

ProDoc Tech Tip

Creating and Using Supplemental Forms

You can add your own forms and letters into ProDoc. If you want, you can even automate them to merge data into pre-selected fields. Follow the steps below to create a simple, representative supplemental form for ProDoc. Alternatively, you can modify ProDoc master templates and save them as Supplemental Forms in ProDoc.

This will show you the basic steps in creating a supplemental form.

1. Create a Supplemental Forms Volume in Which to Store Your Forms

This is not a mandatory step. You can store the forms in any volume folder. Storing them in an existing ProDoc library enables you to insert client and case data saved from a previous assembly session into your supplemental form.

Skip ahead to section 2 if you intend to save your supplemental forms in an existing ProDoc volume.

- A. Click **Tools** ► **Registration** ► **Edit Volumes List**. The **Volumes Browse Window** opens, *Figure 1*, and displays all of the volumes to which you have access through your ProDoc subscription.



Figure 1 - View Volumes

- B. Click the **New** button. The **Volume Information** window opens, *Figure 2*.
- C. Type **Supplemental Forms** in both information fields, *Figure 2*, and click **OK**. Click **Yes** on the **Directory Does Not Exist** confirmation window (*Figure 3*).
- D. The **Supplemental Forms** volume now appears on the list. Click **Close**.



Figure 2 - Name the New Volume

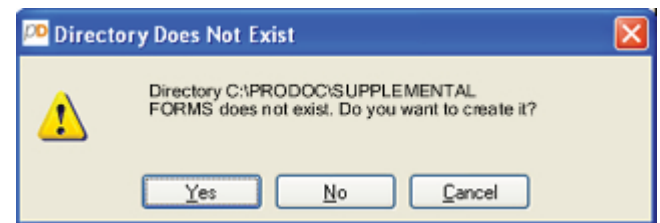


Figure 3 - Confirm the New Volume

2. Start with the Form you Want to Automate

Begin with the form you wish to automate. Then, identify the data that will vary depending on the client and case, as shown in *Figure 4*.

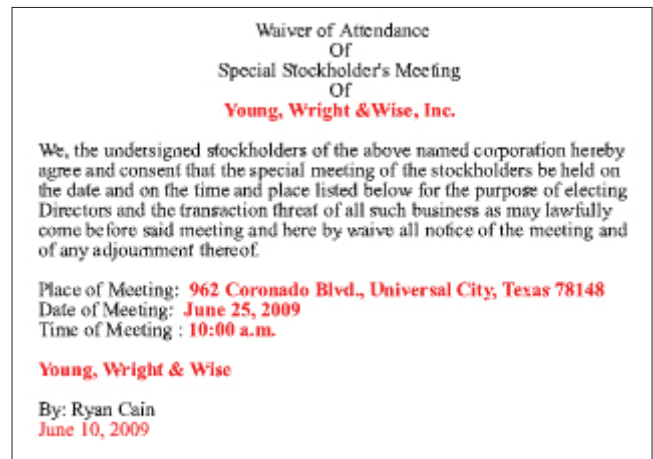


Figure 4 - Identify Variable Data in the Form

3. Use Existing ProDoc Questions

Follow this section if you are plan to use existing questions in ProDoc. Section 4 will show you how to add your own supplemental questions.

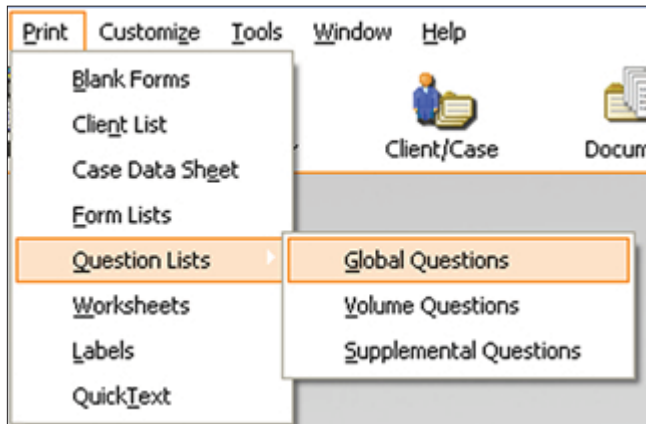


Figure 5 - Choose the Types of Questions to Print

A. Print a list of the questions from which you can choose for automating the merging of variable data into your form by clicking **Print► Questions Lists**.

B. Choose to print either **Global Questions** or **Volume Questions**, as shown in *Figure 5*.

i. **Global Questions** - These questions, and the data saved for them includes law firm information. If you want your firm and attorney information, and/or co-counsel information to flow into the form, you will want to include Global Questions.

ii. **Volume Questions** - These questions, and the data stored for them, will flow into your form from the specific volume into which you save the form. If you want ProDoc to retrieve saved client and case information while drafting this document, you should add Volume Questions into your form.

iii. **Supplemental Questions** - If you have previously created Supplemental Questions for other forms you've created and saved, you can access them, and any data stored for them in this form, as well.

C. For this example, click on **Global Questions** as shown in *Figure 5*.

D. In the **Global Questions Report** window, *Figure 6*, choose **Merge Questions**. **Assemble Questions** will not work for the type of form we are drafting. Later, we will tell you where to access information for creating logic questions to select specific language for the form based on the responses to Assemble Questions. Click **Print**.

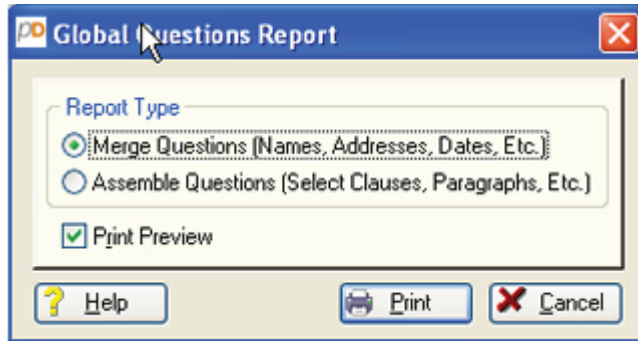


Figure 6 - Global Questions Report

E. In the **Report Destination** window, *Figure 7*, confirm that you want to print the report to your default printer and click **OK**.

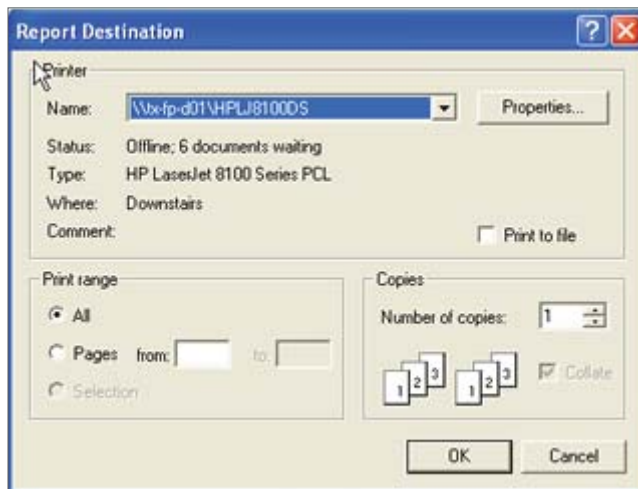


Figure 7 - Select Your Printer

F. The **Report Preview** window now opens, *Figure 8*. Choose whether to print the report by clicking on the printer icon (A) or to save the report as an electronic file by clicking the T icon (B).

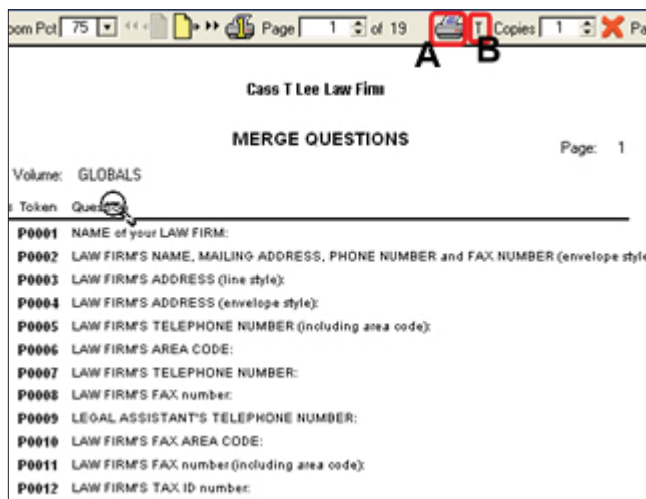


Figure 8 - Print Questions List

4. Create Your Custom Questions

After reviewing the Global Questions list and Volume Questions list, some of the questions we need are not contained in either location so we need to create our own unique questions for this form.

A. Click **Customize►Supplemental Forms & Questions►Supplemental Questions** as shown in *Figure 9*.

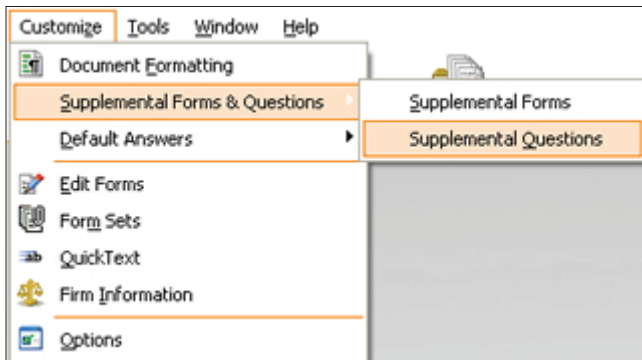


Figure 9 - Choose Supplemental Questions

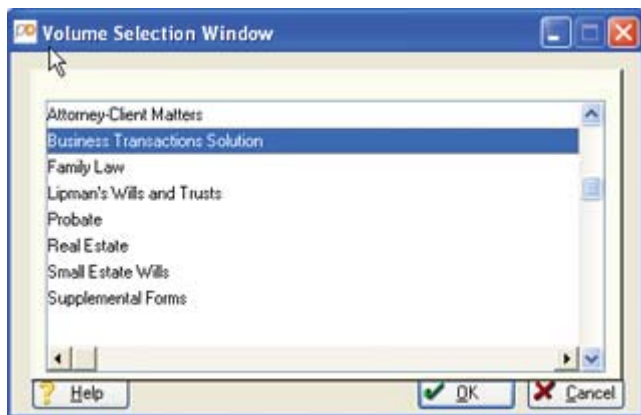


Figure 10 - Select Volume in Which to Save the Questions

B. Choose the volume, *Figure 10*, for which you want to create the Supplemental Questions. For this form, we want to access the client and case data stored in the **Business Transactions Solution** volume so that is our choice. After selecting the volume, click **OK**.

C. The **Supplemental Questions for Business Transactions Solution** window opens, *Figure 11*. Click **New**.

D. In the **Supplemental Question** window, *Figure 12*, use the following guidelines:

- i. **Token** - Enter a four digit number of your choice (A). You can use P0001 (the P is mandatory) as an example for your first question.
- ii. **Size** - Choose the size of your answer in rows and columns (B). In most cases a single row and column will

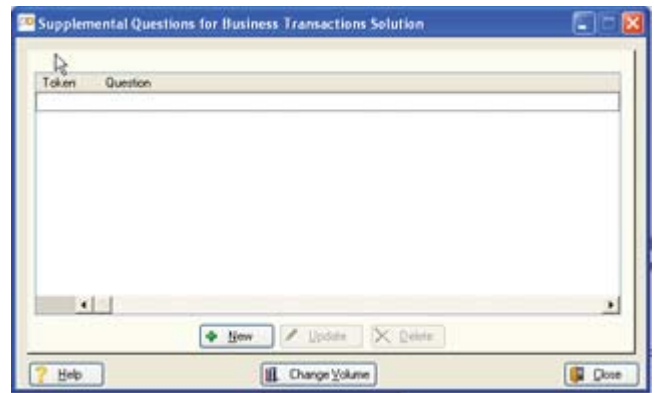


Figure 11 - Choose New to Create New Question

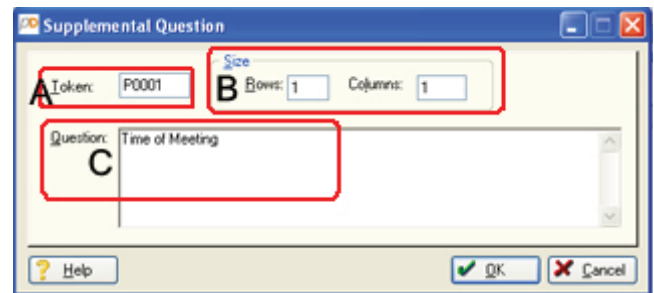


Figure 12 - Make Supplemental Questions Selections

suffice.

iii. **Question:** Type your question (C) - a ? is not required.

E. Click **OK**.

F. Repeat the previous steps for each question you want to create. In our example we created three questions. They display as shown in *Figure 13* after creating the third question. Click **Close**.

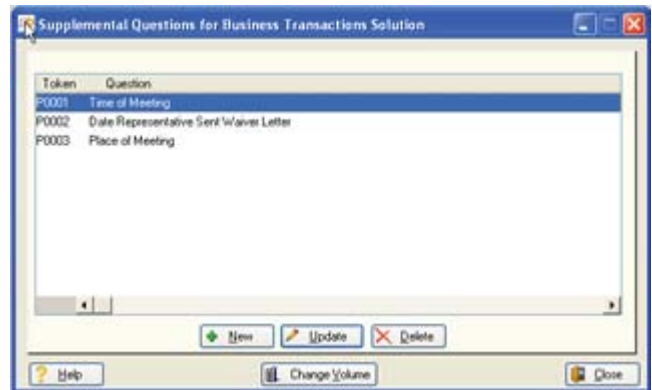


Figure 13 - Completed Questions

G. If you choose to print your list of Supplemental Questions, follow these steps:

- i. Go to **Print►Question Lists►Supplemental Questions** (*Figure 14*).

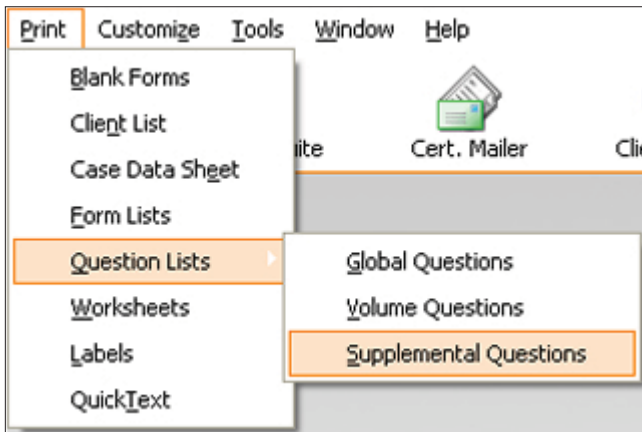


Figure 14 - Print Supplemental Questions

ii. Click **Select Volume** in the **Supplemental Volume Questions Report** window (Figure 15).



Figure 15 - Select the Volume

iii. Select the volume containing the Supplemental Questions that you wish to print and click **OK** (Figure 16).



Figure 16 - Select Volume Questions to Print

iv. Confirm that the displayed volume is the one for which you want to print the Supplemental Questions and click **Print** (Figure 17).

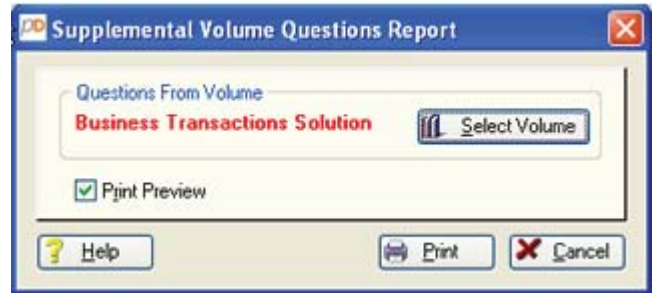


Figure 17 - Confirm Volume Questions to Print

v. Select your printer and click **OK** (Figure 18).



Figure 18 - Select Printer

vi. The **Report Preview** window now displays (Figure 19). Choose whether to print the report by clicking on the printer icon (A) or to save the report as an electronic file by clicking the T icon (B).

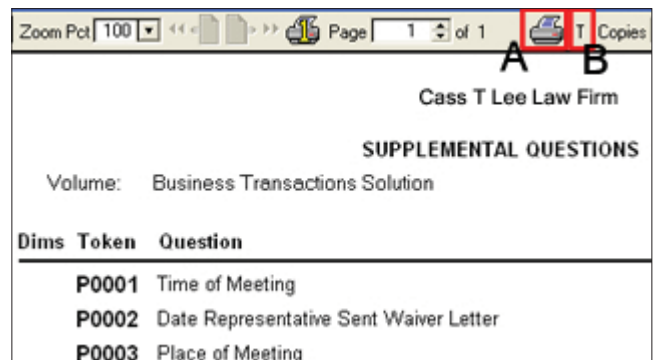


Figure 19 - Print Question List

vii. If you choose to save the **Supplemental Questions** list, click the **T** icon (Figure 19, B) and navigate to where you wish to save the list as a .txt file. Change the file name to one of your choosing and click **Save**.

5. Embedding Token Codes - Adding ProDoc and user defined questions to your form

- A. Open the basic form in Microsoft® Word® or Corel® WordPerfect®.
- B. Replace the variable text with the appropriate tokens as shown in **Figure 20**.

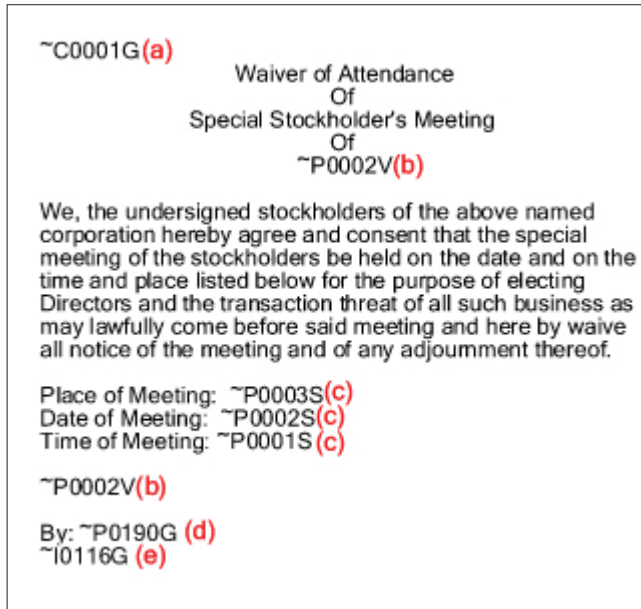


Figure 20 - Insert Token Codes into Form

- C. When finished with the following steps, your form will look like **Figure 20**.
- D. Tokens are the codes that tell ProDoc to seek information at that point and trigger the appropriate question. The base token consists of four characters preceded by a tilde (~). They are also followed by a capital **G**, **S**, or **V**.
 - i. **G** - This tells ProDoc to pull from the Global questions. An example on this form is denoted by **(d)**.
 - ii. The **~C0001G** token **(a)** is a special Global token in that it tells ProDoc to use information previously saved in the Client and Case Manager. Add this token to the top of your supplemental form.
 - iii. The **~I0116G** token **(e)** is a special system token that tells ProDoc to enter today's date. You will find more system tokens in Section 9.
 - iv. **S** - This tells ProDoc to pull from the Supplemental questions. The examples on this form are denoted by **(c)**.
 - v. **V** - This tells ProDoc to pull from the Volume questions. The examples on this form are denoted by **(b)**.
 - vi. **Insert tokens for all variable data** - If you find you are missing any questions, you can go back and create new

supplemental questions if necessary. You do not need to use all of your Supplemental Question tokens in this form.

6. Save Your Supplemental Form

Click to save the form using your usual method.

Navigate to save the form in the same directory into which you associated the Supplemental Questions as shown in **Figure 20, A**.

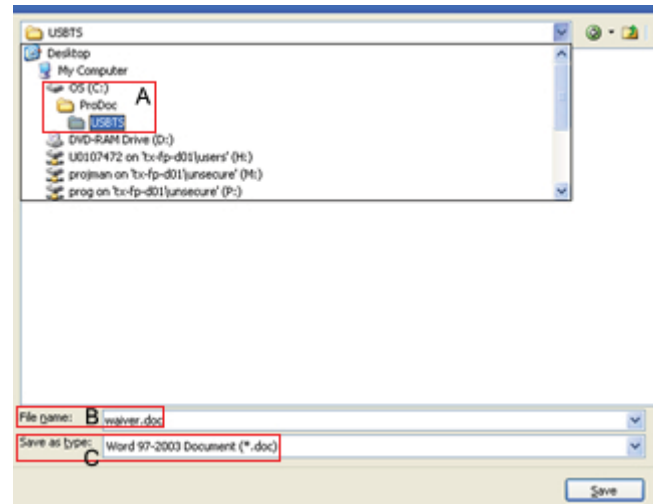


Figure 21 - Save the Completed Form

Save the form with a file name of eight characters or less, **Figure 21, B**.

Save the document as a Microsoft Word 2003, or lower, document (*.doc) or a Corel WordPerfect, any version, document (*.wpd). Do not save the document as a *.docx file if you have Microsoft Word 2007, or higher, **Figure 21, C**.

7. Adding Your Form in a ProDoc Volume

- A. Select **Customize ► Supplemental Forms & Questions** and click on **Supplemental Forms**, **Figure 22**.

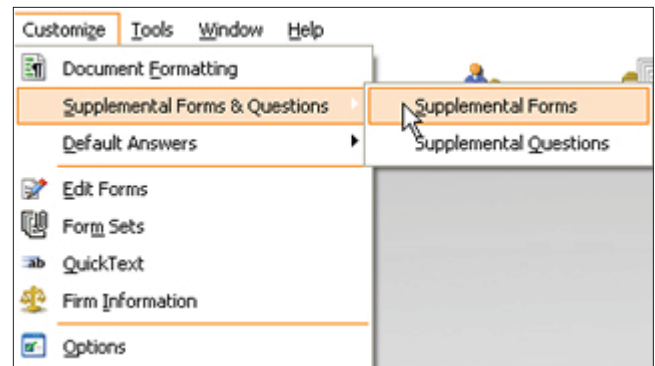


Figure 22 - Adding the Supplemental Form to ProDoc

- B. From the **Volume Selection Window**, choose the volume in which to save your document. In this example, we will save the form in the Business Transactions Solution volume,

Figure 23. Click **OK**.

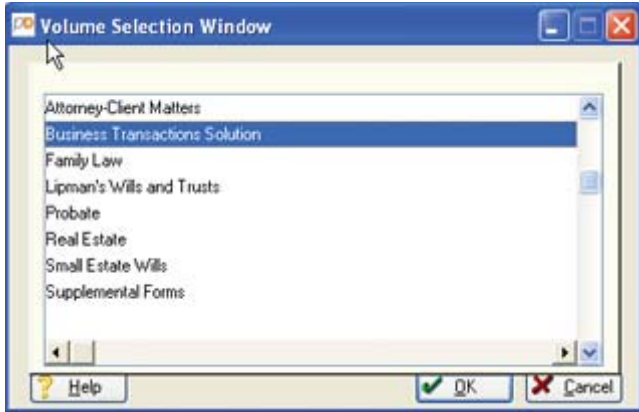


Figure 23 - Select Volume

C. On the **Supplemental Forms for Business Transaction...** window, **Figure 24**, click **New**.



Figure 24 - New Form

D. In the **Supplemental Form** window (**Figure 25**), enter the Filename using the identical eight-or-less-character name you assigned to the form in Section 6.

E. Create a name of your choice for the form in the **Title** field. The **Title** is what you will see when you select from your Supplemental Forms for drafting.

F. Click **OK**.

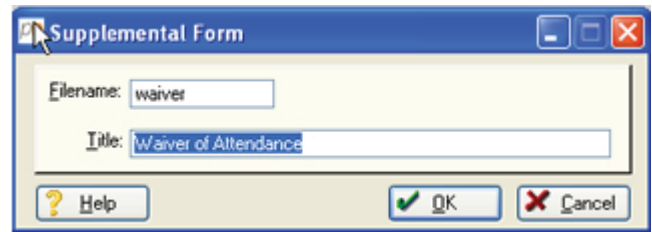


Figure 25 - Enter File Name and Form Title

G. The **Supplemental Forms for Business Transaction...** window, **Figure 26**, opens again and shows that you added the **Waiver of Attendance** form. With no more forms to add, click **Close**.



Figure 26 - Finish Creating New Forms

8. Assemble Your Form

A. Begin an assembly session as you normally do, **Figure 27**.

B. Select your client and case or create them as needed.



Figure 27 - Begin the Assembly Process

C. Click **Select Forms**.

D. The **Select Forms** window opens, **Figure 28**. Choose the volume to which you saved your Supplemental Form; the **Business Transactions Solution** volume in our example.

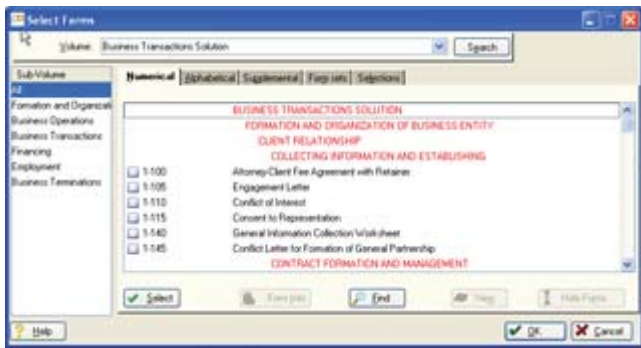


Figure 28 - Select Forms

E. Click the **Supplemental Forms** tab to reveal the list of **Supplemental Forms** associated with this volume, **Figure 29**.

F. Select the Supplemental Form you wish to draft.

G. Click **OK**.

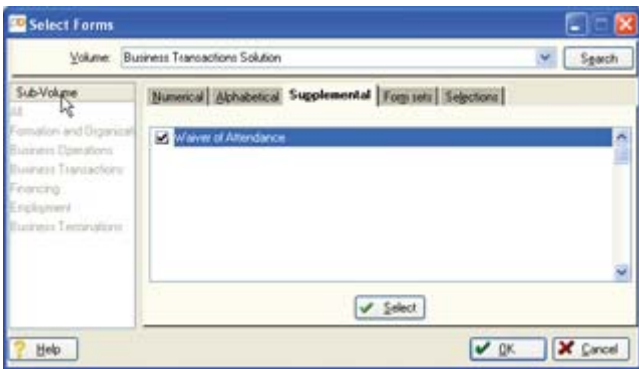


Figure 29 - Select Supplemental Forms

H. Continue the document assembly process just as you would any other ProDoc session.

9. Using System Tokens

Here are some handy system tokens you might choose to use in your form(s):

- **~I9100G**: This token inserts the Document Title wherever you place the token on the form
- **~P9000G**: This token inserts the Case I.D. entry from the Contact Manager
- **~I0114G**: This token provides the current date spelled out, such as July 11, 2007
- **~I0116G**: This token provides the current date in numeric style, 07/11/07
- **~P1208G**: This token asks for Petitioner's full name or it retrieves it, if available, from the client data
- **~P1308G**: This token asks for Respondent's full name or it retrieves it, if available, from the client data

10. Adding Supplemental Forms to Form Sets

You can also add your supplemental form to your form sets.

- A. Follow the usual method to create a form set. If you are not familiar with the process, go here for instructions: <http://tinyurl.com/pd-form-sets>.
- B. When you arrive at the step in which you select the forms to include in the form set, click the Supplemental Forms tab and select the form you wish to add, **Figure 30**.

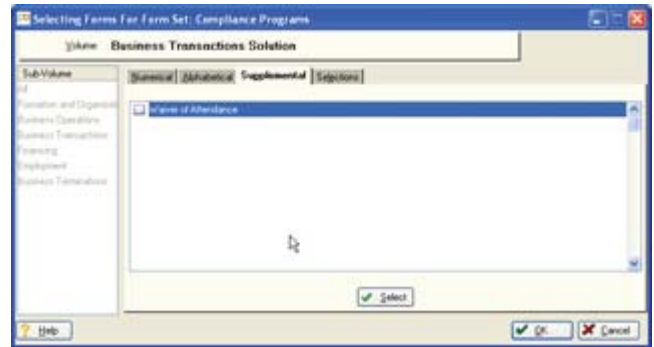


Figure 30 - Add a Supplemental Form to Your Form Set

11. Additional Resources

You have built a simple, basic supplemental form which uses some, but not all, of the ProDoc document assembly automation features.

For more help with creating Supplemental Forms, you can:

- i. Use the training videos available at our web site at <http://tinyurl.com/pd-adv-training>
- ii. Read Appendix D of the ProDoc Software Manual for more information on creating more complex supplemental forms. You can download the manual from: <http://tinyurl.com/pd-manuals>
- iii. Call our Technical Support team at 800-759-5418
- iv. Call our Training Team at 800-759-5418 for a personal training session on this topic

12. An Alternative to Creating Supplemental Forms

After reviewing the process of creating Supplemental Forms, you may decide that it requires more effort than the perceived value of the form. Instead, it may make more sense for you to modify a master template in the volume to which you were planning to add the form. This is a much simpler process. Learn how to modify master form templates in ProDoc at: <http://tinyurl.com/pd-modify-templates>