



ONEAUTHOR

OneAuthor allows time savings and consistency in branding – allowing you to focus on what you do best. Let us help you get the most from these templates

- The OneLaw team



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## Preparing OnePractice for optimal use with templates

For the templates to work optimally with **OnePractice**, enter all relevant information into **OnePractice**.

### Adding users to OneAuthor

Fill in all relevant information for all users in your organisation.

1. From the **Administration** ribbon, click 'users'
2. Select each user and fill in all the relevant information. Job title, addresses, phone numbers, office, email address, etc will be used in the templates. It is important that you accurately enter this information as you would like it to appear in documents

Maintain Staff

Full Name: Jackie Ann Frampton Job Title: Author

File as: Frampton, Jackie Active:

Initials: JAF Office: Gore - Gore

User Account Addresses Time Rates Budget

Addresses

Physical 45 Washington Street, Invercargill, 1425

Phone Numbers

Business Direct 03 555 1212

Email

Email jaf@whitefox.co.nz

Change Password Change Office Save & Close Close

3. When adding an email or phone number, select the "Main" tick box

Warning:

Address Properties

Address For Service

Main Postal Address

Save & Close Cancel

03 374 5896

Note: Riccarton Road

## Offices

1. Select the **Administration** ribbon and click 'Offices'
2. Fill in all relevant information

## Parties

1. Fill in all information pertaining to contact/address details, related parties, financial information (GST number) and any other relevant information

The screenshot shows the 'Edit Client - Partnership' window. The 'Party Name' section includes fields for Full Name (Body Corporate), File as (Body Corporate), Mailing Name (Body Corporate), Salutation (Partners), and Status (Client). The 'Client Team' section shows 'James Leggat' and 'Client Author: James Leggat'. The 'Addresses' section has a 'Physical' address: 'c-Williams McKenzie, PO Box 1353, CHRISTCHURCH, Attention: Jane Ada'. The 'Email' section has an email address: 'body@corporate.co.nz'. At the bottom, there are buttons for 'Deactivate', 'Save & Close', 'Save & New Matter', and 'Close'.

## Contacts

Adding non-client contacts to your OnePractice database allows users to populate their documents with names and address details of clients and non-clients. This allows faster, more accurate document creation.

The screenshot shows the 'Create New Party' dialog box. It has a 'Party type:' dropdown menu, an 'Is a client?' checkbox (which is unchecked), and 'Create' and 'Cancel' buttons. The background shows the 'Administration' ribbon with 'New Party' and 'Edit Party' buttons.

1. Add a non-client contact by selecting 'New Party' in the home ribbon and unticking 'Is a new client?'
2. Contacts can include:

- a. Banks
- b. Councils
- c. Legal firms
- d. Real estate companies
- e. Courts
- f. Trustees, power of attorney, etc.

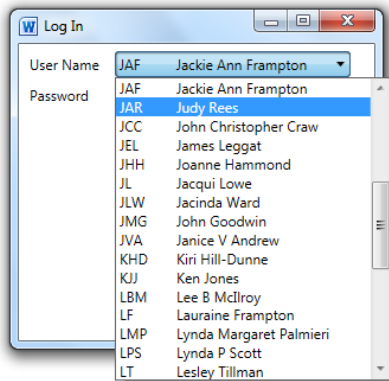
## Documents tab

In OnePractice, the documents tab takes you to the management system.

## Logging in

If using OneDesktop, log in. Open OneDesktop and use the login button on the OneDesktop ribbon.

1. A dialog box opens with a list of all users
2. Your **OnePractice** log in name should appear as the selected name on the list. If it doesn't, click the down arrow and select your name

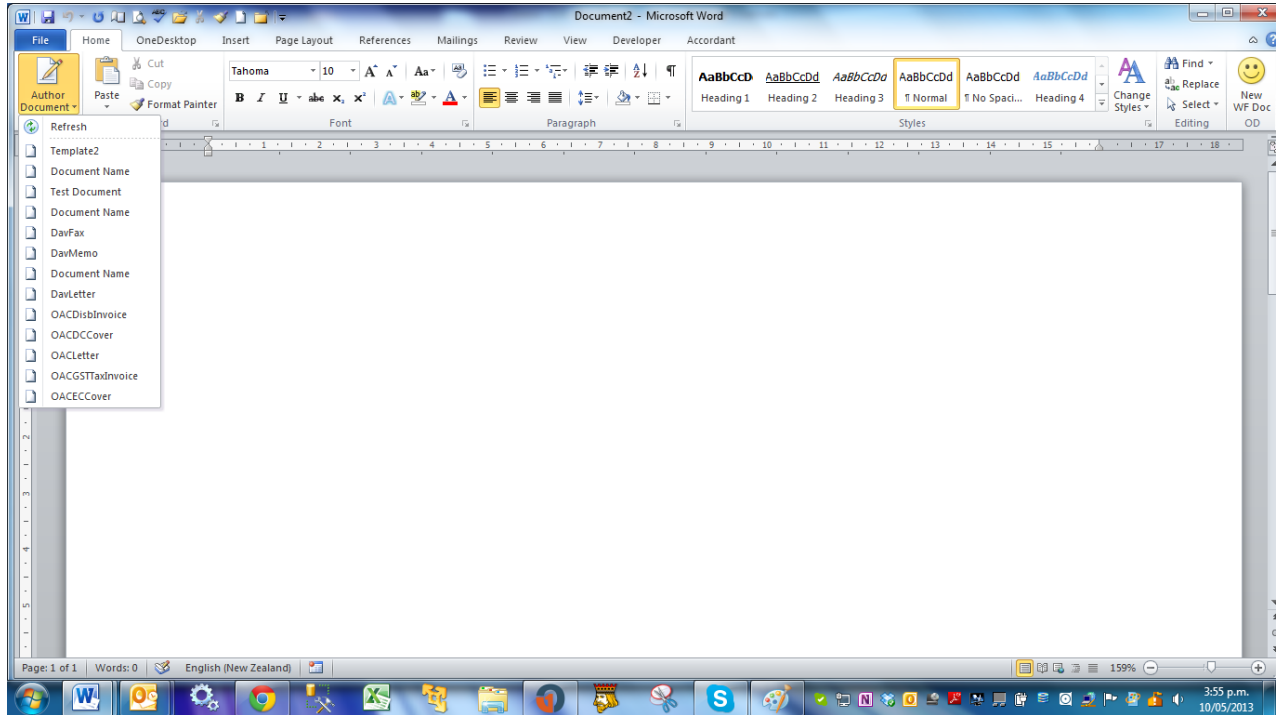


3. Use the same password that you use for OnePractice and click 'OK.' Check the case of your entry if you have a problem

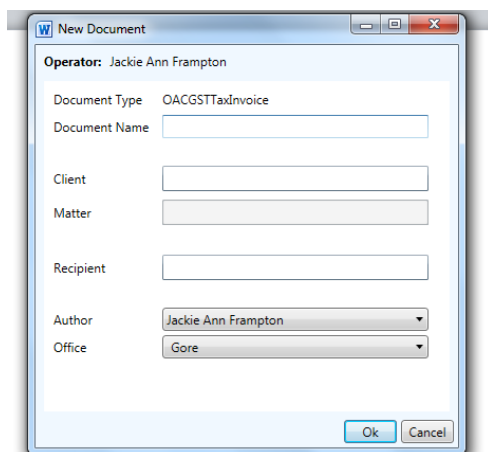
## Using templates

### Create a document

1. Select the **home** ribbon
2. Click '**Author Document**' to drop down a list of templates
3. Click on the name of the template that you want to use



4. A dialog box opens to gather information used to populate the template



5. Fill in the document name
6. Use the **Client** and **Matter** pickers to select both
7. If correspondence is going to someone other than the client, use the Recipient picker to select a contact from the OP database
8. If the recipient is not in the database, clear the recipient box

9. The current operator will be the default author. If this is incorrect, drop-down the list and select the correct author
10. The office will default to the user's office as recorded in OP but can be changed by choosing from the drop-down list
11. Click **'OK'**
12. If more information is required, further dialog boxes will appear on the screen. Further dialog boxes will be for information not stored in OP. Enter information and click **'OK'**
13. The template will appear on the screen

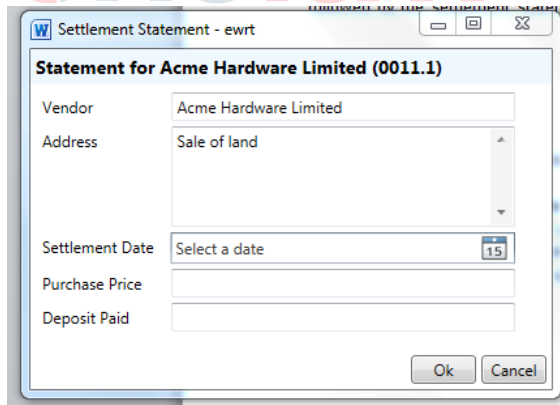
## The letter

1. Select the letter from the list of templates
2. Fill in the OD dialog box
3. A word dialog box appears. Fill in the relevant details
4. This is followed by the letter dialog box. Use this to populate your letter
5. Any information that is in OnePractice will populate the dialog box. The rest however, is entered or selected by you if relevant
6. Enter in relevant information and select the correct options. Click **'OK'** and your letter is created
7. To make changes to the letter from options in this dialog box, click **'Letter'** on your ribbon. This ensures info and formatting go to the correct place in the document

## The settlement statement and calculator

Select the settlement statement from the template list. Fill in the OneDesktop dialog box. This is followed by the settlement statement dialog box.

1. The vendor is your client (based on the client number you choose in the OD box). You can change this
2. The address is the matter description for the matter you have selected. You can change this wording
3. Select a settlement date, add the purchase price and deposit, then click **'OK'**
4. In the next box that appears, add the purchaser's name



### The calculator

To use the calculator for rates and other apportionments, click 'Calculator' on the ribbon. All district councils are loaded into the calculator along with their rating instalment start and end dates. There are several different formulas that can be used and you can use the calculator as many times as you need in a settlement statement.

### By instalment

1. Change 'Type of Payment' to 'By Instalment'
2. Select the council, if different from the default
3. Enter all the instalment payments in each Instalment box at the right. This information can be obtained from the rating council. **Leave zeros in the other boxes**
4. Everything else will be calculated or pulled in from your settlement statement
5. Click 'Calculate.' The rest of the dialog boxes will be populated
6. Select 'Purchaser' or 'Vendor'
7. If different than calculated, select the number of instalments that have been paid by clicking on the number next to the tick box, for example: Click on the **3<sup>rd</sup>** to change the amount paid to only include 3 instalments
8. Click 'OK'
9. The document is populated

### Daily rate

This calculates a daily rate by dividing the annual rate amount by 365 (or 366 in a leap year), resulting in the exact amount owed to the council.

1. Change 'Type of Payment' to 'Daily Rate'
2. Select the council if different from the default
3. Enter the annual payment
4. Click 'Calculate'
5. Select 'Vendor' or 'Purchaser'

### Rent

1. Change 'Type of Payment' to 'Rent'
2. Click 'Calculate'
3. A dialog box appears. Select the rent frequency, enter the amount of last payment and date of last payment
4. Click 'Enter.' The calculator is populated
5. The Purchaser's share is the only option
6. Click 'Enter' and the document is populated

## Body corporate, regional council and other payments

1. Change Type of Payment to 'Body Corporate,' 'Regional Council' or 'Other'
2. Select the council if in the list or type in the name of the body collecting the rates
3. Enter the number of instalments
4. Enter all the instalment payments in each Instalment box at the right. **Leave zeros in the other boxes**
5. Everything else will be calculated or pulled in from your settlement statement
6. Click 'Calculate.' The rest of the dialog boxes will be populated
7. Select 'Purchaser' or 'Vendor'
8. If different than calculated, select the number of instalments that have been paid by clicking on the number next to the tick box ie: click on the 3<sup>rd</sup> to change the amount paid to only include 3 instalments
9. Click 'OK'
10. The document is populated

## Add a debit or credit row

Use the buttons on your ribbon to add debit and credit rows.

1. Place your cursor where you want the row to be entered
2. Click '**Credit**' or '**Debit**' on the ribbon
3. Add your description and tab to the correct column and add your \$ amount
4. Click the **Recalculate** button on the ribbon (very important)

To delete a row, high light the row and click delete.

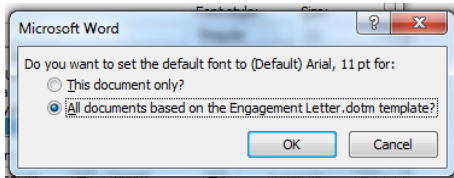
## Recalculate

Use the 'Recalculate' button to recalculate your settlement statement if you have made any changes.

## Create templates

The tools used to create templates are on the **OneAuthor** ribbon. To create a new template from scratch...

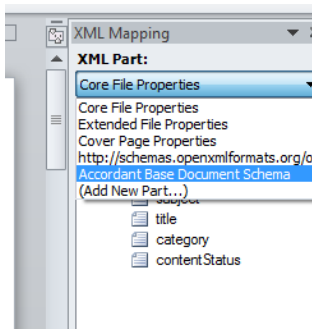
1. Click on **New Template**. A clean new template document appears, unsaved on the screen. Use this as the base for your template
2. Using standard Word commands, set the default font and paragraph settings, including line spacing and paragraph spacing. Make sure you tick 'All documents based on the (template name).dotm template?'



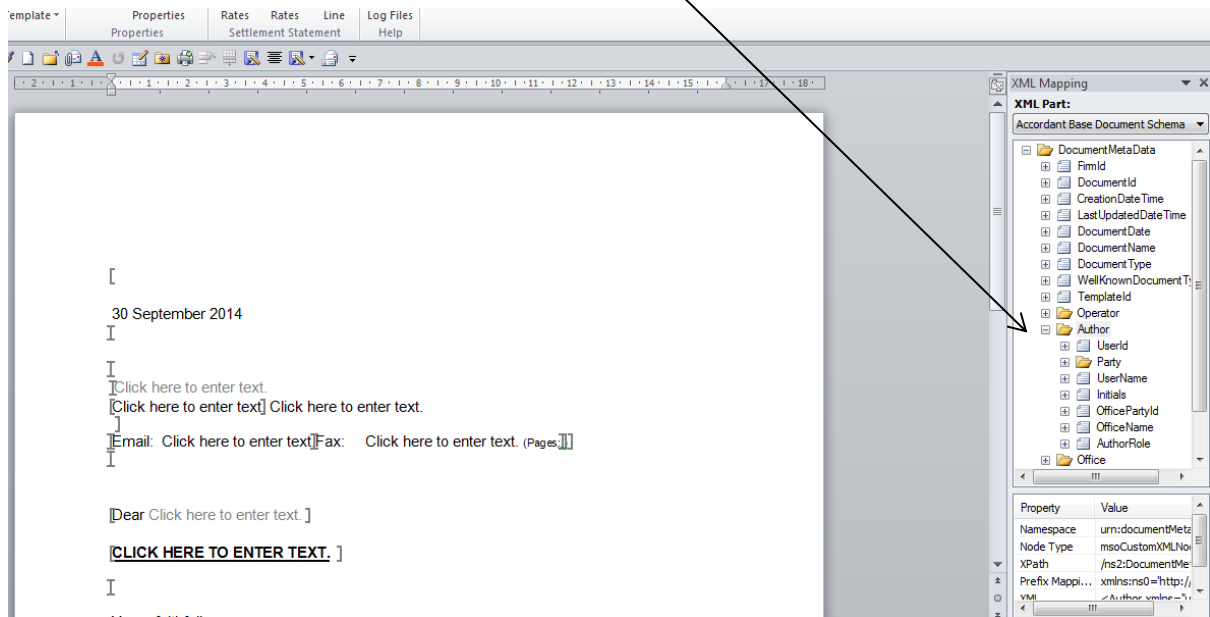
3. Set the default margins
4. Add the text to the template. This can be information typed in or copied in from another document

### The editor

To add **content controls** to your template, click '**Editor**' on the **OneAuthor ribbon**. The default appears as **Core File Properties**. Click the down arrow and select '**OneAuthor Base Document Schema**.'



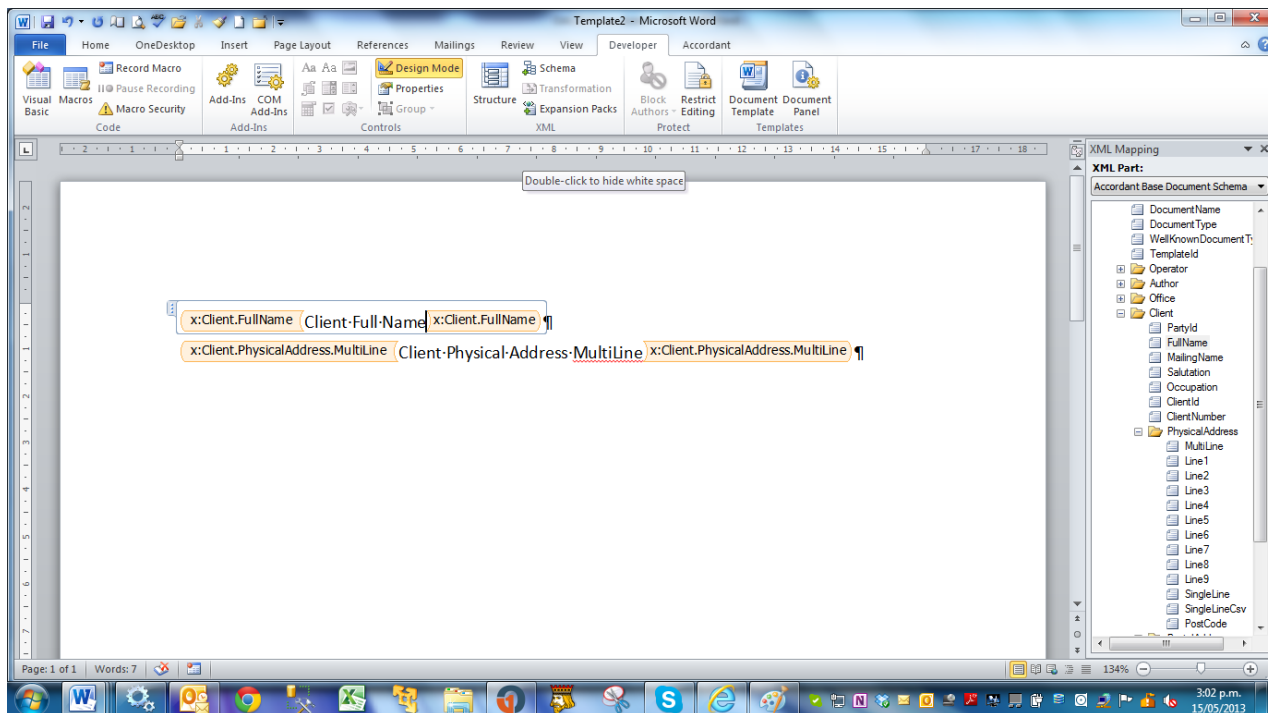
The folders show the different categories of fields (ie:Author). All fields in that folder pertain to the folder name.



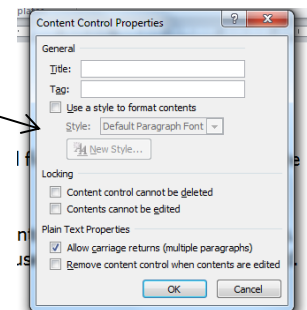
There are subfolders for the address codes. Multiline codes will enter an address on multiple lines. As many single line address codes can be entered and those not used will automatically be deleted. Use these codes if you want to bold the last line of the address.

Click on the label you need (ie:Client FullName) and drag this to the point in the document where it should appear. A content control appears in your document. Change the label by simply typing in the content control.

A content control is managed by using the **'Developer'** ribbon. **'Design Mode'** displays the content control and its tag name. **Properties** lets you set defaults for the content control. For the most part, these are automatically set when the content control is added.



**NOTE:** If you are using a **Multiline Address** content control, you must click the content control property to 'Allow carriage returns (multiple paragraphs)'.



Use the **title box** to give the content control a title that appears in the document when you select the content control.

### Save a template

When finished, click **'Save Template'** and give the template a name. Type in the category name. It will automatically be stored in the correct place and will immediately appear on the **Author Document** list.

### Create subcategories

To create a subcategory, type in the category name i.e. conveyancing followed by a "/" and the subcategory name (ie: Conveyancing/Purchase).

## Edit template

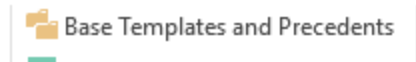
To make changes to a template, select **'Edit Template'** on the OneAuthor ribbon. Select the correct template and it will open. Make changes and click **'Save Template'** when you are finished. The saved template will update the list automatically.

## Delete template

To delete a template, open it and click **'Delete Template.'** It will be removed from the list.

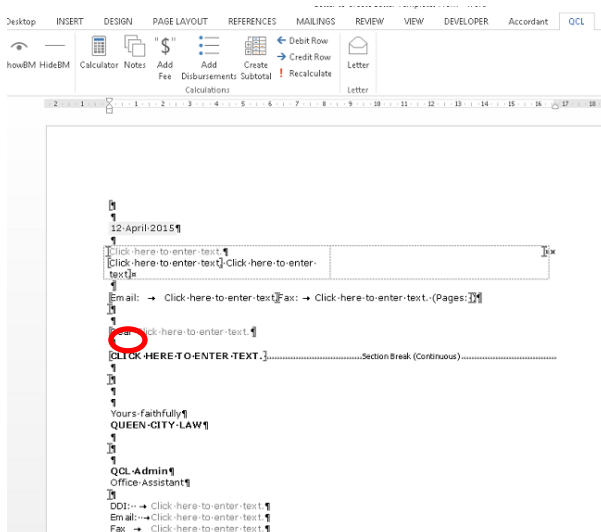
## Create a template using base templates

Base templates are accessed using the **'Base Templates and Precedents'** button on the OneAuthor ribbon.



The base templates and precedents are created from your templates. They have all your formatting and layout and include any macros that run when a document is created from a template.

When working with templates, click **'Bookmarks'** on the OneAuthor ribbon. Bookmarks look like grey uppercase I's or square brackets (see image below). These cannot be deleted because they are used by the macros to identify places in the documents. When turned on, they only show on the screen; they don't print. To help with formatting, click the Word paragraph formatting button. This helps to identify the formatting of the document.



Find the bookmark between the subject line and closing (red circle). Copy the body of the text into here.

Save the template using **'Save'** command on the OneAuthor ribbon.

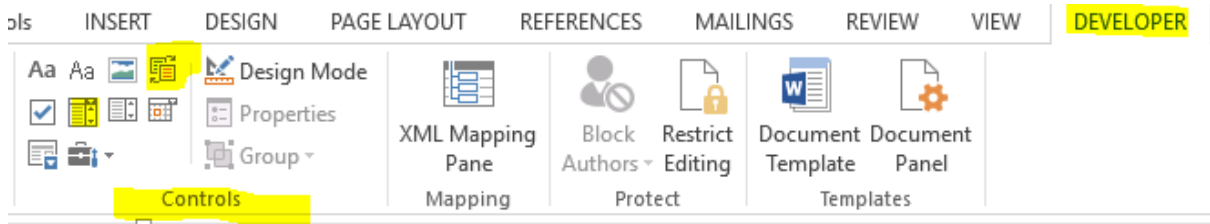
When you use the template, the macros will run.

## Create a precedent using base precedents

OneLaw products won't manage a **template**. Therefore, in the base templates and precedents, the precedent folder holds doc.m (document with macros) files. The template mechanism in the OneAuthor button always creates a document copy of the template; with the precedents, users make a copy by managing their precedent. To use a precedent, open it and copy in or create your intellectual property. Save the precedent to a precedent folder.

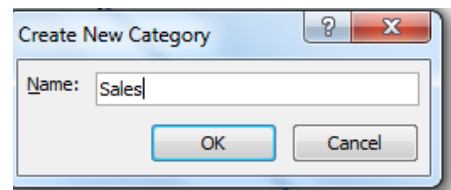
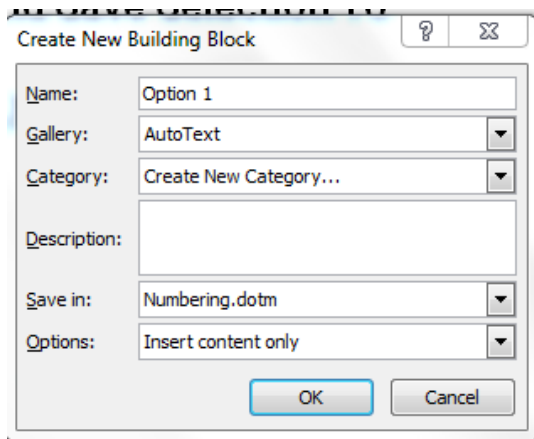
## Create dropdown lists in templates

A dropdown list is an easy way to allow users to select an option in a document. Word provides two types of controls to manage lists. The building block control allows you to save blocks of text. The ComboBox content control lets you create a list to choose from.



### Create options using a building block control

1. I recommend creating your text options in the template you'll be using them in. This way you guarantee the formatting is correct
2. Type out your list entries adding any required styles and formatting
3. Select the entry and use insert quick parts auto text, save selection to auto text entry
  - a. Give the entry a name
  - b. Create a new category. The category is what stores all like entries used by a building block control
  - c. Save the entries in the template



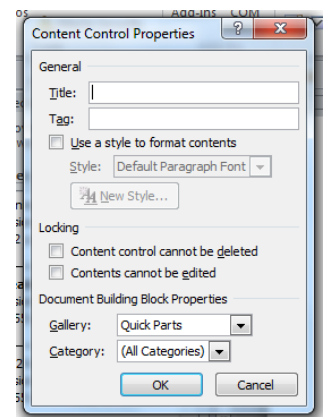
4. Continue as above until all your options are saved as auto text under the category
5. On the **developer ribbon** controls group select the **building block gallery**

### content control

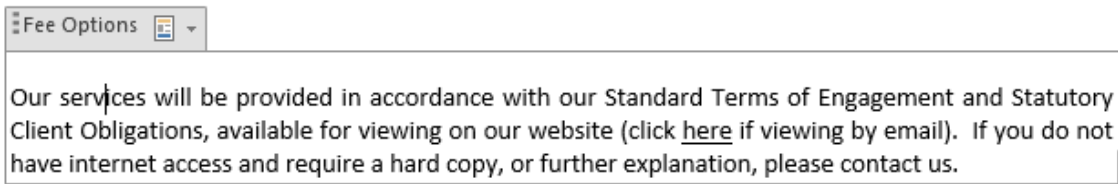


and click in your template where you want the options to be entered.

6. On the **developer ribbon**, click **properties** and type in a title to identify the content control. In the **gallery**, select **auto text**. Under the **category**, select the name you used to define the category for this group of autotext
7. Click OK and your drop-down list is ready to use
8. To add more options to the drop-down list, follow the instructions above and assign the auto text to this category and the option appears immediately
9. To edit your options, in the same template (for consistency with formatting), use 'Insert Quick Parts Building Blocks.' Find your auto text entry and insert it in the template. Make your changes and resave as auto text using the instructions above



10. Save the template when you are finished. To use the building block control, users click on the down arrow and make their selection

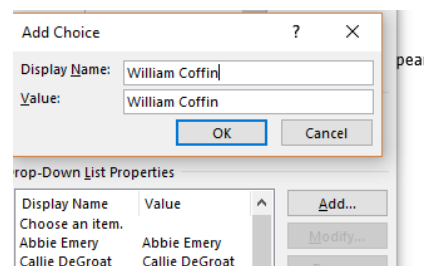
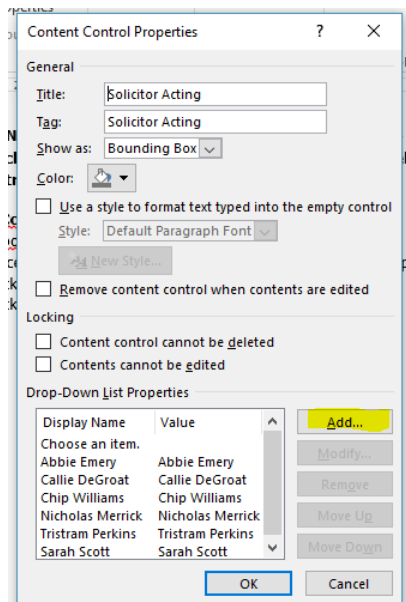
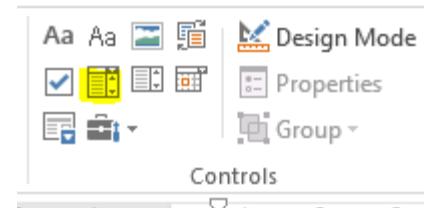


11. NOTE: if you don't have a developer ribbon, right click on your ribbon and select 'Customize the Ribbon.' On the right, click the developer ribbon
12. HINT: When selecting your building block text, be consistent about including or excluding the paragraph marker at the end of the selection. If you select it for one entry, select it for all and vice versa

### Create a ComboBox control

Use a ComboBox when a list is required. To add a ComboBox:

1. Place your cursor in the document where you want it to appear
2. Click on the ComboBox control on the developer ribbon
3. Click on the control, then on the developer ribbon to add your list



Users click on the down arrow to see the list and select their option.

HINT: Once a selection has been made, users may want to remove the content control and its options. To do this, right click on any control and click 'Remove Content Control.'