

Legal Library 2005 - User Guide

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Part I - Overview

Legal Library is as easy to use as Microsoft Word with a few customized Legal Library tools and options. The major difference is that before beginning work on a document, you need to specify which type of document to work on from the File Menu on the toolbar. This guide will assist you in filling out a legal document for you Real Estate transactions.

The CBA Legal Library 2005 supports 4 types of documents:

1.) **New Custom Forms** are interactive forms that you fill out on-screen. You can also edit the body of the text of the forms. If you make modifications to the body of the text, the document will show these changes as crossed-out letters (for deletions and/or small capital letters for insertions).

New custom forms have the extension ".cbf"

2.) **Saved Custom Forms** are simply versions of the custom forms that you have modified and saved.

Saved custom forms have the extension ".cbd"

3.) **Forms for Client Review Forms** are special versions of Saved Custom Forms that custom forms that you can send to your clients for review and edit. These documents can be opened without the need to have the Legal Library installed on the user’s machine. They can be edited by Legal Library Users or anyone that has the Client Review Document Editor. This editor can be downloaded and installed at:

<http://legallibrary.commercialmls.com/downloads/DocumentEditor.msi>

Client review forms have the extension ".doc"

4.) **Open Selected Standard Forms** (Hard Copies) are forms with blank lines that you can print out and fill in by hand or with a typewriter.

Standard forms have the extension ".cbp"

We could also mention a fifth type of document, of which there is only one instance: CBAStartup.doc. This document acts as the gateway to the CBA Legal Library; opening this document is the only way to begin a session with the CBA Legal Library.

Basic Operation

Begin the CBA Legal Library 2005 by double-clicking on the icon that was copied to your desktop during installation. This Icon looks like a yellow legal pad with the title “Legal Library 2005” on it. Alternatively, you can open MS Word and click on the Legal Library button in the tool bar.

When the document loads you will see the CBA_LL toolbars and menus in place, and the CBA Logo on the one page of CBAStartup.Doc. Use the **File/LL Form List** command to bring up a list box with the 40+ custom ‘template’ forms that comprise the CBA Legal Library 2005. You can select a form, or multiple forms to edit by checking the box next to the form(s) you want,

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then selecting 'OK' button. The form(s) are then opened and you can begin by selecting and edit mode. Select 'Fill-in' mode to fill in empty fields. Use the tab key or mouse to move from field to field.

If you wish to edit the actual text that makes up the body of the document, you can switch into *Modify Text* mode by selecting 'Modify Body Text' from the Edit Mode menu, or by selecting the Modify Text button on the Toolbar which has the image "ABC" on it. Then you can toggle back into *Fill-in-Form* mode by using the corresponding menu item or toolbar button.

Part II – What's New for Legal Library 2005

Legal Library 2005 works just like Legal Library 4.0c does with a few new tools and some minor functionality changes. Legal Library 4.0c was designed with minimal MS Word features available to it. Legal Library 2005 is opened to MS Word entirely. MS Word tools and editing functionality can be applied to Legal Library 2005 documents.

A Few Enhancements

- 1) Legal Library 2005 can be used while MS Word and Outlook are running.
 - 2) Fill in fields in a centralized location.
 - 3) Email documents from within Legal Library 2005.
 - 4) Clients can review and modify draft copies sent to them.
 - 5) Save existing file with a new name.
- All of these enhancements are explained in the User Guide section of this documentation.

A Few Changes



New default location for saved documents.

- 1) Three new saving methods.
 - 2) New file extensions for documents (.cbd and .doc)
 - 3) Release Notes
 - 4) Automatic upgrades and updates
- All of these changes are explained in the How To section of this documentation.

Part III – How to

There are two methods of accessing Legal Library 2005. Every time Legal Library 2005 opens the application automatically check the Legal Library Web Server for updates.

Launching Legal Library 2005

- 1) Double Click on the desktop icon, Legal Library 2005. 
- 2) Open MS Word and click on the Legal Library button from the tool bar. 

Release Notes

Each time you launch Legal Library 2005 a Release Notes dialog box appears containing information for the user. This dialog box can be disabled by checking the box "Do Not Show This Message Again" and clicking okay. This box will reappear when the Release Notes have been updated with new information.

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File Menu Items

These items are located in the File Menu.

Accessing New, Saved and Blank Forms

There are three options for accessing forms.

1) LL Forms List

This command allows you to start with a new form template for editing. When selecting this option a dialog box will appear with a list of all the available forms. You can select one or more templates to work on by checking the box next to each form description. Each template will open in its own window.

2) Open Saved LL Form

This command allows you to open previously saved forms. When selecting this option an Open File dialog box will appear. By default, the Original Documents folder opens with all files you have previously created and saved.

3) LL Forms List - Open Selected Standard Forms

This command allows you to start with a new form template for editing. When selecting this option a dialog box will appear with a list of all the available forms. Change the selection below to "Open Selected Standard Forms" and then print the document out so it can be filled in by hand or with a typewriter.

Saving Original Documents & Client Review Documents

There are a few ways to save files in Legal Library 2005.

1) Save Form

This command allows you to save an Original Document (*filename.cbd*) to the Original Document Folder. Save Form is specifically used for saving Original Documents. By default, Original Documents are saved with the .cbd file extension in the Original Documents folder.

2) Save As

This command allows you to save and rename a previously saved Original Document with a new name (*newfilename.cbd*), creating a new Original Document. Save As is specifically used for renaming and saving an original document with a different name, creating a new Original Document. By default, Original Documents are saved with the .cbd file extension in the Original Documents folder.

3) Page Setup / Line Numbering

This command allows you to add line numbers to your documents. From the **File Menu** select **Page Setup**, then select the **Layout Tab**, then select the **Line Numbers button** and then check the box **Add Line Numbering**. Click OK twice and this will exit the Page Setup and add the line numbers to your document.

4) Print

This command allows you to print a document to your available printers. When opening any Legal Library document for print, select the File Menu then the Print option. This will open a print dialog box with all of your print options.

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5) Send To

You now have the ability to email a Client Review Document (*filename.doc*) form within the document. After choosing Export for Client Review and saving the file with a file name, select **File\Send To\Recipient as Attachment**. This will open a new email message in MS Outlook with the Client Review file (*filename.doc*) attached to it. Simply fill in the recipients email address and press send.

6) Close Form

This command allows you to close the current form and prompts you to save the document.

7) Exit

This command will exit Legal Library 2005.

Tool Bars Items



These command icons are located in the tool bars.

Editing Documents

Documents will remain protected until you access one of the following edit modes.

1) Fill in Fields



Select this icon in the tool bar to fill in the blanks of the template. Each time you access Fill in Fields mode for the first time a separate “Document Fields” dialog box will appear with a line by line list of the fill in fields for that document. You can enter text in each line as described. Once you finish filling in the fields, completely or not, click the Apply button and this will send all the text you entered to the appropriate field. If you would rather fill in the template by scrolling through the document, click the cancel button and the “Document Fields” dialog will disappear for that Fill-in Fields session.

2) Edit Document Text



Select this icon in the tool bar to modify document text. You can add and striking through text in this mode, plus import images, insert comments and highlight text for making certain areas of your document stand out. When you select this icon, you will see an additional tool bar appear for this mode.

3) Export for Client Review



Select this icon to save a Client Review Document (*filename.doc*). By default, Export for Client Review will always save a Client Review Document with a .doc file extension and will create the DRAFT watermark on the document. By default, Client Review Documents are always saved in the Review Documents folder.

4) Document Compare



Select this icon to compare Original Documents (*filename.cbd*) against Client Review Documents (*filename.doc*). Users can accept or reject the changes from the Client Review Document to the Original Document and then save it as the New Original Document. This function is available while in an Original Document. This function will open a File Open dialog box where you can choose the Client Review document.

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Select the document to be compared and a new file will be opened with all the modifications made to the Client Review document appearing in blue. You can accept or reject the changes by right clicking on each change made and the choosing accept or reject changes. Once you are finished with the Document Compare, choose file save form and you will be prompted to save the file as an Original Document (*filename.cbd*). You can select an existing file name to save over, or you can give the document a new name at this point. **Note:** Accepting the edits from the Client Review Document become permanent changes to the Original documents after saving.

5) Keep Paragraphs Together

This command formats the selected page boundaries without splitting paragraphs.

6) Reject Changes

This command will allow you to remove a strike though added to the document text. Simply highlight the section with the strike through and click this button to choose to reject the changes. Or, right click on the highlight and select Reject Changes. The text will now be back to its default state.

Legal Library Tools

Editing Client Review Documents

Recipients now have the ability to review and edit the Client Review Documents (*filename.doc*). Existing LL 2005 Users can simply open the Client Review Document outside of Legal Library 2005 and edit it by the Fill in Field and Edit Document Text tools available when opening a Client Review Document. Recipients of a Client Review Document that do not have LL 2005 can edit Client Review Documents by getting the Document Editor located at:

<http://legallibrary.commercialmls.com/downloads/DocumentEditor.msi>

Once they download and install the Document Editor they will be able to edit Client Review Documents anytime they receive one. **NOTE:** The Document Editor only needs to be installed one time.

Conversion Tool / Accessing Files from Version 4.0c

If you have Legal Library 4.0c documents on your machine or on a network share folder you will need to convert these documents for use in Legal Library 2005. Launch the conversion tool by selecting: **Start\Programs\CBA\Legal library\Conversion Tool**. Click **Add File(s)** then navigate out to the folder where the saved files you created in Legal Library version 4.0 are located. **NOTE:** By default, the files are located in **C:\Program Files\Cba Legal Library 4\SavedCustom folder**. If you have saved files to a different location, navigate to that location when prompted to do so. Now select the files you want to convert and then click **Convert**. You can select all files by highlighting one file and clicking Open. A dialog box will appear asking if you want to add all documents in the directory.

Select Yes to convert all the documents in the folder.

Select No if you want to convert the files individually by holding down the Ctrl key on your keyboard and clicking on each file you want to convert. Click Convert and the conversion process will begin and step through the file(s) you selected and convert them for use in Legal Library 2005. A green light will appear next to the file to confirm a successful conversion. The files are now converted and ready to use in Legal Library 2005. The converted files will be located in the same directory you selected the 4.0c files from and it will create a Backup Folder in that same directory and backup the 4.0c files into it.

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Automatic Updates

Each time you launch Legal Library with an active Internet connection running, the application automatically checks the Legal Library Web Server for updates and downloads and installs any upgrades or updates if necessary. If any updates or upgrades are received, Legal Library will inform you that the application has been updated and then ask you to close and restart Legal Library 2005. This process is done immediately at launch and may cause the Legal Library 2005 to load slower than normal if a download is available.

Part VI – Forms Index

AD_1	Disclosure of Agency or Non-Agency
AR	Arbitration Rider
BB_1	Retainer Agreement
BUA	Back-Up Addendum to Purchase and Sale Agreement
CB	Co-Brokerage Agreement
CDF	Commission Disbursement Form
DTR	Deed of Trust Rider
DW	Waiver of Right to Receive Real Property Transfer Disclosure
EMN	Earnest Money Note
GR-LS	Gross Lease
HMA	Hazardous Materials Addendum
LLR	Limitation on Landlord's Liability Rider
LN	Claim of Lien
LOI	Letter of Intent
LOR	Guaranty of Tenant's Lease Obligations Rider
LP_L	Lead Based Paint Disclosure for Leases & Rentals
LP_S	Lead Based Paint Disclosure for Purchases & Sales
LR	Release of Listing
MT_LS	Multi-Tenant Lease Agreement
N_1A	Promissory Note - Fixed Rate of Interest
OR	Option to Extend Rider
OTB	Option to Buy Real Estate
PI	Commercial Property Information
PR	Parking Rider
PS_1A	Purchase & Sale Agreement
PS_2	Bus. Op. Purchase & Sale Agreement
PS_2A	Bus. Op. Real Estate Addendum
PSA	Addendum/Amendment to P&S Agreement
PS-AS	Assignment & Assumption Agreement
PSR	Rescission of Purchase and Sale Agreement
RC	Recording Cover Sheet
RL	Release of Lien
RPTD	Real Property Transfer Disclosure Statement
RR	Rent Rider
RUR	Retail Use Rider
ST_LS	Single Tenant Lease Agreement
Sub-Ls	Sublease Agreement
UA	Utility Charges Addendum to P&S Agreement
VLA	Vacant Land Addendum

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XA	Exclusive Agency Listing Agreement
XB	Business Exclusive Sale Listing Agreement
XL	Exclusive Lease Listing Agreement
XS	Exclusive Sale Listing Agreement