

Pleading with the Experts

WordPerfect Legal Suite fulfills your needs.

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The WordPerfect Legal Suite includes a great tool: the Pleading Expert. There are actually two parts to the Pleading Expert, a Designer and a Filler. The Pleading Expert Designer allows you to create a myriad of pleading styles to use with your pleading documents. You then use Filler to insert case information into a pleading document formatted using a style created with the Pleading Expert Designer.

You can find the Pleading Expert on the Tools menu under Legal Applications. You run the Designer by selecting “Pleading Expert Designer.” You run the Filler by selecting

The Pleading Expert Designer allows you to create a myriad of pleading styles to use with your pleading documents.

“Pleading Expert Filler.” After you create a new pleading style using the Pleading Expert Designer, you can run the Pleading Expert Filler automatically when you are done to create your first pleading using the new style. You also can run the Filler separately when-

ever you need to create a new pleading using an existing pleading style.

Pleading Expert Designer

When you run the Pleading Expert Designer, two dialogs will appear on your WordPerfect screen. One is the Pleading Expert Designer dialog and the other is a preview window. These two windows will likely overlap. However, you can move them around so that you can see them both in their entirety at the same time (assuming, of course, that your screen resolution is high enough and your monitor is big enough). You also can select “No Preview” on the Pleading Expert Designer dialog to turn off the Preview window. Even so, you will probably want to display the Preview window as it shows what your pleading style looks like as you make changes using the Pleading Expert Designer.

By the way, the Pleading Expert is a separate program. Therefore, it will have its own icon on the Windows taskbar (which is, by default, at the bottom of your screen). So, if needed, you can switch between the WordPerfect screen and the Pleading Expert by clicking on the appropriate taskbar icon.

Various options for creating a pleading style appear on the left of the Pleading Expert Designer dialog. You

can click on any option in the list to make a change (the current option will have a green button; those not yet reached will have a gray button, and those already passed will have a blue button). However, it’s usually better to start from the beginning and use the “Next” button at the bottom of the dialog to advance through the options.

After you select “Next,” the Pleading Expert Designer moves to the Create/Edit options (see Figure 1). As you can see, WordPerfect ships with two default pleading styles: <Style 1> and <Style 2>. You can always use <Style 1> or <Style 2>, if you like the formatting. <Style 1> differs from <Style 2> in that <Style 1> uses line numbering, left parentheses in the caption, includes the judge’s name to the right of the caption, uses “By” on the

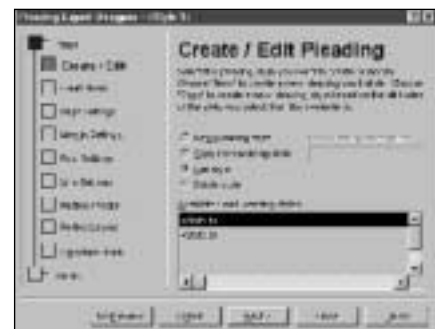


Figure 1: The Create/Edit option allows you many options in creating your pleading.

signature line instead of an “X,” and includes page numbering.

At the Create/Edit Pleading dialog, you can create a new pleading style, copy from an existing style, edit a style or delete a style.

To create a new style, select “New Pleading Style,” type the name for the new style in the input box beneath “New Pleading Style Name,” and select “Next.” It helps if you name your pleading styles with the actual court name so that they are easy to distinguish. To copy from an existing style, select “Copy From Existing Style,” highlight the style name in the list, type a new name in the same input box, and then select “Next.” To edit a style, select

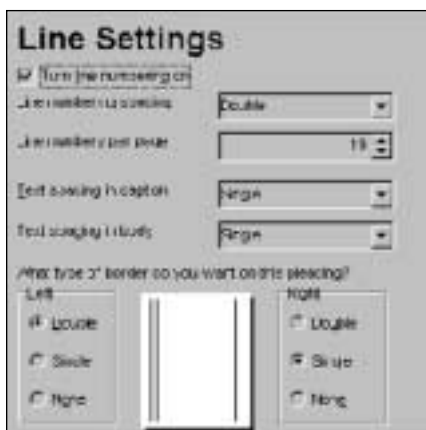


Figure 2: You can further customize your pleading styles with the Line Settings window.

“Edit Style,” highlight the style name in the list, and select “Next.” To delete a style, select “Delete Style,” highlight the name in the list, and select “Next.”

After selecting “Next,” the Pleading Expert Designer displays the Court Name dialog. In the box at the top of the dialog, you type in the court name. You can use multiple lines if needed. A court name can then be left, center or right justified. Select “Next” when you are finished.

The Page Settings dialog allows you to select a paper size for your pleading style. There are also three options for page numbering: on the first physical page, on the page after the caption and no page numbering. If you select one of the last two options, you can begin counting pages on either the first physical page (so that the page after the caption is Page 2) or on the page after the caption (so that the page after the caption is Page 1). There are three options for the style of page numbering: #, - # -, and “Page # of #.” Page numbers can be bottom center, top

right, etc., using standard WordPerfect page number codes or inserted into a footer using any justification.

When you select “Next,” the Pleading Expert Designer displays the Margin Settings dialog. If you want, you can set different top margins for the caption page and all pages after the caption page. The bottom, left and right margin settings affect all pages. After setting margins, select “Next.”

The Font Settings dialog appears next. You can set the font for your document for footnotes and footers, and for line numbering. I’m not sure why footnotes and footers appear together. I usually use the same font for footers as I do in the body of a document, and I use the small font attribute for footnotes. If needed, these font options can be adjusted after you use the Pleading Expert Filler to create an actual pleading document. You just have to modify the footer or footnote style. Select “Next” after you configure your fonts.

The Pleading Expert Designer will display the Line Settings dialog next (see Figure 2). Line numbering can be either on or off. Spacing can be double, one-and-a-half or single. The amount of line numbers per page can be configured separately. Spacing for the caption and the body of your document can be double, one-and-a-half or single. You also can have double or single lines on

You will use the Pleading Expert Filler to create your actual pleading document using the style you created with the Pleading Expert Designer.

each side of the pleading, or none. Select “Next” to continue.

The Parties/Footer dialog (see Figure 3) displays options for entering the information to include in the heading and footer of your pleading. If you elect to include “Attorney(s), firm name and address,” it will appear at the top

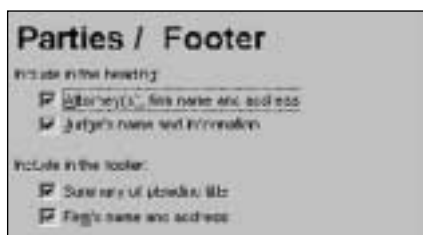


Figure 3: This window gives you options for information at the head and foot of your pleading.

left of your caption. The “judge’s name and information” appears in the caption itself on the right. The choices for the footer are “Summary of Pleading Title”



Figure 4: You may sign your pleading, or motion, in many different ways with this option.

and “Firm’s Name and Address.” I’d hesitate to use either of these options.

The Pleading Expert Designer creates a footer using columns to place information on the left and the right sides of the footer. The firm’s name and address goes in the left column while the pleading summary and the page number go in the right column. If a line is too long, there can be overlap, particularly if you include the “Summary of Pleading Title” and the “Page # of #” page numbering option. In addition, a firm’s name and address can take up a

lot of space. By the way, you don’t type in the information for the footer until you reach a later dialog.

The next dialog is the Parties Layout dialog. There are six styles for the caption itself on this dialog. You also have the option of not using a caption. I recommend Style 5. Captions are created using tables, so you can add additional information later, and the caption will expand automatically (unless you use the one of the parentheses options). Of course, if your caption changes, you can always use the Pleading Expert Filler to make changes and regenerate the caption.

The Signature Block dialog is last (see Figure 4). If you include a signature block, you can “Sign with” an X,

By:, or By, or just use a plain signature line with nothing. If you select X, By:, or By, you can include an underline. You can exclude the attorneys' names and the firm address, or place them above or below the signature line. The signature line can be placed on the left or the right side of the pleading. You also can include a date line if you wish.

Pleading Expert Filler

When you finish designing your pleading, Pleading Expert Designer displays its last dialog and gives you the option of starting Pleading Expert Filler. Select "Next" to run the Pleading Expert Filler.

You will use the Pleading Expert Filler to create your actual pleading document using the style you created with the Pleading Expert Designer. There will be several dialogs asking you for information about your case. After you complete the requested infor-



Figure 5: The Title & Case No. window allows you to name your pleading or motion.

mation, the Pleading Expert Filler will create a shell pleading document in a WordPerfect document window for you to complete (it will just be a shell pleading document with the caption and signature line; you will need to add the filler, such as the claims in a complaint or the argument for a motion).

The first Pleading Expert Filler dialog is similar to the first Pleading Expert Designer dialog. Option categories are on the left with buttons along the bottom. Select "Next" to continue creating your pleading document.

Pleading Expert Filler displays the Case Selection dialog first. The options are similar to the first Pleading Expert Designer dialog.

A sample case is provided. You can create a new one, copy from or edit an

existing one, or delete one. Select "Next" to continue.

The next dialog is the Select Court Dialog. This is where you select the

Pleading Expert Filler will create your pleading document in a WordPerfect document window.

pleading style to use. This is where a descriptive style name becomes essential. Just click on the style you want to use. You can then enter the judge's name in the bottom box if needed (and it's not needed if your pleading style doesn't include the judge's name). Click the "Next" button.

In the Title & Case No. dialog (see Figure 5), enter the title of the pleading or motion you are creating, the pleading title summary (which will appear in the footer if you turned on this option in Pleading Expert Designer) and the case number. You also can indicate whether there will be more than one firm signing the pleading. If you select a number other than one, an additional dialog will appear later asking for information about the additional firm(s).

After selecting the "Next" button, the Parties dialog appears. Parties can be designated as plaintiff/defendant, appellee/appellant, petitioner/respondent, debtor or deceased. The dialog will change depending upon your selection. The name of the first party goes in the first box, and the name of the second goes in the second. There will only be one box if you select debtor or deceased.

The Attorneys & Firms dialog appears next. The first box is for entering your firm's attorneys who will be joining in the pleading. You can have multiple lines. However, the names will all appear under one signature line unless you put in separate signature lines in this box. These will then have to be entered by hand using the underscore key.

You also can include an "Attorney(s) for" line using plaintiff, defendant, petitioner, respondent, debtor or deceased. The last box is for your firm's name and address.

If you indicated on the Title & Case No. dialog that there would be

more than one firm signing the pleading, then additional Attorneys & Firms dialogs will appear when you select "Next."

After the last Attorney's & Firms dialog disappears when you select "Next," the Finish dialog will appear. Just select the Finish button, and the Pleading Expert Filler will create your pleading document in a WordPerfect document window.

If you selected double spacing for the body of your pleading document, the signature line will likely be double spaced as well. To fix this, place your insert point just above the signature line and select Format | Line | Spacing to display the Line Spacing dialog. Change line spacing to single, and select OK. You then can complete your pleading.

If you ever need to file another pleading, just use the Pleading Expert Filler again to create the shell pleading for you to complete. **100**

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