

Creating and Using Default Answer Sets

Creating and setting default answers in ProDoc can save you many hours of work for a small initial investment of time. When you set default answers, you are telling ProDoc to suggest a certain answer each time a specific question arises while generating documents. For instance, if most of your work is in Washington County District Court, for example, set that as your default for the jurisdiction. Then, whenever you generate forms, ProDoc will automatically insert Washington County District Court into the jurisdiction field, reducing the time you spend typing. And, if the jurisdiction is different for a specific case, you can easily overwrite the default answer.

However, you may not realize that ProDoc's default answers can be customized for different attorneys or users. If you add an attorney to your practice or install ProDoc in a firm with multiple attorneys, this feature will save you a lot of time. Once you set up a Default Answer Set for each attorney, you can select the answer set to use when you assemble documents. Each default answer will be suggested by ProDoc when the corresponding question is asked.

You can also create a Default Answer Set for a specific client. By creating a Default Answer Set for a significant firm client, all firm members can generate documents using the Default Answer Set(s) created specifically for the client. This saves your firm a tremendous amount of time.

1. Creating a Default Answer Set

- A. From the Main Menu, click **Customize►Default Answers►Default Answer Sets**.

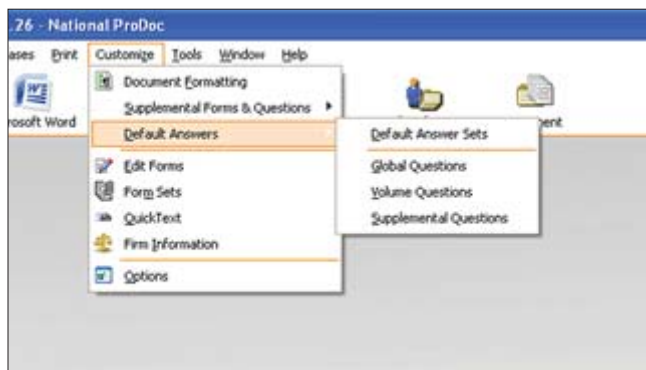


Figure 1 - Creating a Default Answer Set

- B. Click the **New** button (Figure 2, A). On the **Default Answer Set Name** dialog window, type the **Set Name**. We suggest using the attorney's name (Figure 2, B).
- C. Click the **Existing set to copy** field (Figure 2, C) and choose a set from which to copy previously set default answers as a starting point. Some discussion on this choice follows:
- i. It may save you time if you copy another existing answer set. This is particularly true if you are copying the Default Answer Set for an attorney who primarily practices the same area of law as does the attorney for

whom you are creating the new Default Answer Set.

- ii. If there are no answer sets you wish to copy, select **Leave new set empty** (Figure 2, D).

- D. Click **OK** to close the **Default Answer Set Name** window.
- E. Click **Close** to close the **Default Answer Sets** window.

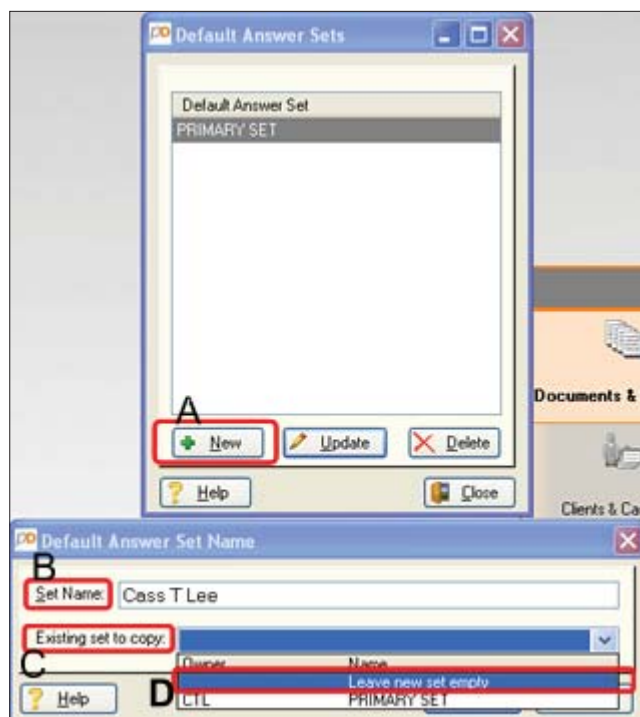


Figure 2 - Default Answer Set Settings

You can configure the set's default answers during assembly sessions using the set, or all at once. To set up default answers in one sitting for the new set:

- A. Click **Customize ► Default Answers**, then click either Global Questions (used throughout all volumes); Volume Questions (used throughout the selected volume); or Supplemental Questions (only used for supplemental questions you previously created) as shown in *Figure 1*.
- B. If you choose **Global Questions** (*Figure 3*), the **Set Default Answers For...** window appears. If you choose **Volume** or **Supplemental Questions**, you will need to choose a volume before opening the window.

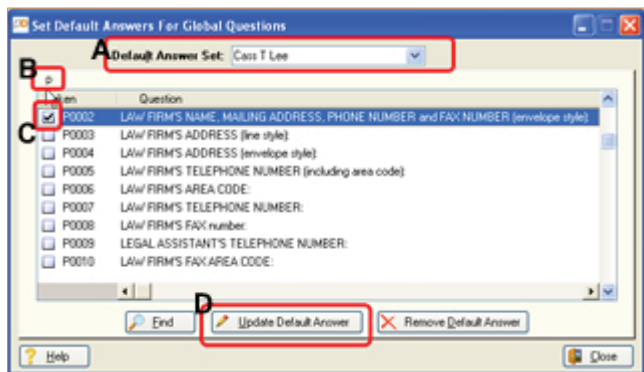


Figure 3 - Selecting Global Defaults

- C. On the **Set Default Answers For...** window, click the **Default Answer Set** field and select the answer set you previously created (*Figure 3, A*). (This option does not exist if extra answers sets have not been created.) Any questions which already have default answers will display a check mark next to the token and question (*Figure 3, C*).
- D. Find the questions for which you want to set/change default answers using any method below.
 - i. Use keyboard navigation keys or the scroll bar to scroll through the list.
 - ii. Click the Find button and enter a word to search for in the **Find what** field on the **Search The Questions** window. Click **Find Next** or **Find Previous** to scroll through matching questions.
 - iii. If you know the code for the question, type it. Typing the letter P (*Figure 3, B*) causes the questions to auto-scroll to the P-xxx section.

E. We recommend that, as a minimum, you default basic law firm and attorney information for the following codes: A0150, A0160, A5290, A5295, P0002-P0028, P0190, P0191, P0194.

F. To set a default answer, double-click a question or click **Update Default Answer** (*Figure 3, D*). This opens the **Set Default Answer** window (*Figure 4*). Answer the question

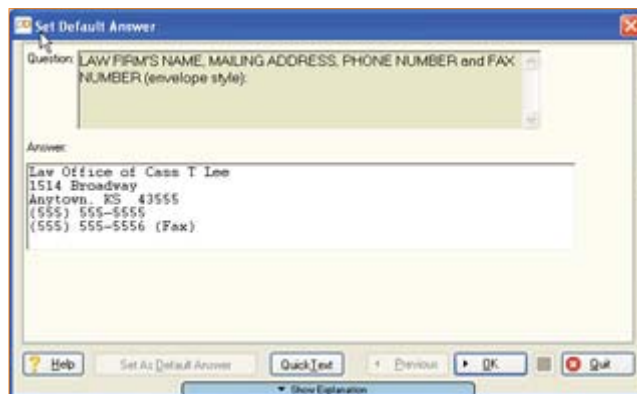


Figure 4 - Selecting Default Answers

and click **OK** to accept your answer.

- G. Repeat the above steps until you have set all desired default answers. Click the **Close** button.

2. Assembling a Document Using a Default Answer Set

Now that you have more than one set, you need to make sure you use the correct set when you assemble documents. Normally, you would select the one you use the most as the default, which can still be changed later during an assembly session. You can choose to have a **Default Answer Set** automatically selected on the **Starting Document Assembly** window.

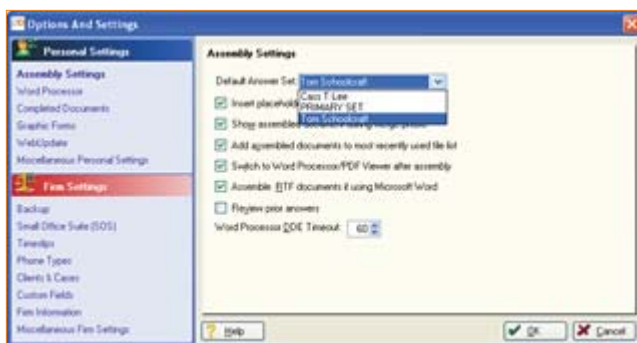


Figure 5 - Selecting the Default Answer Set for Start Up

To select a set as the default, click **Customize ► Options**. In the **Assembly Settings** box, click the **Default Answer Set** field and select the set you will use the most. Click **OK** to save your choice (*Figure 5*).



Figure 6 - Only Two Steps Displayed

To select a set during an assembly session, ensure the Starting Document Assembly window shows all four steps instead of only two. Here is the window with only two steps displayed:

To expand the window, click the flat blue button at the bottom of the window (*Figure 6, A*). Steps 3 and 4 will be displayed (*Figure 7*).

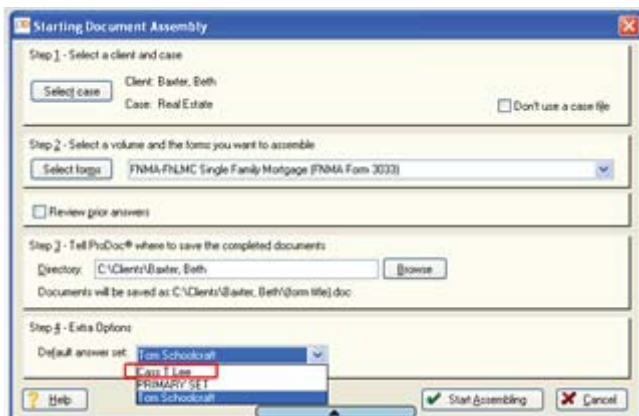


Figure 7 - Four Steps Showing

At the bottom of the window, click the **Default answer set** field and choose the set you wish to use for this assembly session as shown in *Figure 7*.

3. Continue to Build Your Default Answer Set

Creating a **Default Answer Set** for an attorney is a good start but it should be just the opener. The information you entered above is Global in nature—it will flow into every document regardless of the ProDoc volume from which you are assembling.

However, you can easily continue building the **Default Answer Set** during every document assembly session. Be alert to every opportunity to set default answers because the more default answers you set while assembling documents:

- the more extensive your **Default Answer Set** grows.
- the greater the number of questions that are automatically populated by this feature.
- the more time you save.

Here is a quick refresher on how to set default answers during the assembly process.

When answering questions during the assembly phase, you will find the button for setting the default answers below the question as shown in *Figure 8, A*.

When answering questions during the data merge phase (*Figure 9, A*) you will find the button for setting the default answers above on the ProDoc menu bar as shown in *Figure 9, B*.

4. Other Options for Default Answers Sets

The Default Answers Sets we built here were for a specific attorney. But, you have other options as well.

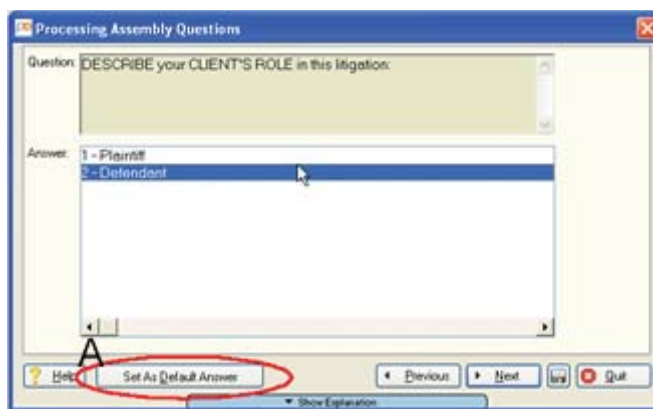


Figure 8 - Set an Assembly Question Default Answer

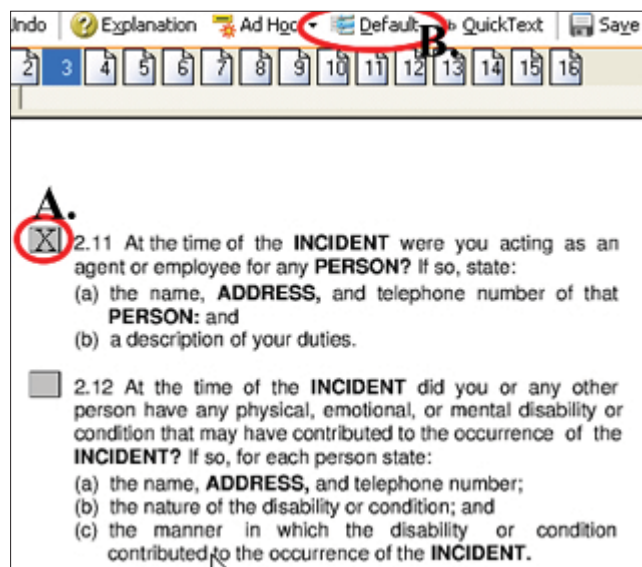


Figure 9 - Set a Merge Question Default Answer

- A. Major client** - If you have one major client for which or for whom your firm handles a large volume of cases, why not build a default answer set for that client? It can contain as much information as your firm wants to set as defaults. Once the default answers have been set, a majority of the forms you now generate for the client will almost self generate due to the high volume of default answers. And, anyone on your firm's network will be able to access the Default Answer Set(s).
- B. Area of Practice/Cause of Action** - Use the same principle outlined above for Default Answer Sets specific to a major client except make them for a specific area of practice or cause of action.
- C. Answer Templates** - While this is an inefficient way to utilize default answers, we mention for those who have used a form template function in another document assembly system. The reason this is less efficient is that the user is setting default answers for only one document.

Thus, you need many form templates for all of the documents needed over the life of the case. By using options 1 or 2 above, you can accomplish the same thing using only **Default Answer Sets**.

5. Caution about Using Default Answer Sets

Remember that when you select a **Default Answer Set** for your assembly session, ProDoc will automatically insert your default answers wherever one is called for. As intelligent as ProDoc is, it has no way of knowing when you might be dealing with an exception to the norm. So, while you can easily overwrite a default answer, ProDoc will use the default answer unless you specifically override it.

This can become an issue if you routinely choose to NOT review previous answers when assembly a document. By deselecting, or not selecting, to **Review prior answers** as shown in **Figure 10**, you are telling ProDoc to automatically insert the default answers and don't display the question behind it for your review.



Figure 10 - Don't Review Prior Answers

While this feature certainly saves plenty of time, as it was designed to do, it can also cause trouble for you if a specific case requires that you select an answer that is different from your default answer.

So, give some thought to your case prior to using a **Default Answer Set** and choosing not to **Review prior answers**.

6. Getting Help/Assistance with Creating and Using Default Answer Sets

For a training session on setting up **Default Answer Sets**, call our Training team at 800-759-5418.

We also provide a self-running training video about how to create and use Default Answer Sets on the ProDoc web site at <http://tinyurl.com/default-answer-training>.