

Printing Worksheets

Many ProDoc volumes contain generic Intake Sheets that you can print using the usual document assembly method. You'll find them named Client Questionnaire, Client Information Worksheet, Profile, etc.—depending on the volume. They are quick and easy to generate but they are generic. Of course, you can choose to generate one and then edit it to fit your requirements.

Another option is to use the Print Worksheets feature in ProDoc. This feature also generates interview questionnaires for clients in a worksheet format. The advantage of using this method is that you can select from a larger group of potential questions.

1. The Print Worksheets feature only works effectively for text-based forms—those forms that you generate in ProDoc and can edit in your word processor. Graphic forms that look like fill-in-the-blank forms and are saved as PDF files do not allow for effective worksheet generation. The client Intake Sheets in ProDoc are better options for these forms.

Perform the following steps to print worksheets:

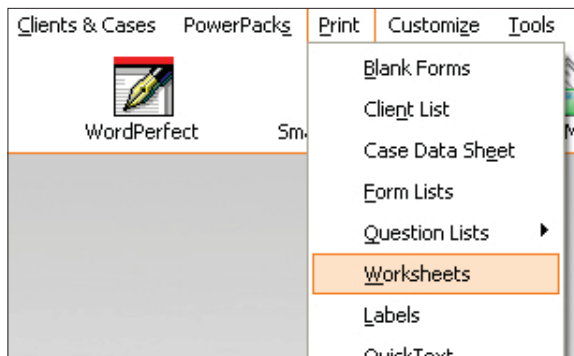


Figure 1. Print Worksheet

2. From the Main Menu, click **Print** → **Worksheets** (Figure 1).
3. Choose one of the five report-types by clicking the button next to the desired type (Figure 2).

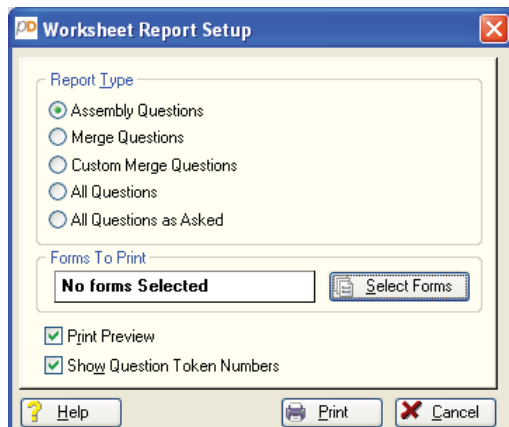


Figure 2. Select Report Type

- Assembly Questions** are number-based questions, Yes/No questions, and multiple choice questions. They will appear in the pop-up windows during the first phase of an assembly session.
- Merge Questions** are the fill-in-the-blank questions that will mostly appear during the second phase of the assembly where you see a preview of the document.
- Custom Merge Questions** creates a “custom” worksheet that contains only those merge questions that would be asked for a specific set of answers to the assembly questions. For instance, using this option for a divorce petition would cause ProDoc to ask how many children there are. If you answer zero, then the worksheet will only include questions that pertain only to couples without children. This option also lets you use the answers you previously entered for a case as default answers to the assembly questions.
- All Questions** prints a list of all questions asked for the selected form(s).
- All Questions as Asked** prints a list of all questions for the form(s) in the order asked.

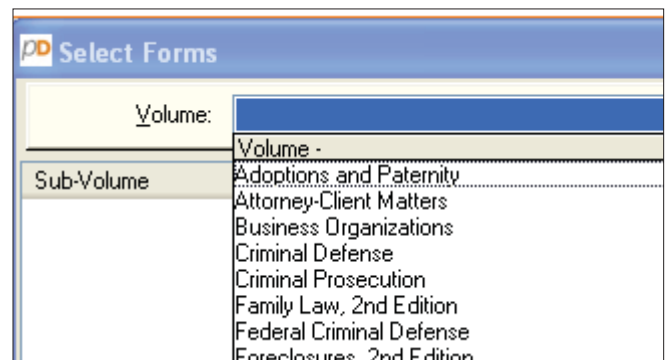


Figure 3. Select Volume

4. Click the **Select Forms** button (Figure 2) to reveal the volume selection window (Figure 3). After selecting the appropriate volume you are immediately taken to the **Select Forms** window (Figure 4).
5. Basic functions of the **Select Forms** window that appears are:

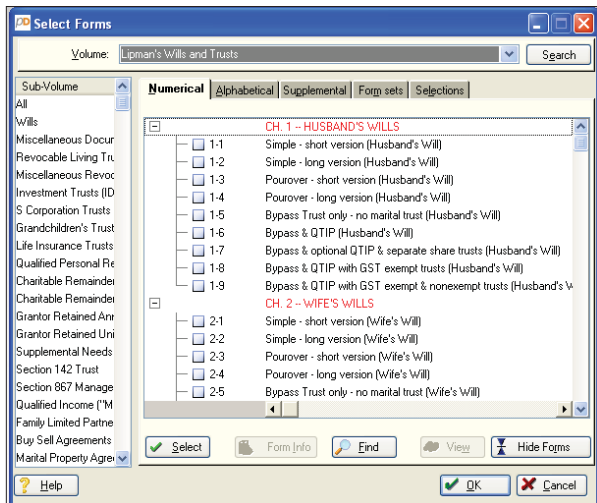


Figure 4. Select Forms

- a. You can find and select one or multiple forms from the volume you select.
 - i. You can choose from the sub-volumes on the left; the default is **All**.
 - ii. You can also display the list in **Numerical** or **Alphabetical** order by selecting the tabs.
 - iii. After you've added **Supplemental forms** to a volume you select, you can find these by selecting the **Supplemental** tab.
 - iv. Use the **Form Sets** tab to add the forms from any special sets you have created to the list of forms to print. If you have not yet set up any special sets, you can do so by clicking the **Set up form sets** button.
 - v. Click the **Selections** tab to display only the forms you have selected.
- b. Click the box next to the forms you want. You can research the forms further:
 - i. Click the form title to select the form;
 - ii. Click **Form Info** to see discussion about the highlighted form and/or **View** to see the form.
- c. You can click **Find** to search for a form by a word or phrase in either the title only or in both the title and the form. You can flip through instances using the **Find Previous** or **Find Next** buttons. Unchecking the

Search form titles only option enables you to search in titles and in the content of the forms.

6. After select the form(s) for which you want a worksheet, click **OK**.
7. The **Worksheet Report Setup** now opens (Figure 5).
8. If you chose **Custom Merge Questions**, you may click the **Select Case** button to select a specific case before proceeding. While not required, selecting a case enables you to save the answers you provide in the selected case file.

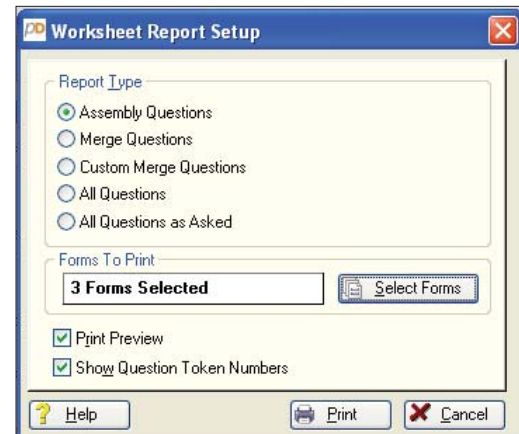


Figure 5. Make Final Choices

By default, the box labeled **Show Question Token Numbers** is checked. These numbers are assigned by ProDoc to identify the token questions and control certain other variables. Uncheck this box if you do not want to print these token numbers.

9. If you chose **Custom Merge Questions**, the **Show Assembly Questions** selection box is displayed. You may click this box to print the questions that will be asked during assembly of the form.
10. Click **Print**. If you are producing a report of **Custom Merge Questions**, you will be prompted to answer questions before printing. When you are finished, the **Report Destination** window appears.
11. Select your printer and click **OK**.

If you didn't choose **Print Preview**, your worksheet will print. If you chose **Print Preview**, you will see the worksheet on your monitor screen before printing it.

If you wish to further customize your worksheet, choose **Print Preview**. When the worksheet displays on your monitor screen, copy it and paste it into a blank word processor page. You can then edit your worksheet in your traditional manner.