

Precedent Manager for MatterSphere: Advanced

Course Description

A 1-day follow-on course to extend skills for existing users of Precedent Manager.

Attendees will learn how to use Advanced Merge Fields and construct logic statements to further automate document production.

By the end of the day, attendees will have extended their skills to identify more complex field codes to fit business specific scenarios and use them effectively in precedent templates.

Learning Outcomes

By the end of the course, attendees will:

- Be able to create advanced precedents from scratch that conform to current company branding.
- Know how to identify and use advanced fields codes that relate to business requirements.
- Be able to design complex precedent templates with structured logic towards specific business goals.

Course Duration

The course is held over a single day and covers approximately 5 hours of instructor time, excluding breaks and lunch.

Prior Knowledge

- Attendees **must have** basic skills with Precedent Manager and be able to add simple stop-codes and merge fields from MatterSphere.
- Good skills with MS Word, including Styles and Formatting is required, prior to attending.
- An understanding of your company's processes and documentation requirements is useful, prior to attending.

Course Content

- Recap of Basic Concepts
 - Toolbar interface essentials
 - Default Templates & Text Only Precedents
 - Stop Codes
 - Merge Field Management

- Conditional Logic
 - IF Statements
 - Nested IF Statements

- Advanced Merge Fields
 - Prompts
 - Associate Prompts
 - Code Lookup
 - Other Lists / Search Lists
 - Formatting Switches

- Extended Topics
 - Excel Precedents
 - Tabular Data
 - Precedent Settings / Print Properties
 - Reporting on Merge Fields

Course Delivery Format

The session will be delivered on-site by a Fusion trainer, within your company's on-premise MatterSphere environment.

Training will be hands on, with a mix of instructor led demonstrations and workshop based exercises.