

# Template Training

Version 11 and higher

Using templates to create documents in TrialWorks increases productivity and efficiency.

## Basic Requirements

Some of the basic fields that should be completed in TrialWorks for your Templates to work efficiently are as follows:

Tabs			
<u>Clients</u>	<u>Other Parties</u>	<u>Insurance / Liens</u>	<u>Caption</u>
<ul style="list-style-type: none"><li>• Name and Address</li><li>• Phone Numbers</li><li>• Date of Loss (Date of Accident)</li><li>• SOL</li><li>• DOB</li><li>• Case Facts</li><li>• Injuries</li><li>• Accident Location</li><li>• Party Name</li><li>• Gender</li></ul>	<ul style="list-style-type: none"><li>• Party Name</li><li>• Date Complaint Filed</li><li>• Service Date</li><li>• Answer Date</li><li>• Other Attorney</li></ul>	<ul style="list-style-type: none"><li>• Insurance Company Name</li><li>• Adjuster</li><li>• Policy No.</li><li>• Claim No.</li><li>• Policy Limits</li></ul>	<ul style="list-style-type: none"><li>• Plaintiff</li><li>• Defendant</li><li>• Case No.</li><li>• Court Name</li><li>• Judge</li><li>• County / Venue</li><li>• Room No</li><li>• Re</li></ul>

## Understanding Bookmarks

A bookmark is a placeholder for the information that will be brought in when the template is merged with the corresponding TrialWorks data field. For example, the bookmark Author corresponds with what you select on the correspondence detail window as the person who signs the letter.

## Creating Your First Template

### Step One: Identify Bookmarks

*Templates>List of Bookmarks (Print)* Print the list of available bookmarks so that you can refer to this list when you are deciding which bookmarks to insert into your document. Or, choose *Templates>List of Bookmarks (View)* to simply view bookmarks on key tabs.

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File Home Current Case **Templates** Reports User Tools Settings Admin Tools Help

List of Bookmarks Print List of Templates View List of Bookmarks Add/Edit Templates Libraries Template Packages

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NOTE: Fields denoted as: Field-Name are Multi-record Bookmarks

Case Bookmarks Client Bookmarks Other Party Bookmarks Caption Bookmarks More Bookmarks

Case Info Tab:

Caseld:	14	DateofRep:	4/2/2017
CaseTitle:	Civil Litigation Test Case	AcctNo:	000001
MasterClient/Payee:	Robert Philips	FileNo:	20160813
Attydiv:	Lead Atty	SignedContract:	<input checked="" type="checkbox"/>
RefAtty:	Referral Lawyer, Esquire	TypeofFee:	Contingent
RefAttyTwo:		CaseStatus:	2
RefAttyThree:		RefFee:	25%
Support:	Assoc Atty	Rainmaker:	Wanda Lawyer
SupportTwo:	Paralegal	Valuation:	\$100,000.00
SupportThree:	Legal Secretary	Liability:	Personal Injury
CaseNameAlias:		Division:	General Practice

Extra Info Tab:

Priors:	There were no priors incidents in this case.	Damages:	Metastatic disease Work loss
Synopsis:	Delay in diagnosis of cancer.	Extras:	This field is for additional information.
LiabilityMemo:	Failure to identify and treat suspicious mass.	Quick:	Quick Notes provide automated pop-up warnings

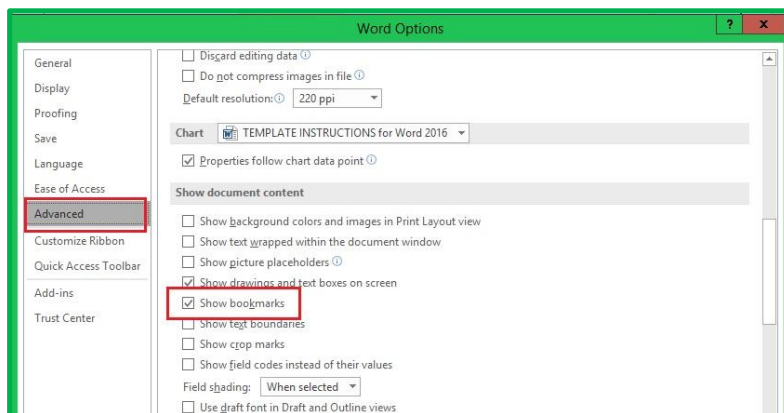
Date Info Tab:

PTC	03/05/2016	RJ:	08/08/2015
CalendarCall:	03/02/2016	NoteOfIssue	06/24/2015
Mediation/Settlement:	04/05/2016	Status:	10/25/2014
Arbitration:	05/06/2016	Discovery:	11/27/2015
TrialDate:	10/08/2017	DiscoveryCutOff	02/27/2017
SecondTrialDate	11/08/2018	CaseManagementConference:	09/25/2014
DateofFiling:	07/21/2014	FirstClientMeeting	03/16/2013
InformationalStmt	07/24/2014	IMECompleted	03/22/2016
AddlPartiesJoined:	09/13/2014	InformCourtOfMediator	12/04/2016
MediationDeadline	06/24/2016	DispMotionsSch:	06/25/2016
PltfExpertsDisclosed	02/13/2016	NonDispMotionsSch	07/25/2016
DefExpertsDisclosed	03/13/2016	BindingArbitrationDate	05/06/2016
AppealDate	10/14/2017	MotionsToLimine	07/24/2016
JuryInstSpVerdictDeadline	01/19/2018	Expert:	02/24/2014
JuryInstructions	11/17/2017	LayWitness	02/25/2014
StatementOfCase	06/25/2017	Deposition:	05/21/2014
DispMotionsheard	08/08/2017	SJMotion:	09/23/2016
NonDispMotionsheard	09/08/2017	Exhibits:	10/17/2016
WitnessExhibitDeadline	03/16/2017	TrialBrief	04/27/2017



## Step Two: Enable Microsoft Word

Ensure that you will be able to see your bookmark placeholders (looks like a bold letter “I”) by clicking on **Tools, Options, View**, and ensuring that the bookmarks box is checked. File>Options>Advanced>Show Document Content:

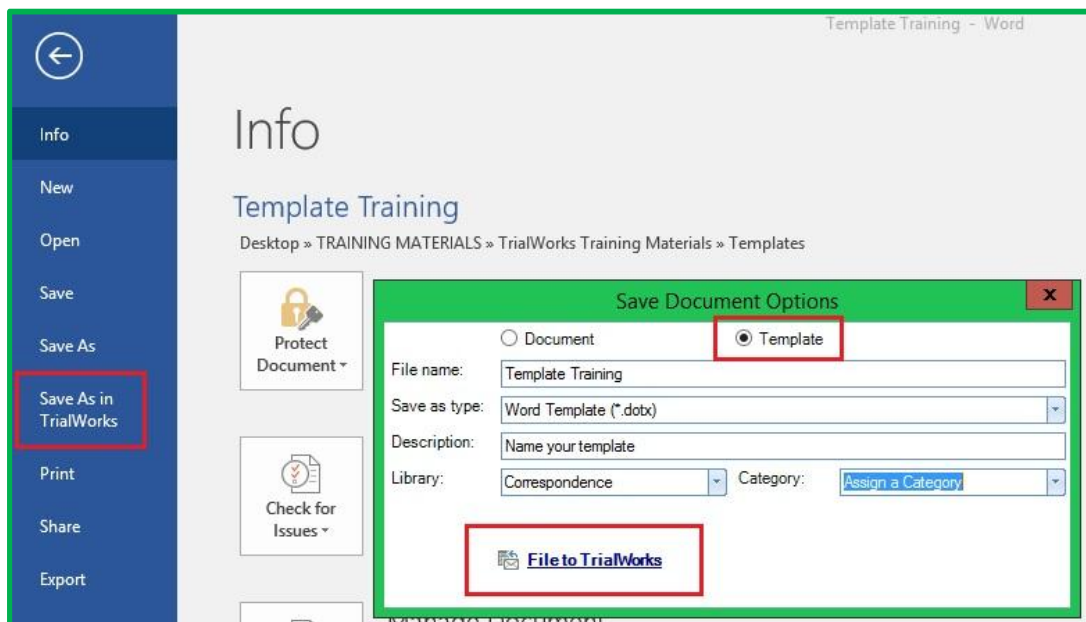


## Step Three: Transform an Existing Document into a TrialWorks Template

Open the document that you want to change into a template. Go to File>SaveAsinTrialWorks and select Template.

- **File Name:** Template Name
- **Save as Type:** Defaults automatically to Word Template
- **Description:** Pre-fills out with file name
- **Library:** Drop down list of TrialWorks Template Libraries
- **Category:** Choice of currently used template categories for each library



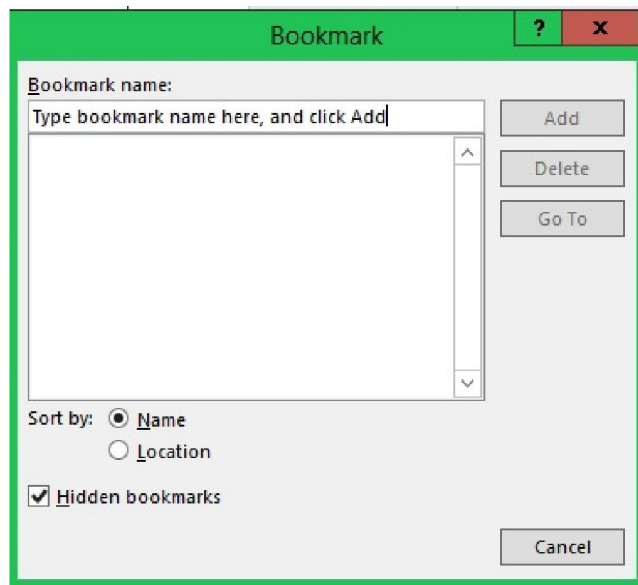


#### Step Four: Bookmark the Template

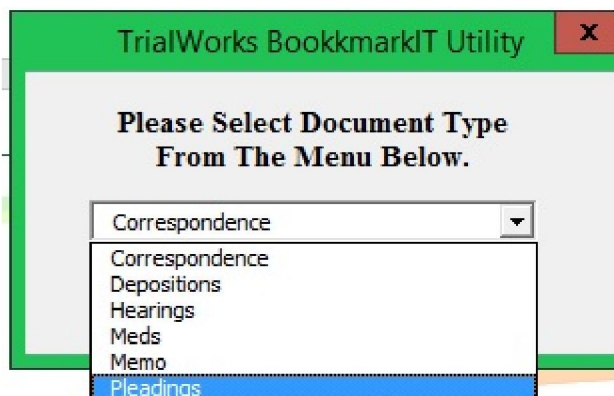
Determine where your first bookmark will be placed. For example, Client's name, address, or salutation. Place the cursor at the first character of the text that will be replaced by your bookmark. There are 3 ways to insert a bookmark:

1. Use the Shortcut: If you hit **ALT** and the letter **"I"** simultaneously, and then release the keys and hit the letter **"k,"** the Bookmark window will appear (see image below.) In the Bookmark window, type the name of the bookmark you select to replace the text. Click **ADD**. A placeholder will appear that looks like a bold capital **"I"**. (Note: the Bookmark window is NOT a pick list but is a list of all bookmarks entered in that document).
2. Use Toolbar Insert: Click *Insert*, then *Bookmark*. The same entry window referred to in (1) will appear. Enter your bookmark and click on **ADD**.





3. Use BookMarkIt Utility: From the toolbar, click *Add-Ins*, then click on *TrialWorks Bookmarks*. The TW Bookmark Utility will appear (please contact TrialWorks if this option is not visible). Select the type of Template you are making and click on *List Bookmarks*. A pick list will appear from which you can pick the necessary bookmark. Move the pick list to the side and you can leave it open to pick additional bookmarks. Close BookMarkIT when finished. Be sure to delete the text that you intend to be replaced when you merge the TrialWorks data with your template.



#### Step Five: Special Notes and Comments



- **Using the same bookmark multiple times within a document.** If you are **repeating** a bookmark within the same document, the second time such bookmark is inserted, you **must number the subsequent uses**. Example: author (first time), author1 (second time), author2 (third time), and so on.
- **Bookmarks do NOT use spaces.** They are also not case-sensitive. You may only use the bookmarks appearing on the list that you printed up in Step 1. (for example, BarNo). If you do not see your bookmark on the list, your information is not going to appear.
- **Look at Samples.** Take a look at the **templates** that were sent with your **TrialWorks software** to see which **bookmarks** we used when creating them (to view the bookmarks within a document hit **ALT + “i” then “k”**).
- **Use Prompts.** To **insert** prompts for information not represented by TrialWorks data fields, enter a prompt, and as the document is assembled, the user will be prompted for such information with a pop-up window. Prompts **MUST** be set off by [square brackets.]

**EXAMPLE:** [prompt, type person with whom client has appointment scheduled].

You are now ready to use your template to create documents! When you generate a document, the template you just attached will now become part of your list of available templates on the appropriate corresponding tabs.

### *Editing Templates*

Users can edit existing templates through the TEMPLATE LIBRARY. On the menu bar at the top, click on *TEMPLATES*, then choose on the appropriate LIBRARY. Find the template that you want to edit, and click on the EDIT button which is the *pad and pencil icon*.



Description	Link	Category	Docket Days	Reminder Days	Docket Activity	Billable Hours	Task
Appointment Reminder Ltr to Client	<a href="#">Appointment Reminder Ltr to Client</a>	General	0	0		0	
Blank Firm Letterhead	<a href="#">Blank Firm Letterhead</a>	General	0	0		0	
Bookmarked Letter sample	<a href="#">Bookmarked Letter sample</a>	Bookmarked	0	0		0	
Client letter of Representation	<a href="#">Client letter of Representation</a>	Client	10	2	Follow Up	0	
Demand Letter Condo	<a href="#">Demand Letter Condo</a>	General	0	0		0	
Demand Letter HOA	<a href="#">Demand Letter HOA</a>	General	0	0		0	
Enclosing Draft Complaint for Client Verification	<a href="#">Enclosing Draft Complaint for Client Verification</a>	General	0	0		0	
Filing 50 without Hearing Request	<a href="#">Filing 50 without Hearing Request</a>	General	0	0		0	
Form 21 WCC	<a href="#">Form 21 WCC</a>	General	0	0		0	
Letter of Representation - DEF	<a href="#">Letter of Representation - DEF</a>	General	0	0		0	
Letter of Representation to Adverse Carrier	<a href="#">Letter of Representation to Adverse Carrier</a>	General	0	0		0	
Letter of Representation to Client's Carrier	<a href="#">Letter of Representation to Client's Carrier</a>	General	0	0		0	
Letter to Attorney re Past Due Disc Resp	<a href="#">Letter to Attorney re Past Due Disc Resp</a>	General	0	0		0	
Letter to Carrier	<a href="#">Letter to Carrier</a>	General	0	0		0	
Letter to Carrier Rejecting Offer	<a href="#">Letter to Carrier Rejecting Offer</a>	General	0	0		0	
Letter to Clerk Filing Default	<a href="#">Letter to Clerk Filing Default</a>	General	0	0		0	
Letter to Clerk Filing Summons & Complaint	<a href="#">Letter to Clerk Filing Summons &amp; Complaint</a>	General	0	0		0	
Letter to RMVC Filing Title to Real Estate	<a href="#">Letter to RMVC Filing Title to Real Estate</a>	General	0	0		0	
Medical Bills to Adjuster for payment	<a href="#">Medical Bills to Adjuster for payment</a>	General	0	0		0	
Medical Release	<a href="#">Medical Release</a>	General	0	0		0	
Sample Correspondence Templat	<a href="#">Sample Correspondence Templat</a>	General	0	0		0	
Sample Correspondence Templat	<a href="#">Sample Correspondence Templat</a>	General	0	0		0	

The user can then either edit the existing template, or create a new one based on that template.

- If it is the existing template that needs editing, click on *NO* and the template will appear in WORD for editing.
- If the user desires to create a new template, click on *YES*. Name the new template and TrialWorks will automatically save and attach the new template to the same library with that new name. It will then open in WORD as the new template, available for editing.

**HINT:** Creating new templates based on previous templates is an easy and efficient way to add to your template library, rather than creating templates from scratch.

### *Samples without Bookmark "I" Displayed:*

If you don't like the "I" bookmark symbol, and instead, would like to have the actual name of the bookmark in the place of the data field, simply **highlight the name of the bookmark**, hit **ALT** and the letter **"I"** simultaneously, and then release the keys and hit the letter **"k,"** the Bookmark window will appear, and select the name of the bookmark in the Bookmark window. When you click **ADD**, the highlighted text will be surrounded by [brackets] and your bookmark will be in its proper place.

For example,



[JURISTITLE ]

[PLAINTIFF ]	Employee/Claimant	[CASENO ]
v.		[DOA]
[DEFENDANT ]	Employer/Carrier	

**TITLE OF YOUR DOCUMENT**

Type the body of your pleading here.

I CERTIFY that a copy of the foregoing has furnished by Electronic Mail Only this  
     the day of     , 2018 to the above-named address(s).

+	[AUTHOR ]
	[FIRMNAME ]
	[FIRMADDRESS ]
	[FIRMCIY], [FIRMSTATE ] [FIRMZIPCODE]
	[FIRMPHONE ]
	ATTORNEY FOR EMPLOYEE/CLAIMANT





## Pronoun Bookmarks

The use of gender-specific pronouns is available in templates by using the proper bookmarks. Remember, the pronoun bookmark is looking for the gender in the **Contact Record**, so be sure that the gender field is completed:

The screenshot shows a software interface with a ribbon menu (File, Home, Current Case, Templates, Report) and a toolbar. A 'Personal' form is overlaid on the main interface. The 'Personal' form has the following fields: Gender (dropdown), SSN (text), DOB/DOD (text), and Language (dropdown). The 'Entity' dropdown is set to 'Female'. The 'Miscellaneous Info' section has the following fields: FirmName (#Name?), FirmAddress (#Name?), FirmPhone (#Name?), FirmFax (#Name?), Spronoun (he), Ppronoun (his), Opronoun (him), OtherSpronoun (he), OtherPpronoun (his), and OtherOpronoun (him). The 'Investigation Tab' section has the following fields: Damage (text), DamageDollar (text), PoliceOfficer (ttR), PolicePrecinct (ACME Insurance), PoliceAddress (44 Main St), PoliceNumber (4145553200), PoliceReportNo (ttE), PoliceDate (9/9/2011 11:13:21 AM), RoomNo (text), and PartNo (#Name?).

For example, if the template requires “he” or “she,” then the “spronoun” bookmark should be used.

Additionally, if the pronoun is coming from the Other Party Tab, then the “opronoun” bookmark should be used.



*Samples with Bookmarks Displayed*

Pleading:

<b>JURISTITLE</b>	
<b>PLAINTIFF</b>  v.  <b>DEFENDANT</b>	Employee/Claimant  Employer/Carrier
<b>CASENO</b>  <b>DOA</b>	
<b>TITLE OF YOUR DOCUMENT</b> Type the body of your pleading here.	
I CERTIFY that a copy of the foregoing has furnished by Electronic Mail Only <u>this</u> <u>th</u> day of _____, 2018 to the above-named address(s).	
	<b>AUTHOR</b> <b>FIRM NAME</b> <b>FIRM ADDRESS</b> <b>FIRMCITY</b> <b>FIRMSTATE</b> <b>FIRMZIPCODE</b> <b>FIRMPHONE</b> ATTORNEY FOR EMPLOYEE/CLAIMANT



**FIRMNAME**

By: **AUTHOR**

**EMAIL**

Attorney ID No.: **BARNO**

I  
II  
I

Attorneys for Plaintiff [prompt.Type 's' if multiple

Plaintiffs and/or click OK]

**PLAINTIFF**

v.

**DEFENDANT**

**JURISTITLE**

**CASENO**

By:

**AUTHOR2, ESQUIRE**

Counsel for Plaintiff [prompt.Type 's' if  
multiple Plaintiffs and/or click OK]

Date: **DATE**



Correspondence:

**DATE**

**ADDRESS**

Re: **RE**

Dear **SALUTATION**:

Enclosed is a copy of the Complaint, which we intend to file on your behalf. Please review for any changes or corrections that should be made. Also, please sign the Verification where indicated, and return the Verification only to me in the enclosed envelope.

If you have any questions, please do not hesitate to contact me. Thank you.

**CLOSING STATEMENT,**

**AUTHOR**  
**TITLE**

**USER INITIALS** **TYPIST**

[prompt] **CC**  
[Type  
"cc." if  
applica  
ble]



*Your Firm's Letterhead / Logo*

HEADER

AUTHOR  
EMAIL  
USERDIRECTDIAL

DATE

ADDRESS

**Re: RE**

Dear SALUTATION:

Enclosed please find our firm's Standard Fee Agreement for your review and approval.

Should you have any questions, please do not hesitate to contact me. If this document meets your approval, kindly execute and return to me in the self-addressed, stamped envelope also enclosed herein. Thank you.

CLOSINGSTATEMENT,

AUTHOR1  
USERTITLE

USERINITIALS/TYPIST

Enclosures:

*Your Firm's Footer*

FOOTER

