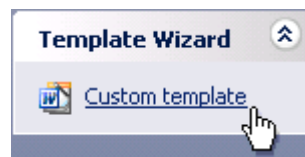


iLaw Custom Template Creator

iLaw Create Plug-in Packs for iLaw CK Case Management

The Custom Document Creator is the short step way to creating templates for file notes, letters and documents in iLaw. The *Custom Template Creator* allows you to position iLaw data form fields in Microsoft Word™ files so they are populated with iLaw file information for the selected client matter. It is opened from the document screen by clicking on the link in the 'Template Wizard' menu.



When the screen opens you will see that it has three sections.

1. Select Query:

This is the selection of the type of iLaw data to use such as Crime or Family fields

2. View sample parameters

You can select a client file to view a sample of the iLaw data that will be used

3. Query Results Preview

In this section you can view the sample iLaw data for the client selected.

1. Select Query. iLaw divides the information it retains into different sets of database records. These are each referred to as a 'Query'. In this section, select the query which will have the information you wish to be brought through on to the template you are creating.



The selection of the query is the most important process in this screen before you move on to creating your template in MS Word™. You do not have to complete Section 2 and 3 if you know the set of form fields you wish to use.

2. View sample parameters. This section lets you pick a file so that as you populate your template with form fields, you can see what data will potentially be brought through when used to create a document.

2. View Sample Parameters

Many document queries retrieve case, client or office specific information. Select a case below to see the data preview:

File Reference TEST001

Client Test. Jason

Office Manchester

3. Query Results Preview. The preview shows the value of each field of the file reference selected. This is useful for getting used to what information is available to create documents with and where it is.

3. Query Results Preview

Field Name	Preview value
ClientDetails	
ClientDetails.ClientDetails_Id	355216
ClientDetails.CaseDetails_Id	355214
ClientDetails.CentralClientDetails_Id	355215
ClientDetails.Client_Name	Test
ClientDetails.Client_Forename	Jason
ClientDetails.NI_No	NH 44 55 66 Y
ClientDetails.DOB	28/10/1988
ClientDetails.Closed	0

When you are happy that you have selected the right query, click on 'Create a template'.

Microsoft Word™ will open with the 'Custom template form fields' window positioned in front. You can either open a blank document or find a standard letter you may have created that now needs to be populated with form fields.

Each form field in the long list can be dragged and dropped onto a document or you can also double click on them with the cursor positioned where the field is to be placed. Any other text can be typed at this stage to form your template.

The 'Custom template form fields' window shows the Name and the Field Value which will correspond to the file reference selected. This acts as a reminder to the type of data that will be 'pulled through' on the template in the iLaw documents screen.



Note. As you drag and drop fields onto the MS Word™ page, make sure you enter carriage returns for each new line a field is to be positioned on.

Your Firm & Co.

LetterAddressee.Title LetterAd

LetterAddressee.Address1

LetterAddressee.Address2

LetterAddressee.Town

LetterAddressee.County

LetterAddressee.PostCode

Other.TodayVerbose

LetterAddressee.Salutation

Re : NextHearing NextHearingI
for NextHearing Reason

I am writing to confirm the deta
difficulties attending the venue

Yours Sincerely

NextHearing.FullName

Custom template form fields

An new instance of MS Word should now be open.
Using this copy of MS Word, create new template or open on of your existing document.

Next, drag the fields you require from the list below and drop them into Word at the point you require them.

When you have finished, click on the 'Finish' button > **Finish**

FileName	Field Value
Other.TodayVerbose	28th October 2011
Other.Today_DayOfMonth	28
Other.Today_MonthOfYear	October
Other.Today_Year	2011
Other.ClientFullName	Jason Test
DOB.DOB_Verbose	28th October 1988
DOB.DayOfMonth	28
DOB.MonthOfYear	October
DOB.Year	1988
DOB.DD	28
DOB.MM	10
DOB.YYYY	1988
DOB.DDMM	2810
DOB.DDMMYYYY	28101988
Case_FeeEarner.Staff_Id	335440
Case_FeeEarner.Initials	AC
Case_FeeEarner.FullName	ANDREW NOVA

Drag and drop your form fields onto the page and click 'Finish' when you have done. An explorer window shows for you to save your template in the templates folder.



Note. Do not save your template outside of the Template folder in iLawshared. It will not be accessible from the iLaw Mini Notes Document Processing screen.



Tip. You can create your own subfolders in the Templates area if you want to group certain templates together and avoid a long list of templates to choose from.