

Shoot Out: Templates, Numbering & Macro Packages

Presented by the
User Support Peer Group

Payne Group

Maritta Terrell

Softwise Innova

Michelle Spencer

iCreate

Damian P. Burdette

Legal MacPac

Cindy Foellmer

The perspectives offered are solely that of the respective speakers as the products are used at their firm (with their unique setup and needs). It may not reflect all features and capabilities of the product. Please speak to the vendors for greater detail or clarifying information. They're all located in the Vendor Hall.

Payne Group

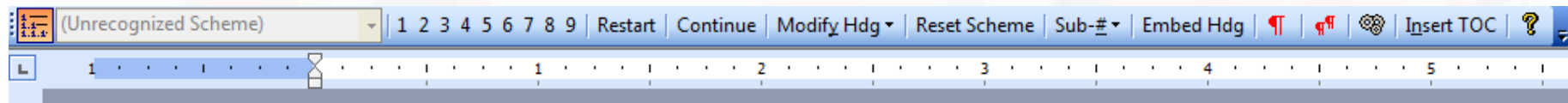


Maritta Terrell

Lloyd Gosselink Rochelle & Townsend, P.C

- Maritta Terrell, Trainer & Help Desk Specialist.
- Austin, Texas
- 38 attorneys, 85 users, 1 office

Payne's Numbering Assistant toolbar for Office 2000 to 2003



Filter Numbering Schemes By:

All Numbering Schemes

Default Scheme

Available Numbering Schemes:

General Numbering (1a)
General Numbering (2)
General Numbering (2a)
General Numbering (3)
General Numbering (3a)
Legal Numbering (2 Levels)
Legal Numbering (3 Levels)
Legal Numbering (4 Levels)
LG Agreement Headings

Description:

Basic legal numbering scheme, with first three levels being legal-style, and the remainder general numbering.

Options:

- Automatically number each paragraph
 Wrap text to margin on all levels
 Double-space numbered paragraphs

Insert Comment Indicating Scheme in Use

(image is not to scale)

1. Heading 1. This is how this heading will appear when inserted into the document...
 - 1.1 Heading 2. This is how this heading will appear when inserted into the document...
 - 1.1.1 Heading 3. This is how this heading will appear when inserted into the document...
 - (a) Heading 4. This is how this heading will appear when inserted into the document...
 - (i) Heading 5. This is how this heading will appear when inserted into the document...
 - (1) Heading 6. This is how this heading will appear when inserted into the document...
 - a. Heading 7. This is how this heading will appear when inserted into the document...
 - i. Heading 8. This is how this heading will appear

Capture New Scheme

Update Selected Scheme

Delete Selected Scheme

I can click on the 1, 2, 3, etc to get the Heading

- 1. Style Heading 1
 - 1.1 Style Heading 2
 - 1.1.1 Style Heading 3
 - (a) Style Heading 4
 - (i) Style Heading 5

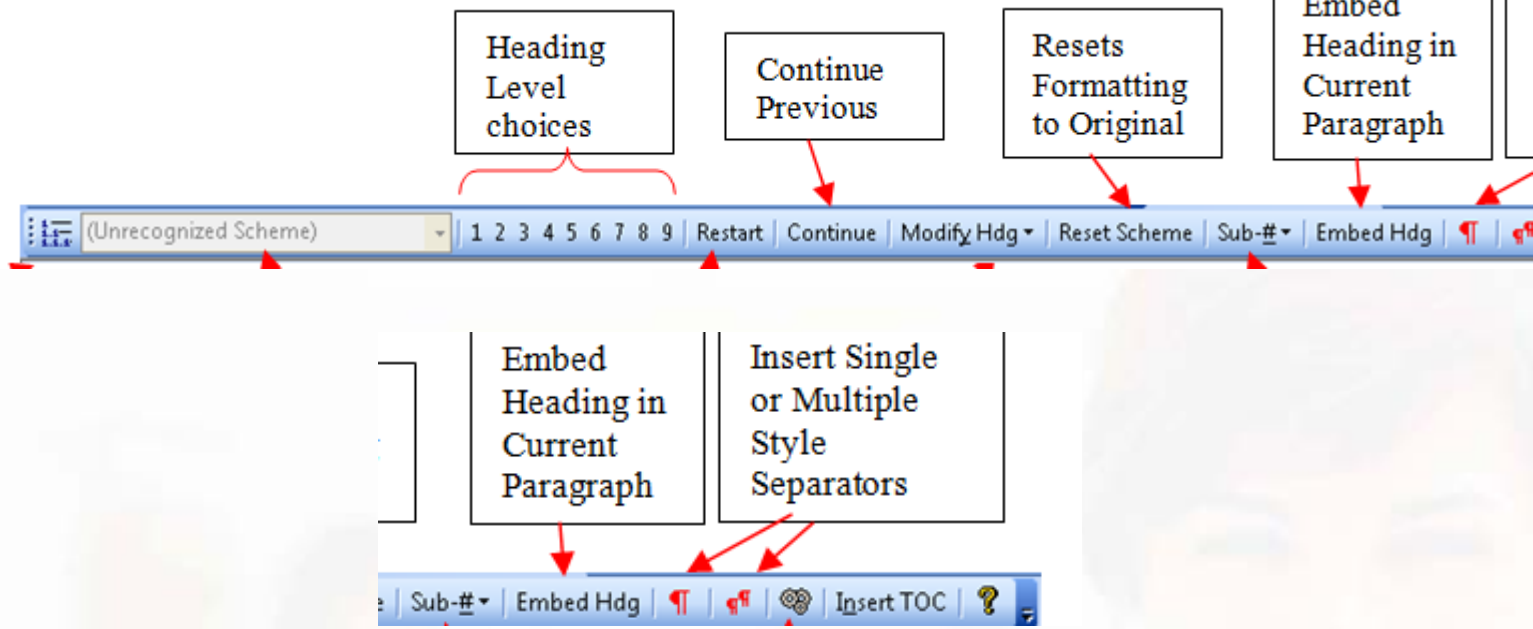
Etc..

Payne Consulting Group Numbering Assistant

Press Ctrl + Alt + 1, Ctrl + Alt + 2, and so on, for each numbered Heading level desired.

Don't show me this reminder in the future.

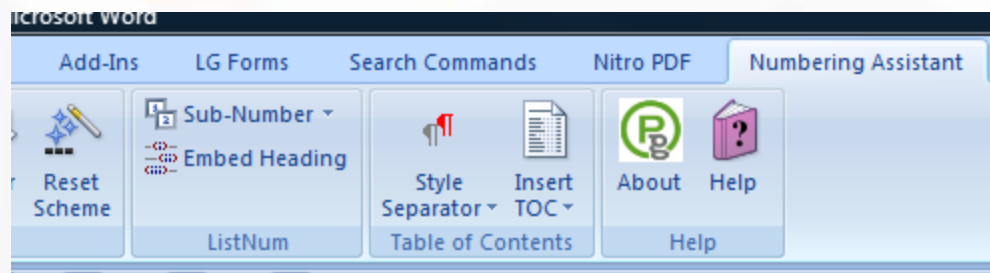
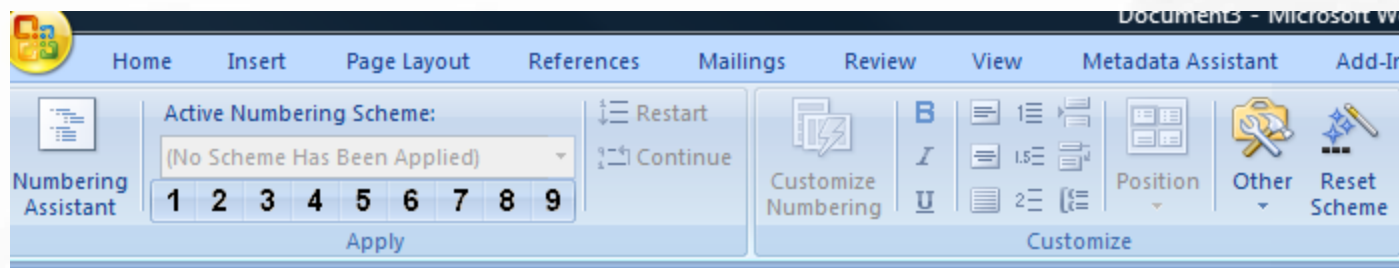
OK

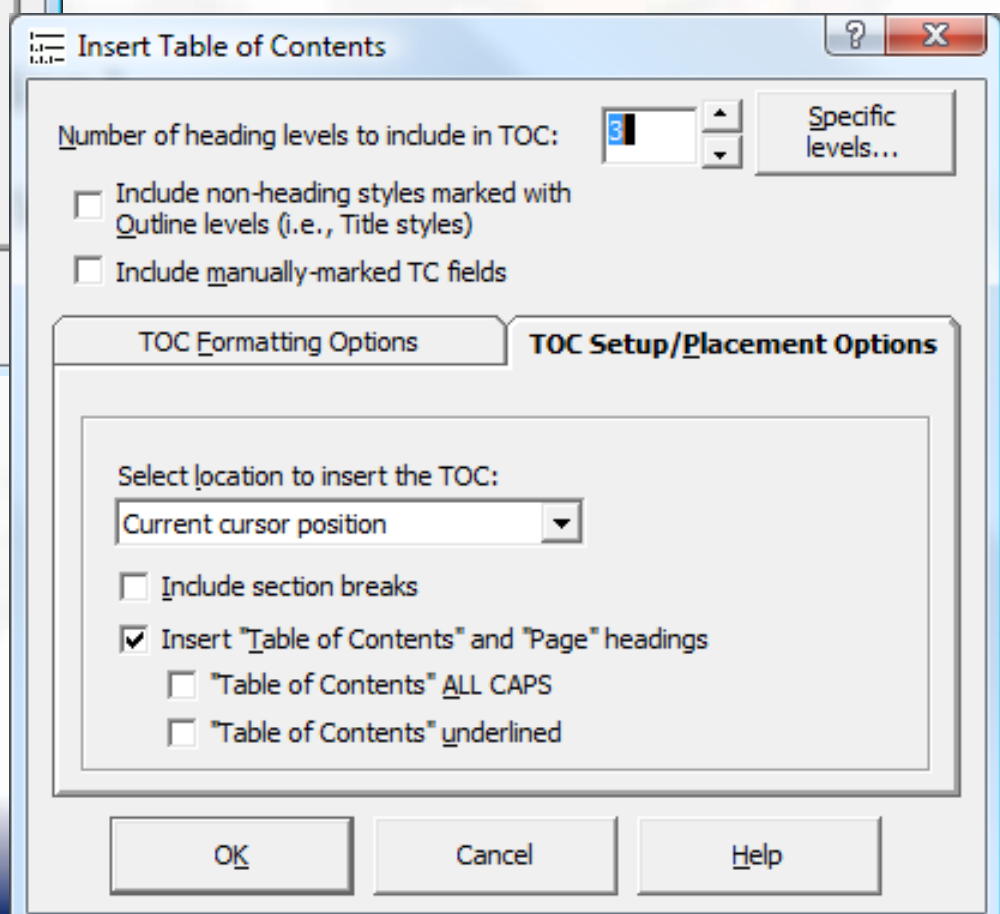
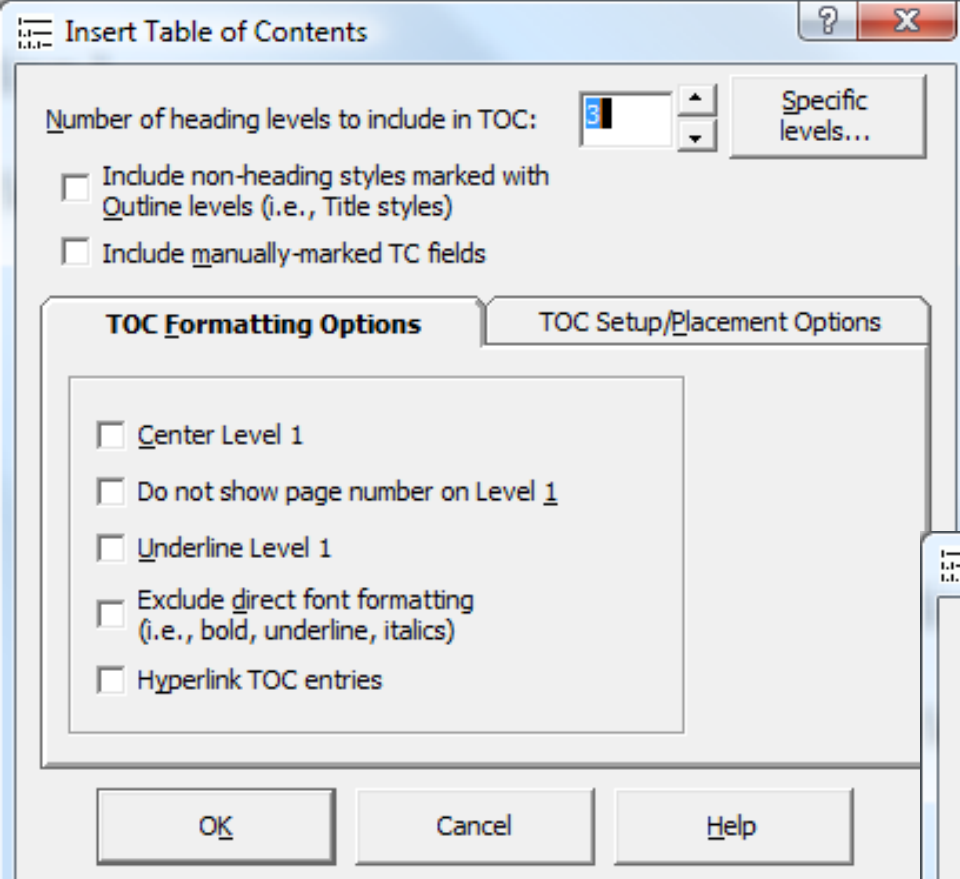


The Numbering Assistant toolbar has many options – to reset the scheme, restart or continue the numbering, and insert Style Separators, and more.

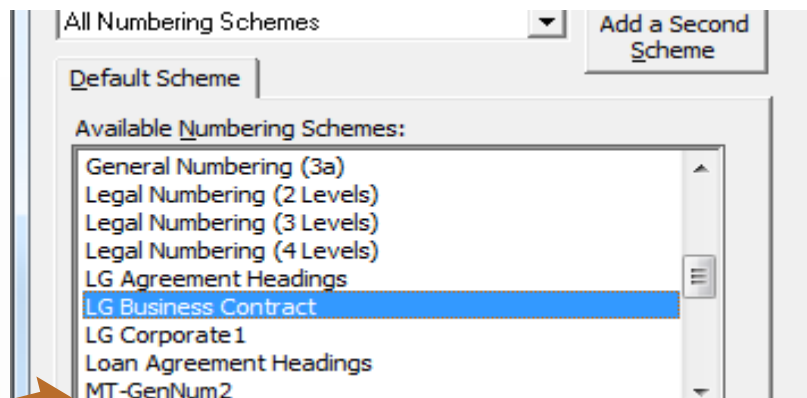
What's unique to MacPac and Payne is the “Embed Heading” in the paragraph.

Payne's Numbering Assistant for Office 2007





To insert the Table of Contents, just click on the Insert TOC icon on the toolbar, make your choices, and click OK



Section 1. Heading 1. This is how this h
when inserted into the docum

1.1 Heading 2. This is how this h
when inserted into the docum

(a) Heading 3. This is how
appear when inserted in

(i) Heading 4. This i
will appear when
document...

1) Heading 5.
heading wi
inserted int

(a) Head
this 1

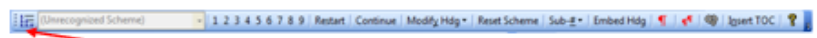
Create your own Numbering Scheme:
New Schemes can be created and saved.
An existing scheme can be modified, or a
new one can be captured as well.

Training

- Users have to attend the Styles 101 (introduction and Style basics) before coming to the Numbering Assistant class (or demonstrate understanding of Styles)
- The class is usually about 20 minutes demonstration, and then 20 minutes hands-on practice.

Quick Reference Card is just a 2-page hand out (created in-house)

Numbering Assistant Toolbar Quick Reference Sheet

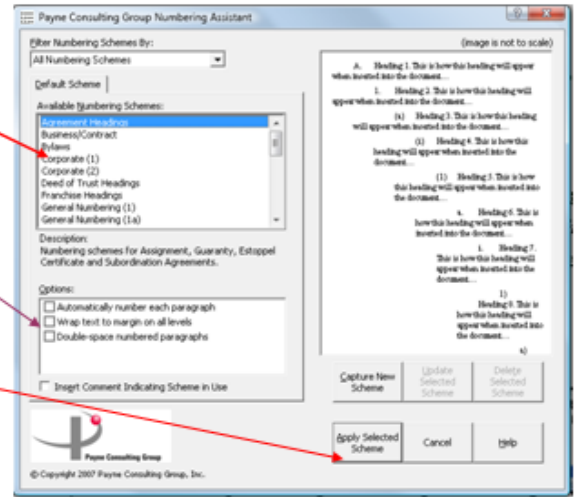


Click on the **Show Numbering Assistant** on the Toolbar.

Search through the various numbering schemes to find the one that is **CLOSEST** to what you need (you can easily modify it).

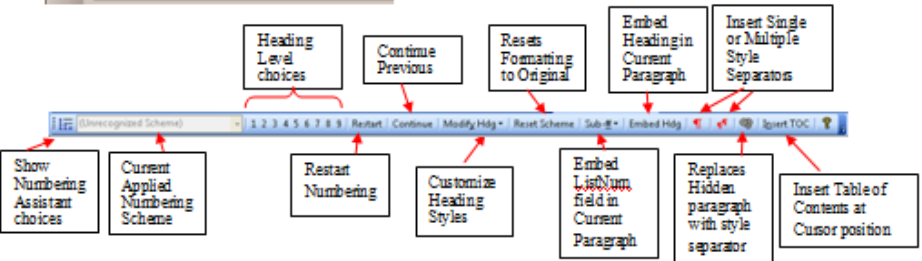
Choose what options you want for your numbering scheme

Click on **Apply Selected Scheme** to apply it to the document you are in.



Click on **1 – 9** respectively on the Toolbar for the heading you need. OR, you can press **Ctrl + Alt +** the number of the Heading you want to use.

You can modify the numbered heading styles using the commands displayed under the **Modify Hdg** button on the Numbering Assistant toolbar. The first item (Show Customize Numbering Dialog Box) will help you change the numbering options (i.e., change A to I)



The following keystrokes can be used with this Toolbar:

ALT+SHIFT+N = Brings up Numbering Assistant options

(even if the Toolbar is not 'seen', it opens up the Numbering Assistant program)

CTRL+ALT+Enter or **CTRL+ALT+H** = *Style Separator (Hidden Paragraph Mark)*

CTRL+ALT+# (1 through 9) = Applies Heading 1 through 9, respectively

ALT + Y = Brings up the *Modify Heading options*

ALT + N = Brings up the "Insert Table of Contents" Option box

Use the *Style Separator* mark to separate the Heading from text that is going to come right after the Heading.

TOC CREATION: Click on *Insert TOC*, choose your options, and click OK. Your TOC will be created.

Create your own Numbering Scheme:

You can create new schemes in one of two ways: modify an existing scheme and capture it as a new scheme; or, open a document that contains a scheme that you would like to use as your own, and capture it as a new scheme. Once you have one of those done, do this: Choose Numbering Assistant and click **Capture New Scheme**. In the **Name of Scheme** box, type the name of your scheme, and press **TAB** to move to the **Description of Scheme** box. Type a description to fit your new scheme. Click **Continue**. Then Click OK on the message that comes up.

Share your own Numbering Scheme.

Send the document that has the numbering scheme you want to share to someone else in the firm. They open up the document and then call up the Numbering Assistant Toolbar Scheme (Ctrl + Alt + N). Choose **Capture New Scheme** and give it a name they can remember it by.

Payne's Forms Assistant (for templates)

- Payne has a Forms assistant template that works very well inside Word.
- It allows you to lookup recipient information from any MAPI-compliant data source (Outlook, GroupWise, InterAction, etc.) while simultaneously providing you with the ability to store frequently used recipients lists for easy retrieval.

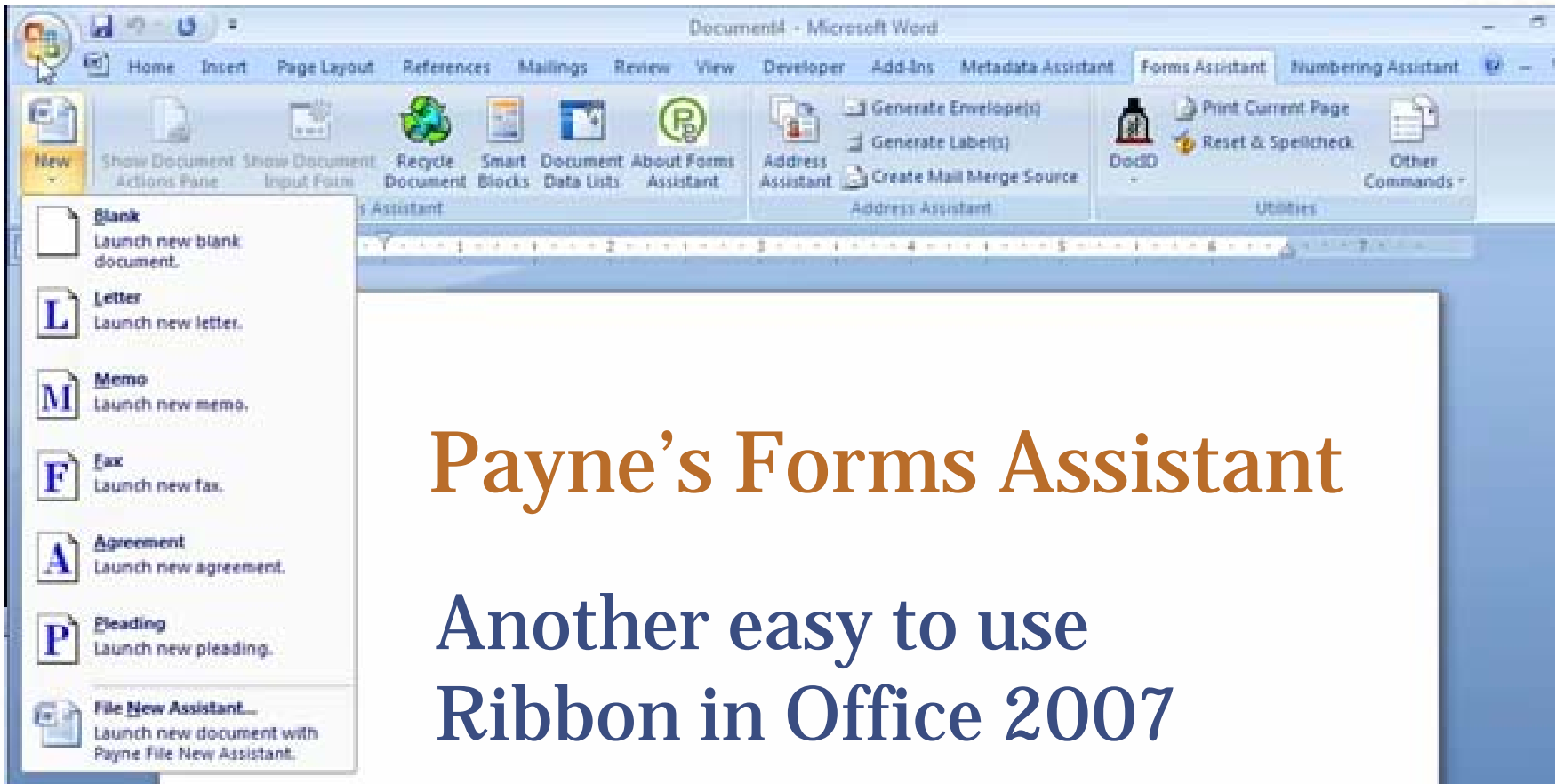
Forms Assistant

The Forms Assistant is a template based document automation utility designed to allow you to quickly create letters, memos, faxes, agreements and pleadings based on the documents your create day in and day out.

The Forms Assistant runs from within Microsoft Word and is customized to include your firm's logo, letterhead and other specific information.

Payne Forms Assistant – Some Product Features

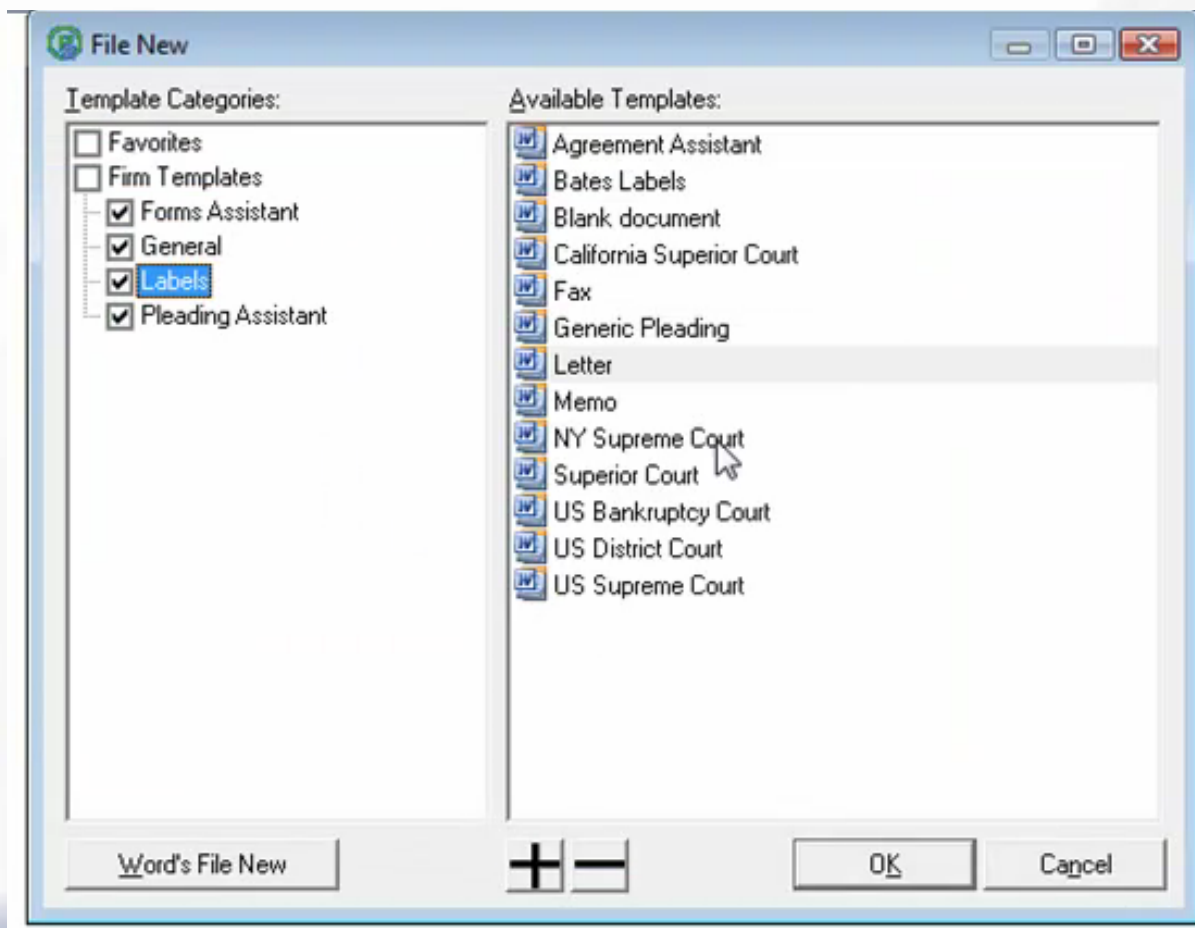
- Contains letter, memo, fax, pleading, agreement, address and label templates
- Integrates with document management systems
- Lookup recipient information from any MAPI-compliant data source
- Save and retrieve recipient information
- Ability to redisplay input box to make document changes from one central location
- Agreement Assistant to create long, complex documents
- Pleading Assistant to create, save and reuse pleading captions for any jurisdiction
- Address and Label Assistants to quickly create custom labels



Payne's Forms Assistant

Another easy to use
Ribbon in Office 2007

Can list all firm templates, or just have your own Favorites list



Can work from an Input form for any of the templates, or use the Task Pane

The option is there to save the recipient list; add recipients to Outlook, etc. It's linked to the content controls with Contacts

Title

Company

Delivery Address

Telephone

Fax

E-mail

Clear

Recipient Type
 To cc bcc

Add to Recipient List

Add To Outlook

Recipient List

Recipient	Address	Type
Ms. Jane Smith, ABC Company	111 3rd Ave, Seattle, WA 98101	To
Karen Walker, ABC Company	5421 Front Street, , Somewhere, , Snoqual...	cc
Fred Jones, New Company	555 Landers St, Portland, OR 12345	cc
Garnet Byers	#44-5688 152nd St, Surrey BC V3S3K2, Can...	To

Save Recipients

Get Recipients

Remove/Edit

Remove

Remove All

Letter Salutations

Dear Ms. Smith and Garnet: ▼

Auto-insert Salutation Generic (No Salutation)

The option is there to save document data (information) for shells of letters, forms, etc.; and you can also save paragraphs, graphics, etc. for reuse in other documents.

Letter Input Form

1: Recipient Details
 2: Document Options
 3: Sender Details

Sender Details

Sender

Sender Lookup: Martin, Sara
 Name: Sara Martin
 Title: Business Paralegal
 Initials: sm
 Direct Dial: 503-555-9284
 Direct Fax: 503-555-2222
 E-mail Address: sm@demo.com
 Letter Closing: Very truly yours,
 Letterhead Office Location: Seattle

Recent Senders
 Gilman, Karen
 Byers, Tara
 Martin, Sara

Add to Sender List

Letterhead Options
 Name Title Credentials
 Direct Telephone *
 E-mail Direct Fax

Signature Options
 Title

Sender List

Name	Telephone	Fax Number
Sara Martin	503-555-9284	503-555-2222

Remove Sender Remove All Senders

Save Document Data Get Saved Document Data Get Last Document Data Reset Form OK Cancel

Utilities

Forms Assistant

Smart Blocks

Firm Smart Blocks

My Smart Blocks

My Smart Blocks

Disclaimer

Recently Used

ilta09

leading technology | optimizing value

Leading Technology | Optimizing Value

Softwise Innova



Michelle Spencer

Bracewell & Giuliani LLP

- **Michelle Spencer, Training Manager**
Austin, Texas
 - Approx. 400 attorneys, 900 users, 10 offices
- **Used Innova while at Brown McCarroll LLP**
 - Austin, Texas
 - Approx. 200 attorneys, 400 users, 5 offices

Background

- **Early adopter in 2003**
- **Migrating from WordPerfect to Word**
 - Standardization
 - Using Word Styles
- **DMS Integration**
 - Client/Matter Numbers
 - Document ID
- **SQL-based**
- **Friendly User Interface**
- **Ease of Maintenance**

Third-Party Integrations

- Interwoven
- GroupWise
- InterAction
- RightFax
- Deltaview

Interface in 2003

Innova Menu



Numbering Toolbar

Define/Select
Numbering Format

Create/
Update TOC



Change Active
Design

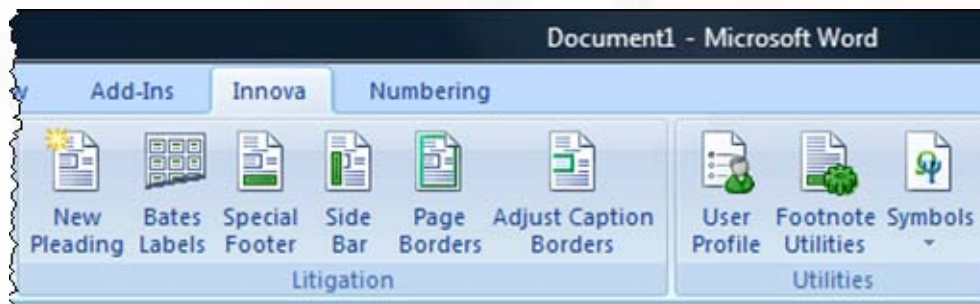
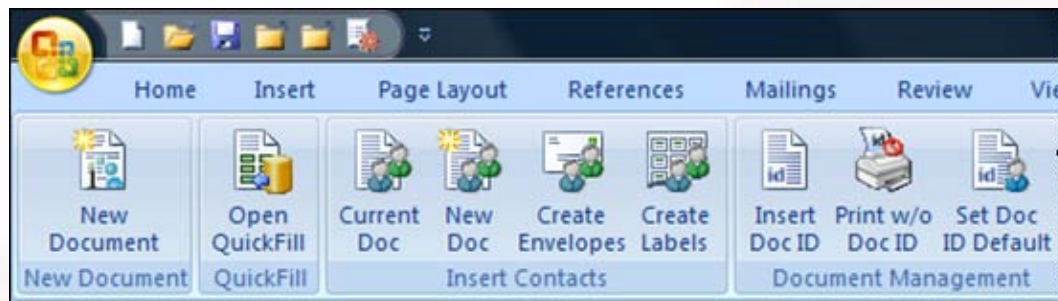
Apply Heading # Level

Promote/
Demote Level

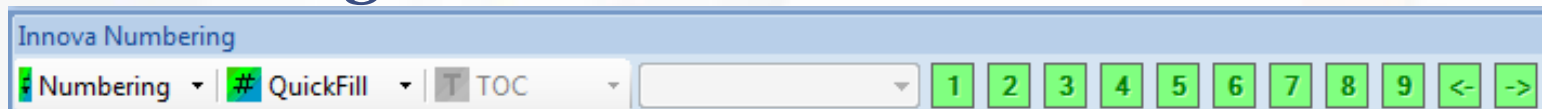
Numbering
and TOC
Utilities

Interface in 2007

Innova Ribbon



Numbering Toolbar



QuickFills

- **Numbering**

- Preloaded with 8 Public Schemes
- Personal Schemes
- Can be shared
- Native Word Styles
- Can create from Heading Styles in existing documents

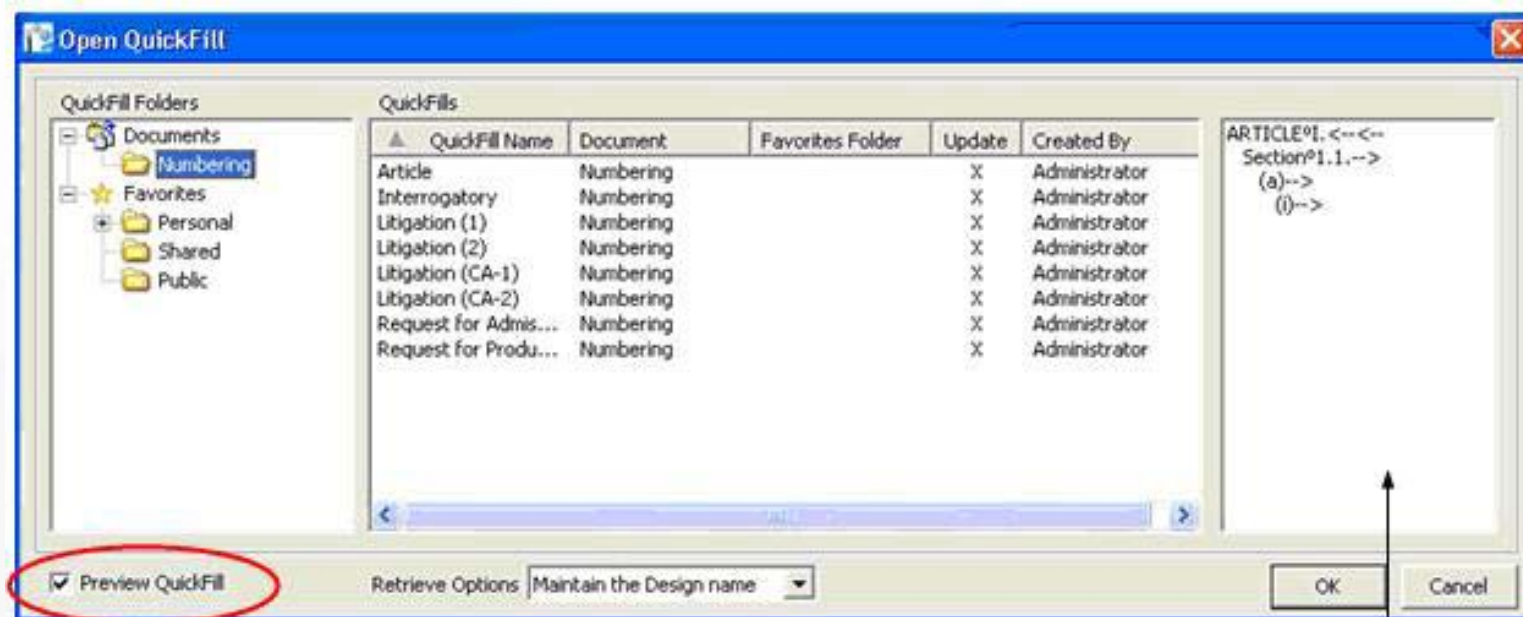
- **Document**

- Fill in a dialog once and reuse it over and over
- Use a Letter QuickFill to fill out a Memo
- Contact information is dynamically linked to Outlook or InterAction
- Assistants LOVE them!!!
- Can be shared

WOW!



Numbering Simplicity



Preview
Pane

Numbering Simplicity

The screenshot shows a document editor interface. On the left is a navigation pane with a list of styles: Title, Heading 1, Heading 2, Heading 3, Heading 4, Heading 5, Heading 6, Heading 7, and Heading 8. The main document area displays a multi-level list under the heading 'HEADING DESIGN':

- I. THIS IS AN EXAMPLE OF THE LEVEL 1 STYLE. THIS IS AN EXAMPLE OF THE LEVEL 1 STYLE.
- A. This is an example of the Level 2 style. This is an example of the Level 2 style.
- 1. This is an example of the Level 3 style. This is an example of the Level 3 style.
- a. This is an example of the Level 4 style. This is an example of the Level 4 style.
- i. This is an example of the Level 5 style. This is an example of the Level 5 style.
- (A) This is an example of the Level 6 style. This is an example of the Level 6 style.
- (1) This is an example of the Level 7 style. This is an example of the Level 7 style.

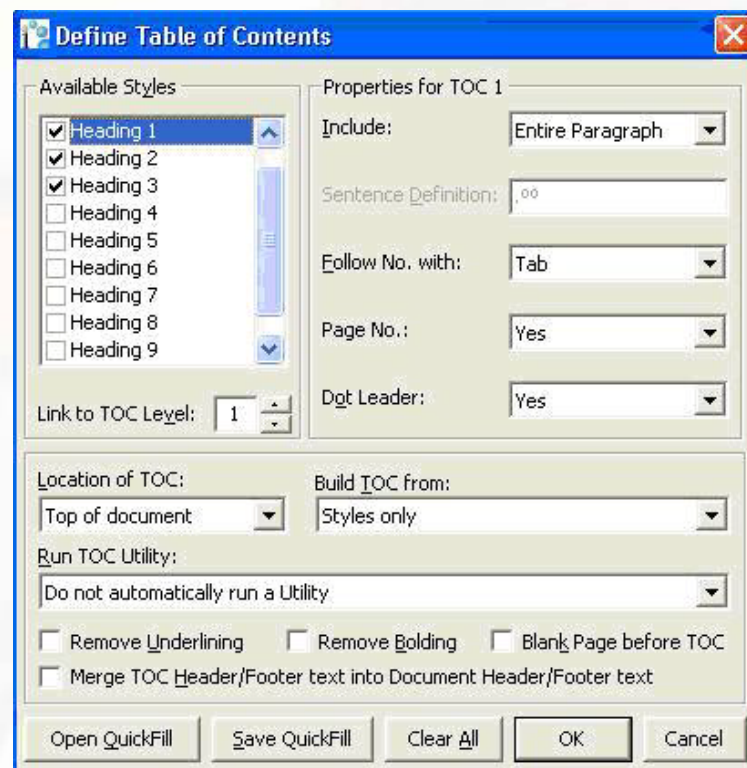
Overlaid on the right is the 'Define Numbering' dialog box. It has a title bar with a close button. The 'Document Designs' section shows 'Heading' selected in a list, with 'Add New', 'Remove', 'Rename', and 'Clear' buttons. The 'Numbering Information' section includes:

- Level 1: Text Before No.: (empty), Multi-Level (checked)
- Level 2: Numbering Style: I, II, III, IV, V ...
- Level 3: Text After No.: .
- Level 4: Follow No. With: Tab
- Level 5: Style That Follows: Body Text 2

 At the bottom, there are checkboxes for 'Restart After Higher', 'Right Align', and 'Legal Style Numbering', along with buttons for 'Conform Font for Styles in this Design', 'Number Font', 'Open QuickFill', 'Save QuickFill', 'OK', and 'Close'.

TOC Creation

- Pick your location
- Decide what to include
 - Style and Level
 - Portion of Heading
 - Styles and/or TOC Codes
- Options to remove Font Formatting
- Sets up TOC Page
- Option for Cover Page
- More QuickFills!!!



Document Creation

The screenshot shows a 'New Document' dialog box with a menu bar containing 'File' and 'View'. On the left is a tree view of folders under 'Templates', including Administration, Bankruptcy, Commercial, Corporate, Human Resources, Information Services, Litigation, and Work in Progress. A 'Favorites' section is also visible. The main area is a table listing templates with columns for Name, Date Modified, and Size.

Name	Date Modified	Size
Innova Certificate of Service	6/2/2006 11:35:46 AM	24
Innova Fax	6/2/2006 11:35:24 AM	12
Innova Letter	8/9/2006 4:41:04 PM	2
Innova Letter (Litigation)	6/7/2006 2:31:42 PM	21
Innova Letter (Multi-Office)	6/2/2006 11:34:56 AM	12
Innova Memo	6/2/2006 11:35:12 AM	12
Innova Pleading	12/29/2002 11:47:06 AM	0
Innova Smart List (Sample)	6/12/2006 10:23:40 AM	0
Innova Verification (Attorney)	6/2/2006 11:36:04 AM	12
Innova Verification (Corporate)	6/2/2006 11:36:16 AM	12
Innova Verification (Executor)	6/2/2006 11:36:32 AM	12
Innova Verification (Individual)	6/2/2006 11:36:46 AM	12

At the bottom of the dialog are four buttons: 'New Blank Doc', 'Open QuickFill', 'New Doc', and 'Close'.

Document Dialogs

- Familiar Interface
- Location field
- Client/Matter fields
- Send to Fax option
- QuickFill buttons

The screenshot shows the 'Innova Fax' dialog box. It features a blue title bar with the text 'Innova Fax' and a close button. The main area is divided into two columns. The left column contains four contact selection fields labeled 'To:', 'From:', 'CC:', and 'BCC:', each with a small icon and the text '[Insert Contact]'. Below these is a larger 'Re:' field. The right column contains a 'Location:' dropdown menu set to 'Boston', and three text input fields labeled 'Call, if problems:', 'Total Pages:', and 'Client/Matter:'. The 'Client/Matter:' field has a small '...' button to its right. At the bottom of the dialog, there is a row of six buttons: 'Contacts', 'Open QF', 'Save QF', 'Send to Fax', 'OK', and 'Cancel'.

Contacts Viewer

- Familiar Interface
- Links
 - E-mail
 - Personnel Database
 - CRM Database
- Dynamically Linked



Document Management Features

Innova Document Manager Administrator

Document Manager
Interwoven DeskSite 8.0-8.2 (EA)

Doc ID Options

Default Location: Every Page

Default Layout: DocID

Allow Location Change (for individual documents):

- Every Page
- First Page Only
- No Doc ID
- Last Page Only
- End of Document

Update Doc ID

Initial Save: Ask Always

Open: If Exists

Save: Never

Print: Never

Save As: Always

Layouts Save Close

Insert Doc ID

Doc ID Location

- No Doc ID
- Every Page
- First Page Only
- Last Page Only
- End of Document

Doc ID Layout

LibraryNumberVersion

LIB 99999v.9

OK Cancel

Training/Support

- Initial training
- Train basics of Numbering, QuickFills and TOCs in 1 hour
- Train Documents, Pleadings and QuickFills in 1 hour
- Attorney use

Administration

- Initial setup and training
- SQL-based
- Contacts
- Personnel
- Client/Matter Data
- Maintenance of templates
- Support Portal

Reference Information

- www.softwise.net
- Third Party Compatibility Grid
www.softwise.net/SoftWise/products/InnovaGrid.pdf



ilta09

leading technology | optimizing value

Leading Technology | Optimizing Value

Esquire iCreate

ESQUIRE
Innovations, Inc.

Damian P. Burdette

Taylor, Porter, Brooks & Phillips

- Damian P. Burdette,
Information Technology Manager
Baton Rouge, LA
- 80 Attorneys, 170 Users, 1 Office

Background of Macro Packages

- Office 2003 Rollout in Spring '04
 - Another Macro purchased for that deployment
- Summer '06 Firm changes logo and branding
 - Branding change leads to all letterhead templates changing
- Decided to revisit market for options
 - April '07 iCreate, iDocID and iRedLine were deployed

Top 6 Required Features

- Intuitive User Interface
- Ease of administration
- Ease of Template Creation and Modification
- A Numbering Suite that is build on Word's Native Numbering
- Integration with Outlook Contacts
- Responsive Technical Support

Selection Process of a Package

- In anticipation of the upcoming changes we visited with vendors at the '06 ILTA Conference
- Determined which vendors we wanted follow-up demos from
- Involved IT staff in the demos, especially the helpdesk/trainer
- Picked final candidate for in-house evaluation

Deployment Situation

- Not an image update or large scale update
- We removed the previous product and installed iCreate, iDocID and iRedline using push technology
- Actual silent install deployment scripts given to us by Esquire. Very easy to deploy with the scripts
- Updated the images as needed and now part of standard image
- Template and database updates to local PCs occur doing login or manually with sync utility

Training

- Train the Trainer was provided by Esquire after the backend deployment
- Training for the staff occurred the week prior to the iCreate deployment
- Staff participated in classroom based training that last 1 to 1½ hours
- Document producing attorneys were trained on a one-on-one basis followed the deployment
- Follow-up floor support and short one-on-one training with staff following the deployment

Application Integration

- iCreate Contact Management integration with Outlook, but also integrates with GroupWise, Interaction, Notes. Contact Ease integration coming in a future release.
- IDocID DM Integration with Interwoven FileSite and DeskSite, but also integrates with OpenText, WORLDDOX and NetDocs

End User Reaction

- Overall acceptance was great
- Ease of use was remarked on in the majority of comments
- Some of the success would have to be credited to the users' familiarity with Word
- Minimum follow up training was needed

Features – Template Customization

- Template creation and modification is relatively easy
- VBA knowledge is helpful, but not necessary to create new templates
- 95% of template creation and maintenance is performed in-house. Occasionally we will outsource a dialog box change or advanced template creation to Esquire

Features – Numbering Suite

- iHyperstyles Numbering (part of iCreate) offers a numbering suite tied to Words native numbering
- Appears as a toolbar in 2003 and a ribbon in 2007
- Simple to customize a scheme and apply it from the toolbar or keyboard shortcuts
- A large percentage of our users utilize the feature while others think they know better and can do without it... But they'll eventually all come around!

Working Offline

- iCreate utilizes an Access DB which is copied down during Synchronization. This allows users to use iCreate while away from the office

End-User Customizations

- By utilizing the iEncore feature, users can save commonly used fill-in information for the templates
- Can build personal numbering schemes and share them with the firm
- Our advanced users take advantage of these functions

Continued Education

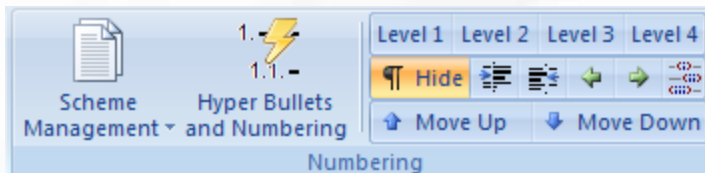
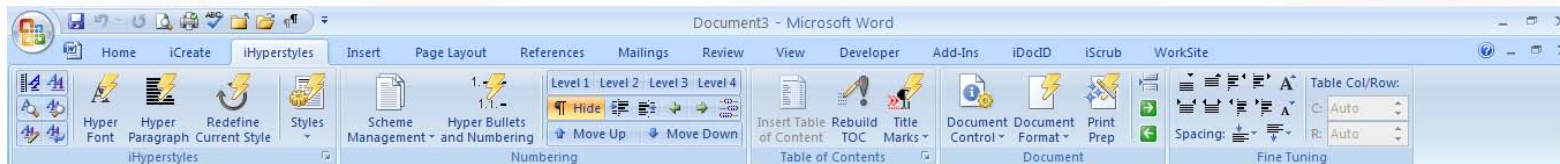
- Short Captivate videos have been created on a wide range of topics and posted to our help website
- Non-mandatory training classes are offered on specific topics and are kept under 30 minute sessions
- Most common topics are Numbering, TOC and iHyperstyles

Firm Favorite Features

- Numbering Suite
- iEncore for quick fill-in of commonly used information
- Outlook Contact Connectivity – especially to their attorney's contacts

Firm Favorite Features

Numbering Suite Toolbar and Ribbon



iEncore - 2003

iEncore Profile

Name
John Smith

Client Matter
1111 00001

Ok Cancel

iEncore List

Tools

Local iEncore Entries for Letter

Client No.	Matter No.	Description	Last Modified Date/Time	Author
1111	00001	John Smith	7/16/2009 - 8:45:38 AM	Train 1

Show Global Delete

Ok Cancel

Users can share iEncore
Fill-ins with the firm

Show Global

iEncore - 2007

iEncore [Close]

Name:

Description:

Client Number: ...

Matter Number: ...

Allow everyone to use this entry

iCreate 7 [Close]

Client No.: ... Template: (All) [v] Show Public Entries

Matter No.: ... Author: (All) [v] Only Show My Entries

Name	Template	Client #	Matter #	Description	Modified	Author	Public
iCreate Implementation...	Letters	77700	0002	Letter detailing the imple...	6/17/2009 8:1...	Rabinowitz, Davi...	No
iCreate Training	Letters	33400	0001	Letter to new client	6/15/2009 9:0...	Rabinowitz, Davi...	No
Tim Raines vs. Margot ...	Pleadings	77700	0002		6/17/2009 8:1...	Rabinowitz, Davi...	No
Staff Meeting	Memos	33400	0006		6/17/2009 8:1...	Alexander, Merle	No
Henderson Deposition	Fax Cover Sheet	88800	0002		7/16/2009 9:4...	Rabinowitz, Davi...	No
Transcripts	Fax Cover Sheet	77700	0002		7/16/2009 9:4...	Rabinowitz, Davi...	No
Goren Discovery	Fax Cover Sheet	88800	0001		7/16/2009 9:4...	Rabinowitz, Davi...	No
Robert Goren vs. Elisa...	Pleadings	88800	0001		6/17/2009 9:0...	Rabinowitz, Davi...	Yes
ILTA Conference	Letters	99900	0001	Letter about ILTA present...	6/17/2009 8:4...	Rabinowitz, Davi...	Yes
iCreate Training	Memos	33400	0005		7/16/2009 9:4...	Rabinowitz, Davi...	Yes

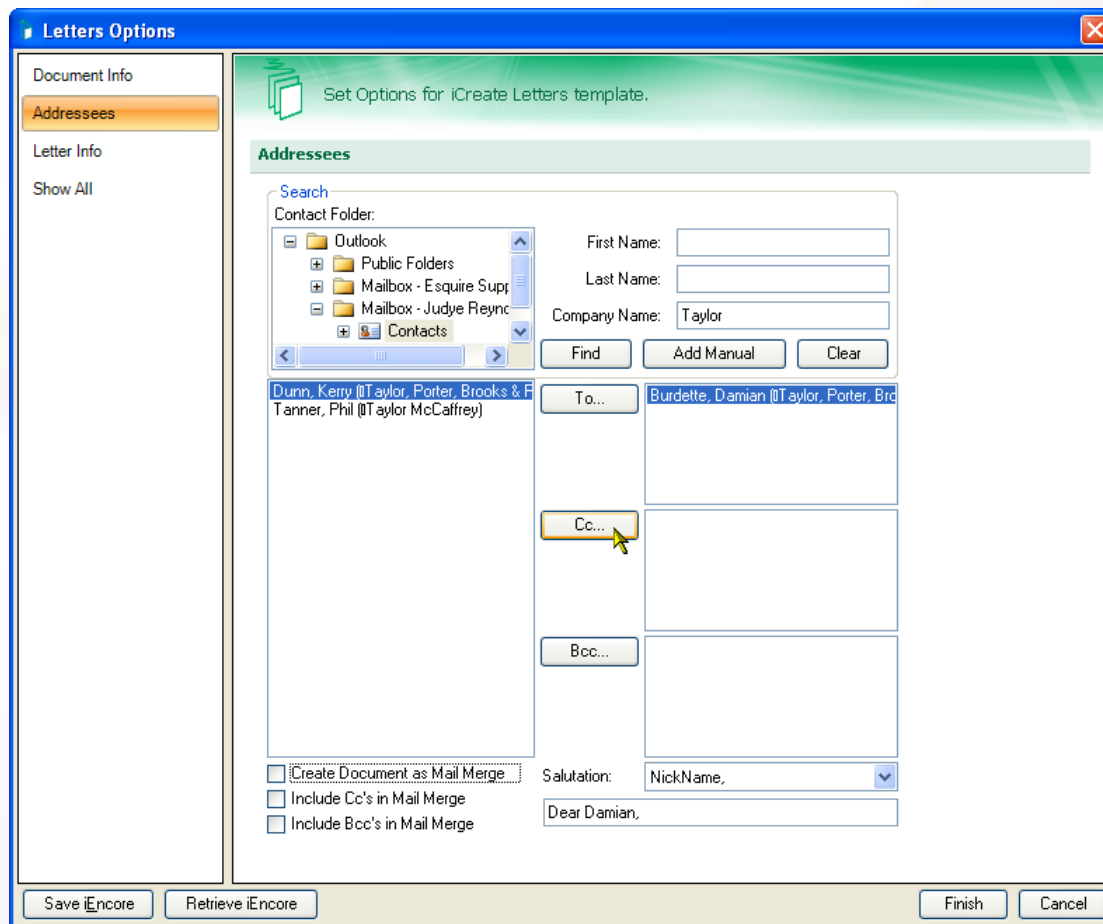
Author: [v] Typist: [v]

Outlook Contact Connectivity - 2003

The image displays three overlapping windows from Microsoft Outlook 2003:

- Letter Template:** A window with tabs for Document Info, Addressees, and Letter Info. It features fields for Addressees, CC, and BCC, along with an iCreate logo and an iEncore button.
- All Public Folders-Attorney Information:** A search window with a menu bar (File, View) and toolbars. It has two tabs: Fast Find (active) and Advanced Find. The Fast Find section includes input fields for First Name (containing 'harry'), Last Name, and Company Name. Below these are dropdown menus for Time (set to 'none') and When (set to 'yesterday'), and a checkbox for 'All Contacts'. On the right are buttons for 'Find Now', 'New Search', and 'Close'. The Results section is empty, and the 'Contacts to insert:' list contains 'Philips, Harry J.'. The status bar at the bottom reads 'DAMIAN.BURDETTE'.
- Select Folder:** A window showing a tree view of folders. The folders listed are: Mailbox - Damian P. Burdette (expanded), Calendar (1), Contacts (expanded to show Personal), Deleted Items (57), Drafts, Inbox (13), Journal, Junk E-mail [7], Notes, Outbox, Sent Items, Tasks, and Public Folders. On the right are buttons for 'OK', 'Cancel', and 'New...'.

Outlook Contact Connectivity - 2007



Wish List

- Easier creation and editing of the dialog boxes for the templates
- Easier way to make iHyperstyle schemes and Numbering schemes global
- Better Synchronization utility. The current one works fine, but you have to have Word and Outlook, if Word is the email editor, closed when you run the sync tool.

ilta09

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The Sackett Group Legal MacPac



Legal MacPac
Custom Templates • Macros • Styles

Cindy Foellmer

Vedder Price P.C.

- Cindy Foellmer, Software Analyst
- Chicago, IL
- 263 Attorneys, 473 Users, 3 Offices

Macro Package Selection Process

- MacPac 9.x beta partner in 2000
- For migration from WordPerfect to Word 2000, wanted a template/macro package to assist in standardizing templates and numbering schemes
- Also wanted the ability to be able to customize and maintain templates and numbering in-house

Feature Requirements

- In-house maintenance and customization
- Standardization of templates and numbering styles
- End user ease of use
- Responsive Technical Support

Deployment

- New Windows 2000/Word 2000 image
- MacPac installed as part of base image
- Template and database updates pushed to user pcs using Zenworks during login

End User Training

- Train-the-trainer provided by MacPac during initial install
- Secretaries received 5 days of training for all applications
- Approximately 3-4 hours spent on MacPac templates and numbering
- Two attorney classes (View/Print only and Editing Documents)

Integrated Applications

- Docs Open 3.9.6
- MacPac Contact Integration with GroupWise for Letters, Memos and Fax
- Workshare 4.5
- DocXtools

End User Reaction

- Wow, this is easy to use
- Loved numbering, especially continuation styles because they brought uniformity to the document and cut down on searching for styles
- Templates organized based on Practice Area
- Template special macros

Template Customization

- Administrative Partnership Programs provides on site admin training for customizing and developing as well as support
- Template creation, maintenance and modification very easy
- MacPac assistance needed only for special macros or complex templates
- VBA knowledge not required

Numbering Customization

- Numbering creation, maintenance and modification very easy
- Enhances Native Word Numbering
- 68 firm schemes to choose from
- Easy to choose scheme and modify, if necessary

Working Outside Office

- MacPac is maintained using a database, template and boilerplate files
- For laptop users, all files are stored on the local machine
- Users may also access MacPac via Citrix or terminal server

End User Favorites

- Users can save favorite templates
- Users can save favorite Pleadings
- Users can set favorites authors and author preferences for letter, memo and leadings

Continued Education

- On-demand refresher classes
- Class duration depends upon request
- Most requested refresher class is MacPac Numbering

Firm Favorites

- MacPac Numbering
- Underline Last Line of Paragraph Macro (Awesome for Pleadings)
- Scheme Macros
- Contact Integration with GroupWise
- Attach to
- Reuse

Wish List

- Easier way of changing from one template to another
- Dynamic Document Assembly
- Author Preferences for all Templates (including Vedder Price templates)

q&a