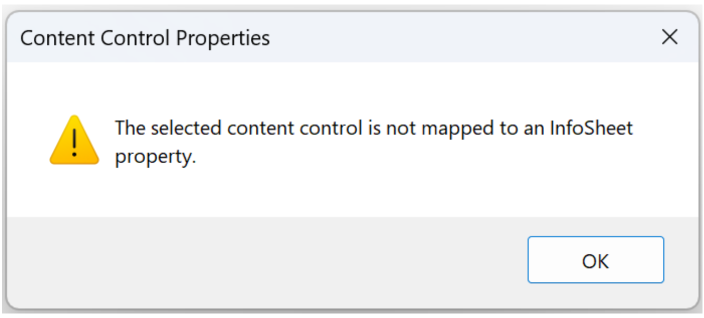


Figure 120

To relink an unlinked content control, click on the content control, then in the XML Mapping pane, right-click the field you want to link to, and click "Map to Content Control."

Specifying Content Control Formatting

For date content controls, you may want to specify the desired formatting for the date, for example, "22 June 2025" instead of "22/06/25." The date format can be specified in the Content Control Properties dialog. Click into the content control, then on the Developer tab and click Properties.

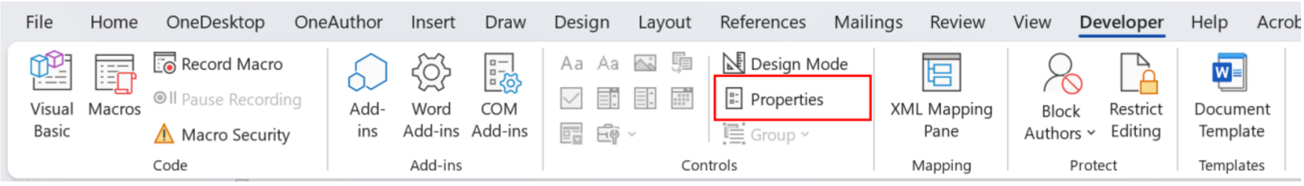


Figure 121

This will show the Content Control Properties dialog, where the date format can be set:

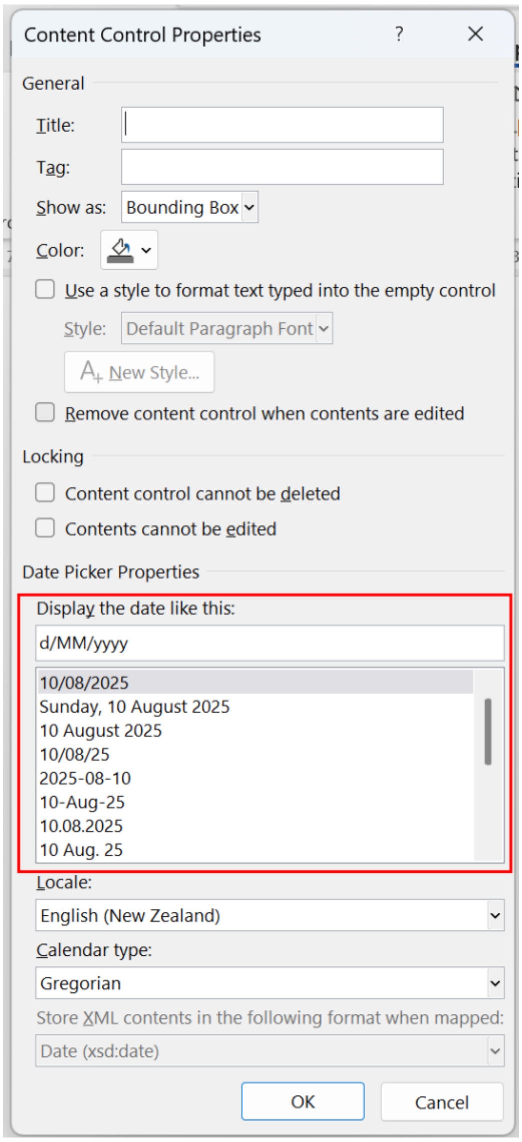


Figure 122

The same principle holds for other field types that can have different formatting, such as numeric or currency values.

Working with Merge Fields

Merge Fields are a built-in Word field type that gets replaced with a field value during the document assembly process. After this process, the merge field no longer exists in the document, only the resulting value. Within the OneLaw document assembly process, a merge field can resolve to a simple field value, or Fragment/Clause related tag that in turn resolves into a Fragment or Clause.

For more information on the Fragment/Clause scenarios, see the Clauses/Fragments section. This section focuses on simple field values including text, date, number etc.

Like all Word fields, merge fields have 2 view modes – instruction mode and result mode. See below for an example of how a merge field looks in the different modes:

Mode	Example
Result	«OP.Client.FullName»
Instruction	**{** MERGEFIELD OP.Client.FullName * MERGEFORMAT **}**

NOTE: The bolded brackets **{ }** in the instruction mode are not simply brackets, they are special Word field delimiters.

The following key commands can be used to work with merge fields (and all Word fields):

+ **F9**: Refresh the field result (i.e. update the result mode with changes made in the instruction mode)
+ **Shift + F9:** Toggle a field between result mode and instruction mode
+ **Alt + F9:** Toggle all fields in the document between result mode and instruction mode
+ **Ctrl + F9:** Insert a new empty field (This will be inserted in instruction mode, and will look like this: **{ }**.)

It is also possible to refresh or toggle a field using the right-click menu on the field:

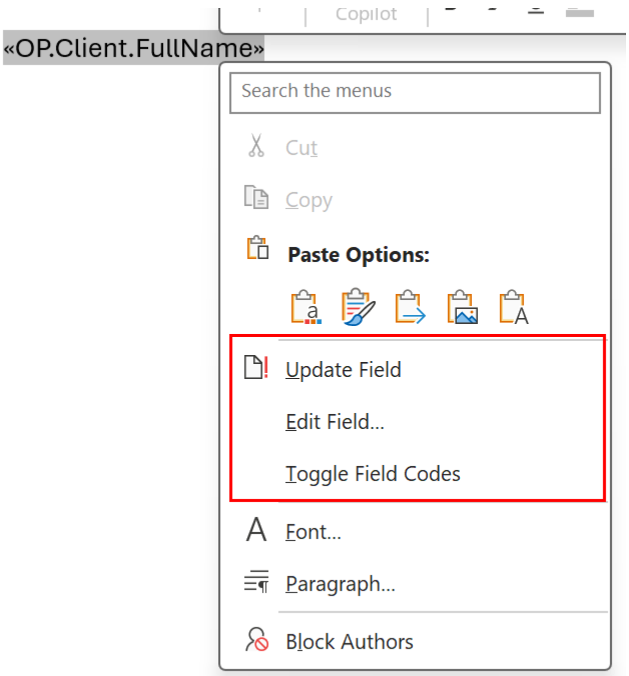


Figure 123

OneLaw Merge Field Naming

Merge fields in OneLaw follow a convention-based naming scheme:

- All built-in fields start with "OP." Simple document fields like Document Date have a name like "OP.DocumentDate"
- Fields on linked data (such as client or matter) use a dot "." to separate each level in the field name – e.g. "OP.Matter.Name"
- All InfoSheet fields start with the Field Code Prefix of the InfoSheet. For example, all fields for the below InfoSheet will start with "Residential"

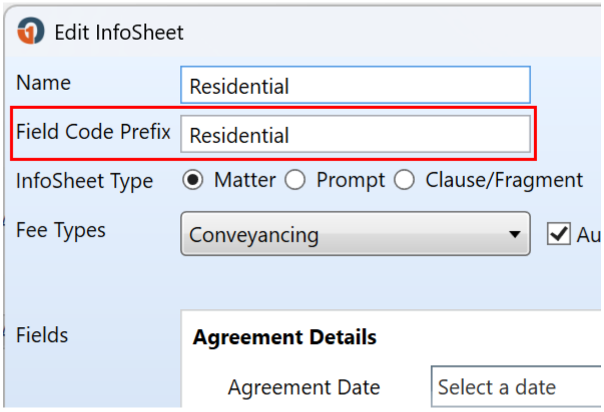


Figure 124

- InfoSheet field names use the Field Code defined on the field. For example, using the same InfoSheet as above, the "Agreement Date" field is defined Agreement Date. The merge field name will be "Residential.Agreement-Date"

Figure 125

Viewing All Available Merge Fields

In any OneLaw precedent, you can access all available merge fields, built-in and for any attached InfoSheets, by clicking Merge Field Names on the OneAuthor tab:

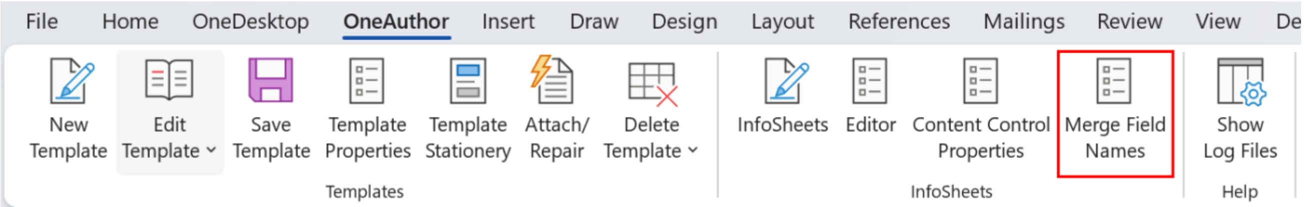


Figure 126

This will open a new Word document containing merge fields for all available fields. As there are many available fields, this document is many pages long:

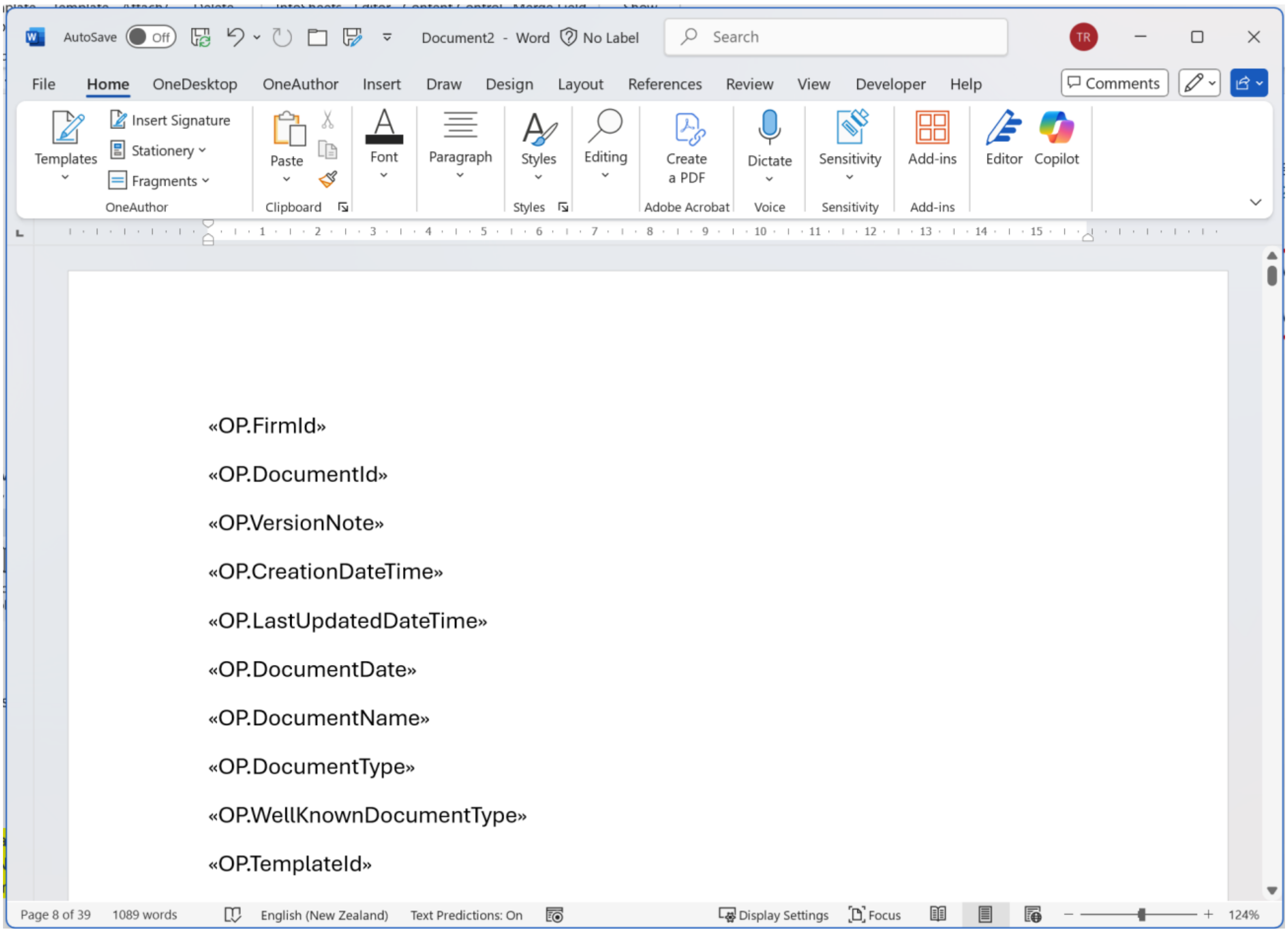


Figure 127

All the built-in fields come first, followed by the attached InfoSheet fields.

Inserting Merge Fields

There are multiple ways to insert a merge field in a precedent:

+ Within the Word Insert tab, click "Quick Parts", then "Field…". This will show the Word Field dialog. Select "MergeField," enter the name of the field (per the naming conventions here: OneLaw Merge Field Naming

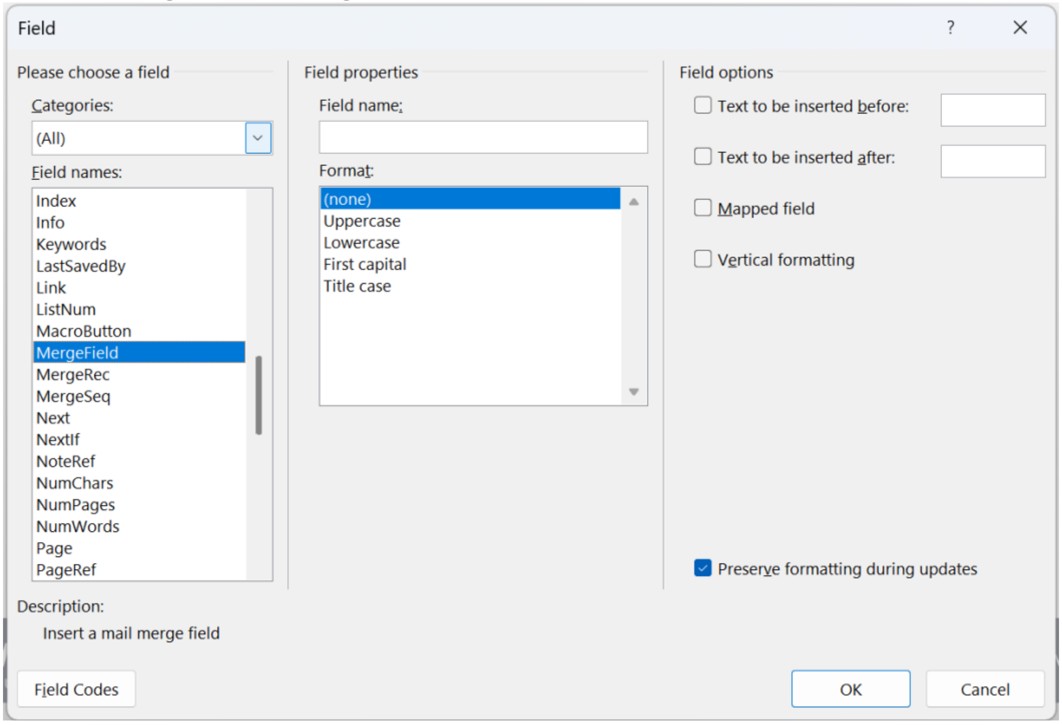


Figure 128

+ Manually insert a field using Ctrl + F9, then type the merge field code into the new field. This should be something like: **{** MERGEFIELD OP.Client.FullName * MERGEFORMAT **}**
+ Copy and paste the merge field from the Merge Field Names document described above. It is best to use the Word paste option "Merge Formatting," available from the Paste button on the toolbar (shown below). This is the easiest and recommended way to insert merge fields

Figure 129

Formatting Merge Fields

The basics of formatting a merge field work by using the controls in the Font section of the Home tab in Word. These include bolding, italicising, underlining, changing font and colour etc. For more complex formatting, such as capitalising or changing date formats, see the article from Microsoft here.

The examples below show how a date merge field looks from the Merge Field Names list. We want to reformat it so that it reads as: day MONTH year being 1 January 2025. We add in the syntax \@ "d MMMM yyyy" – you can find other formats here.

{ MERGEFIELD OP.DocumentDate * MERGEFORMAT }	1/1/25
{ MERGEFIELD OP.DocumentDate \@ "d MMMM yyyy" * MERGEFORMAT }	1 January 2025

Figure 130

Conditional Logic with IF Fields

When using merge fields, it is possible to combine these with Word IF fields to conditionally include text or other fields in a document. Some scenarios where this can be useful are as follows:

- Include some text when a field contains a specific value. e.g. include the word 'her' when a Gender field contains 'Female'
- Include a default value when a field contains no value
- Include the value of another field when a field contains a specific value
- Remove a paragraph when a field contains no value. NOTE: This utilises a special OneLaw feature 'OA REMOVE'. e.g. remove a fax number line (paragraph) when the fax number field is not populated
- Include a clause contained in another document when a field contains a specific value

NOTE: Many of the solutions outlined in this section can be achieved using other OneLaw capabilities. For example, Choice Fields in InfoSheets can be used to specify additional gender pronouns on a Gender field, and Fragment Selector fields in InfoSheets are often an easier solution for selecting clauses. Where other solutions exist, IF fields should be a fallback solution. Preferred solutions will be outlined below.

IF Fields Overview

IF fields take the form **{**IF "Expression1" Operator "Expression2" "TrueValue" "FalseValue"**}**.

Expression1 and Expression2 should be surrounded by quotation marks as shown above. They can be text values, merge fields or numbers.

Operator can be one of the following:

Operator	Description
=	Equal to
<>	Not equal to
>	Greater than
<	Less than
>=	Greater than or equal to
<=	Less than or equal to

TrueValue and FalseValue represent the content that will be included in the document when the comparison is either true or false.

There are two ways to insert an IF Field. The first is via the Quick Parts on the Insert tab in Word:

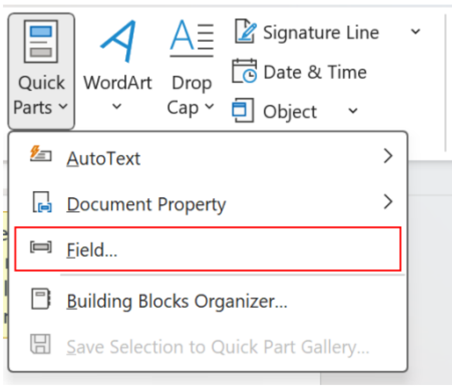


Figure 131

This opens the field selector dialog, where you can type the contents of the IF field.

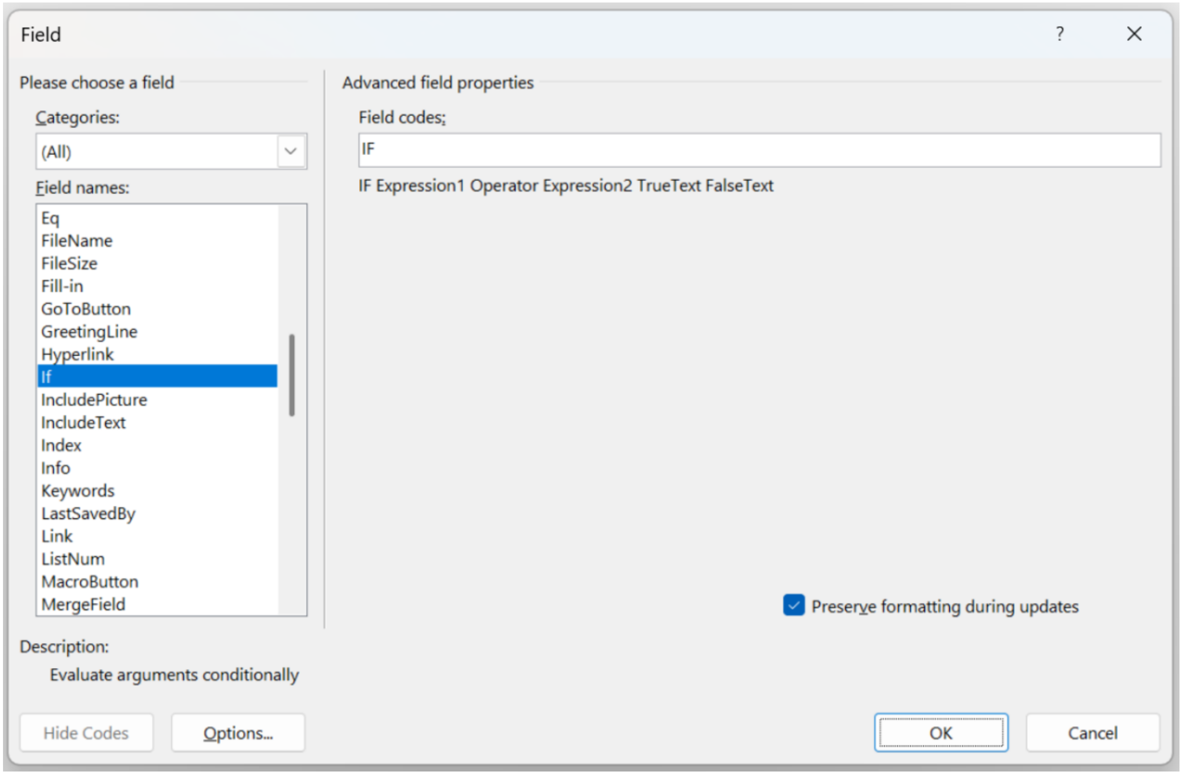


Figure 132

An easier and preferable method is to do the following (assuming an ‘=’ comparison):

1. In the document in the location for the IF field, type Ctrl + F9. This inserts an empty field that will look like this: **{ }**
2. Inside the field insert the following: **{**IF “” = “” “” “”**}**. This puts the structure of the IF field in place, with all the required quotes
3. Inside the first quotes, paste the merge field you want to compare to, e.g.:
   {IF “«MyInfoSheet.Gender»” = “” “” “”**}**
4. Inside the second quotes, add the value you want to compare to, e.g.:
   {IF “«MyInfoSheet.Gender»” = “Female” “” “”**}**
5. Now fill in the TrueValue and FalseValue expressions:
   {IF “«MyInfoSheet.Gender»” = “Female” “her” “his”**}**
6. IF fields can be nested where there are more than 2 options you want to consider, e.g.:
   {IF “«MyInfoSheet.Gender»” = “Female” “her” “**{**IF “«MyInfoSheet.Gender»” = “Male” “his” “their”**}**”**}**
   NOTE: It is strongly recommended to avoid deeply nested IF statements as these can be very hard to read, understand and maintain.
7. The field can be toggled between the edit view above and the result view using Shift + F9. In the case when comparing a merge field to a value, this will always evaluate to false prior to executing the template, so the FalseValue will always show in the results view

Scenarios

A number of specific scenarios are outlined below to illustrate the types of solutions that IF Fields led themselves to. There are many more scenarios where IF Fields may be a good option.

Include Text When a Field Contains a Specific Value

In this case, the field will look something like **{**IF "«MyInfoSheet.Gender»" = "Female" "her" "his"**}**.

Where the field is an InfoSheet CheckBox field, the possible values are "true" and "false," all lowercase. E.g.: **{**IF "«MyInfoSheet.IsFemale»" = "true" "her" "his"**}**.

NOTE: Where the field is an InfoSheet Choice Field, it is almost always preferable to avoid IF fields by using the additional values on the Choice Field values. For example, a choice field 'Gender' might have 3 values, Male, Female and Non-binary. We can attach up to 5 additional values to each Choice Field value, which might be as follows:

Value	Male	Female	Non-binary
Additional Value 1	he	she	they
Additional Value 2	him	her	them
Additional Value 3	his	her	their
Additional Value 4	his	hers	theirs
Additional Value 5	himself	herself	themself

These additional fields are available directly as merge fields, avoiding the need to use IF fields in this case. For more information, see the Field Types section.

Include Another Field Value When a Field Contains a Specific Value

In this case, we might see something like:
{IF "«MyInfoSheet.ShowParty2»" = "true" "«MyInfoSheet.Party2.Name»" ""**}**.

Specify a Default Value if a Field is Not Populated

In this case, we might see something like:
{IF "«MyInfoSheet.ReviewDate»" = "" "[Specify Review Date]" "«MyInfoSheet.ReviewDate»"**}**.

Remove a Line/Paragraph if a Field is Not Populated

OneLaw specifies some special tags that can be used in documents to support various clause insertion scenarios. One of these tags can also be used to remove paragraphs when a field contains no value. This avoids leaving an empty line.

This tag is: {{OA REMOVE PARAGRAPH}}
NOTE: The braces in this case do not indicate a Word field object – they are just text.

For example, consider we have a fax number line that we want to show when the fax field is populated, but we want the entire line to be removed if there is no fax number specified. In this case we might have a field like:

{IF "«OP.Client.Fax»" = "" "" "Fax Number: «OP.Client.Fax»"**}**.

This has the net effect of not showing the Fax Number line when the Fax field is not populated, but it still leaves a blank line. To also remove the blank line, we can use the OA REMOVE tag as follows:

{IF "«OP.Client.Fax»" = "" "{{OA REMOVE PARAGRAPH}}" "Fax Number: «OP.Client.Fax»"**}**.

Now when the precedent is executed, if the fax field is empty then the OA REMOVE tag is placed into the document, instructing the OneLaw software to remove the whole paragraph, including the trailing newline.

NOTE: the OA REMOVE tag is only supported in document precedents, not email precedents or statement templates.

Include a Clause When a Field Contains a Specific Value

In this case, we might see something like:
{IF "«MyInfoSheet.IncludeBequestClause»" = "true" "{{OA INCLUDE P:\Clauses\BequestClause.docx}}" ""**}**.

This makes use of OA INCLUDE tags, which are covered fully in the *OA INCLUDE tag* section OA

NOTE: the OA INCLUDE tag is only supported in document precedents, not email precedents or statement templates.

Bidirectional Data Flow

Bidirectional data flow is an optional feature that allows changes to content controls bound to certain InfoSheet fields to be written back to the InfoSheet when the document is managed.

This only supports simple field types – text, date, number and money.

When this feature is enabled, if the user has modified any supported content control fields bound to an InfoSheet, then when the user manages the document to OneLaw, they will have the option to also push the data changes back to the InfoSheet:

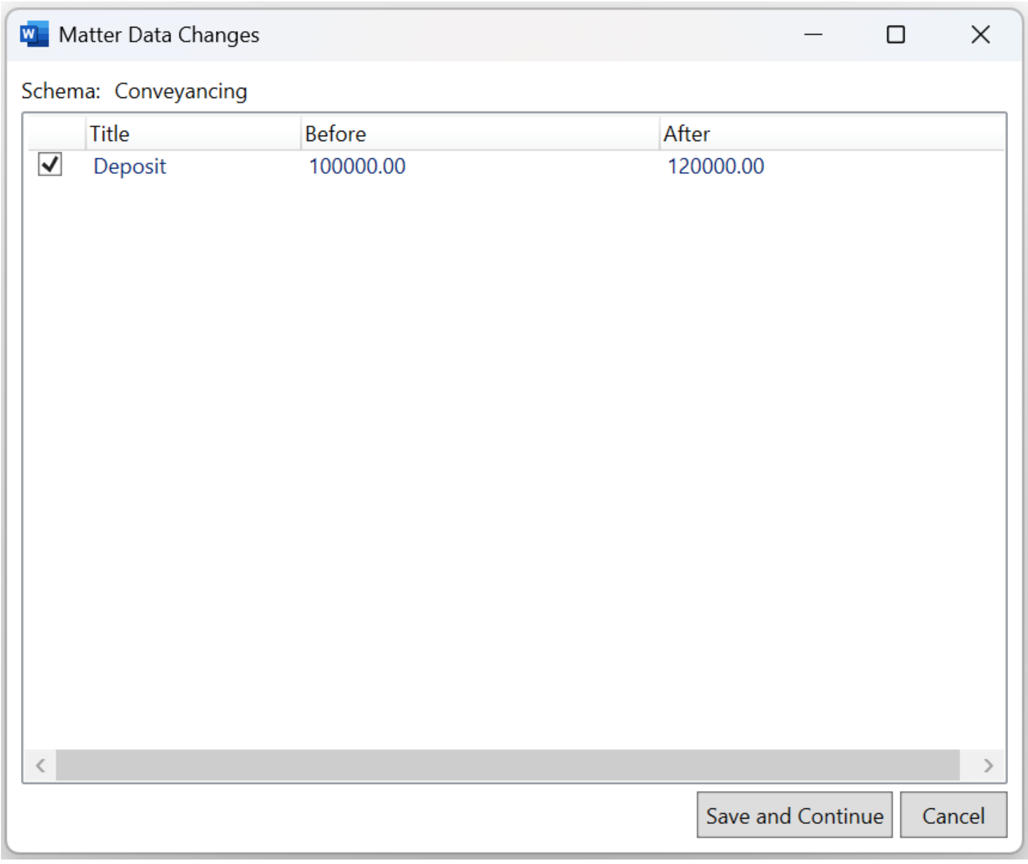


Figure 133

NOTE: It is generally recommended that bidirectional data flow is disabled for firms unless the following points are all true:

- The firm does not use merge fields in its precedents
- The firm does not use complex InfoSheet field types (CheckBox, Choice Lists, etc.)
- The firm really wants this capability and understands it only applies to InfoSheet fields, not built-in fields

Unless all the above are true, then this capability can lead to user confusion due to inconsistent treatment of different field types.

Please contact OneLaw support to request that this feature be enabled or disabled: support@onelaw.co.nz

Clauses/Fragments

Introduction

Clauses and fragments in OneLaw are documents whose contents can be inserted into another document. They are stored in .docx files, and the contents of the clause/fragment .docx file can be copied into another document – either automatically when executing a full automation precedent, or manually from the Fragments menu in Word.

Clauses and fragments in OneLaw are very similar in concept but have some key differences. The table below outlines the similarities and differences:

Feature	Fragments	Clauses
File type	.docx	.docx
Storage location	Document templates in OneLaw	In external folder, referenced by clause library
Method of organisation	Fragment categories	Clause libraries, folders, subfolders
Maximum file size	1Mb	Unlimited
Available in Fragments menu in Word?	Always	If clause library matches fee type of matter
Nested Fields (content controls, merge fields)	Yes	Yes
Clause/Fragment InfoSheets	Yes	Yes
Nested clauses/fragments	Yes	Yes
Nested clause pickers	Yes	Yes

There are three ways clauses and fragments can be included in documents:

+ Automatically inserted upon creation of a document from a precedent, either always or depending on selections made in InfoSheets
+ Inserted based on selection in an inline clause selector that has been inserted upon creation of a document from a precedent
+ Manually in any document, from the Fragments menu in the OneAuthor area of the Home tab in Word

Style Considerations

When building and using clauses and fragments, Word styles need to be considered. The process of inserting a clause or fragment is effectively inserting the contents of a source Word document (the clause or fragment) into a target Word document (the precedent or document). When Word performs this action, it needs to merge the styles of the source and target.

With clauses and fragments, style priority is always with the target, which means if the clause/fragment contains content in a style, and the precedent/document also has a style with that name, the style formatting in the precedent/document will be applied to the incoming content from the clause/fragment.

Example scenario:

- A clause document defines the Normal text style as font Arial and contains content using Normal style with no paragraph or character font overrides
- A precedent defines Normal style as font Calibri
- When the clause is inserted into the precedent, the content in the clause using Normal style will appear as Calibri in the precedent rather than Arial, as the precedents' Normal style will take precedence over the clause's Normal style

Manually Inserting Clauses and Fragments

Fragments

Under the Home tab in Word, select the Fragments tool.

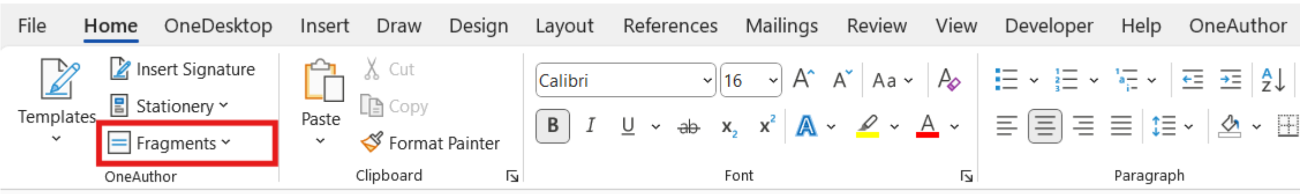


Figure 134

The drop-down menu will show all firmwide Fragment Categories before the divider (indicated with the arrow). A divider will separate Fragment Categories from Clause Libraries, and will be present when both are available:

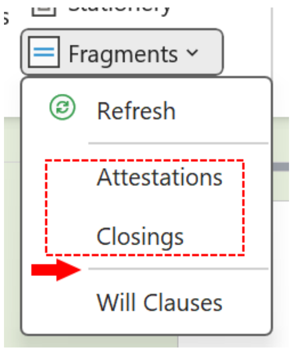


Figure 135

.Select the desired fragment category, and the fragment chooser will show:

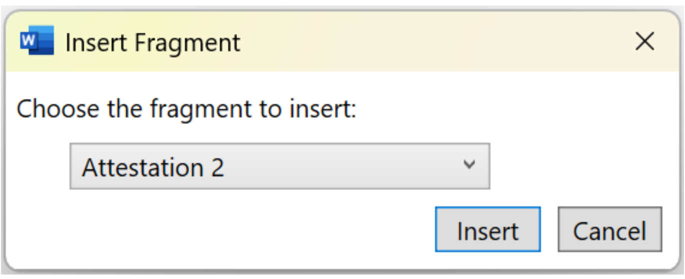


Figure 136

Select Insert, and the fragment will insert at the cursor.

Clauses

Under the Home tab in Word, select the Fragments tool.

The drop-down menu will show all Clause Libraries available for the fee type of the matter selected for the document. These will show after the divider (indicated with the arrow below). The divider will separate Fragment Categories from Clause Libraries, and will be present when both are available:

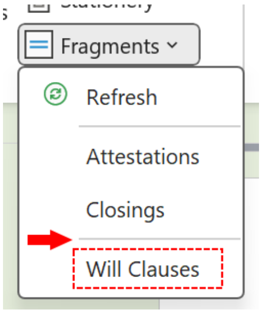


Figure 137

When the Clause Library is selected, the clause picker will show:

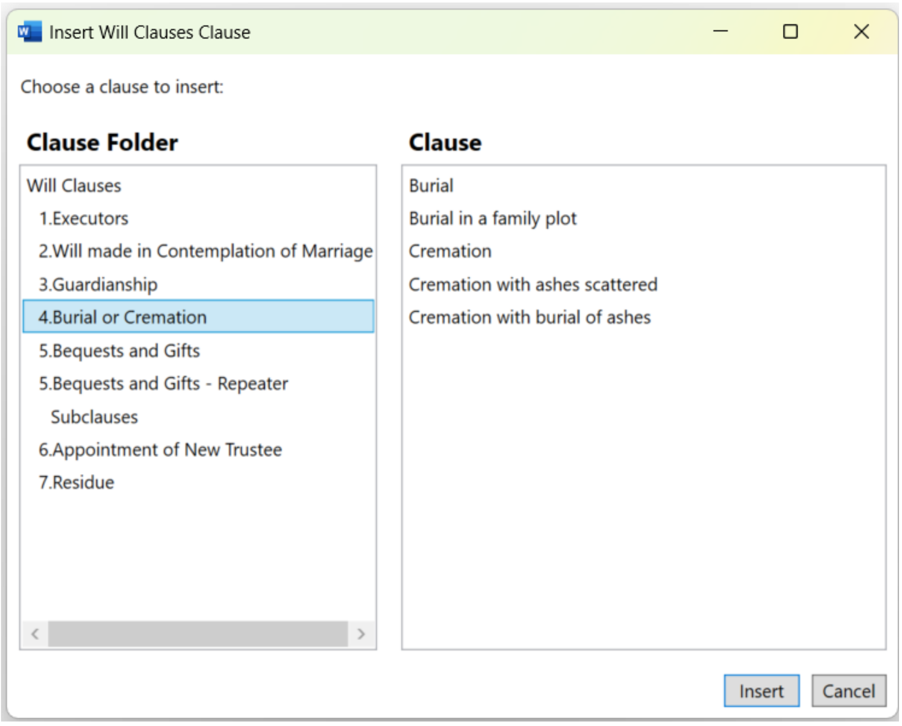


Figure 138

Choose the Clause Folder (these are sub-folders in the clause library), then the clause on the right-hand side. When Insert is clicked, the selected clause will be inserted at the cursor.

If a specified fee type has been assigned to the clause library, these clauses will only show in Word if the user is working on a matter with that specified fee type. If a clause library has been assigned to “ANY” fee type, then these clauses will be available in any Word document.

Managing Fragments

Each fragment document gets uploaded as a document template to OneLaw. Currently, the maximum size for any document template is 1Mb.

Once you have created a fragment document, save it somewhere accessible to OneLaw.

Follow the steps below to upload the fragment document:

1. Navigate to the Administration (or Templates) tab and select Document Templates:

Figure 139

2. In the Document Templates screen, find the OneAuthor Fragments section:

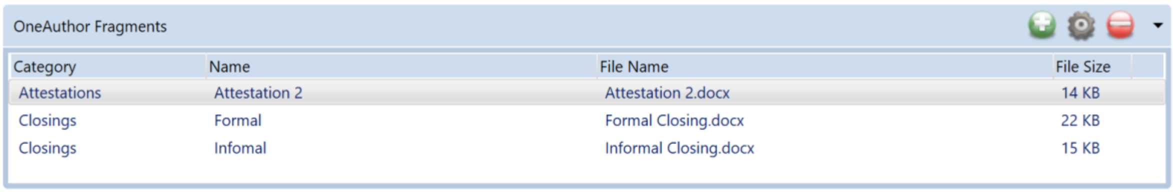


Figure 140

3. Click the (+) button. You will see the Fragment dialog box:

Figure 141

4. Specify the Category of the fragment. The Category defines what will appear in the Fragments menu in Word:

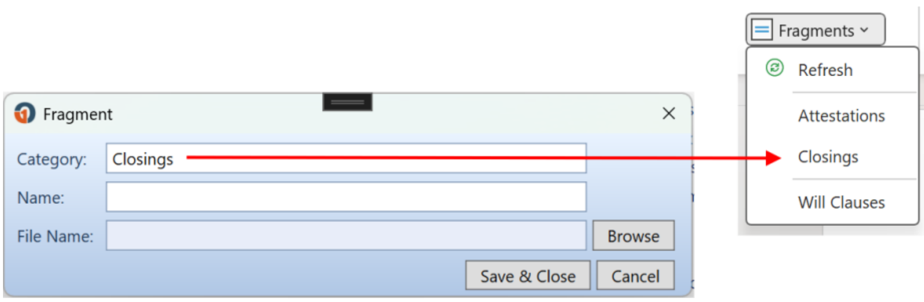


Figure 142

5. Specify the name of the Fragment:

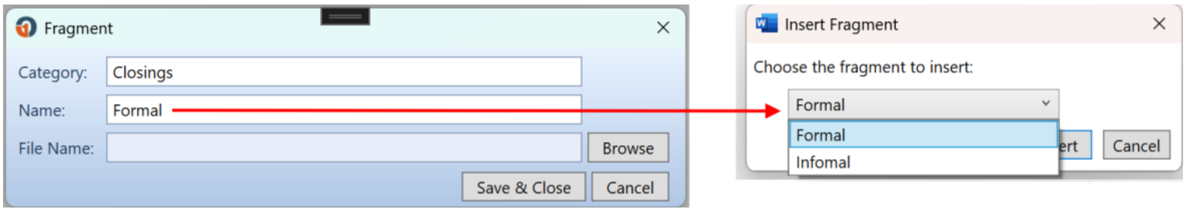


Figure 143

6. Click Browse, select the fragment document you saved earlier and click Save & Close

Once fragments have been created, they can be edited from the OneAuthor Fragments section of the Document Templates screen. When editing, the Name and Category can be changed, and the fragment document can be re-uploaded. There is also an option to download the existing fragment document by clicking View.

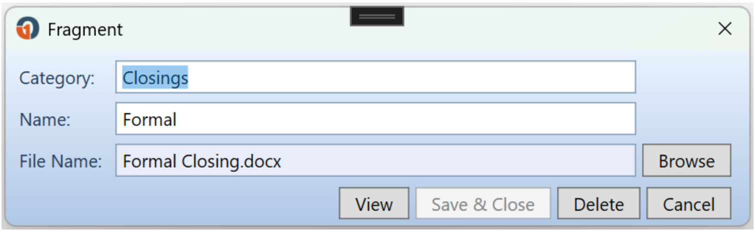


Figure 144

Managing Clauses

Navigate to the Administration tab in OneLaw and select Manage Libraries:

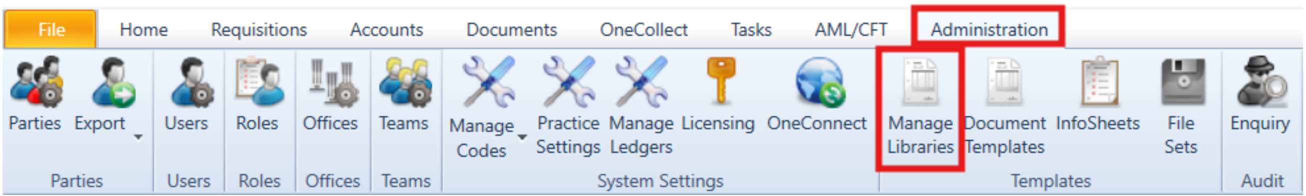


Figure 145

In the Manage Libraries screen, there is a Clause Libraries section. You can use the standard buttons at the top left to add, delete or modify Clause Libraries:

Figure 146

To create a new clause library, click on the green plus (+). A dialog will appear which requires the following:

+ **Name:** Provide an appropriate name for the clause library, e.g. Will Clauses
+ **Folder:** either manually enter the path to the external folder containing the necessary clause folder or select Choose Folder. This can contain subfolders, which can be referenced in clause selectors. If the folder is a SharePoint location, it will be mapped to the user profile of each user. In this case, use **%USERPROFILE%** so it's not pointing to a specific user's user profile. To do this, instead of C:\Users\a.user\OneLaw\Precedents, specify %USERPROFILE%\OneLaw\Precedents. The %USERPROFILE% tag will resolve to each user's correct user profile path on their PC.
+ **Fee Types:** Assign a fee type to the folder. This can be either a main fee type, a sub fee type, multi select across different fee and sub fee types, ANY (which means the clauses will be available across all fee types) or None. If None is selected, the clauses in the clause library won't be available for users. This is a good option for when first creating a clause library and testing is required before finalising and releasing it to the firm.

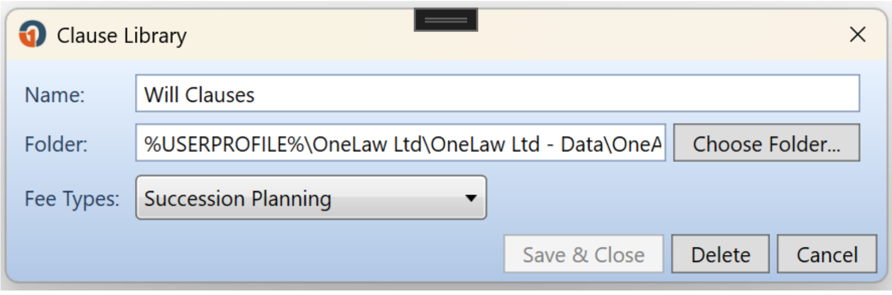


Figure 147

Structuring Clause Libraries

Organise clause libraries in an external folder that best suits the firm. This external folder should only be accessible to administrators and those with permission to maintain the content.

See below for examples of how to structure clause libraries. There is no limit to how many folders and subfolders there can be.

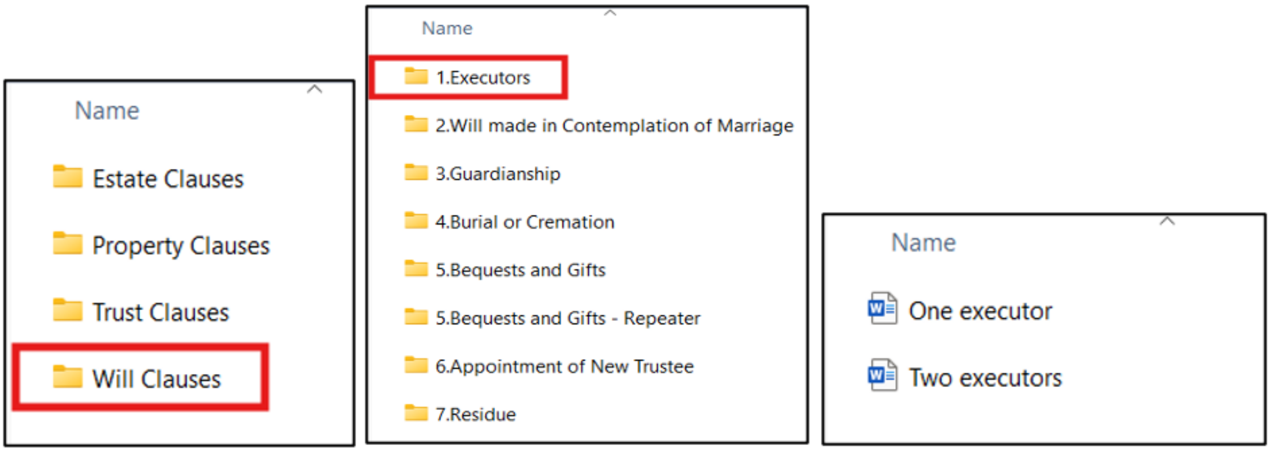


Figure 148

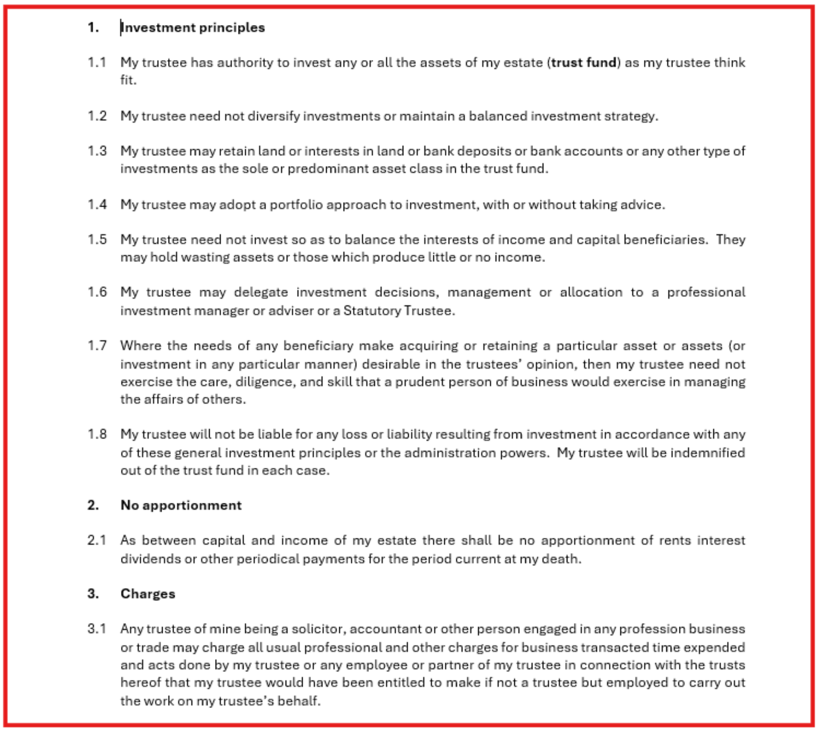
Creating a Clause/Fragment Document

Clause and fragment documents are simply .docx files containing the content to be inserted into the precedent when the clause/fragment is inserted. Clauses and fragments can contain any content that would work in the target precedent. This includes text, content controls, merge fields and inline clause pickers.

Generally, the clause/fragment documents need to be designed for the types of precedents they will be inserted in, with matching styles (see Style Considerations) and numbering. An exception is something like a terms sheet, which should use unique styles of its own, so there are no unexpected changes due to conflicting styles in the precedent.

The easiest and most reliable way to create a clause/fragment document for a particular type of precedent is to have the required clause or fragment content correctly placed in the precedent document, then copy it to a new, clean document. This can be done by completing the following steps:

1. Put all of the possible clauses for a particular clause selection into a copy of the precedent. Ensure that the styles and numbering are correct for all clauses throughout the precedent.



1. Investment principles

1.1 My trustee has authority to invest any or all the assets of my estate (**trust fund**) as my trustee think fit.

1.2 My trustee need not diversify investments or maintain a balanced investment strategy.

1.3 My trustee may retain land or interests in land or bank deposits or bank accounts or any other type of investments as the sole or predominant asset class in the trust fund.

1.4 My trustee may adopt a portfolio approach to investment, with or without taking advice.

1.5 My trustee need not invest so as to balance the interests of income and capital beneficiaries. They may hold wasting assets or those which produce little or no income.

1.6 My trustee may delegate investment decisions, management or allocation to a professional investment manager or adviser or a Statutory Trustee.

1.7 Where the needs of any beneficiary make acquiring or retaining a particular asset or assets (or investment in any particular manner) desirable in the trustees' opinion, then my trustee need not exercise the care, diligence, and skill that a prudent person of business would exercise in managing the affairs of others.

1.8 My trustee will not be liable for any loss or liability resulting from investment in accordance with any of these general investment principles or the administration powers. My trustee will be indemnified out of the trust fund in each case.

2. No apportionment

2.1 As between capital and income of my estate there shall be no apportionment of rents interest dividends or other periodical payments for the period current at my death.

3. Charges

3.1 Any trustee of mine being a solicitor, accountant or other person engaged in any profession business or trade may charge all usual professional and other charges for business transacted time expended and acts done by my trustee or any employee or partner of my trustee in connection with the trusts hereof that my trustee would have been entitled to make if not a trustee but employed to carry out the work on my trustee's behalf.

Figure 149

3. Copy one clause at a time and paste it into a new document, ensuring the styles and numbering remain. NOTE: Numbering will restart.

1. Investment principles

1.1 My trustee has authority to invest any or all the assets of my estate (**trust fund**) as my trustee think fit.

1.2 My trustee need not diversify investments or maintain a balanced investment strategy.

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Figure 150

1. No apportionment

1.1 As between capital and income of my estate there shall be no apportionment of rents interest dividends or other periodical payments for the period current at my death.

Figure 151

1. Charges

1.1 Any trustee of mine being a solicitor, accountant or other person engaged in any profession business or trade may charge all usual professional and other charges for business transacted time expended and acts done by my trustee or any employee or partner of my trustee in connection with the trusts hereof that my trustee would have been entitled to make if not a trustee but employed to carry out the work on my trustee's behalf.

Figure 152

4. Attach any necessary Clause/Fragment InfoSheets to the document and map required fields.

5. Save the clauses separately as .docx files to an external clause library. NOTE: There can be an infinite number of clauses in the libraries, as well as subfolders.

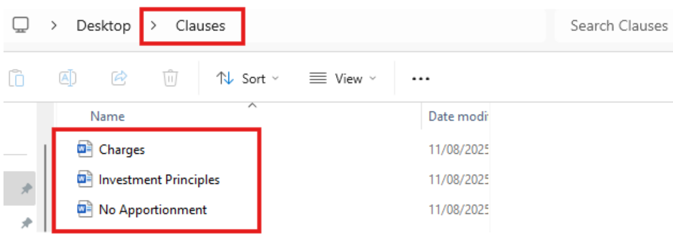


Figure 153

6. Once the clause library is complete, upload the path to OneLaw. See

8. Managing Precedent Libraries for more information.

Including Fragments/Clauses in Precedents

There are multiple ways to include fragments/clauses in precedents:

+ **OA INCLUDE tag:** A simple text tag that specifies a clause or fragment to include. These can be included directly in a precedent to include a shared piece of content that is reused across multiple documents – e.g. terms of service or disclaimer. OA INCLUDE tags can be used inside IF fields to provide simple conditional inclusion of clauses/fragments
+ **InfoSheet Choice fields:** It is possible to set up InfoSheet Choice fields such that there is an additional value containing an OA INCLUDE tag. This allows the Choice field to specify specific clauses/fragments to be included when each choice value is selected
+ **InfoSheet fragment picker fields:** These effectively work as an auto-populating choice field for fragments and clauses. For fragments, the picker will auto-populate with all fragments with a particular Category. For clauses, the picker will auto-populate with all clause files in a particular folder in a Clause Library. This can be the root folder of a Clause Library, or any subfolder nested beneath a Clause Library. These pickers automatically pick up new fragments matching the category, or clauses in the Clause Library folder
+ **Inline fragment pickers:** These are auto-populating drop-down list style content controls added to the body of a document. They auto-populate in the same way as the InfoSheet Fragment Picker fields. When a clause/fragment is chosen in the picker, the picker is removed and replaced with the selected clause/fragment. There is an option to create repeating clauses, whereby the picker is not removed when a clause is selected, allowing a subsequent clause from the same list to be selected

The remainder of this section provides details on how to use each of the above options.

OA INCLUDE tag

The primary method used by OneLaw to insert fragments and clauses into documents is the OA INCLUDE tag. This tag can be used directly in documents, in Word IF Fields, in InfoSheet Choice fields and underpins InfoSheet Fragment Pickers where the OA INCLUDE tags are generated automatically.

<u>OA INCLUDE tag overview</u>

An OA INCLUDE tag is structured like the following:
{{OA INCLUDE PathToFragment Modifier}}

The braces {{ and }} are simple text braces, not Word field delimiters.

Modifier specifies an optional command to modify the behaviour of the OA INCLUDE tag. There is currently only one available modifier: "*NONEWLINE". By default, when clauses or fragments are included, there is a trailing newline. This is desirable when bringing in an entire clause, but when inserting a fragment or clause into the middle of an existing paragraph, the trailing newline is most likely unwanted, in which case we can suppress it with the *NONEWLINE modifier. e.g. {{OA INCLUDE P:\Clauses\MyClause.docx *NONEWLINE}}

PathToFragment specifies the location of the clause or fragment to be inserted. This points to a docx file in the file system, a Clause Library or a Fragment Category. The specified path must work for all.

The following list indicates how to specify PathToFragment for different scenarios:

+ **Clauses on shared drive**: PathToFragment will simply be the full file path to the clause, e.g. If the clause is available at P:\Clauses\MyClause.docx, the tag would look like:
  {{OA INCLUDE P:\Clauses\MyClause.docx}}
+ **Clauses in SharePoint**: PathToFragment will be the local path where the SharePoint location is synced to. SharePoint locations are synced to the user's Windows User Profile. This needs to be a consistent location for all users, and each firm's IT may need to ensure this is the case.
  When referencing file paths in the User Profile, use the special %USERPROFILE% path so a path can be specified that works for all users, e.g.:
  {{OA INCLUDE %USERPROFILE%\OrgSharePointLibrary\Clauses\MyClause.docx}}
+ **Clauses in a Clause Library**: PathToFragment will be the name of the Clause Library specified between $ characters, followed by the path to the desired clause, including subfolders, e.g. If we have a Clause Library called "Will Clauses", then the tag might look like:
  {{OA INCLUDE $Will Clauses$\Bequests\Bequest of Money.docx}}
+ **Fragments (in document templates)**: PathToFragment will be the form [Category\Name], e.g. for a Fragment like this:

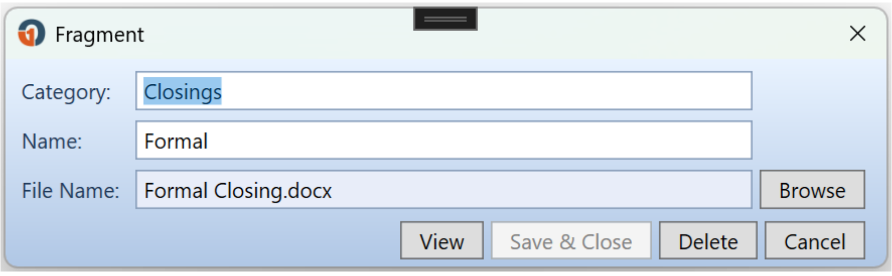


Figure 154

  The tag would be like this:
  {{OA INCLUDE [Closings\Formal]}}

NOTE: It is generally recommended for clauses that a Clause Library is used rather than using direct paths in OA INCLUDE tags. This way, if the clause location ever gets moved, only the path in the Clause Library needs to be updated, and not the paths specified in all the OA INCLUDE tags.

<u>OA REMOVE tag</u>

A related tag to OA INCLUDE is OA REMOVE. OA REMOVE tags instruct the OneLaw software to remove trailing newlines or whole paragraphs upon document assembly. These are generally used in conjunction with OA INCLUDE to handle the case when no clause is desired, and an empty paragraph or empty numbered item is not desired.

For example, if there is a merge field "MyInfoSheet.OptionalClause" which generally resolves to an OA INCLUDE tag, and therefore instructs a clause to be inserted, the template might have the following block:

…

1. This is the clause before.
2. «MyInfoSheet.OptionalClause»
3. This is the clause after.

…

Figure 155

In the scenario where the user wants no clause, the default behaviour of the merge field would be to resolve to empty text, i.e. “”. This would result in the below:

> …
> 1. This is the clause before.
> 2.
> 3. This is the clause after.
>
> …

Figure 156

The empty 2. Numbering is undesirable in this situation. To resolve this, the merge field can be changed to an OA REMOVE tag, which will result in the following:

> …
> 1. This is the clause before.
> 2. This is the clause after.
>
> …

Figure 157

The OA REMOVE tag comes in 2 forms:

1. **{{OA REMOVE NEWLINE}}:** Removes a trailing newline, but only if the next character is a newline (i.e. end of paragraph)
2. **{{OA REMOVE PARAGRAPH}}:** Removes the entire paragraph containing the OA REMOVE tag, including the trailing newline character.

<u>Using OA INCLUDE and OA REMOVE in Word IF fields</u>

It is possible to use Word IF fields to conditionally include clauses by specifying an OA INCLUDE tag as the resulting value of the IF field. For full details on how to use IF fields, see the Conditional Logic with IF Fields.

The following IF field shows an example of how to optionally include a clause if a CheckBox InfoSheet field is checked, or otherwise remove the numbered item using OA REMOVE:

> 1. This is the clause before.
> 2. **{**IF “«MyInfoSheet.IncludeTestClause»” = “true” “{{OA INCLUDE P:\Clauses\TestClause.docx}}” “{{OA REMOVE NEWLINE}}”**}**
> 3. This is the clause after.

Figure 158

In this case, when the CheckBox is checked, TestClause.docx is inserted as numbered item 2. When the CheckBox is unchecked, numbered item 2 is completely removed.

InfoSheet Choice List Fields

When using an InfoSheet Choice List field, where multiple options are available, it is possible to use nested Word IF fields to insert different clauses for different values selected in the Choice List field. However, these nested IF fields are messy and hard to work with. A better way to associate clauses with Choice List field values is to make use of the additional values that can be specified on the choice field.

For example, with the following Choice InfoSheet selected:

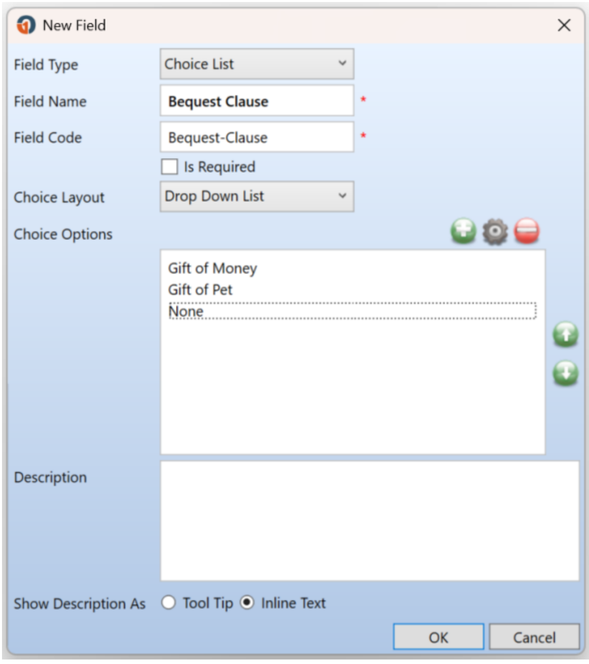


Figure 159

In this case, a nested IF field could be put into a precedent to pull in the appropriate clause or remove the paragraph as appropriate:

{IF "«MyInfoSheet.Bequest-Clause»" = "Gift of Money" "{{OA INCLUDE P:\Clauses\GiftOfMoney.docx}}" "**{**IF "«MyInfoSheet.Bequest-Clause»" = "Gift of Pet" "{{OA INCLUDE P:\Clauses\GiftOfPet.docx}}" "{{OA REMOVE NEWLINE}}"**}**"**}**

This nested IF structure gets unwieldy very quickly, so a better way to achieve the same result is to put the OA INCLUDE and OA REMOVE tags into the Additional Values on the Choice List:

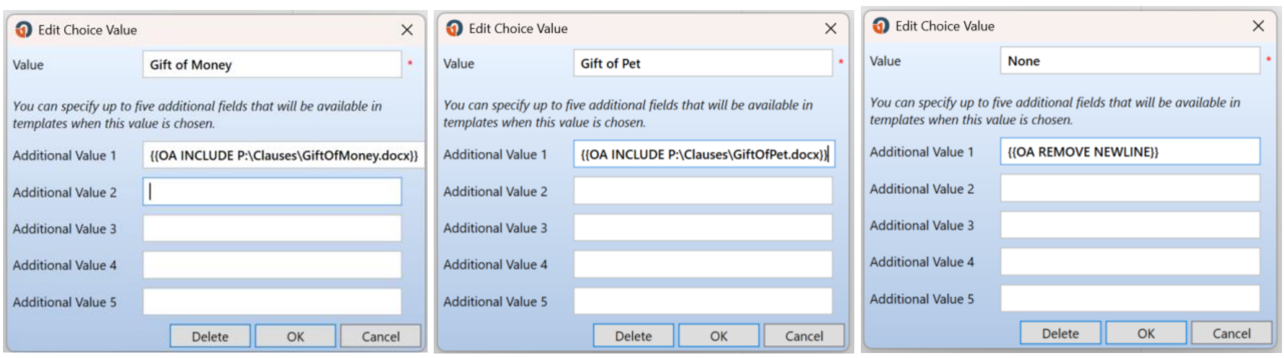


Figure 160

Then a single merge field can be used in the precedent: «MyInfoSheet.Bequest-Clause.Value1». In this case the ".Value1" specifies that the merge field references the "Additional Value 1" values from the Choice List.

InfoSheet Fragment Selector

As per the InfoSheet Choice List Fields section above, a clause picker can be included in an InfoSheet. This solution is highly flexible, but does have some negatives:

- When a clause is added or renamed, it is necessary to update the InfoSheet Choice List field
- It is necessary to code the OA INCLUDE and OA REMOVE tags into the Choice List field, which is a little technical

For simple cases where a clause or fragment picker is required in an InfoSheet, where the picker would contain all clauses in a folder in a Clause Library (or Fragment category), where alphabetical order is acceptable, and where the picker is only automating a single clause selection, then it is possible to simplify the InfoSheet building process by using a Fragment Selector field.

The Fragment Selector field is effectively an auto-populating drop-down list of clauses in a particular location, where the location can be a Clause Library, a subfolder in a Clause Library or a Fragment category.

For example, given the following folder contents (for a folder under a Clause Library):

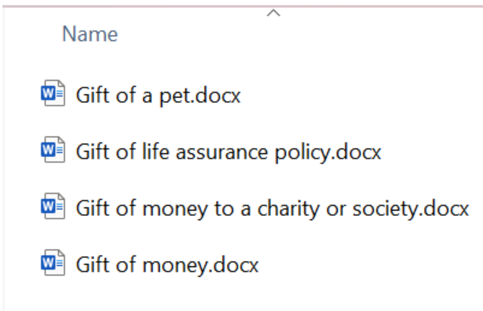


Figure 161

Then a Fragment Picker configured to use that folder would auto populate as follows (assuming None option selected):

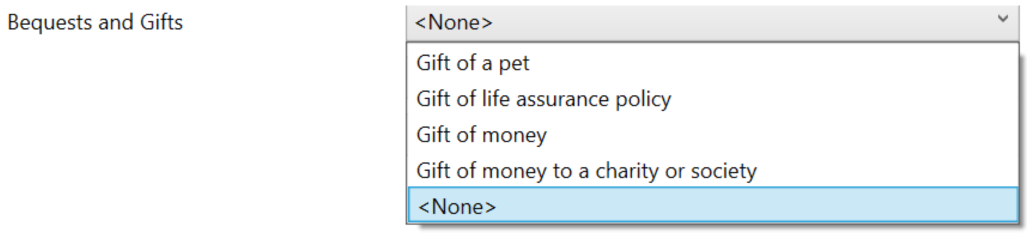


Figure 162

The above can be achieved by simply configuring the Fragment Selector field as follows:

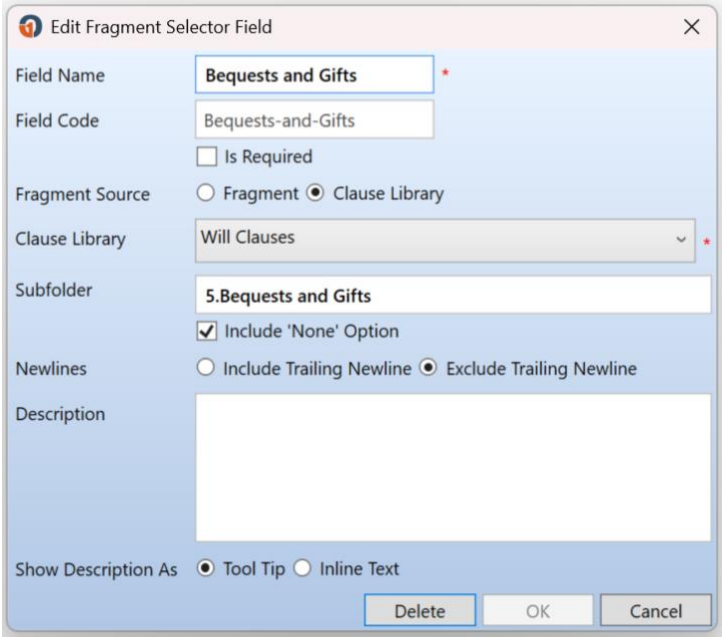


Figure 163

The same principle applies to fragments uploaded to the Document Templates area. Simply choose a Category in the field definition, and the drop-down box will auto-populate with all fragments with that Category. Doing so will produce the result as shown below:

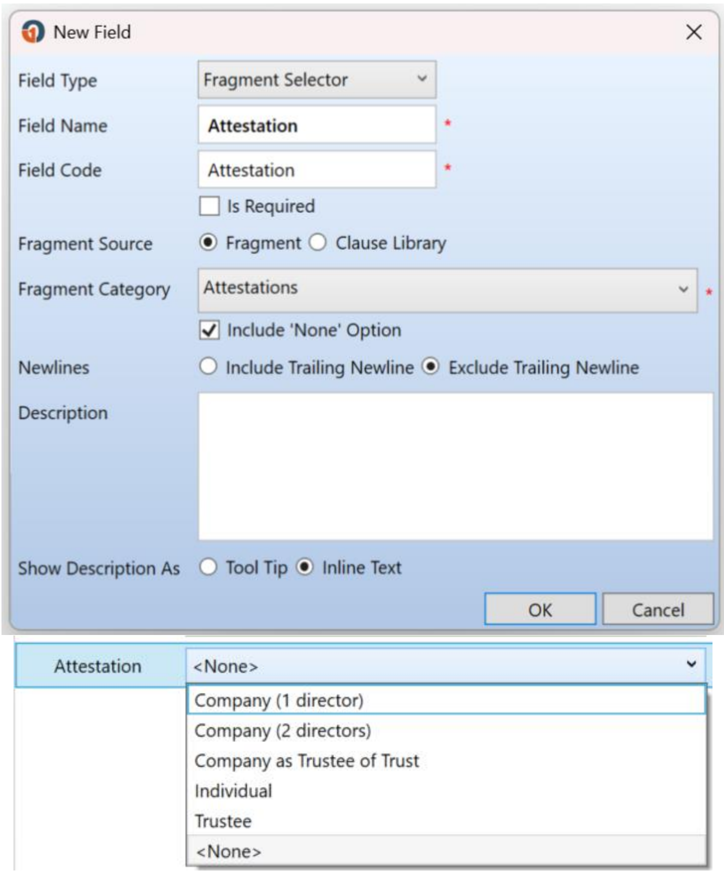


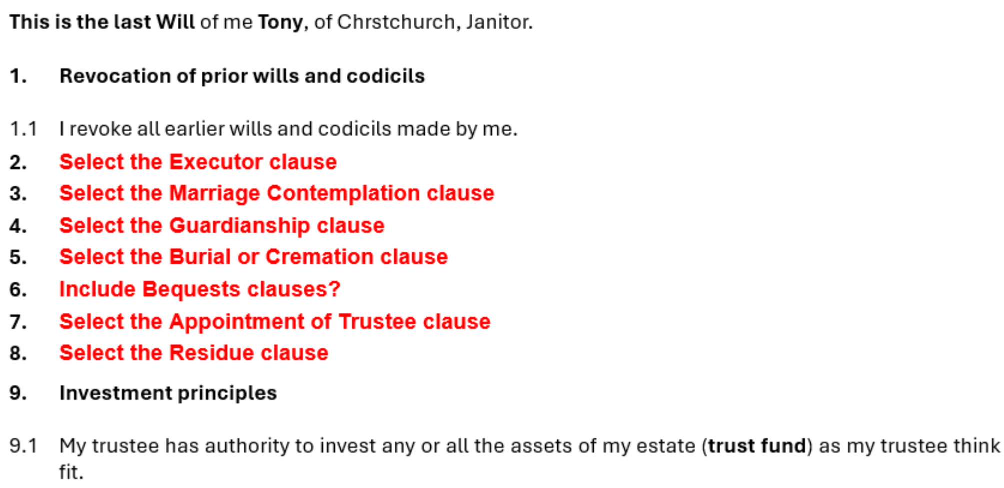
Figure 164

Inline Fragment Picker

<u>Overview</u>

In some cases, users may prefer to be able to choose clauses when working in a document, with the context of the document content to guide them. Fragment Selectors in InfoSheets don't meet this need, as all clause choices need to be made up-front before the document content is visible. In this case, it is possible to use an inline fragment picker.

An inline fragment picker is a drop-down content control within a document that allows the user to pick a clause directly within the document. Using a simple Will as an example, the image below shows what these pickers look like within a document:


This is the last Will of me **Tony**, of Chrstchurch, Janitor.

1. **Revocation of prior wills and codicils**

1.1 I revoke all earlier wills and codicils made by me.

2. **Select the Executor clause**
3. **Select the Marriage Contemplation clause**
4. **Select the Guardianship clause**
5. **Select the Burial or Cremation clause**
6. **Include Bequests clauses?**
7. **Select the Appointment of Trustee clause**
8. **Select the Residue clause**
9. **Investment principles**

9.1 My trustee has authority to invest any or all the assets of my estate (**trust fund**) as my trustee think fit.

Figure 165

In this image, the red text shows the inline fragment pickers. Clicking on a picker reveals a drop-down menu of clauses:

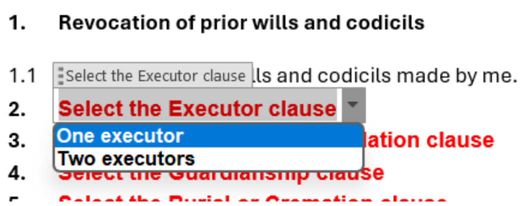
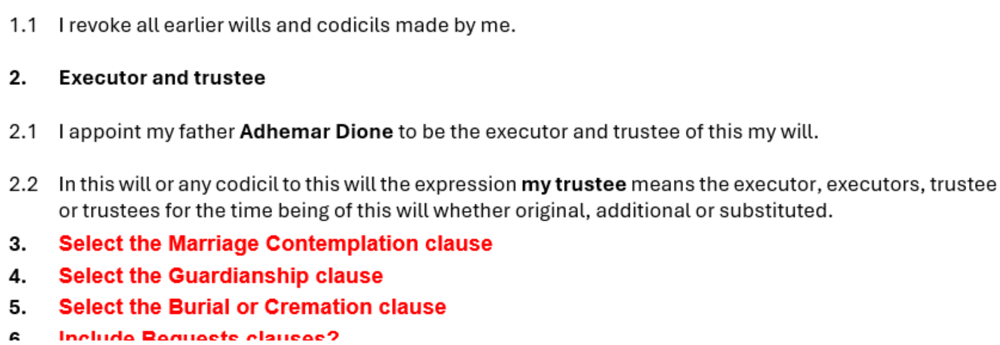


Figure 166

Clicking on an item from the list will insert the selected clause:


1.1 I revoke all earlier wills and codicils made by me.

2. **Executor and trustee**

2.1 I appoint my father **Adhemar Dione** to be the executor and trustee of this my will.

2.2 In this will or any codicil to this will the expression **my trustee** means the executor, executors, trustee or trustees for the time being of this will whether original, additional or substituted.

3. **Select the Marriage Contemplation clause**
4. **Select the Guardianship clause**
5. **Select the Burial or Cremation clause**

Figure 167

Inline clause pickers can be configured to include a “None” option:

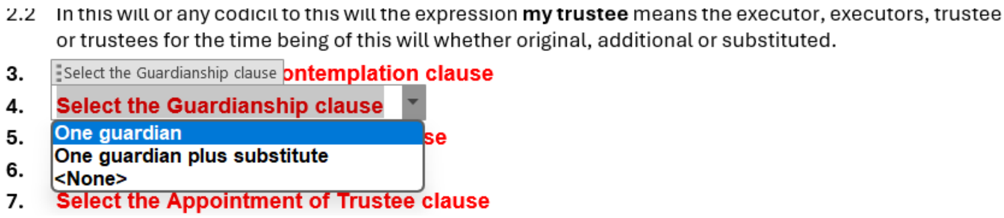


Figure 168

Selecting <None> will remove the picker, including the trailing newline so no empty numbered items will be left behind. The Figure below shows how the “Select the Guardianship clause” has been removed after selecting <None>.

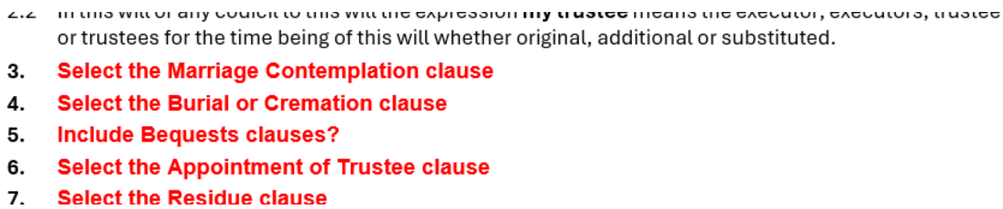


Figure 169

It is possible for clauses inserted by inline clause pickers to themselves contain inline clause pickers. For example, selecting “Include” on the bequests clause picker inserts a clause that contains a further picker:

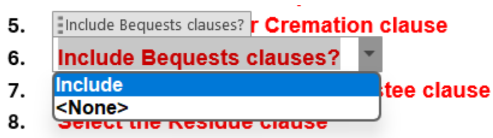


Figure 170

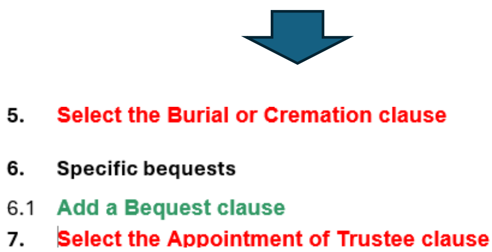


Figure 171

Inline clause pickers can be configured to support a selection of multiple clauses. In this case, when the user selects a clause, the picker remains in the document so a further clause can be chosen. Once all required clauses have been inserted, the user can dismiss the picker by selecting <Done>:

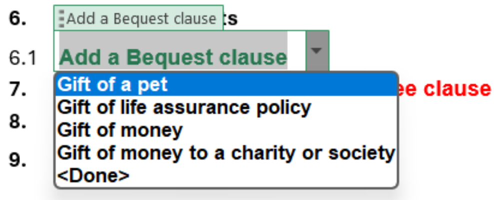


Figure 172

6. Specific bequests

6.1 I give my pet *[Chihuahua] [name]* to my friend **[Name]** together with the sum of *[$0.00]* as a contribution to my pet's future maintenance.

6.1.1 *Optional extra wording* - I express the wish that my pet be maintained with the same care and affection *[he/she]* received during my lifetime but my trustee is to have no responsibility or liability in this respect.

6.1.2 *Optional extra wording* - If my friend **[Name]** disclaims this gift I express the wish that my trustee take such alternative action they consider appropriate to ensure the welfare of my pet.

6.2 **Add a Bequest clause**

Figure 173

Adding Inline Clause Pickers to Precedents

Inline clause pickers are added to precedents by adding drop-down content controls, then setting the Tag on the content control to a special value that marks it as a clause picker. This can be done with the following steps:

1. Using the Developer tab in Word, add a drop-down content control to the precedent document:

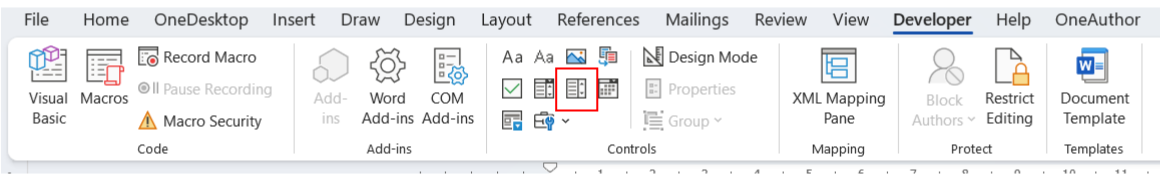


Figure 174

2. Select the content control, then select Properties on Developer tab:

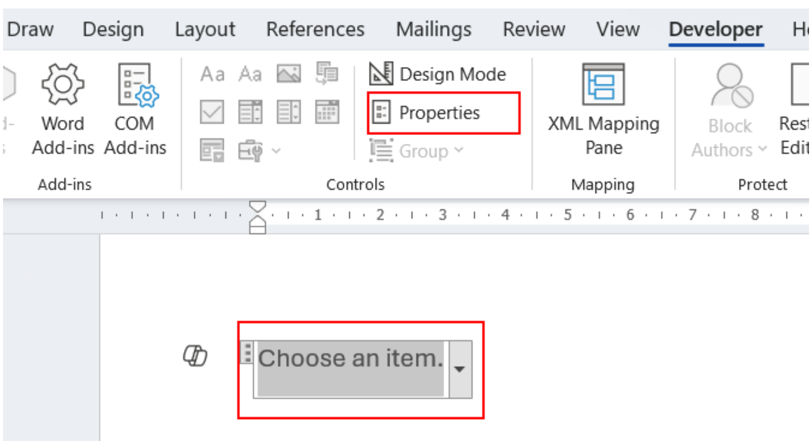


Figure 175

3. The Content Control Properties dialog box will show:

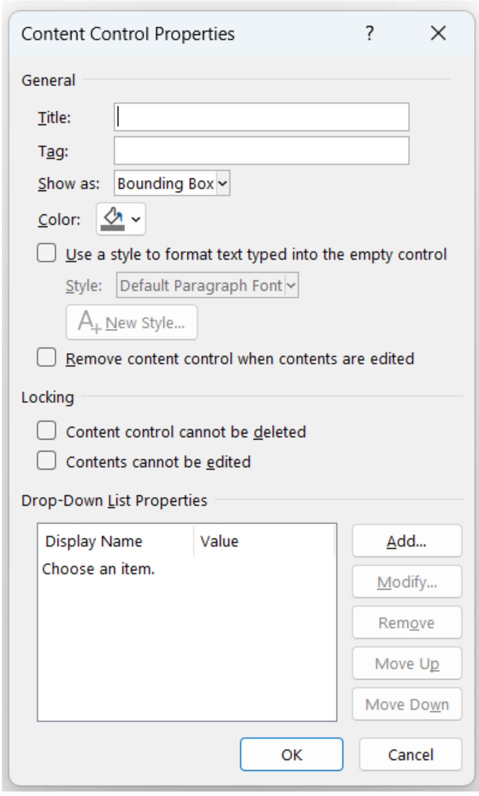


Figure 176

4. In the Title field, enter the text that should be displayed in the picker in the document. For example, for the below, “Select the Guardianship clause” would be entered in the Title field:

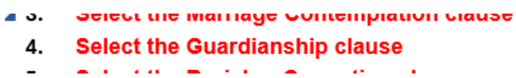


Figure 177

5. Enter the appropriate OA tag into the Tag field. This is in the format:

   OA CLAUSE ClauseLocation Modifier

   a. ClauseLocation is the name of a Clause Library, or the name of a Clause Library with a subfolder path – e.g. “Will Clauses” or “Will Clauses\Guardianship”
   b. Modifier is optional, and can be one of:
      i. “*ADDNONE” – this specifies that a <None> option is added to the list of clauses
      ii. “*REPEATER” – this specifies that the picker remains in the document after a selection is made, allowing further clause or clauses to be inserted. A <Done> option is added to allow the user to dismiss the picker

For example, for the Guardianship picker in the examples above, which includes a <None> option, the Tag field might be:

OA CLAUSE Will Clauses\Guardianship *ADDNONE

And for the Bequests picker, which supports choosing multiple bequest clauses, the Tag field might be:

OA Clause Will Clauses\Bequests *REPEATER

6. Choose a colour for the picker title text. If this is left unchanged the title text will be red as per the example above. If a colour is selected, the title text will reflect that colour – for example in the Bequests example below, the title text is green:

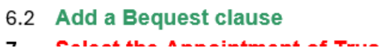


Figure 179

This is because the colour is set to green in the Colour field:

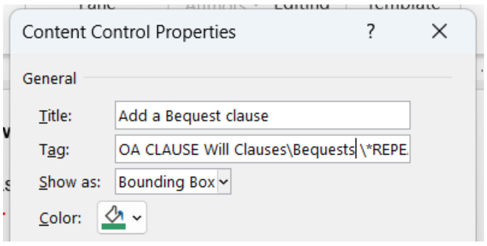


Figure 178

Signatures

Introduction

This section describes how to use and manage signatures in OneLaw, and how to include pre-defined signature blocks in precedents and fragments.

The Signatures feature in OneLaw supports the following:

+ Signing of any document at the cursor
+ Signing of documents generated from precedents at pre-defined locations.
+ Multiple signers per document
+ Signing on behalf, based on well-defined signing delegation rules
+ Easy management of signatures and delegation rules on the user records in OneLaw

Applying Signatures

Under the Home tab in Word, there is an Insert Signature tool.

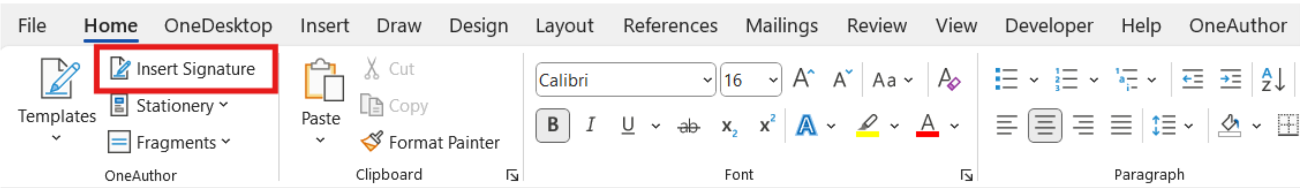


Figure 180

NOTE: If the user does not have an electronic signature loaded against their user profile in OneLaw or doesn't have permission to sign on behalf of anyone else, then when the Insert Signature tool is selected, the following message will be prompted. If this occurs, contact your system administrator.

Figure 181

The Insert Signature tool will insert an electronic signature at the cursor or placeholder. When using this tool, the following options are presented:

+ **Use My Signature:** Selecting this option will insert the users own electronic signature
+ **Sign on Behalf of:** This is a dropdown box that will show the signatures that the user is authorised to sign on behalf of. Selecting this option will insert the chosen user's electronic signature

The electronic signature that has been chosen to use will have their user details populated.

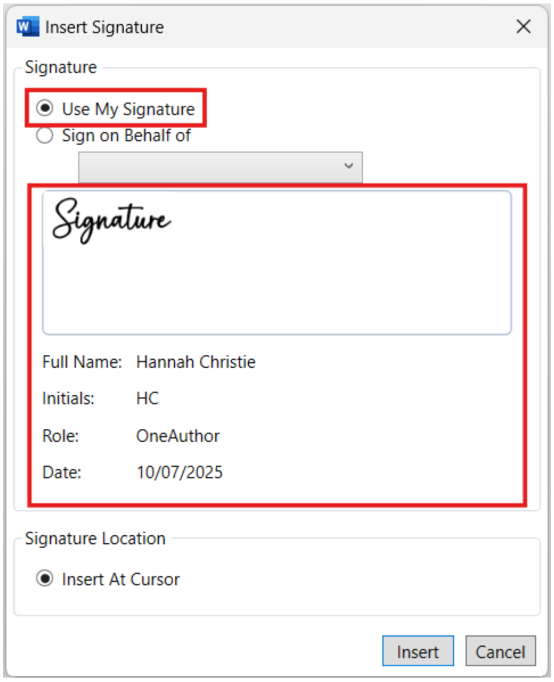


Figure 182

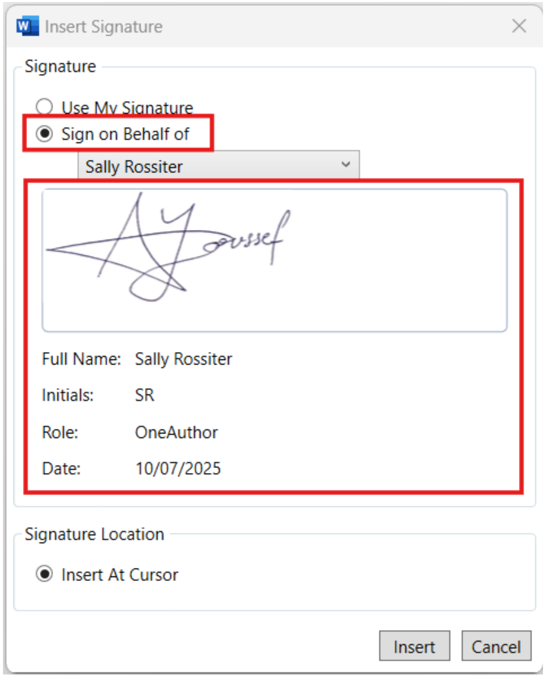


Figure 183

Now that the signature has been chosen, select where the signature is to be inserted. There are two options for this:

+ The first option is to insert the signature where the cursor is. This means that wherever the cursor is in the document, that's where the electronic signature will be inserted

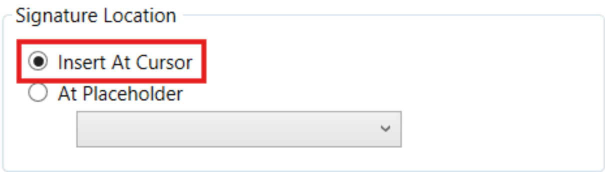


Figure 184

+ The second option is to insert the signature at the placeholder. This is a designated area within the document where the electronic signature will be inserted. As previously mentioned, there can be multiple placeholders in a single document

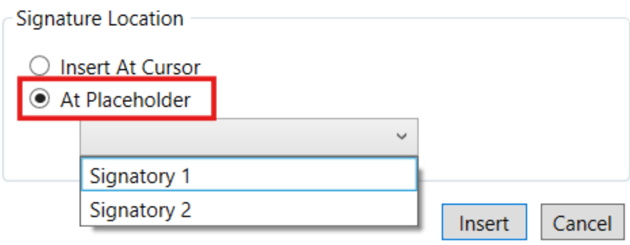


Figure 185

Once the appropriate details have been selected, click insert, and the signature will be inserted into the document. When inserting at a placeholder, other relevant information may be included, such as name, role, email address, and phone number.

Managing Signatures

Open OneLaw and navigate to the Administration tab > Users > and select the appropriate User.

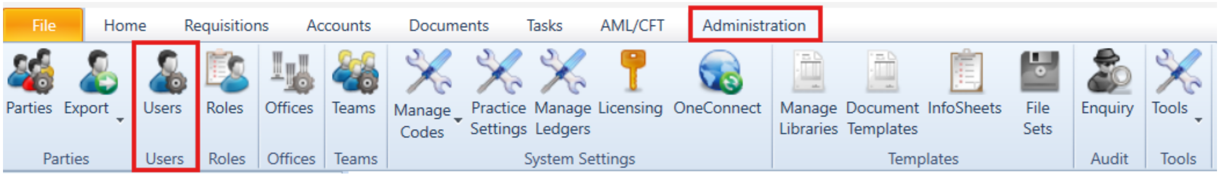


Figure 186

Once the user is selected, navigate to the tab on the user profile called 'Signature.' Click on Choose Signature and upload the user's signature.

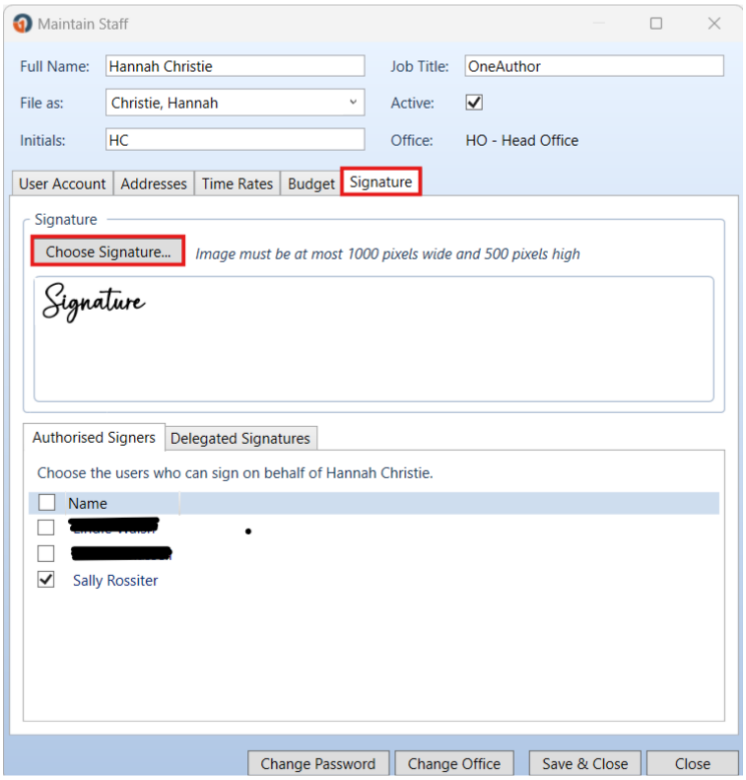


Figure 187

There is also the option to apply permissions for users to be able to sign on behalf of other users, and vice versa.

+ **Authorised Signers:** Choose who has the authority to sign on behalf of the user
+ **Delegated Signatures:** Choose who the user can sign on behalf of

Figure 189

Figure 188

NOTE: If changes are made to a user's selected authorised signers or delegated signatures, upon saving the updated user profile, all other user profiles will reflect said changes.

Creating Signatures

This section is a step-by-step guide for how to create an electronic signature for users. Signatures are saved to an external folder and uploaded against the user's profile within OneLaw.

Step 1: Prepare the Signature

1. Use a plain white piece of paper and sign using either black or blue ink
2. Scan the signed paper and save to your desktop

Step 2: Edit the Signature

For best results, resize and clarify the signature using a tool like Paint. Follow these steps:

1. Open the scanned signature file in Paint
2. Use the cropping tool to remove excess white space around the signature
3. Resize the Signature:
    - Click the 'Resize and Skew' button under the Image tab
    - Resize the signature to match the firm's standard dimensions. A recommended starting point is resizing to 100 Vertical Pixels, but adjustments may be required
4. Remove Background Interference (Optional and not always required):
    - Use the background removal tool available in Paint (Windows 11 or higher) to enhance the clarity of the signature

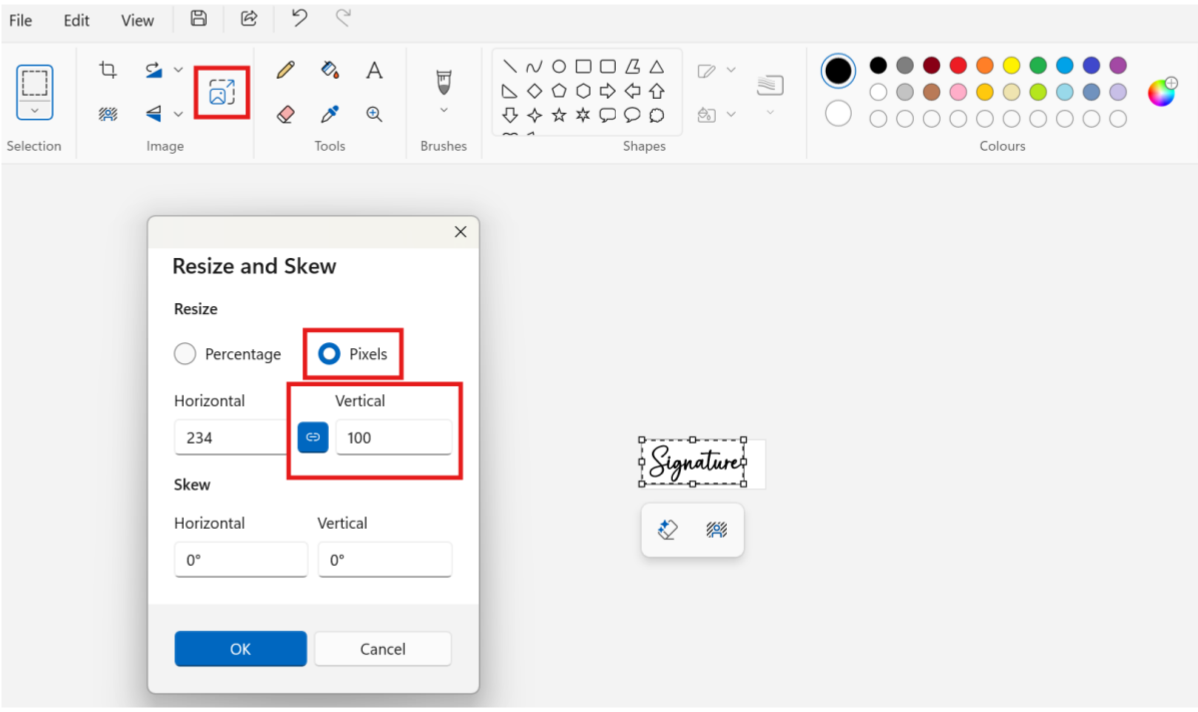


Figure 190

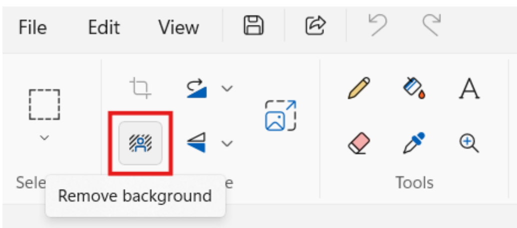


Figure 191

Step 3: Save the Edited Signature

Once satisfied with the appearance of the signature, save the file as a .png or .jpeg in an external folder or secure location. According to the firm's policy, save the user's signature in a secure folder with restricted access permissions

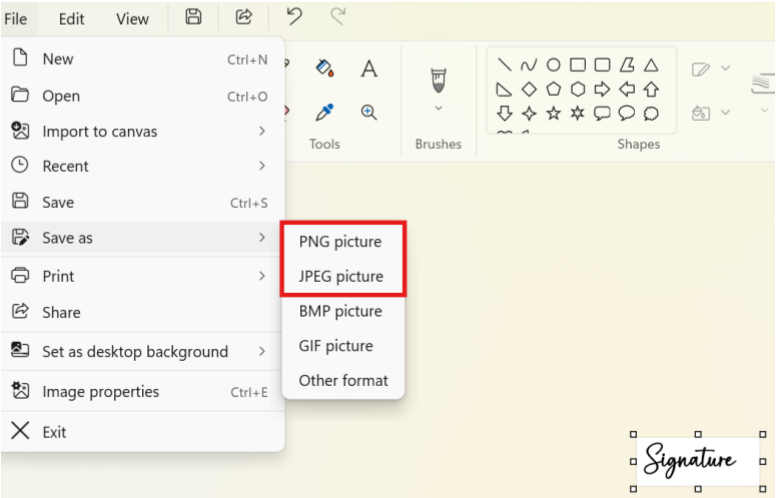


Figure 192

NOTE: Resizing and editing may require some trial and error to achieve the desired size and clarity.

Once a user's signature has been saved, it needs to be uploaded to OneLaw against the user's profile (see the Managing Signatures section above).

Set Up Precedents or Existing OneAuthor Templates with Signature Placeholders

Electronic signatures have been designed so that they can be inserted either where the cursor is in a document or where a specific signing placeholder is within a document. There are multiple ways to set up a placeholder within a document: using bookmarks, content controls or a combination of both.

Creating a Signature Placeholder Using Bookmarks

To set up a signature placeholder using bookmarks, open the document and place the cursor where the placeholder should sit within the document. Navigate to the Insert tab. In the Links group, select the Bookmark button; this will insert a placeholder for the Bookmark.

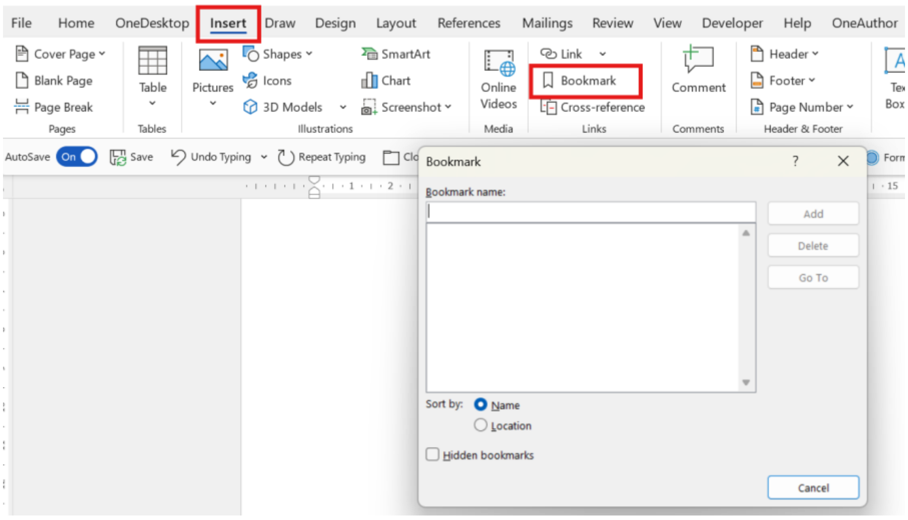


Figure 193

Next, a tag needs to be assigned to the bookmark so that it can link to OneLaw and pull through the correct details. OA SIGNATURE is the prefix code for signature details.

In the Bookmark Properties window, enter OA_SIGNATURE in the Bookmark Name field. Click 'Add' and close the window.

NOTE: bookmarks don't recognise spaces, use an underscore to represent a space between words, e.g. OA_SIGNATURE

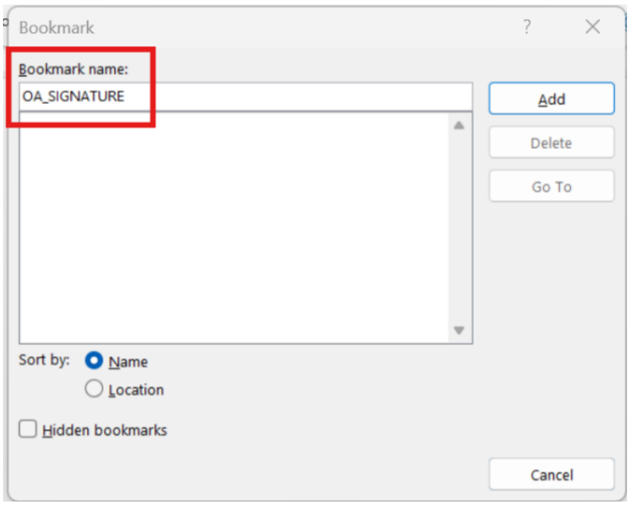


Figure 194

Additional tags can be assigned to bookmarks for user-specific details, such as author name, author initials, author role and date. Follow the steps above, but add the following suffixes to the OA_SIGNATURE tag:

+ For **Author Name**: Use OA_SIGNATURE**NAME**
+ For **Author Initials**: Use OA_SIGNATURE**INITIALS**
+ For **Author Role**: Use OA_SIGNATURE**ROLE**
+ For **Author Email**: Use OA_SIGNATURE**EMAIL**
+ For **Author Phone**: Use OA_SIGNATURE**PHONE**
+ For **Author Mobile**: Use OA_SIGNATURE**MOBILE**
+ For **Date**: Use OA_SIGNATURE**DATE**

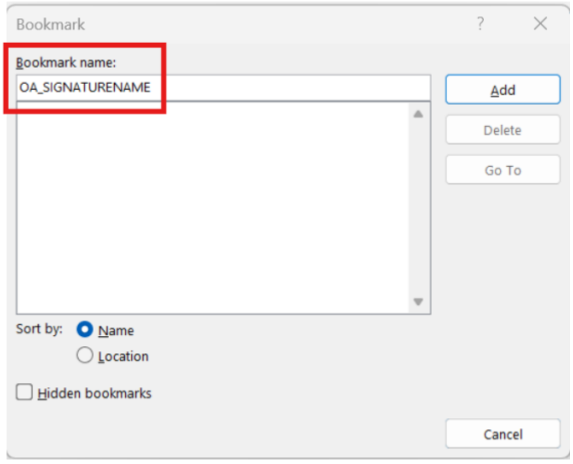


Figure 195

Dual or multiple signing is available for documents using the Insert Signature tool. If multiple signatories are required for a document, create additional tags to distinguish between them. For example:

+ OA_SIGNATURE Signatory 1 or Author
+ OA_SIGNATURE Signatory 2 or Partner

Customise these tags to align with the firm's naming conventions. Finally, confirm each bookmark is tagged correctly, and its settings match the firm's preferences. The placeholder is now ready for use in the document with the specified bookmarks and tags.

Creating a Signature Placeholder Using a Content Control

To set up a signature placeholder using content controls, open the document and place the cursor where the placeholder should sit within the document.

To insert a content control, navigate to the Developer Tab. If the Developer Tab is not visible, enable it by navigating to File > Options > Customise Ribbon, and check the box for Developer.

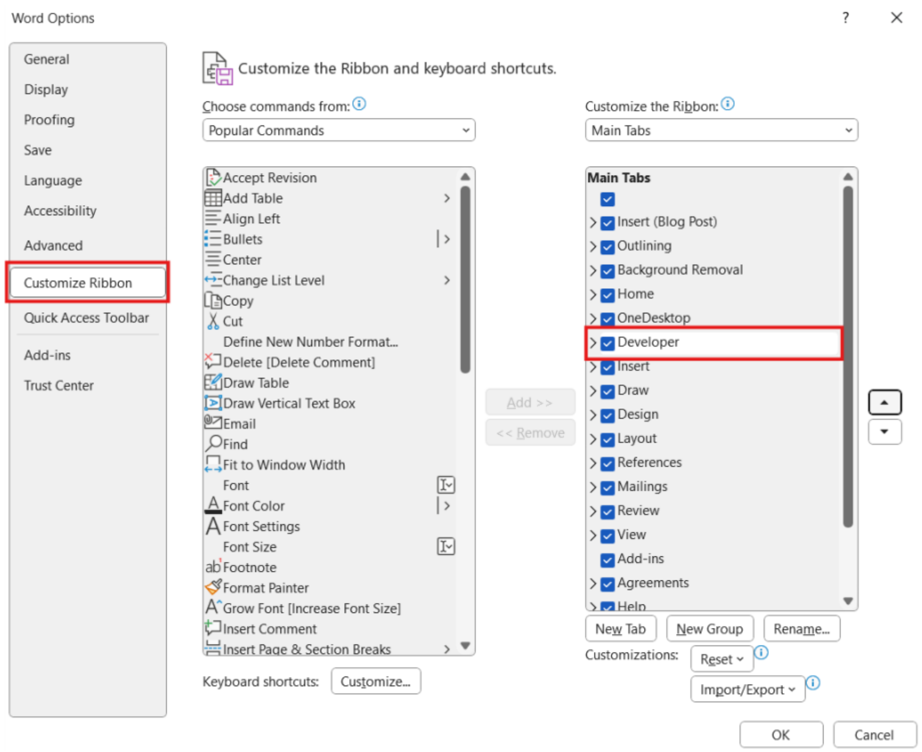


Figure 196

In the Controls group of the Developer tab, select the Picture Content Control button. This will insert a placeholder for the electronic signature.

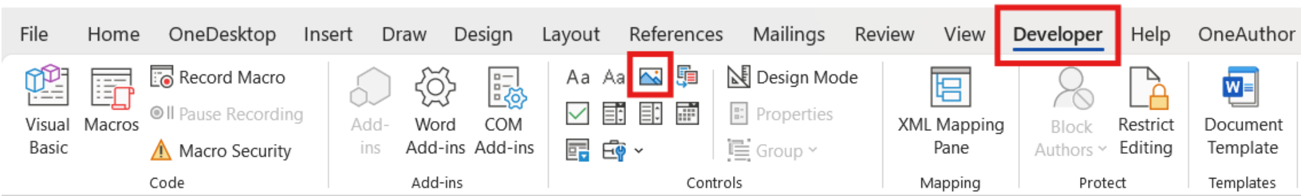


Figure 197

Reshape the content control. Click and drag the edges of the content control to adjust its size and shape as needed.

Next, a tag needs to be assigned to the content control so that it can link to OneLaw and pull through the correct details. OA SIGNATURE is the prefix code for signature details.

Click on the inserted content control to highlight it. In the Developer Tab, click Properties (located in the Controls group). In the Content Control Properties window:

- Enter OA SIGNATURE in the Tag field
- Set Show as: to ‘None’ from the dropdown menu
- Check the box for Contents cannot be edited to lock the control
- Click OK to save the settings

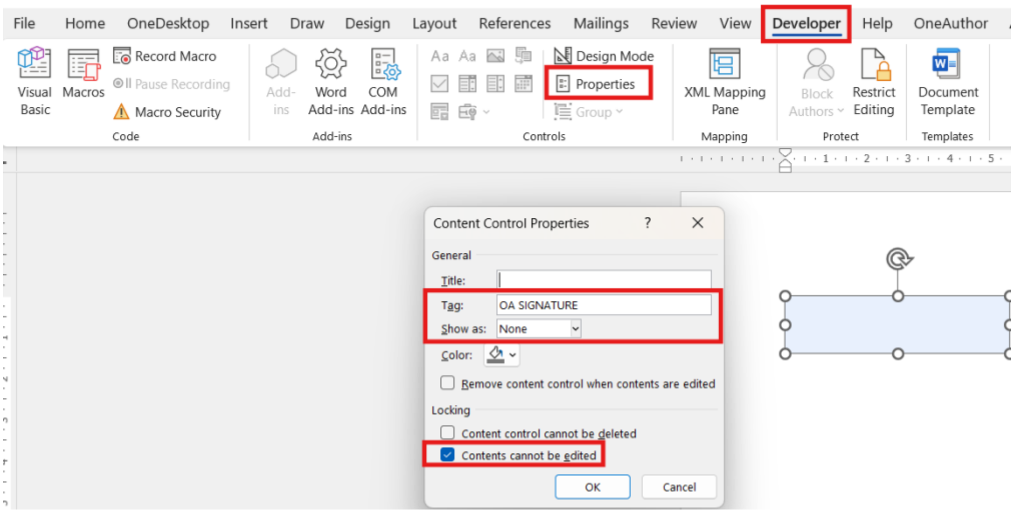


Figure 198

Additional tags can be assigned to bookmarks for user-specific details, such as author name, author initials, author role, and date. Follow the steps above, but add the following suffixes to the OA SIGNATURE tag:

- For **Author Name**: Use OA SIGNATURE**NAME**
- For **Author Initials**: Use OA SIGNATURE**INITIALS**
- For **Author Role**: Use OA SIGNATURE**ROLE**
- For **Author Email**: Use OA SIGNATURE**EMAIL**
- For **Author Phone**: Use OA SIGNATURE**PHONE**
- For **Author Mobile**: Use OA SIGNATURE**MOBILE**
- For **Date**: Use OA SIGNATURE**DATE**

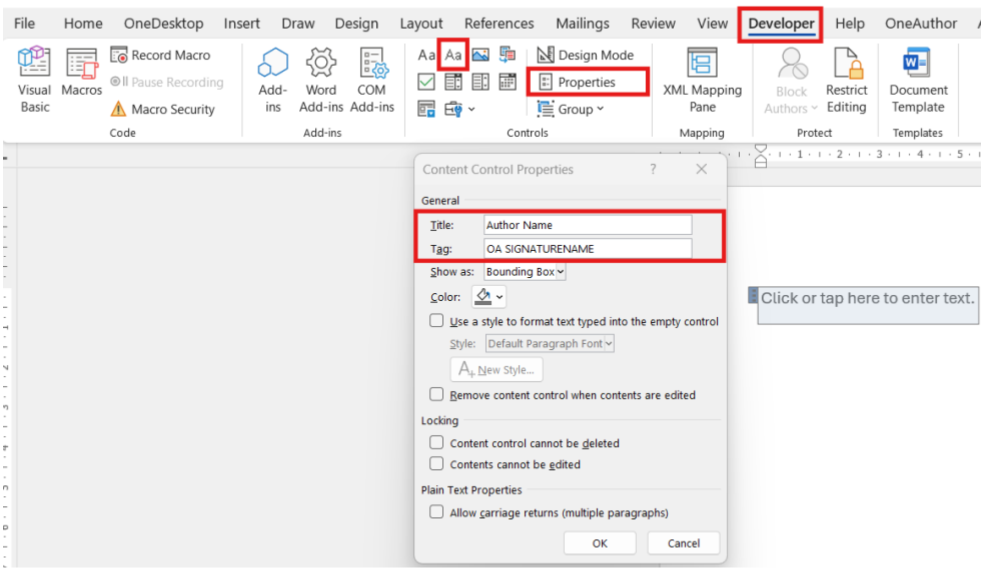


Figure 199

NOTE: Use plain text content controls for user-specific details.

Dual or multiple signing is available for documents using the Insert Signature tool. If multiple signatories are required for a document, create additional tags to distinguish between them. For example:

- OA SIGNATURE Signatory 1 or Author
- OA SIGNATURE Signatory 2 or Partner

Customise these tags to align with the firm's naming conventions. Finally, confirm each content control is tagged correctly, and its settings match the firm's preferences. The placeholder is now ready for use in the document with the specified content controls and tags.

Additional Information About Editing Picture Content Controls

Edit the colour of a picture content control by:

- First untick the 'Contents cannot be edited' check box under the Properties – however, remember to re-select this once the editing of the picture content control is finished
- Navigate to the Picture Format Tab > Colour > Recolour > choose the desired colour option

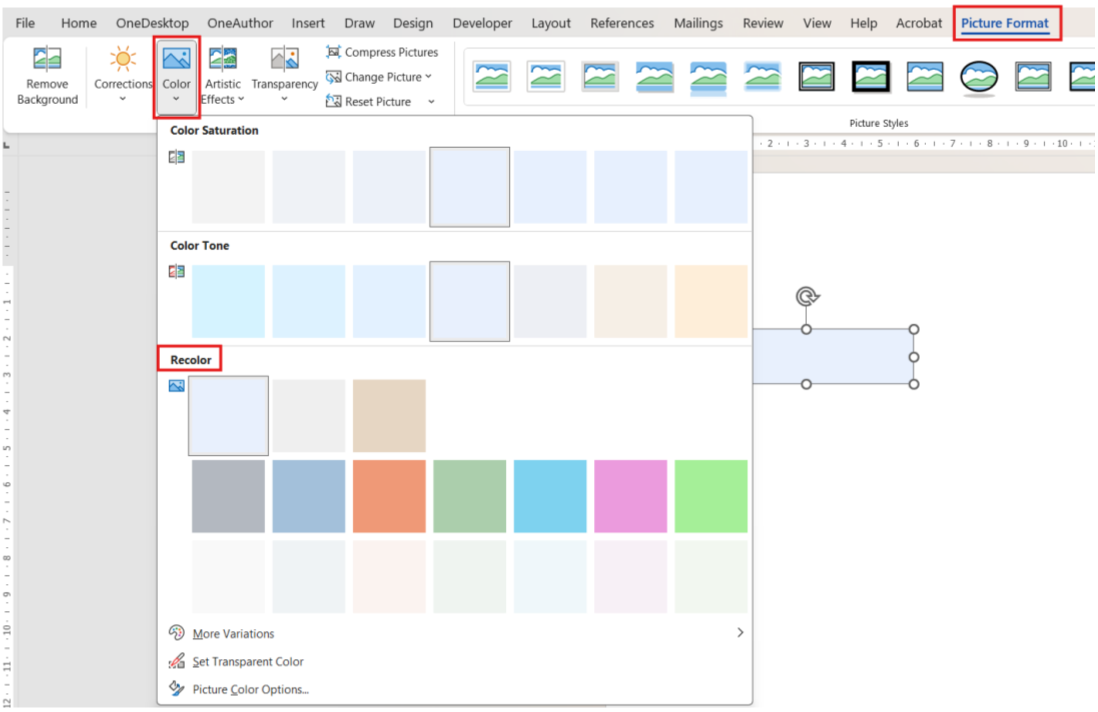


Figure 200

Stationery – Headers/Footers

Introduction

Firms can store and manage their Stationery in OneLaw. Stationery refers to a firm's headers and footers (or letterhead), logos, styles and numbering. In this section, the focus is on header and footer templates.

Header and footer templates are Word documents containing a firm's header and footer, which can be manually applied to other documents or precedents or utilise the option to automatically apply a header and footer when creating a precedent.

NOTE: Ensure header and footer templates are saved as Word documents (.docx files).

Applying Headers/Footers

Under the Home tab in Word, there is the Stationery tool. This tool will insert stationery into the selected document.

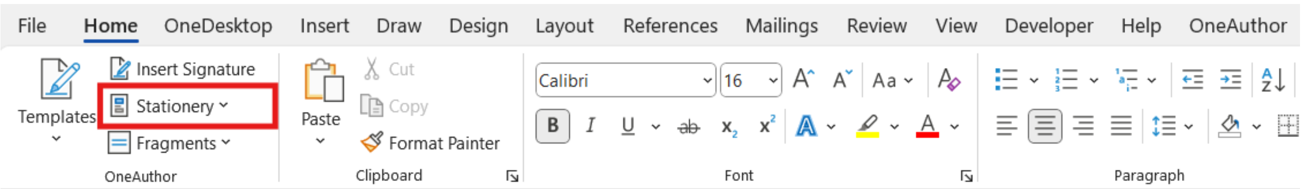


Figure 201

The Stationery tool is a dropdown list option to distinguish between Header and Footer and StyleSheets. Once the User has selected to insert a header and footer, they will be presented with all available options from OneLaw.

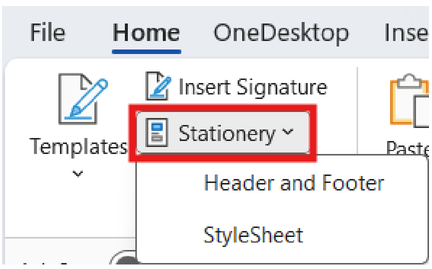


Figure 202

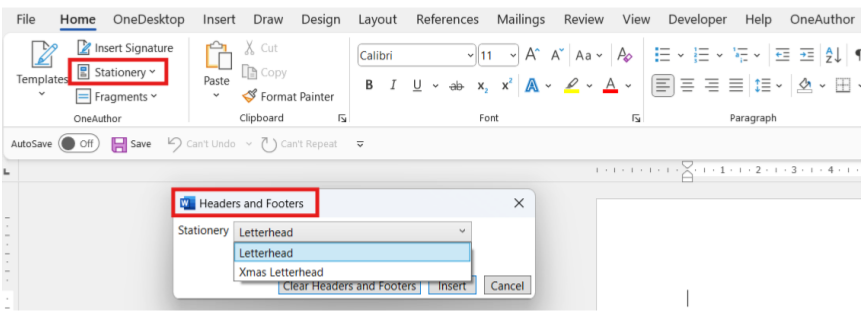


Figure 203

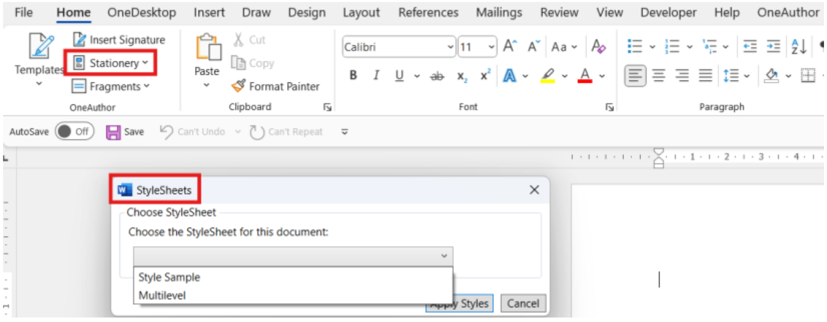


Figure 204

Once the user has selected Header and Footer and then chooses the appropriate letterhead, they can then click Insert. This will insert the selected letterhead into their document.

If the user has selected the incorrect letterhead, they can repeat the above step and select the correct letterhead. Users do not need to delete the letterhead manually. The correctly selected letterhead will override whichever header and footer is currently in the document.

If the user wishes to remove all headers and footers from a document, they can do so by clicking Clear Headers and Footers. This will remove all headers and footers inside the document.

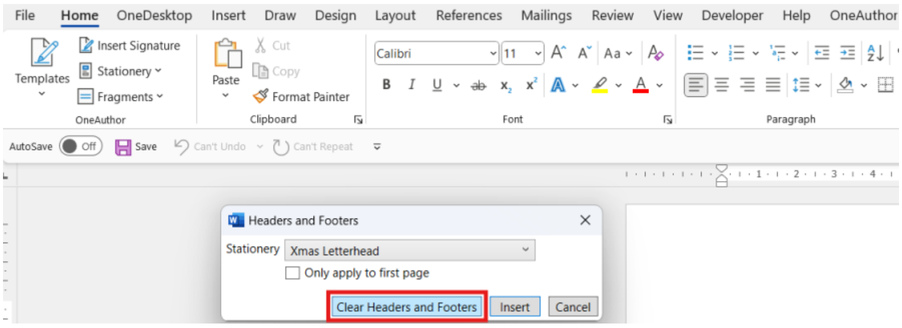


Figure 205

Managing Headers/Footers

Navigate to the Administration (or Templates) tab in OneLaw. Select Document Templates and scroll down to OneAuthor Stationery Templates.

This area is where a firm can store and manage their header and footer templates. Firms can have multiple header and footer templates stored here, with the ability to set one header and footer template as the firm's default.

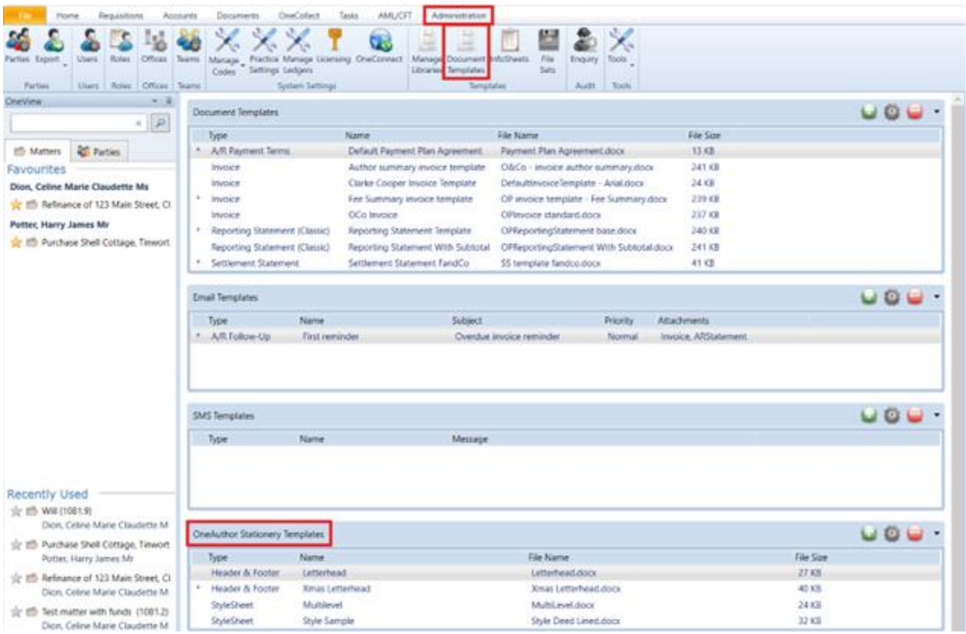


Figure 206

Adding New Stationery in OneLaw:

1. Click on the green plus (+) icon to the right of OneAuthor Stationery Templates
2. Select Header and Footer from the Use dropdown box
3. Give this stationery item a name e.g. Letterhead or Xmas Letterhead
4. Browse to attach the appropriate stationery file
5. If a header and footer template has been selected, there is an option to check the tick box to save this as the firm's default letterhead

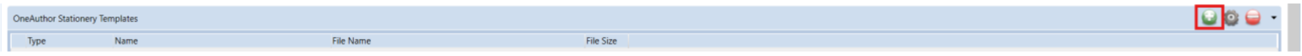


Figure 207

Auto Apply Headers/Footers Creating Documents from Precedents

When creating templates or precedents, there is the ability to automatically apply the firm's default letterhead. This allows for scenarios such as if a change is made to a firm's letterhead, instead of needing to individually update each document, if all documents requiring letterhead have the auto apply default set, then any changes to said default letterhead can be made and updated in OneLaw and then be pushed out to all documents.

When in edit mode, navigate to the OneAuthor tab in Word. Only those with the Template Administrator permission will have this tab available in Word. Click on Template Stationery. A dialog box will pop up and provide the following options:

+ Only apply to first page
+ Auto Apply Default Stationery

Check the box to Auto Apply Default Stationery.

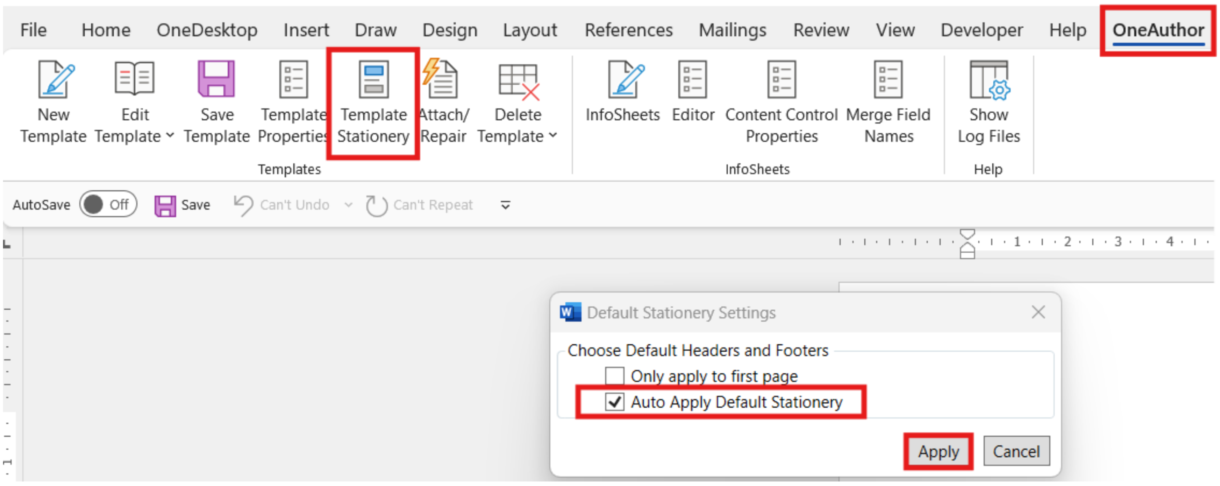


Figure 208

Building Headers and Footers

Start with a new Word document. Standard Word rules apply when creating header and footer Templates.

Header: Click into the header section of the document. Insert the firm's logo and details.

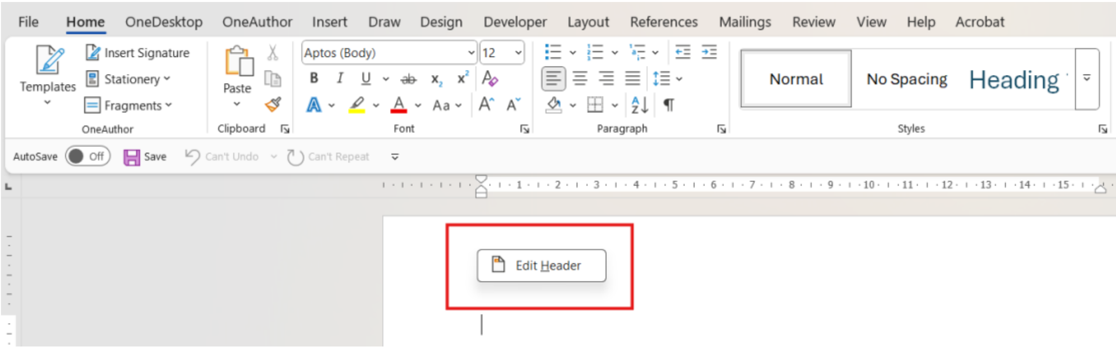


Figure 209

Footer: Click into the footer section of the document. Insert the firm's logo and details. Footers are also a common place where firms like to include additional fields such as client number, matter number and document ID. If fields are being used in a header and footer template, these will need to be content controls.

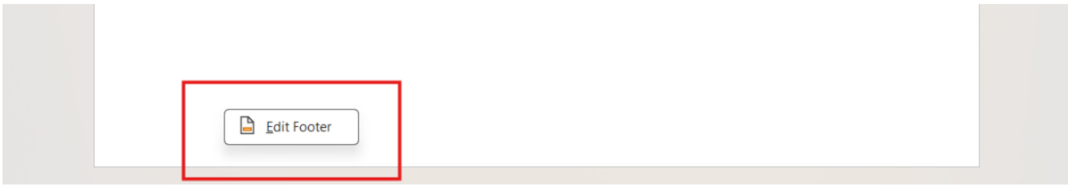


Figure 210

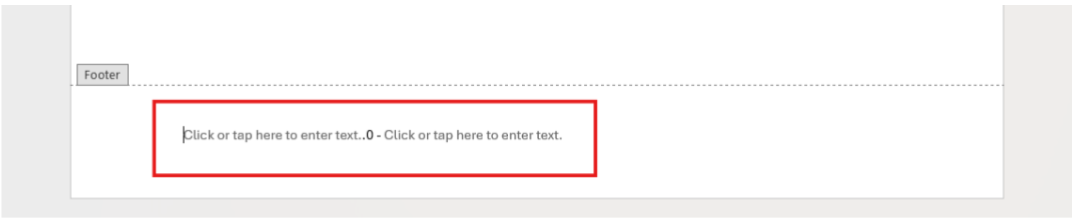


Figure 211

Once the header and footer template is finalised, save the document as a .docx file and save it to an external folder or desktop. From there, it can be uploaded to OneLaw per the instructions in the Managing Headers/Footers section.

Different First Page

OneLaw respects the settings specified in Word around whether the header/footer on the first page is different.

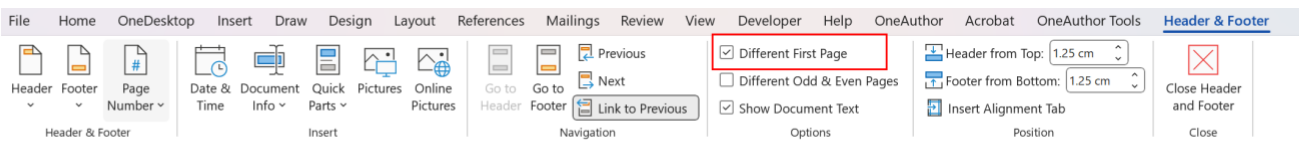


Figure 212

Stationery – StyleSheets

Introduction

StyleSheets provide a way to define a set of Word styles and other formatting, matching a firm's style guide or standards, that can then be applied to other documents. OneLaw provides the capability to define multiple StyleSheets and apply them as needed to any document open in Word.

When applying a StyleSheet, a user can select which styles and other formatting to apply to the current document in Word. Applying the StyleSheet will copy the selected styles into the current document, and if styles with the same names already exist, then they will be updated, and any content using those styles will be updated.

All Word styles are supported, including headings, numbers and bullets, grid formats and body text formats including Normal. Additional formatting supported includes margins, spacing and justification.

Applying Styles

Under the Home tab in Word, there is the Stationery tool. This tool will insert stationery into the selected document.

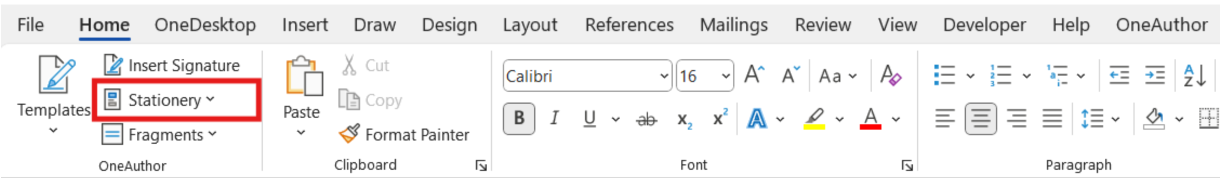


Figure 213

The Stationery tool is a dropdown list option to distinguish between Header and Footer, and StyleSheets. Once the user has selected to insert a StyleSheet, they will be presented with all available options from OneLaw.

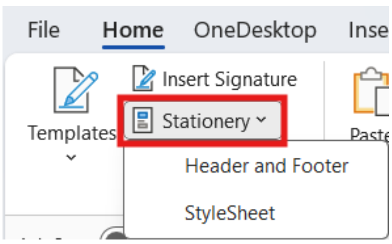


Figure 214

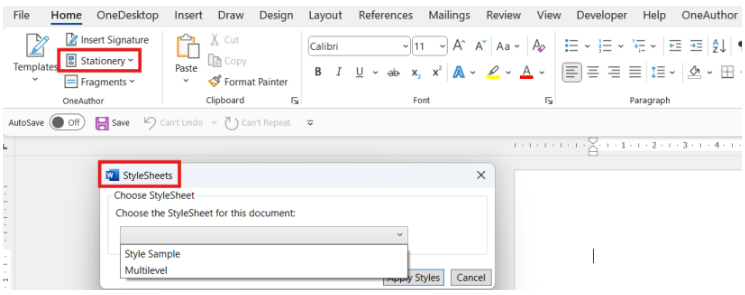


Figure 215

Once a StyleSheet has been selected, click Insert. This will insert the StyleSheet into the document.

Available styles from a StyleSheet will appear in the Styles Ribbon. Users can also pop out this ribbon by clicking the bottom right-side arrow.

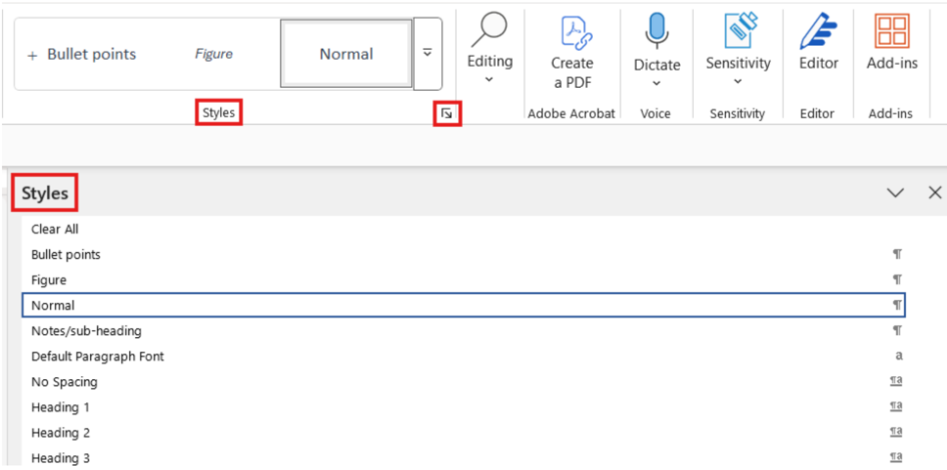


Figure 216

Managing StyleSheets

Navigate to the Administration (or Templates) tab in OneLaw. Select Document Templates and scroll down to OneAuthor Stationery Templates.

This area is where a firm can store and manage their StyleSheets. Firms can have multiple StyleSheet templates stored in OneLaw.

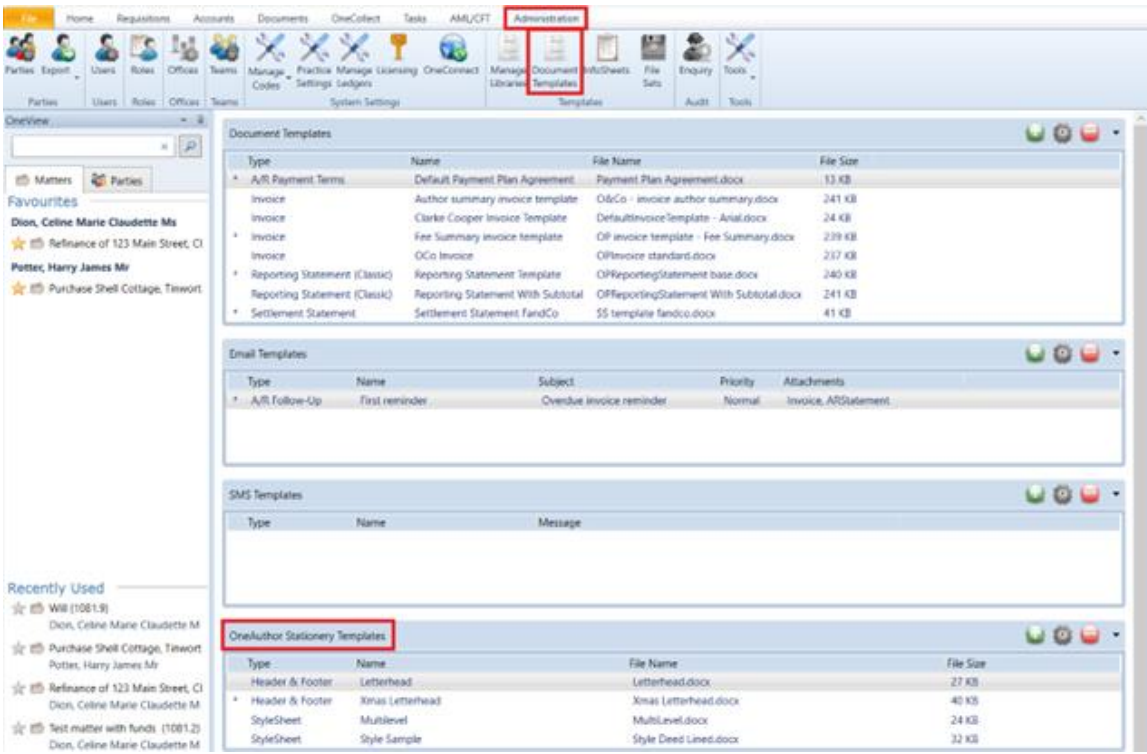


Figure 217

Adding New Stationery in OneLaw:

1. Click on the green plus (+) icon to the right of OneAuthor Stationery Templates
2. Select StyleSheet from the Use dropdown box
3. Give this stationery item a Name e.g. Letter Style or Deed Style or Court Style
4. Browse to attach the appropriate stationery file

Figure 218

Building StyleSheets

A StyleSheet provides a consistent and structured way to format documents. It defines how elements such as body text, headings and numbered lists appear throughout the document, ensuring visual coherence and ease of navigation.

Normal

The starting point for any StyleSheet is the Normal style, which governs the appearance of the main body text.

To begin, open Microsoft Word and navigate to the Home tab to access the Styles group.

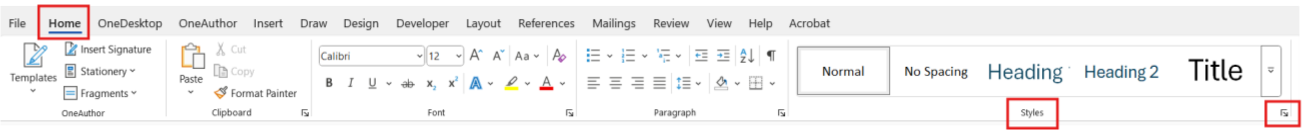


Figure 219

Enter the word "Normal" into the document and apply the Normal style from the Styles menu.

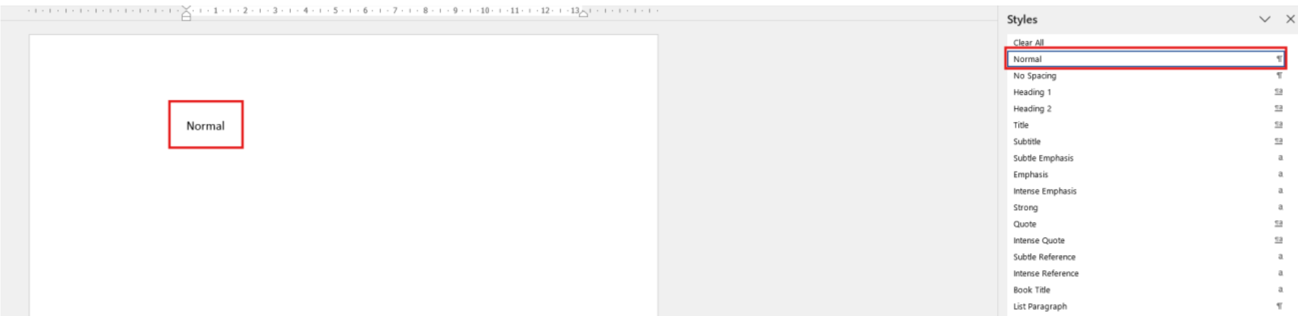


Figure 220

Once applied, right click on the Normal style and select Modify.

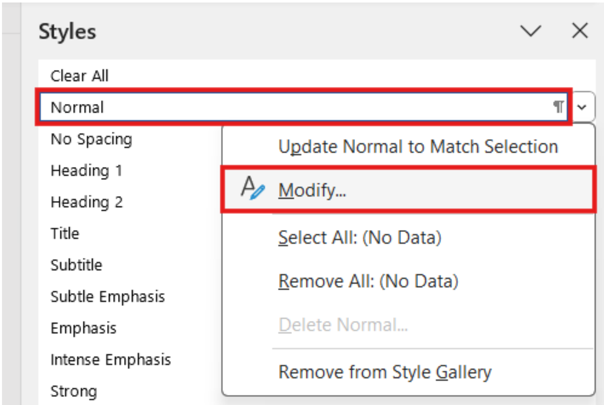


Figure 221

This opens the Modify Style dialog, where default formatting can be specified, including font type, font size, line spacing, text alignment and colour.

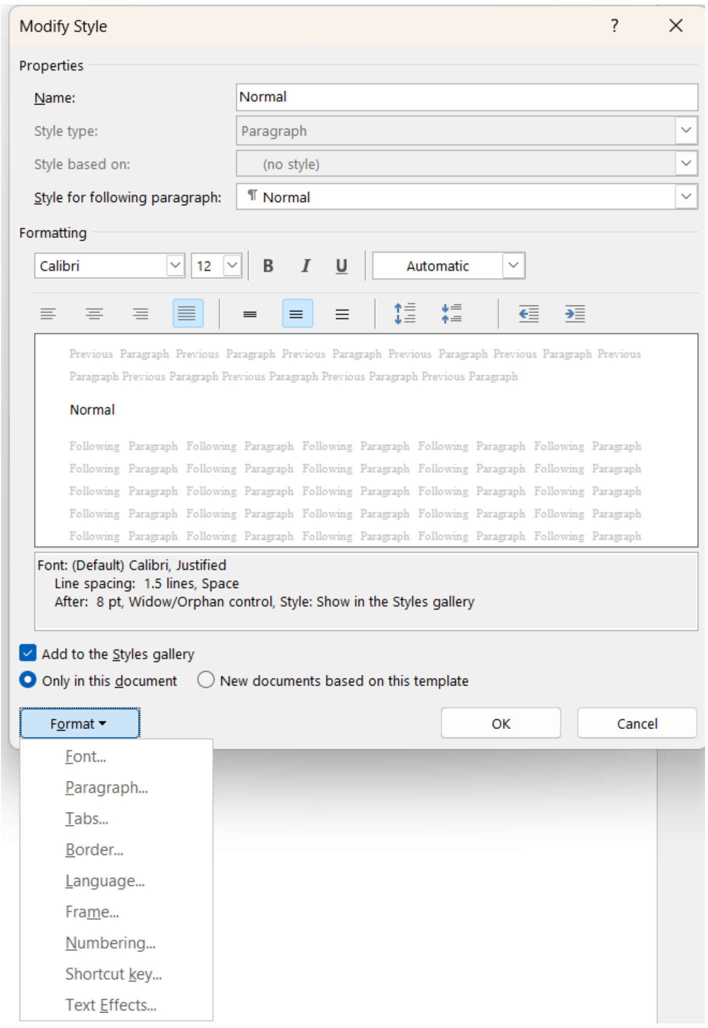


Figure 222

After the desired attributes are set, click OK to apply the changes. This redefined Normal style forms the visual foundation for the remainder of the document.

Headings & New Styles

With the Normal style established, the next step involves defining additional styles to support the document's structure, most commonly: heading levels, subheadings, tables, bullet points or other content categories.

To modify an existing heading style, type the corresponding name (e.g. "Heading 1") into the document, apply the style via the Styles menu, then right-click the style name and select Modify. Within the Modify Style dialog, the formatting can be adjusted to match the intended function and appearance.

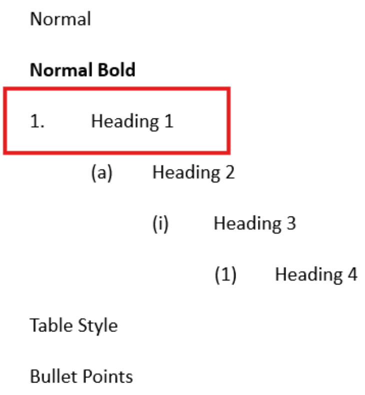


Figure 223

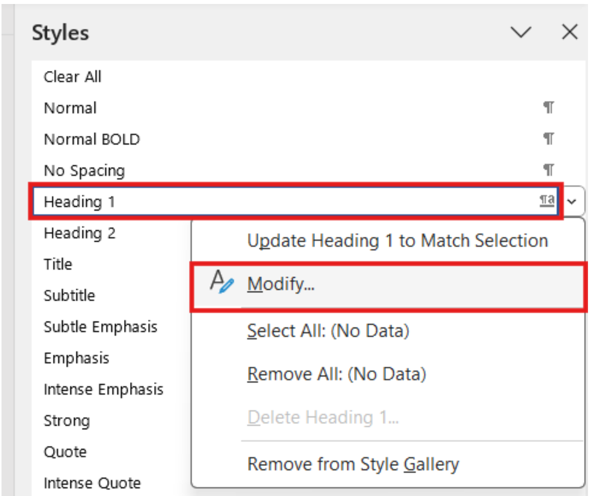


Figure 224

To create a completely new style, use the Add New Style button within the Styles pane. This allows for the assignment of a custom name and the configuration of all formatting options, including font settings, spacing and text effects.

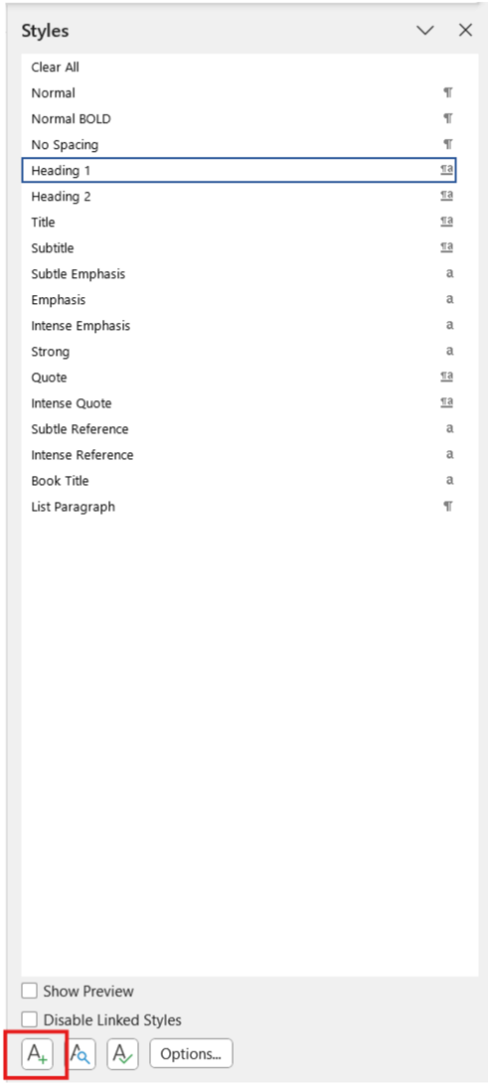


Figure 225

Repeat this process for each additional style required within the StyleSheet. Each style can be tailored to match specific content needs.

Numbered Headings

For documents requiring a structured outline, styles that involve numbering must be linked to a multilevel list.

Begin by selecting text formatted with the first numbered style (e.g., "Heading 1"). Within the Home tab, under the Paragraph group, click on the Multilevel List icon and select Define New Multilevel List from the dropdown options.

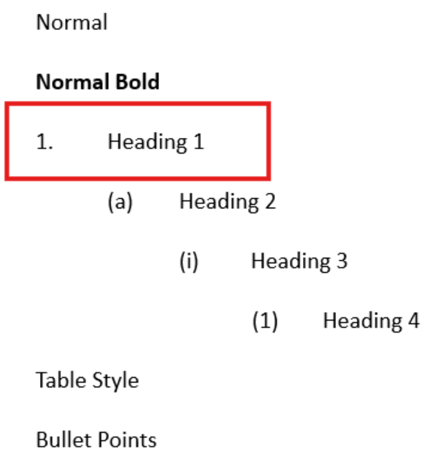


Figure 226

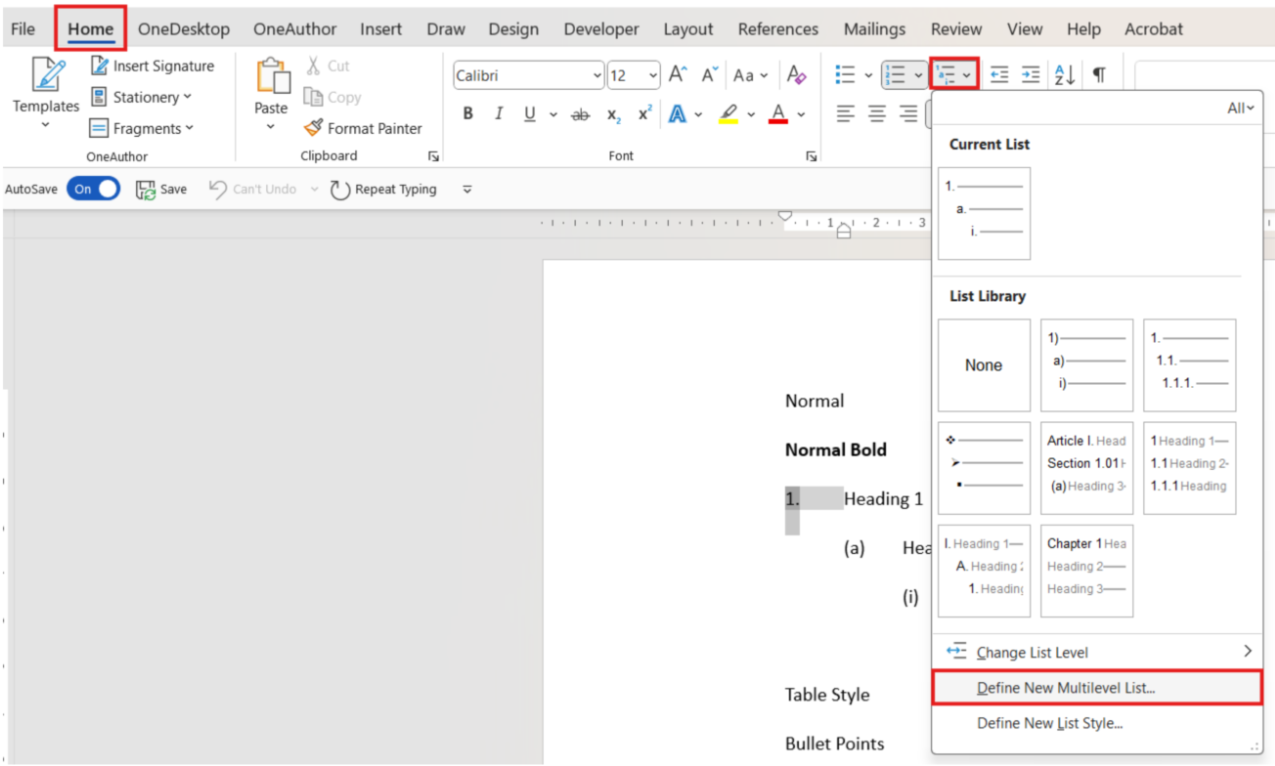


Figure 227

When the Define New Multilevel List dialog appears, click the More button to access advanced configuration options. Each level of the list (Levels 1–9) can then be linked to a specific style (e.g. Heading 1, Heading 2, etc.). Number formats, alignment and positioning for each level can also be defined here.

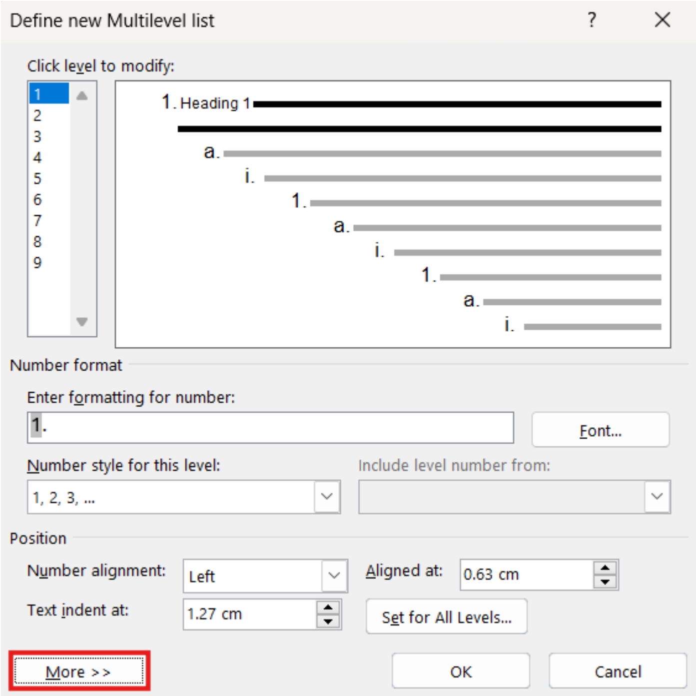


Figure 228

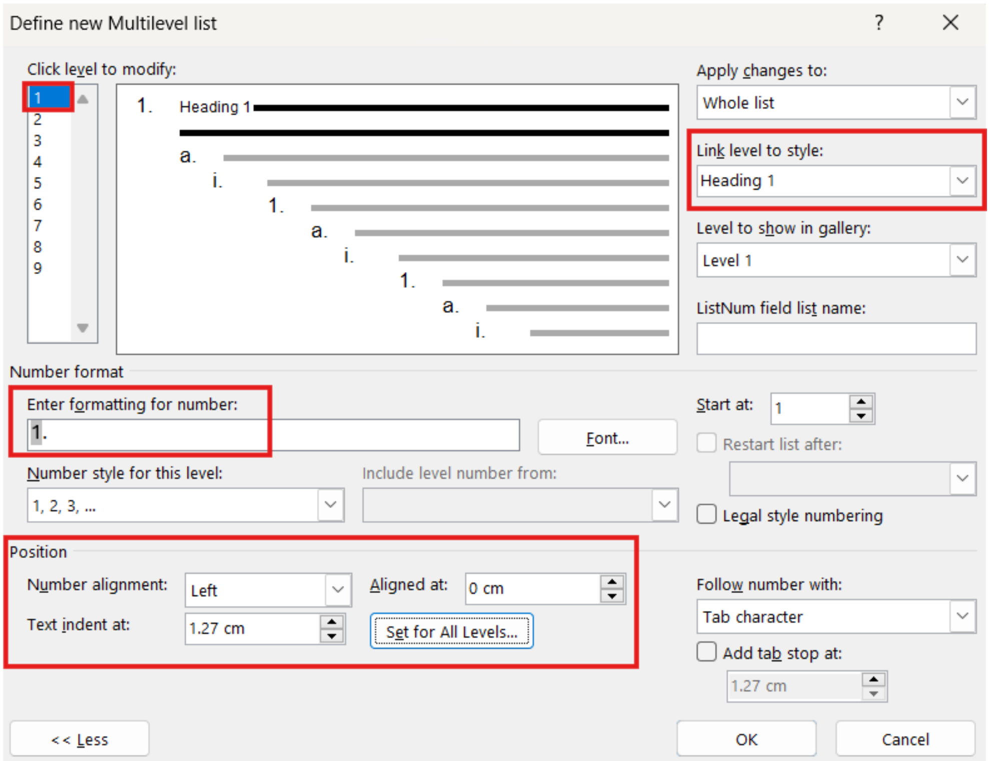


Figure 229

Upon completion of these settings, click OK to apply the style structure.

Save the StyleSheet as a .dox file. See the above Managing StyleSheets section on how to upload StyleSheets in OneLaw.