

How to Create Hearing Template

Objectives

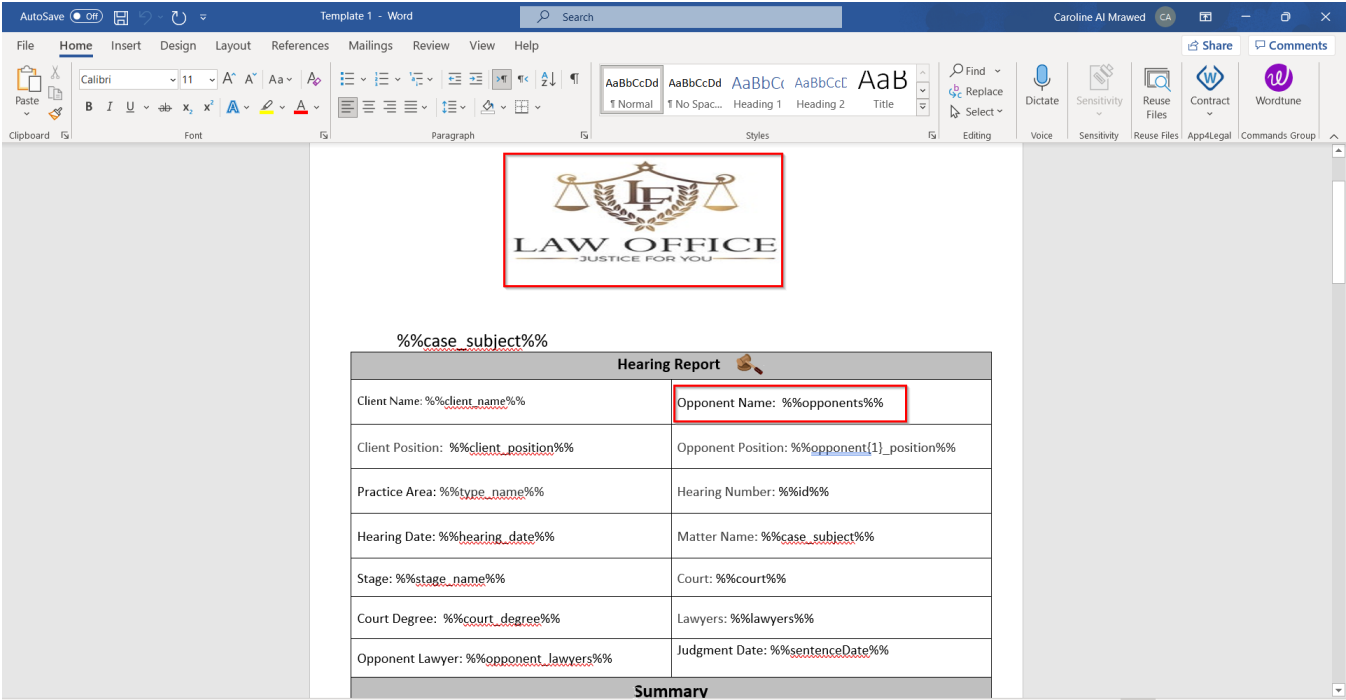
- Create a Hearing Template

Steps


In order to build hearing templates, certain steps need to be followed:

Step 1:

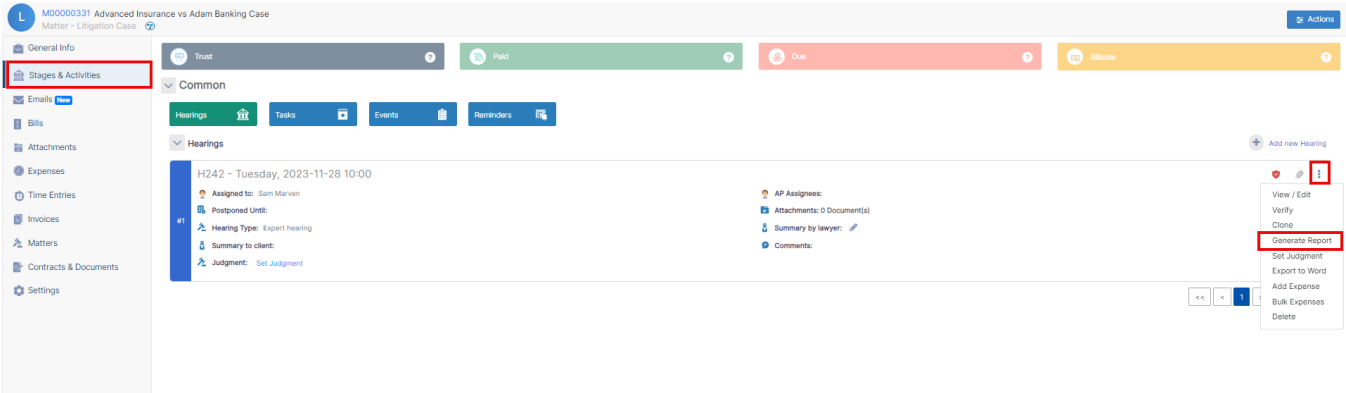
Prepare your template Word document that includes all the details needed such as the Hearing Date, Postponed Date, Lawyers Summary, and so on, in addition to your logo.



Therefore, generate a Word document based on your requirements, and make sure to use the fields as indicated in the system in order to fetch their values.

 To make the template readable by the system, you must use special characters when writing the variables

You can find the variable that the system accepts by clicking on the three dots within the hearing in the **Stages & Activities** tab and selecting **"Generate Report."**



Click on the "i" icon, to access these fields, and use them in your template to match and replace their values.

Hearing Report Generator



Choose template



Cancel

All the fields can be found in the table and added to the template form. The system will automatically fill in all the fields when the report is generated.

The system accepts only the docx files in the template folder. You can use custom fields no more than 50 characters (i.e. %%client_name%%) or use the following fields in the template to match and replace their values:

%%id%% - Id	%%hearing_date%% - Hearing Date
%%hearing_time%% - Start Time	%%postponedDate%% - Postponed Date
%%postponedTime%% - Postponed Time	%%summary%% - Summary
%%summaryToClient%% - Summary to Client	%%comments%% - Comments
%%judged%% - Judged?	%%judgment%% - Judgment
%%reasons_of_postponement%% - Reasons of Postponement	%%internalReference%% - Internal Ref Number
%%caseID%% - Related Matter	%%client_name%% - Client Name
%%opponent_lawyers%% - Opponent Lawyers	%%assignee(s)% - Assignee(s)
%%court%% - Court	%%court_type%% - Court Type
%%court_degree%% - Court Degree / Circuit	%%court_region%% - Court Region
%%case_subject%% - Matter Name	%%client_position%% - Client Position
%%type_name%% - Practice Area	%%stage_status%% - Stage Status
%%stage_name%% - Stage	%%sentenceDate%% - Judgment Date
%%case_description%% - Description	%%reference_date%% - Reference Date
%%opponents%% - Opponents	%%stage_opponents%% - Stage Opponents

Step 2:

Go to the iDocs in LEXZUR and Create a new Folder for the Hearing Templates:

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Universal Search

App4Legal Documents Google Drive OneDrive Dropbox URL's

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Documents

1 Selected

Documents

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By	Modified on
Contract Templates	-	-	-	-	2021-11-03 13:15:21	Carolina Robinson	Carolina Robinson	2022-06-01 11:39...
Document Generator	-	-	-	-	2023-03-03 19:15...	Alice Jones	Alice Jones	2023-03-03 17:15...
Documents	-	-	Agreements	-	2022-02-01 12:33...	Sam Marven	Carolina Robinson	2023-03-03 14:31...
Hearing Templates	-	-	-	-	2021-12-30 16:...	Carolina Robins...	Carolina Robins...	2021-12-30 16:...
Supporting Documents	-	-	-	-	2023-07-20 08:3...	Carolina Robinson	Carolina Robinson	2023-07-20 09:3...
Templates	-	-	-	-	2021-11-30 16:14:21	Carolina Robinson	Carolina Robinson	2023-06-16 10:11...
Document in AR.docx	-	-	-	94.5 kB	2023-08-18 16:07...	James Marven	Karina diab	2023-12-05 11:12...
POA Lauren20231204130300.docx	-	-	-	17.1 kB	2023-12-04 13:05...	Maria Dave	Maria Dave	2023-12-04 13:05...
POA-Lauren20230303170501.docx	-	-	-	15.4 kB	2023-11-15 10:34...	Carolina Robinson	Carolina Robinson	2023-11-15 10:35...
Purchase Agreement.docx	-	-	-	38.8 kB	2023-11-15 14:17:15	Carolina Robinson	Carolina Robinson	2023-11-15 14:17...
Purchase Agreement (1).docx	-	-	-	38.8 kB	2023-11-15 10:39...	Carolina Robinson	Carolina Robinson	2023-11-15 10:39...

Step 3:

Upload the template (word document) created in the first step, to the Hearing Template folder.

App4Legal Documents Google Drive SharePoint OneDrive Dropbox URL's

+ New

Upload

Documents

Search Hearing Templates

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By	Modified on
hearing_english_default_template.docx	-	-	-	20.7 kB	2022-05-26 07:01:29	Carolina Robinson	Carolina Robinson	2022-05-26 07:0...
Template 1.docx	-	-	-	18.9 kB	2023-01-30 10:01:49	Sam Marven	Sam Marven	2023-01-30 10:01...
Template 2.docx	-	-	-	30.7 kB	2021-12-30 14:10:02	Carolina Robinson	Carolina Robinson	2021-12-30 16:10...

Step 4:

As a last step, you should determine which folder to use whenever a user wants to generate a hearing report.

To do this, go to the **system settings**, open the **"Hearing Report Generator Templates Folder"** under the Attachments section,

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Universal Search

Single Sign On

Setup

Outlook Configuration

Setup

Client Portal

Manage Clients

Configure Roles

Sync clients with 'Azure Active Directory'

Clients by Companies

Request Type Categories

Request Types

Permissions

Contract/Document Request Type Categories

Contracts/Documents Request Types

Contracts/Documents Permissions

Delegations

External Advisors

Advisor Portal

Manage Advisors

Workflow Permissions

Manage Email Templates

Manage Workflows

System Settings

Billing and Plan

Manage Users

Add User

Apps Marketplace

Attachments

Matter Attachment Classifications

Matter Attachment Types

Matter Attachment Statuses

Matter Container Attachment Types

Matter Container Attachment Statuses

iDocs Attachment Types

iDocs Attachment Statuses

Company Attachment Types

Company Attachment Statuses

Person Attachment Types

Person Attachment Statuses

Document Generator Templates Folder

Hearing Report Generator Templates Folder

Matter Folder Templates

Teams

Assigned Teams

Seniority level

Delegations

and choose the folder that contains the templates.

Template Folder Path*

A screenshot of a web application's settings page. A dropdown menu is open, showing a list of folder paths. The 'Hearing Templates' option is highlighted with a blue bar. A red rectangular box is drawn around the dropdown menu. To the right of the dropdown is a blue question mark icon. The dropdown list contains the following items: 'Hearing Templates', 'Contract Templates', 'Document Generator', 'Documents', 'Private Documents', and 'Templates'. The 'Hearing Templates' item is currently selected.

Hearing Templates

Contract Templates

Document Generator

Documents

Hearing Templates

Private Documents

Templates

Save

You can now use this template while generating hearing reports.



Learn more about how to Generate Hearing Reports [here](#).

For more information on LEXZUR, reach out to us at help@lexzur.com

Thank you!