

ProDoc Tech Tip

Creating Case Data Sheets

There is a faster and easier way to conduct the initial review of ProDoc-generated documents using the Case Data Sheet feature.

Your legal assistant/paralegal can quickly and easily print a Case Data Sheet after generating a document. The Case Data Sheet shows all of the document assembly and client matter choices your legal assistant/paralegal made during the assembly process. If some of the choices are incorrect, it is much easier to spot those issues on the Data Sheet with all of the boiler plate stripped out. This process also makes it very easy for your assistant to identify the data to be corrected and then make those revisions.

After such a review of the Case Data Sheet, when your legal assistant/paralegal presents the document(s) for your review, you can feel more confident that the major legal issues are already resolved. This provides you more time to focus on the finer legal issues.

Here's how to print and use the **Case Data Sheets** feature:

- A. On ProDoc's main menu, click **Print►Case Data Sheet** as shown in *Figure 1*.

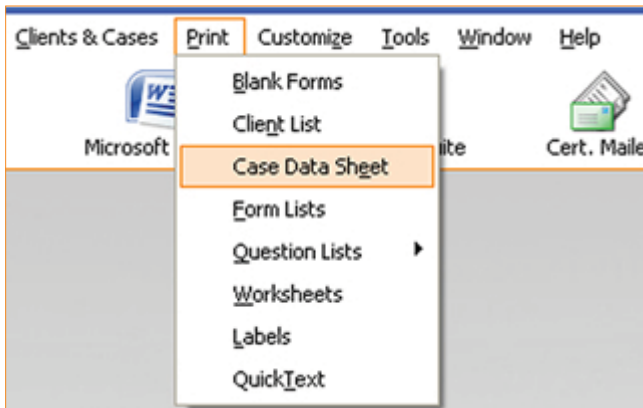


Figure 1 - Select Case Data Sheet

- B. The **Case Data Sheet Report** window appears (*Figure 2*).

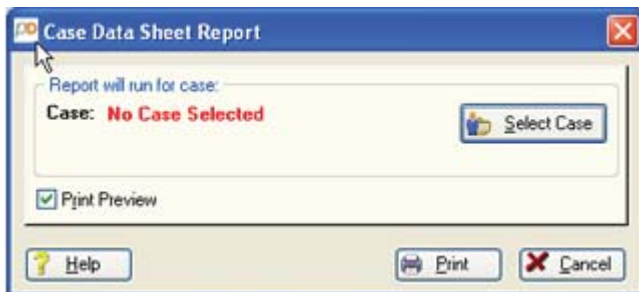


Figure 2 - The Case Data Sheet Report

- C. Click the **Select Case** button.
D. The **Select A Case** window appears (*Figure 3*).
E. To select a case, you can:

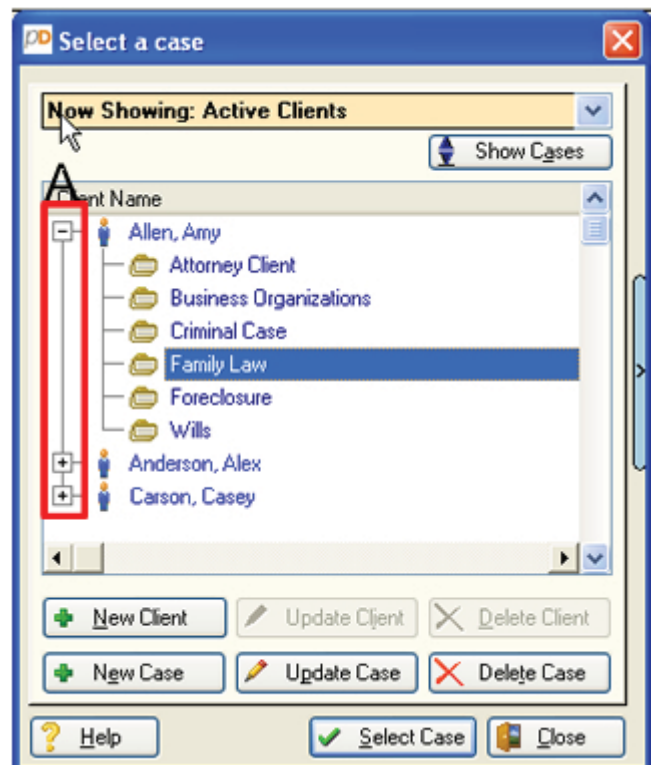




Figure 3 - The Select a case Window

- a. Double-click a displayed client to reveal the cases for that client,
b. Click the + sign before the client (*Figure 3, A*) to reveal the cases for that client.
F. After revealing the case(s), select the case by:
a. Double-clicking on the case,
b. Highlighting the case and pressing the **Enter** key, or

- c. Highlighting the case and clicking the **Select Case** button.
- G. To find a client or case that's not displayed, use the keyboard locator. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
- H. After selecting a case, the **Case Data Sheet Report** window appears with the case listed as shown in *Figure 4*.
- A.



Figure 4 - The Client and Case Selected

- I. You can choose to preview or not preview the report by checking or unchecking the **Print Preview** check box (*Figure 4. B*). The preview page gives you many choices for output and formatting. It is checked by default and we recommend that you leave it checked.
- J. Click the **Print** button to choose your printer and preview the report.
- K. The **Report Preview** window displays your report just as it appears when printed. You have several options available at the top of the page, including:
 - a. Navigate through the report using the page-to-page navigator (**A**) or the page-to-page/jump navigator (**C**) features.
 - b. Print the current page only by clicking the  icon (**B**).
 - c. Print the entire report by clicking the  icon (**D**).
 - d. Save the report as a text (.txt) file so you can manipulate it in a word processor by clicking the **T** icon (**E**).
 - e. Choose how many copies of the report to print in the **Copies** field (**F**). By default, you print only one copy.
 - f. To cancel the process and not print the report, click the **X** (**G**).

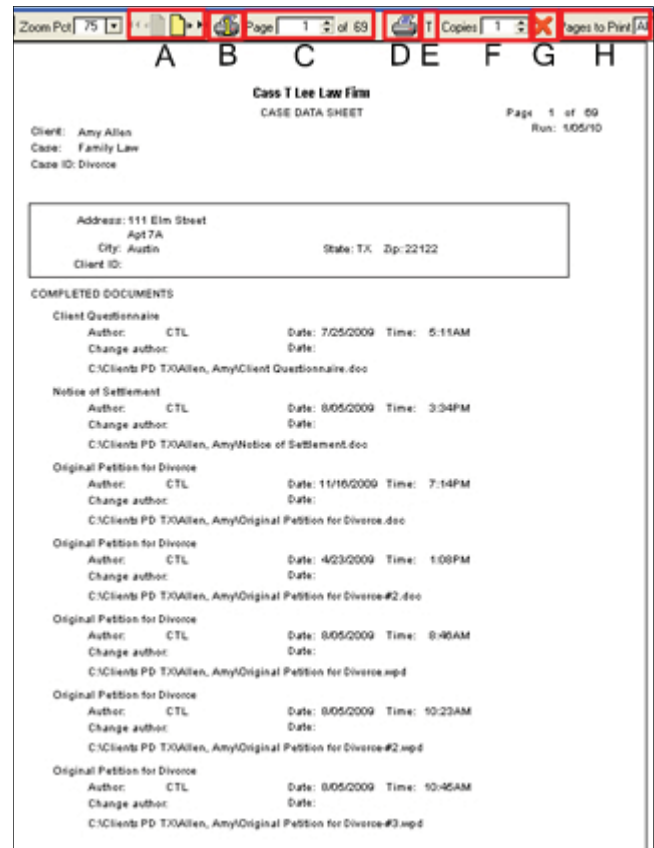


Figure 5 - Previewing the Case Data Report

- g. Enter the range of pages to print in the **Pages to Print** field (**H**) by entering the page range. By default, it is set to **All**.
- L. When ready, click the appropriate button, **B** or **D** to print or **E** to save the report as a .txt file.