

Setting up Document Templates

You can create your own document and letter templates in iLaw so that relevant client data entered in iLaw is used in letters or documents created in the **Document Processing** screen. There are two methods for creating document templates depending upon the level of iLaw information you would like to use. Whichever method you use, you will need to have your own text ready to use as the basis for letters or a plan of how you want documents or file notes to look.

Method 1. Using the existing iLaw templates as the basis of new templates

Some letter templates are included as standard in iLaw but contain very basic client and office information. If you want to create some letter templates for the client and have the text ready to be copied into each template this method will ideal.

Requirements

- You will need to be able to navigate to the iLaw Shared folder situated on the server or PC that holds the iLaw database
- Any standard letter or document text that you want to use in templates

Method 2. Using the Custom Document Creator

This facility is standard for iLaw Professional users and can be purchased on for one or more iLaw CK users. It can be purchased and allocated to a nominated user or alternatively it can be used by the first person to access the screen.

It offers a very high level of iLaw form field inclusion and doesn't require you to navigate to the shared folder itself.

Requirements

- iLaw Professional or the Custom Document Creator iLaw Create pack
- Any standard letter or document text that you want to use in templates

Method 1. Using the existing iLaw templates as the basis of new templates

A good way to start creating templates is to navigate to the iLaw shared folder and identify an existing template that can be used as the basis for your new templates. If you have iLaw open, you will be able to see or check the name of your server at the top of the main menu window in order to locate the shared folder on your network.

Use Windows Explorer to navigate to the shared folder. The typical address you can type is

`\\SERVERNAME\ilawshared`

In the shared folder, open the templates folder. Each module is represented by a folder that contains any existing templates. The Custom folder contains templates that are available no matter what type of file you have selected in the Document Processing screen.

If the template you want to create is specific to a module such as Crime or Family then it should be created in that folder.

Any Microsoft Word™ file saved into the module folders or in the Custom folder will show in the Create Document screen in iLaw.

In the 'Custom' folder there is a 'Blank Letter to anyone' template. When you open this document you will see that there are some form fields for each element of the 'Letter Addressee' fields. You can save this letter template as another template (using the 'Save As' option). The new file will form the basis of your new template and you can now add the text for whichever type of template this will be.

Method 2. Using the Custom Document Creator

The Custom Document Creator is the short step way to creating templates for file notes, letters and documents in iLaw. The creator essentially allows you to create Microsoft Word™ files to act as templates, in which you position form fields that will populate with iLaw file information when produced for a client matter. The main use of the Custom template creator is to populate standard letter templates with address details that will get 'pulled through' onto the letter from a client or non client address selected in the iLaw document processing screen. 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. We will follow each section through as we create a letter template.

Select Query. iLaw divides the information it retains into different sets of database records. This is 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™. Section 2 and 3 of this screen allow you to check how form fields are categorized within each query.

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.

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
<input type="checkbox"/> ClientDetails	
ClientDetails.ClientDetails_Id	114460
ClientDetails.CaseDetails_Id	114459
ClientDetails.CentralClientDetails_Id	114444
ClientDetails.Client_Name	Smith
ClientDetails.Client_Forename	Kerry
ClientDetails.NI_No	NZ124453T
ClientDetails.DOB	03/06/1982
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 onto a document or you can also double click on them.

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 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.