



## Amicus Attorney: Document Assembly Notes

This document is intended for firms who are **upgrading from an earlier version of Amicus Attorney to Amicus Attorney V+ or Small Firm Edition**. It also provides instructions for firms upgrading to a higher version of HotDocs.

In the case of an Amicus Attorney update, the installation program copies and updates files and converts your existing macros and Master Document templates. Part of this process is performed by the Updater Macro, which, if necessary, you can run after the installation. This document explains these tasks and provides further details on how to preserve any customized macros.

### Supported third-party applications

During the installation of Amicus Attorney V+ or Small Firm Edition, you are prompted to choose your word processor(s) and indicate whether you use HotDocs. Sample versions of Master Documents will be installed based on this selection.

The following table shows the various word processors and document assembly applications supported in Amicus Attorney Version V+ or Small Firm Edition. In addition, any limitations relating to particular versions are noted.

**Note:** Amicus Attorney V+ is available in three editions: Organizer, Advanced, and Client/Server. All three editions offer support for the applications listed in the following table.

Application Name and Version	Limitations and/or Issues
Corel WordPerfect 8, 9, 10, 11, 12, 13 (X3)	The AutoMerge feature will not work if WordPerfect is running. Latest Corel WordPerfect Service Pack is required.
Microsoft Word 2000, 2002, 2003, 2007	Ensure that Macro Security Settings are set to Medium or Low. Latest Microsoft Office Service Pack is required.  There are some compatibility issues with Word 2007 under Windows Vista. For details, see the <i>Windows Vista Compatibility Statement</i> available from the Support > Technical Resource Guides page on our website.
HotDocs 5.3 or higher, 6.1 or higher, 2005, 2006, 2007	For HotDocs support of versions of Corel WordPerfect and Microsoft Word, we recommend that you check with LexisNexis. For example, HotDocs 6 requires either WordPerfect 9 or higher or Word 2000 or higher.  The HotDocs 6.2 toolbar in Master Documents includes new buttons that are not functional in HotDocs 6.1.  In HotDocs 2005 (and higher) Word Master Documents, the Next Field and Previous Field buttons on the HotDocs Navigation toolbar do not work.

# What happens on upgrade to Amicus Attorney V+ or Small Firm Edition from Version IV or earlier?

If you are upgrading from a previous version of Amicus Attorney to Amicus Attorney V+ or Small Firm Edition, the installer will check for your previous version of Amicus Attorney. It will then perform the following tasks:

- 1 The existing Master Document templates are copied as follows:

**Advanced and Client/Server Edition users:**

- From the old server `Template\Document` folder  
(e.g. [*drive*]:\TEAM#\Template\Document)
- To the new `Template\Document` folder  
(e.g. [*drive*]:\TEAM50\Template\Document)

**Organizer Edition users:**

- From the old standalone `Template\Document` folder  
(e.g. [*drive*]:\AMICUS#\Template\Document)
- To the new `Template\Document` folder  
(e.g. [*drive*]:\AMICUS50\Template\Document)

**Small Firm Edition users:**

- From the old standalone `Template\Document` folder  
(e.g. [*drive*]:\TEAM#\Template\Document or [*drive*]:\AMICUS#\Template\Document)
- To the new `Template\Document` folder  
(e.g. [*drive*]:\AMICUS TEAM SF\Template\Document)

- 2 The standard MAP file depending on your word processor (`WP.MAP` for WordPerfect and `WORD.MAP` for Word) is updated to include the new fields available for document assembly, if necessary.
- 3 Your word processor will be launched to run the appropriate **Updater Macro** to convert existing macros and/or Master Document templates, only if the required word processor is installed on the Server. If you do not have the required word processor on the Server, you can run the Updater Macro later. (*See the next section for information on running the Updater Macro after install.*) The Updater Macro is called only during the installation of Amicus Administrator on the Server.

**Note:** Your existing Master Document templates on the server are copied—not moved—from your previous version.

Following is a brief description of install routines specific to Microsoft Word and Corel WordPerfect, as well as the Updater Macro routines that run for each.

## Corel WordPerfect

When you are installing a Team Member in the Amicus Attorney V+ Advanced or Client/Server Edition or the Amicus Attorney Small Firm Edition, or when you are installing the Amicus Attorney V+ Organizer Edition, the `AMIMERGE` folder is backed up to a folder named `OLDAMIMERGE`, and then the following macro files are copied to the `AMIMERGE` folder:

- `AABRAD.WCM`
- `AAFIELD.WCM`
- `AAWPMERG.WCM`
- `AAWPTLBR.WCM`
- `X001.WCM`
- `x002.WCM`

In addition, the `AAWP.WPT` template will be updated. These macros overwrite existing macros of the same name in the `AMIMERGE` folder. They contain new routines and enhancements, such as improved Save to Brad functionality and new fields.

**Note to those upgrading from Amicus Attorney Version III or lower to Version V+ or Small Firm Edition:** If you chose WordPerfect as your word processor during the upgrade from Version III to V+ or Small Firm Edition, the installer will automatically run the `AAUPDATER.WCM` macro provided it finds WordPerfect installed on the Server. This macro will proceed to look into each existing WordPerfect Master Document template (excluding WordPerfect HotDocs templates) and renumber any of the Extended Party Field variables to a higher Field number. This was necessary to accommodate the increase in the number of custom fields. For example, Extended Party variable Field #241 will be renumbered Field #333. For this reason it is important that the Master Document templates use the updated `WP.MAP` file to ensure field consistent mappings.

**Note about existing HotDocs WordPerfect Master Documents:** It is not necessary to convert WordPerfect HotDocs templates because the Extended Party Fields are handled differently, and the Save To Brad functionality will be called from the new `AABRAD.WCM` macro. However, new Amicus Attorney fields will NOT be available in existing HotDocs templates, as HotDocs Component files were unable to be updated. The new fields will be available in new HotDocs templates created after the update.

## Microsoft Word

If you are **upgrading** from Amicus Attorney 5.0.x or an earlier version to Version V+ or Small Firm Edition, the installer will instruct you on running the Updater Macro, `AAUPDATER.DOT`. The Updater Macro will convert all of your existing Word Master Document templates, but does not affect HotDocs Word master documents.

If you chose NOT to run the updater at the time of your installation, or were unable to do so because your word processor was not installed on your server, please consult the `WORDREADME.TXT` file. This file is located in the `TEAM50` folder on your Server if you are using the Advanced Edition or Client/Server Edition, or in `AMICUS50` folder if you are using the Organizer Edition.

The following macros will be updated: **AmicusMerge** and **AmicusMergeFields**.

The following new macros will be added: **AAFields**, **AAMerge**, and **AASavetoBrad**.

If you have any existing Word Master Document templates that contained customized versions of these macros, you should test these documents to see whether they are affected. *(See the later section on custom issues.)*

**Note about existing HotDocs Word Master Documents:** It was not necessary to convert HotDocs Word templates because the Save To Brad functionality is called from `SAVETOBRAD.DOT` in the Word global templates folder. However, new Amicus Attorney fields will NOT be available in existing HotDocs templates, as HotDocs Component files were unable to be updated.

## Running the Updater Macro later (if necessary)

If you chose not to run the Updater Macro at the time of upgrading to Amicus Attorney V+ or Small Firm Edition from Release 5.0.x or an earlier version, or were unable to do so because your word processor was not installed on your server, you can run it later, after the installation/upgrade.

First, if you are an Advanced or Client/Server Edition user, ensure that no Team Members are creating or generating Master Documents.

Second, run the macro on the workstation of an installed Amicus Attorney Team Member who has the appropriate word processor installed.

**Note:** The length of time it takes to run the macro depends on the number of Master Documents that need to be updated. Once you have run the macro, there is no need to run it again.

To run the Updater Macro, complete the following instructions for the word processor you are using.

### Corel WordPerfect

#### **Advanced, Client/Server, and Small Firm Edition users:**

- 1 Ensure that no Team Members are working with any master documents.
- 2 Start WordPerfect.
- 3 Open the Tools menu and choose Macro, then choose Play.
- 4 From the 'Look in' drop-down list, choose the Amicus Attorney file server.
- 5 Open either the `TEAM50` folder (if Advanced or Client/Server) or the `AMICUS TEAM SF` folder (if Small Firm), and select `AAUPDATER.WCM`.
- 6 Click Play.

#### **Organizer Edition users:**

You do not need to run the Updater Macro.

### Microsoft Word

- 1 Make sure that no Team Members are working with any master documents.
- 2 Start Microsoft Word.
- 3 Open the File menu and choose Open.
- 4 Open the `TEAM50` folder (if Advanced or Client/Server), the `AMICUS50` folder (if Organizer), or the `AMICUS TEAM SF` folder (if Small Firm), and then select the `AAUPDATER.DOT` document template.
- 5 Click Open.
- 6 Follow the instructions in the `AAUPDATER.DOT` template.

The `AAUPDATER.DOT` template also contains some troubleshooting tips for some common errors that you may or may not experience depending upon the version of Word your templates were created in and your current version of Word.

## Conversion issues for customized macros

If your existing Master Documents contained extensive customization that may have been affected by the conversion routines described earlier, it may be more efficient to copy those existing templates back from the Template folder of your previous version.

### Corel WordPerfect

Please note that we do NOT recommend that you overwrite the new Amicus Attorney .WCM files because this will cause unexpected results. You should ensure that any customized macros are still accessible to those Master Documents requiring such macros.

### Microsoft Word

Because Word Master Documents each hold the macros necessary to run that individual template, it may be advisable to copy those existing Master Documents back, depending on the complexity of any customized macros they may contain. As noted earlier, the previous versions of your Master Document templates still exist under your old Amicus Attorney version folder in the "TeamX\Template\Document" folder on your Server.

#### **For those upgrading from Version III or earlier to Version V+ or Small Firm**

**Edition** : Old Word templates that you do not convert will still run, but some routines will no longer work including the following ones:

- The Save To Brad routines will not work because they are looking for the **AA32.ini** file rather than the **Aa50.ini** file.

If you wish to manually update this routine so that it will still run the old Save To Brad functionality, go into the macro *AmicusMerge* and search for the following line:

```
WordBasic.SetPrivateProfileString "Add Doc To File Brad", "File",  
DocumentName$, "aa32.ini"
```

The line above should be replaced with the line below:

```
WordBasic.SetPrivateProfileString "Add Doc To File Brad", "File",  
DocumentName$, "aa50.ini"
```

- New fields (i.e. new custom fields) will not be available to the template. Adding this functionality manually is more complex than the items above, but if you are familiar with writing macros, then refer to the AAFIELDS macro in the AMICUS.DOT template.

### Map Files in Amicus Attorney V+ and Small Firm Edition

The new default MAP files (WORD.MAP and WP.MAP) that reside in the Template\Document folder on the Server are backward compatible with previous variables, including custom fields. Existing WordPerfect templates that contain Extended Party Fields will be compatible with the new WP.MAP file, provided those existing templates were converted as noted earlier.

# HotDocs Master Documents

## Sample Master Documents

### Amicus Attorney Small Firm Edition

If you indicated that you are a HotDocs user during the installation/update of Amicus Attorney V+, sample **HotDocs 6** Master Documents will have been installed.

### Amicus Attorney V+

If you indicated that you are a HotDocs user during the installation/update of Amicus Attorney V+, sample **HotDocs 5** Master Documents will have been installed.

If the sample Master Documents (or your own Master Documents) do not match your current version of HotDocs, you may need to complete some additional steps as outlined below. For example, there were major changes made to the HotDocs document structure between HotDocs 5 and 6. The HotDocs 6 Master Documents are compatible for use with HotDocs 6.2 and higher, while the HotDocs 5 Master Documents are not.

Sample **HotDocs 6** Master Documents are available for Amicus Attorney V+.

- To use them in Amicus Attorney V+, copy them from the ...\\TEAM50\\Extras\\HotDocs 6\\Word and/or ...\\TEAM50\\Extras\\HotDocs 6\\WordPerfect folders to the ...\\TEAM50\\Template\\Document folder.
- To use them in Amicus Attorney Small Firm Edition, copy them from the ...\\AMICUS TEAM SF\\Extras\\HotDocs 6\\Word and/or ...\\AMICUS TEAM SF\\Extras\\HotDocs 6\\WordPerfect folders to the ...\\AMICUS TEAM SF\\Template\\Document folder.

**CAUTION:** These HotDocs 6 Master Document files will overwrite HotDocs 5 Master Documents with the same name.

## Upgrading HotDocs 5 or earlier Master Documents

### A. Remove existing Word macros

(This step is NOT necessary for HotDocs WordPerfect Master Documents.)

- 1 Ensure that no Team Members are using any HotDocs Word Master Documents in either Amicus Attorney or HotDocs.
- 2 Complete the following steps at a workstation or server on which Amicus Attorney V+ or Small Firm Edition, HotDocs 6 or higher, and your earlier version of HotDocs are installed,
- 3 If you are using Word 2000 or higher, ensure that Word's macro security level is set to either Medium or Low.
- 4 Ensure that your previous version of HotDocs is running
- 5 Launch Word.
- 6 Choose File > Open and open AAHD6UPDATER.DOT. In Amicus Attorney V+, this file is located in the ...\\TEAM50\\Extras\\Hotdocs 6 folder. In Amicus Attorney Small Firm Edition, this file is located in the ...\\AMICUS TEAM SF\\Extras\\Hotdocs 6 folder.
- 7 Follow the instructions on the screen. This process will remove the old macros from the firm's Amicus Attorney HotDocs Word Master Documents created in earlier versions of HotDocs.

## B. Convert Master Documents

In HotDocs 6 or higher, create a new Library. From Windows Explorer, drag and drop your HotDocs 5 or earlier Word and WordPerfect Master Documents into the new HotDocs Library. In HotDocs 6 or higher, open them for editing, and then save them. This completes their conversion. For more information, see the documentation that came with your HotDocs program.

## Using HotDocs 2005 or higher

**If your firm now uses HotDocs 2005 or higher**, users may continue to *generate* documents from HotDocs 6 Master Documents. Any Master Documents *edited* will be automatically converted to your current version of HotDocs.

We recommend that you convert the blank Amicus HotDocs 6 Master Documents to your current version of HotDocs. These blank Master Documents are utilized whenever HotDocs Master Documents are *created* in Amicus Attorney.

The blank Master Documents are HD6WORD.DOT and hd6wp.wpt. In Amicus Attorney V+, these files are located in the ...\\TEAM50\\Template\\Sysdoc folder. In Amicus Attorney Small Firm Edition, these files are located in the ...\\AMICUS TEAM SF\\Template\\Sysdoc folder. To convert them, create a new Library in your current version of HotDocs. From Windows Explorer, drag and drop them into the new HotDocs Library. In HotDocs, open them for editing, and then save them. This completes their conversion. For more information, see the documentation that came with your HotDocs program.

## For further information, contact



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