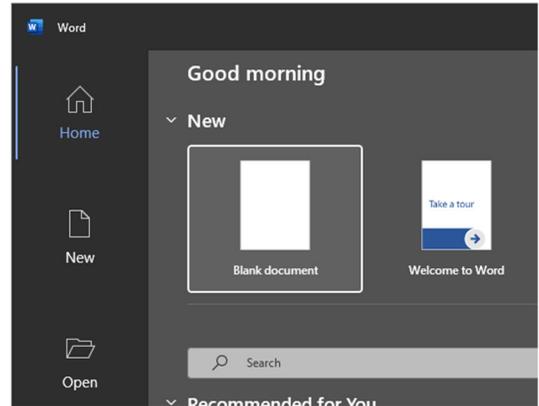
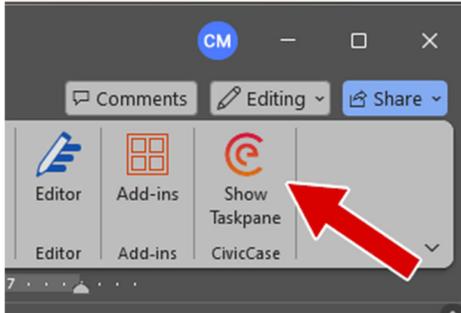


How to Generate a Document using the Word Add-in

Starting a instance of Word for the background Messaging Server

1. Open Microsoft Word and click on “Blank Document”.
2. Click on the Add-in “Show Taskpane” button.

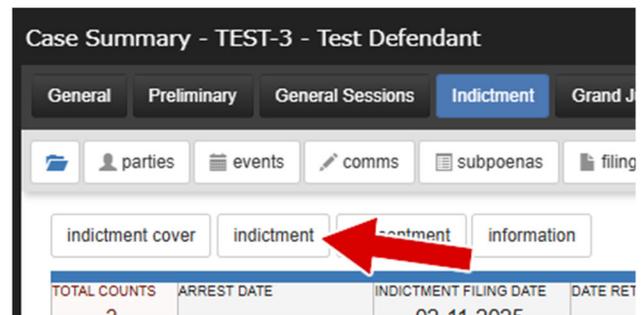


3. Log in to CivicEye within the task pane, just as you would if logging into CivicCase.
 - a. If the taskpane is showing a blank white screen or error, right click in that area and choose “Refresh”.
4. Now that you’ve logged in, you can leave this instance of Microsoft Word open in the background. This will be the messaging server that maintains a connection to CivicEye while you generate other documents. You may see a current case showing within the task pane but you can ignore it for now.

If you close this window but want to generate more documents, you will need to reopen Word & follow steps 1-3.

Generating an Indictment (and Presentment or Information if they’re available)

5. Now that you have a messaging server instance of Word open in the background, within CivicCase, find a case that you would like to generate an indictment for.
6. Go to that case’s Indictment tab, and click the “Indictment” button.
7. On the next screen click “Open Document in Word”.
8. At this point a new Word document should open containing your Indictment template.



If you have minimized the messaging server Word document, then the new template will be minimized as well.

9. On the Word document containing your template, click “Show Taskpane” as you did in step 2.
10. You should see a summary of the case details. If you are wanting to create an indictment that includes codefendants, you can toggle “Include related cases”.
11. Now press the blue button “Replace Template Tags”. At this point you can click the hamburger button (triple-line) to find the “Save” options.

