



# LegalBar Administration Class Agenda

## DAY 1, MORNING

### Module 1 CoreRelate LegalBar Admin Settings

**Objective** Be able to manage CoreRelate settings

Goal 1 Set up Companies and Offices

Goal 2 Create Stationery

Goal 3 Set up and initialize Default Author Preferences

Goal 4 Set up File Stamp

### Module 2 Author Preference Management

**Objective** Be able to set up Author Preferences in CoreRelate

Goal 1 Customize an author preference set

Goal 2 Create multiple author preference sets for a user

### Module 3 Word LegalBar Settings

**Objective** Know what is managed by the LegalBar.ini and Registry settings

Goal 1 Understand all Word LegalBar Admin settings

Goal 2 Be able to configure and deploy Word Admin settings to users

### Module 4 Managing the Firm Styles Guide

**Objective** Understand Styles and Themes

Goal 1 Review of native Word styles

Goal 2 Review of using LegalBar for styles and numbering

Goal 3 Review of native Word themes

**Objective** Be able to customize the Firm Styles Guide

Goal 1 Planning Firm Styles

Goal 2 Create and modify Firm Body Text and Title styles

Goal 3 Create and modify Firm List Number styles

Goal 4 Create and modify Firm Outline schemes

Goal 5 Create and modify Firm Style Sets

Goal 6 Customize Administrative Settings for Firm Styles Guide



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LegalBar and Assemble-It  
are part of the CoreRelate Framework





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### Module 5 Customizing Clean and Prepare

**Objective** Be able to configure Clean Up Tools

Goal 1 Configure Firm Standard Document Defaults

Goal 2 Create Clean Up AutoFills

Goal 3 Create Firm Themes

## DAY 1, AFTERNOON

### Module 6 Customizing the Firm Templates Organizer

**Objective** Be able to manage the Templates Organizer

Goal 1 Locate the Firm Templates and Workgroups folders

Goal 2 Create subfolders

Goal 3 Populate folders with various file types

Goal 4 Rename and Remap Workgroups Folder

### Module 7 Using the Variable Builder

**Objective** Be able to create variable document content using the Variable Builder

Goal 1 Understand content controls vs fields

Goal 2 Understand the Variable Builder's connection to CoreRelate

Goal 3 Insert content controls into documents

Goal 4 Format content controls

Goal 5 Manage clearing bookmarks

## DAY 2, MORNING

### Module 8 Creating LegalBar Correspondence Templates

**Objective** Be able to create and code automated correspondence templates

Goal 1 Plan Correspondence Templates

Goal 2 Create the base template

Goal 3 Create insert files for Stationery Switching

Goal 4 Set correspondence administration options

Goal 5 Customize Firm AutoText

Goal 6 Customize supporting text files

Goal 7 Understand LB\_Finish macro and other custom macros

Goal 8 Understand Document Tags for automation

Goal 9 Use matterlink fields to create subject lines



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## Module 9 Creating Firm Envelope and Labels Templates

**Objective** Be able to create Envelope and Labels Templates

Goal 1 Locate Envelope and Label Formatter folder

Goal 2 Identify merge codes in envelope and label templates

Goal 3 Understand Firm Mailing Label(s) code

Goal 4 Modify Formatted Firm Labels

Goal 5 Learn document tag to launch Envelopes and Labels Formatter from within Firm Templates Organizer

## DAY 2, AFTERNOON

### Module 10 Introduction to assemble-it

**Objective** Understand Assemble-It features

Goal 1 Understand clause libraries and clauses

Goal 2 Understand content control binding

### Module 11 Preparing a Document for Automated Assembly

**Objective** Be able to analyze and prepare a document for automated assembly with Assemble-It

Goal 1 Analyze document(s) and determine logical content blocks for clauses

Goal 2 Analyze documents' variable data for content control

Goal 3 Determine automation launch method

### Module 12 Creating Assemble-It Libraries and Clauses

**Objective** Be able to create and organize Clause Libraries, Clauses and Q/A Scripts

Goal 1 Understand clause library organization and security

Goal 2 Create a clause library to support analyzed document content

Goal 3 Create clauses

Goal 4 Create a Q/A script

### Module 13 Using Assemble-It Utilities

**Objective** Understand and be able to use Assemble-It Utilities to troubleshoot and manage Assemble-It templates and documents