



# EasyDocs for Document Templates

Getting Started with Document Templates

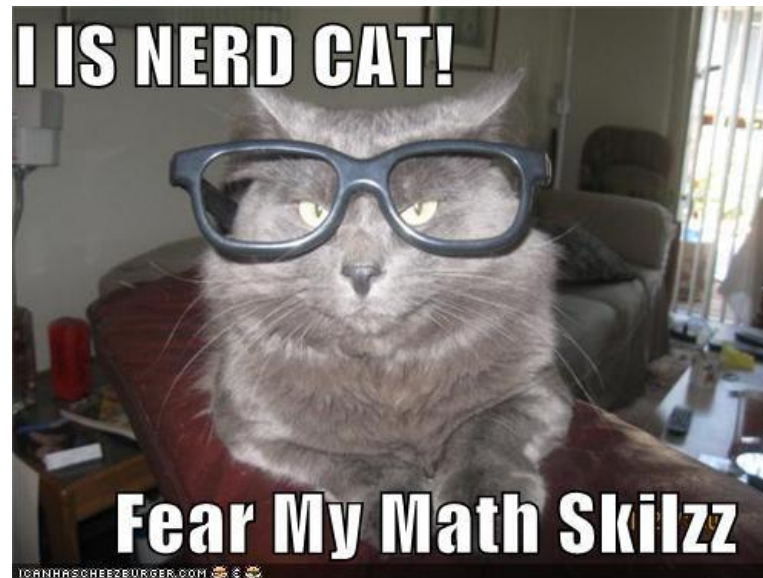
Brad Baldauf, Mitratach Professional Services



Lead Business Analyst in Professional Services  
8 Years with Mitratesch  
16 Years in Legal IT  
25 Years in Systems Implementation  
Award Winning Fiber Artist

By the end of this session, attendees will

- 1) Have a basic understanding of templates and the use of EasyDocs
- 2) Be one step closer to being as nerdy as me



- Overview of Document Templates
- Overview of EasyDocs
- Process for creating a template
  - RTF Files
  - Field Mapping
- Cool things you can do with EasyDocs

# DOCUMENT TEMPLATES IMPROVE EFFICIENCY

---

- 1) Document Templates let users combine the data in TeamConnect with documents and reduce the amount manual keying.
- 2) Document Templates allow for consistency across an operation for documents that are used. Standard Release Forms, Retainer Letters, etc.
- 3) Document Templates can be used to create Matter Hardcopies tailored for your business process.

- EasyDocs is the TeamConnect Tool that allows users to create document templates without having to program XML files.
- EasyDocs provides a graphical interfaces that allows for mapping data within TeamConnect to the template
- EasyDocs works by creating a Mail Merge file and then mapping fields to the Mail Merge elements

# THE PROCESS

---

**Step 1: Create RTF with Merge Fields.**

Step 2: Upload RTF to TeamConnect.

**Step 3: Map RTF Merge Fields to TeamConnect Data.**

Step 4: Convert RTF to Document Generator Template.

Step 5: Test Your Template.

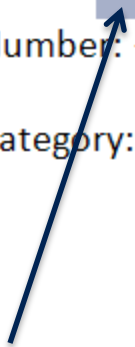
# Creating Merge Fields – Part One

This is a new document template

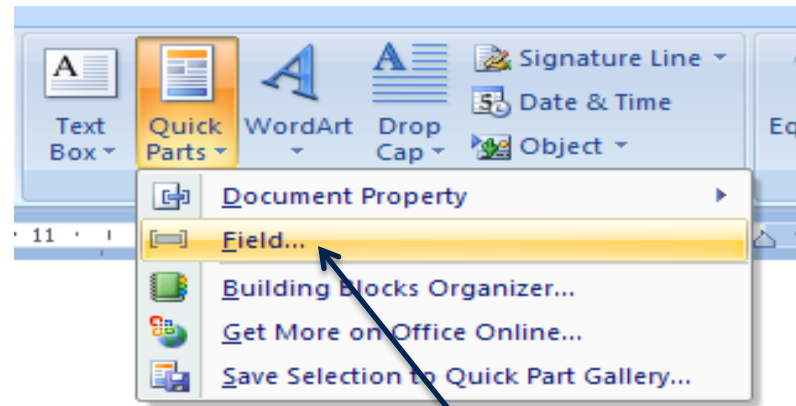
Matter Name: <Matter Name>

Matter Number: <Matter Number>

Matter Category: <Matter Category>



Highlight the place holder

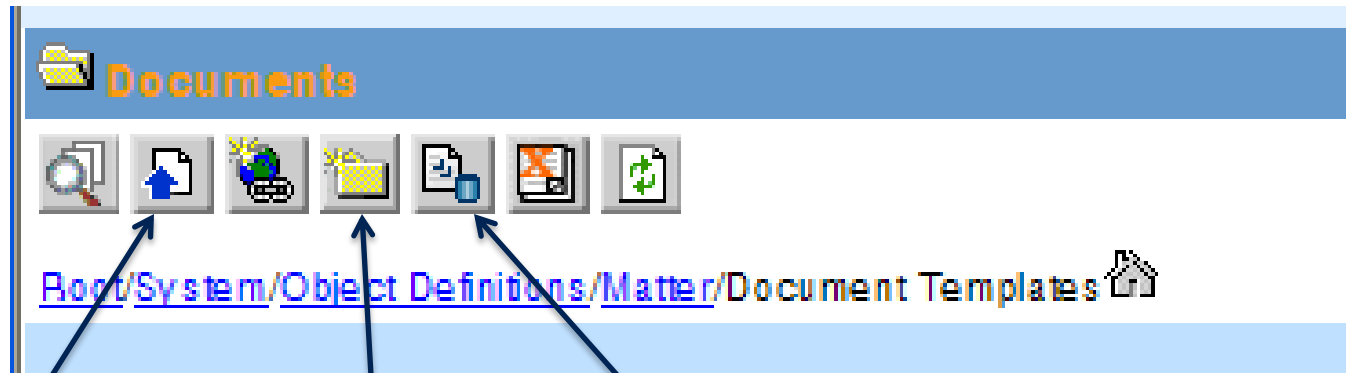


In the Insert ribbon, select the Quick Parts button and then field



# Mapping Fields

After creating the Rich Text File, you will need to upload it into the appropriate location in TeamConnect and then use the Mapping Function in the setup tools.



Upload Document

Create New Folder

Easy Docs Mapping Tool

# Field Mapping Options

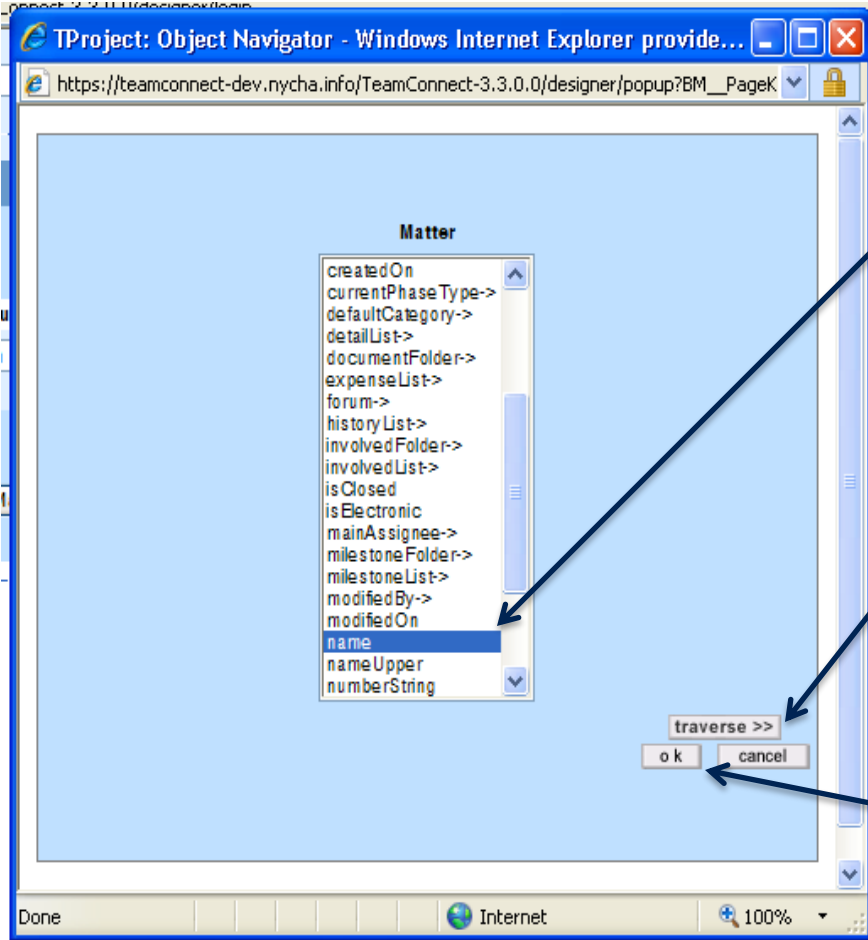
The screenshot shows a 'Data Mapping' interface for a file named 'First Template.rtf'. It features a table with two columns: 'Merge Field' and 'Mapping Function'. The 'Merge Field' column contains a dropdown menu with 'Matter Name' selected. The 'Mapping Function' column contains a dropdown menu with 'Map to an object field' selected. A dropdown menu is open for the 'Mapping Function' column, showing the following options: '(Select a Mapping Function)', 'Map to an object field', 'Map to a file', 'Map to today's date', 'Map to current user', and 'Define an input screen for user input'. A 'Save Mapping' button is located below the 'Merge Field' column. A 'reset' button and an 'add more' button are located to the right of the 'Mapping Function' column.

List of fields to map

Options

Object Navigator

# The Object Navigator



Matter Name

You will use the Traverse button to move deeper into the object.

Click OK when finished

# Stop - Demo Time

---



# Cool Things you Can Do

---

- 1) Create templates that pull in a file with the letterhead
- 2) Loop through an embedded object and display the records on the template
- 3) Update the text of a template and use the existing field mapping
- 4) Use EasyDocs as the starting point for more complex templates

# Stop - Demo Time

---



# Limitations of EasyDocs

---

- Complex formatting and formatted tables
- Data entry forms with more than one field

If you need to use these, you can manually create the XML files. Starting with EasyDocs can still save development time.

- Document templates improve operational efficiency
- EasyDocs lets you create templates without programming
- There is a 5 step process for creating a template

We highly recommend getting some training before trying this at home.



# QUESTIONS

---



# THANK YOU

**PLEASE TAKE 5 MINUTES TO COMPLETE THE  
SESSION FEEDBACK FORM VIA THE MOBILE APP!**