

Using TheFormTool in Your Law Practice

No More Copy & Paste

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www.theformtool.com

Organizing Forms

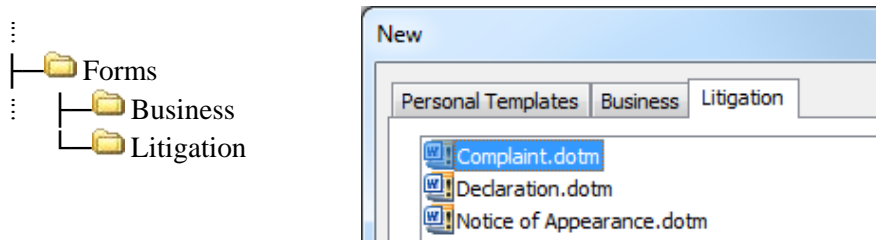
Word users have two basic methods to access forms: (1) the File-New menu; and (2) Windows Explorer. Both work well, but the second method has a couple advantages.

First Method (pretty good): Word's File-New Menu


1. Set the location of your form folder so Word knows where to look.

Pre-Word 2007	Word 2007	Word 2010
◆ Tools , ◆ Options , ◆ File Locations , ◆ User Templates , ◆ Modify , and select the location where your forms are saved.	Click the  Office button, ◆ Word Options , ◆ Advanced , ◆ File Locations , ◆ User Templates , ◆ Modify , and select the location where your forms are saved.	◆ File , ◆ Options , ◆ Advanced , ◆ File Locations , ◆ User Templates , ◆ Modify , and select the location where your forms are saved.

2. If you have lots of forms, subdivide the Forms folder into categories that will appear as tabs in the File-New screen.



3. Save forms as *template* files to the desired location. (See the blue box on page 2 for a discussion of the difference between *documents* and *templates*.)

Pre-Word 2007	Word 2007	Word 2010
◆ File , ◆ Save As , and choose Document Template (*.dot) in the Save as type box.	Click the  Office button, ◆ Save As , and choose Word Template (*.dotx) in the Save as type box.	◆ File , ◆ Save As , and choose Word Template (*.dotx) in the Save as type box.

4. Use forms with Word's **File, New** command.

Pre-Word 2007	Word 2007	Word 2010
◆ File , ◆ New , ◆ General Templates .	Click the  Office button, ◆ New , ◆ My Templates .	◆ File , ◆ New , ◆ My Templates .

The Difference Between Documents and Templates

A template file is a form that's used repeatedly to create many documents. You might use a Contract *template* to create a Contract *document* for John Doe, and then use the same *template* again to create another Contract *document* for Jane Smith, and so on.

Double-clicking a document file opens that document for editing. Make some changes and click **Save**, and your revised document replaces the previous draft of the document.

But double-clicking a template file *creates a new document without altering the template*. If you edit the new document and click **Save**, you are prompted to save the new document in a new location with a new filename -- there is no danger of overwriting the template form.

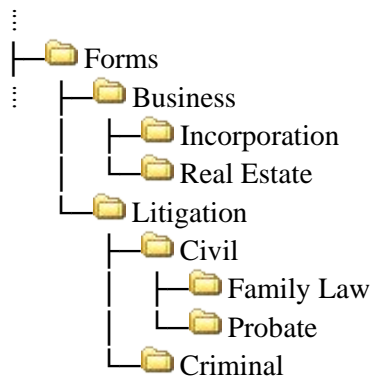
When you really *do* want to make changes to a template, rather than double-clicking it you must right-click and choose **Open**.

If the display of file extensions is enabled on your computer (see Step 1 in the blue box on page 3), document files end with **.doc**, **.docx**, or **.docm**. Template files end with **.dot**, **.dotx**, or **.dotm**.


Second Method (better): Windows Explorer



Using Windows Explorer to browse to your form folder has a few advantages: (a) categories can be subdivided; (b) Windows' search function can be used to locate forms; and (c) shortcuts can be used to further organize forms and form packets.


1. Create a folder for forms -- if you have a network, create it in a shared location on the server. Unlike the first method above, you may subdivide it into categories, subcategories, sub-subcategories, and so on.



2. Save forms as *template* files to the appropriate category within the Forms folder.

 Pre-Word 2007
◆ File , ◆ Save As , and choose Document Template (*.dot) in the Save as type box.

 Word 2007
Click the  Office button, ◆ Save As , and choose Word Template (*.dotx) in the Save as type box.

 Word 2010
◆ File , ◆ Save As , and choose Word Template (*.dotx) in the Save as type box.

3. Make the Forms folder easily accessible by doing at least one of the following:
 - a. Add it to your Favorites list.
 - b. Create a shortcut on your desktop.
 - c. Pin it to your Taskbar. (See the blue box on page 3 if you use Windows Vista or Windows 7.)

- To use a form: (a) use your Favorites link, desktop shortcut or Taskbar icon to open the Forms folder; (b) browse to the desired subcategory or use Windows' search function to locate the form; and (c) double-click the form to create a new document.

Pinning Folders to the Taskbar in Windows Vista and Windows 7 (an obscure tip for the adventurous tinkerer)





When you pin a folder to the Taskbar in Windows Vista or Windows 7, the folder is added to a collection of items within the Explorer icon, where it is not instantly accessible. To create a dedicated icon in the Taskbar that opens a particular folder with a single click, you need to trick the operating system:

- Make sure file extensions are enabled by clicking **Start, Computer, Organize, Folder and search options, View**, and unchecking **Hide extensions for known file types**.
- Temporarily create a text file on the desktop by right-clicking the desktop then clicking **New, Text Document**.
- Right-click the text file you created, click **Rename**, and type a new name with ".exe" at the end instead of ".txt" (e.g., **My Forms.exe**).
- Drag the file you created onto the Taskbar to create a pinned icon there.
- Right-click the pinned icon, right-click its name (e.g. **My Forms**), and click **Properties**.
- In the **Target** box (on the **Shortcut** tab), type the path to your folder (e.g., **F:\Firm\Forms**).
- Click **Change Icon** and choose an appropriate icon, then click **OK, OK**. (The new icon will appear next time the computer is rebooted.)
- You can delete the temporary file from your desktop.

Tips for Form Authors

Default Filenames

Save time for form users and promote file naming consistency by assigning a default filename to each form template you create:

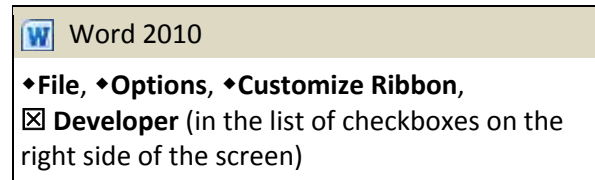
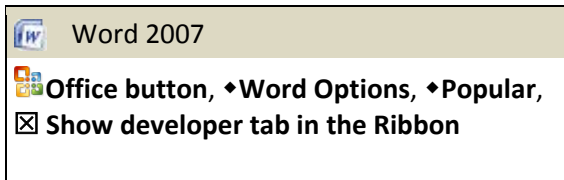
 Pre-Word 2007 ♦File, ♦Properties, ♦Summary, type default filename in Title box.	 Word 2007  Office button, ♦Prepare, ♦Properties, type default filename in Title box.	 Word 2010 ♦File, ♦Info, type default filename in Title box on right side of screen.
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When the template is used to create a document and the resulting document is saved, the filename you specified will be provided as a default.

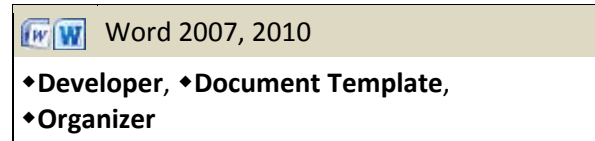
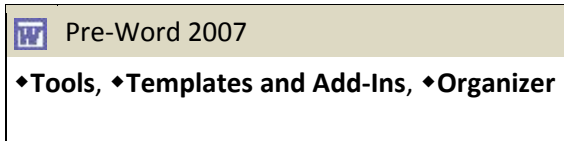
Copying Styles Between Documents

As you create a form library, you will be copying and pasting material from a variety of old documents. This cross-pollination of text from several sources often leads to formatting problems related to Word's styles feature. One way to simplify the process is to make sure style definitions are identical in the source and target documents. Trying to conform styles between two documents can be frustrating, but

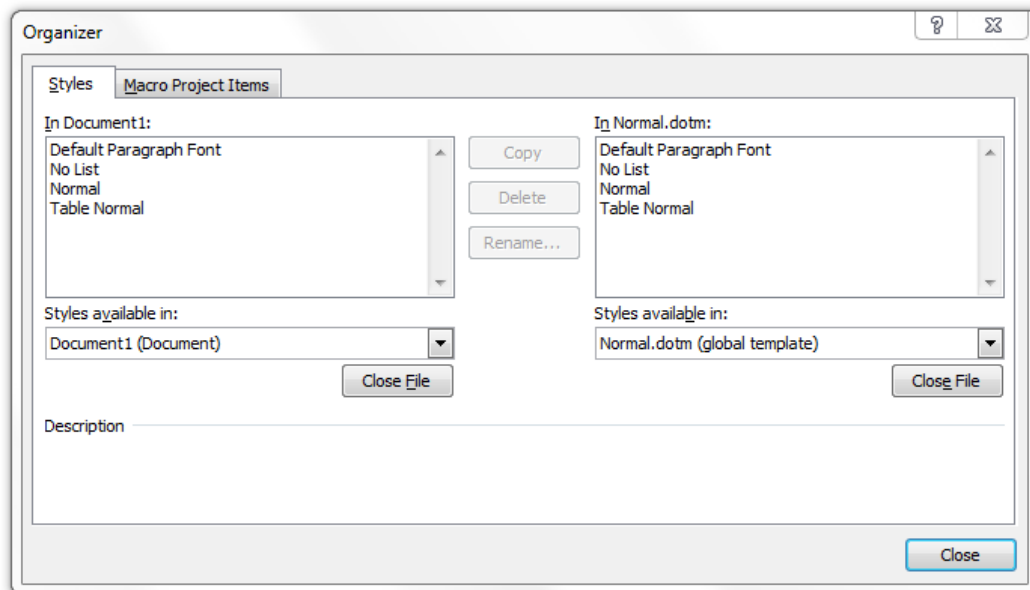
there is an easy method hidden away in Word's sub-basement. First, if you use Word 2007 or Word 2010, turn on the Developer tab:



Then open the Organizer screen:



The Organizer screen is shown below. The current document is selected on the left side. On the right side, click **Close File** then **Open File** to open the document or template from which you will copy styles. Then, in the right-hand list, select the styles to be copied and click **Copy** in the center of the screen.



Shortcuts

To simplify the job of keeping forms current, it's important that you don't create multiple copies of any particular form. But you can still organize forms into a variety of multipurpose "packets" by using shortcuts.

What's a Shortcut?

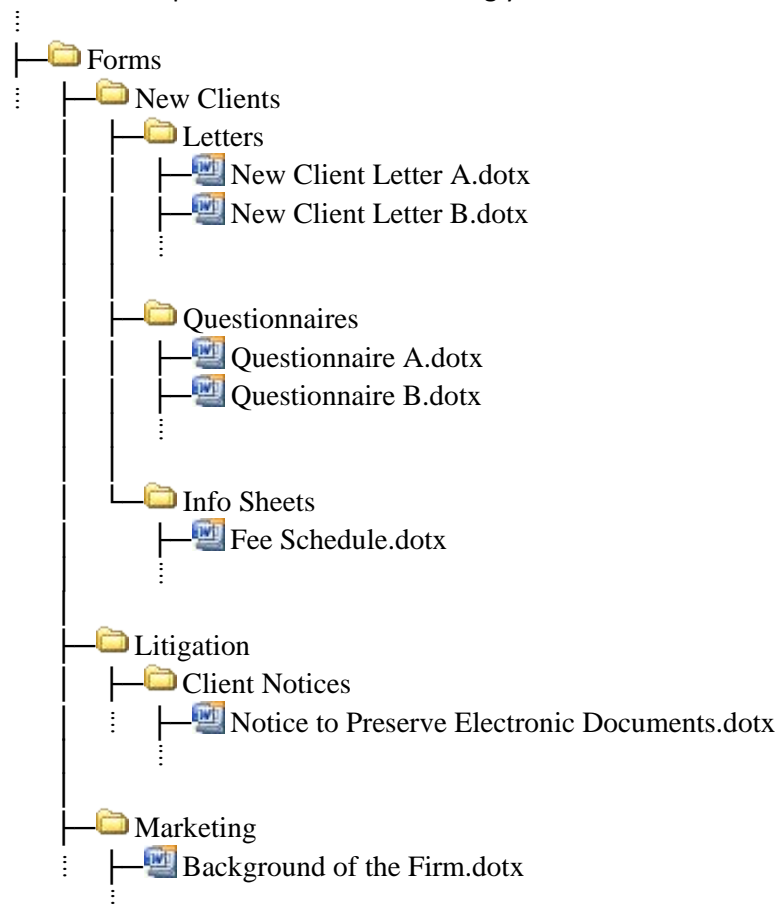
Shortcuts are analogous to links that you click to open a web page. There is only one web page, but links are scattered far and wide, so people can get to the web page from many different locations. When the web page needs to be updated, it only has to be updated in one place, and all of the links point to the new information. Shortcuts have a similar purpose, but they point at files instead of web pages.

There are many ways to create a shortcut to a file. Here's a simple one: First browse to the file in Windows Explorer and copy it as you normally would (for example, right-click on the file and choose **Copy**). Then right-click in the folder where you want to create a shortcut and choose **Paste shortcut**.

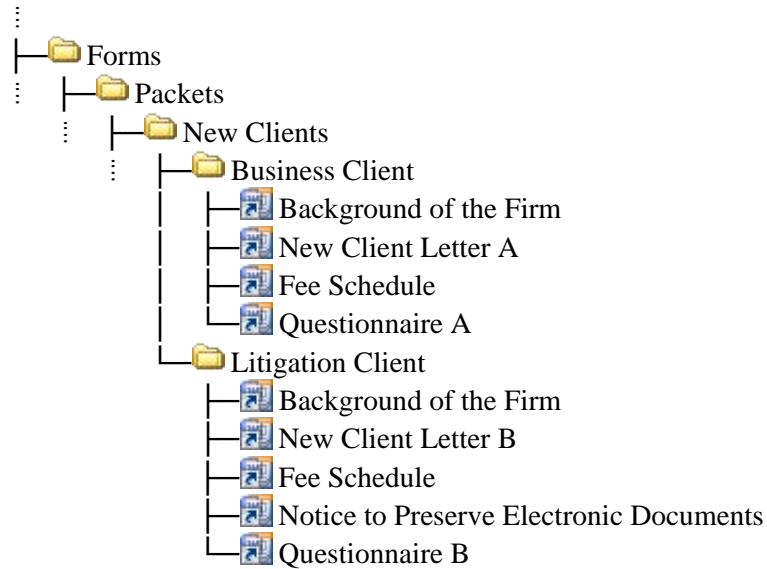
For example, suppose that every time you sign on a new client you generate the following packet of documents:

- Background of the Firm
- New Client Letter A (if it's a business client)
- New Client Letter B (if it's a litigation client)
- Fee Schedule
- Notice to Preserve Electronic Documents (if it's a litigation client)
- Questionnaire A (if it's a business client)
- Questionnaire B (if it's a litigation client)

Further suppose that those seven templates are scattered among your forms like so:



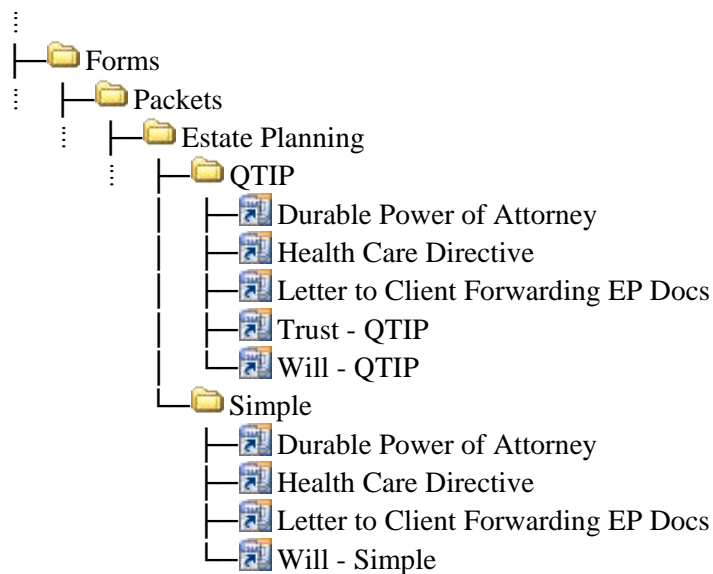
Rather than embark on a hunt for the scattered forms each time a new client signs on, you can create a “packet” of form shortcuts for each type of client:



Now you can find all the forms you need in one location, and you’ve reduced the chance that you might forget one or mistakenly use Form A instead of Form B.

Note that these are *shortcuts* to your form files; they are not *copies* of the forms.

The same approach can be used with any set of forms that tend to be used in packets rather than singly. For example:



Bonus Section: Some Handy Lesser-Known Features in Microsoft Word

Favorite Keystrokes

Every command on the ribbon can be accessed with the keyboard instead of the mouse. Tap **Alt** to see the necessary keystrokes.

Many commands also have an additional keystroke shortcut, which can be found in the command's tooltip. (To see a command's tooltip, hover over it with the mouse.) Some personal favorites are listed below.

Formatting

Apply font formatting with **Ctrl+B** (bold), **Ctrl+I** (italic), and **Ctrl+U** (underline).

Align paragraphs with **Ctrl+E** (center), **Ctrl+J** (justify), **Ctrl+L** (flush left) and **Ctrl+R** (flush right).

Set the left margin with **Ctrl+M** and **Shift+Ctrl+M**.

Set hanging indents with **Ctrl+T** and **Shift+Ctrl+T**.

Type tabs within tables with **Ctrl+Tab**.

Add line breaks within a paragraph with **Shift+Enter** -- works great in address blocks and numbered lists.

Toggle uppercase/lowercase/title case with **Shift+F3**.

Apply a Heading style with **Ctrl+Alt+1**, **Ctrl+Alt+2**, and **Ctrl+Alt+3**.

Remove style formatting (**Shift+Ctrl+N**), paragraph formatting (**Ctrl+Q**), and font formatting (**Ctrl+spacebar**).

Moving, Selecting, Typing

Find text with **Ctrl+F**, find again with **Ctrl+Alt+Y** (think "Yes, search again"), and replace with **Ctrl+H** (think "Hunt and replace").

Move the cursor by word (**Ctrl+Left/Right**) or by paragraph (**Ctrl+Up/Down**).

Select text by holding **Shift** and pressing arrow keys (also combine with **Ctrl**, as shown above). Press **F8** repeatedly to select a word, sentence, paragraph, section, or document. Select all text with **Ctrl+A**.

Jump to last three revisions with **Shift+F5** or **Ctrl+Alt+Z**. Immediately after opening a document, press **Shift+F5** to jump to last edit before it was saved.

Move selected paragraphs (or table rows) up or down with **Shift+Alt+Up** and **Shift+Alt+Down**.

Many foreign characters can be typed with an intuitive two-keystroke sequence: **Ctrl+punctuation mark** followed by an **alpha character**. For example: Type á with **Ctrl+'** then **a**. Type ü with **Ctrl+:** then **u**. Type ñ with **Ctrl+~** then **n**. Type ç with **Ctrl+,** then **c**. (Note that the colon and tilde are Shifted keystrokes, so you'll be holding down **Ctrl** and **Shift** at the same time.)

Actions

Toggle field codes with **Shift+F9** (affects selected fields) or **Alt+F9** (affects all fields).

Close a document without closing Word with **Ctrl+W** or **Ctrl+F4**.

Change views with **Ctrl+Alt+P** (print layout), **Ctrl+Alt+N** (draft layout), and **Ctrl+Alt+I** (print preview).

Switch document windows with **Ctrl+F6**.

Alt+1 through **Alt+0** use the first ten commands on the Quick Access Toolbar.

Favorite Underused Tools

View

Zoom in and out with **Ctrl+mousewheel**.

Toggle visibility of table gridlines with **Table Tools, Layout, View Gridlines**.

If top and bottom margins disappear in Print Layout View, double-click the gray border between pages.

To view two documents side-by-side, click **View, View Side by Side**. Then use the **Synchronous Scrolling** checkbox to “tie” them together when scrolling.

Split the screen to view two parts of the same document by dragging the small horizontal line at the top of the scrollbar on the right side of the screen.

View symbols and hidden text with the **Show/Hide ¶** icon, and the Reveal Formatting panel with **Shift+F1**. Within the Reveal Formatting panel, click any underlined item to make changes.

Buttons (only for Word 2007 and 2010)

Right-click the status bar at the bottom of the screen to add buttons and control the way information (like page numbers) is displayed.

To minimize the ribbon at the top of the screen, right-click it and choose **Minimize Ribbon**.

Add any button to the Quick Access Toolbar by right-clicking it and choosing **Add to Quick Access Toolbar**. Do the same with a group name to add a whole group of buttons to the Quick Access Toolbar.

If you need more room on the Quick Access Toolbar, right-click it and choose **Show Quick Access Toolbar Below the Ribbon**.

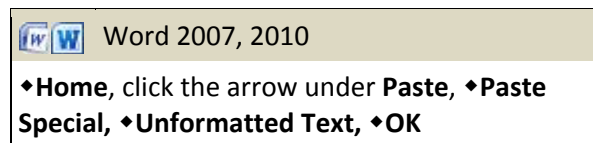
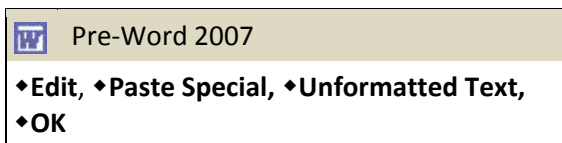
Navigation

Press **Ctrl+F** to open the navigation pane. Use it to browse by pages or headings (with collapsible hierarchy).

The three browse-by-object buttons below the scroll bar on the right side of the screen can be used to move to next/previous section, page, heading, field, etc.

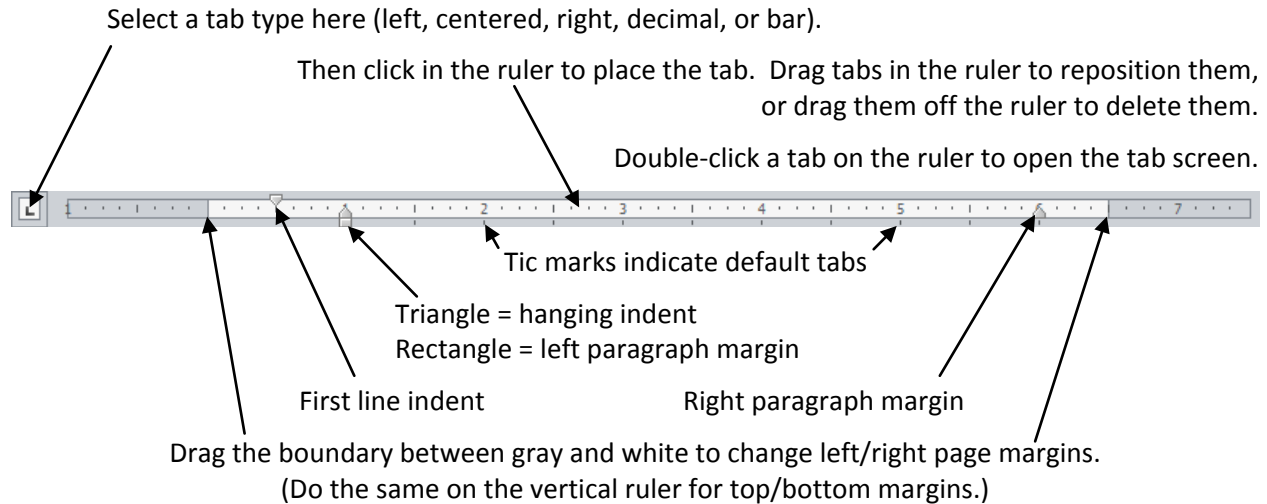
Paste Unformatted Text

When copying and pasting text from external sources (especially web pages!), it is critically important to paste *unformatted text* (also known as pasting *text only*) so that you don't inadvertently contaminate your document with unwanted or contradictory formatting.



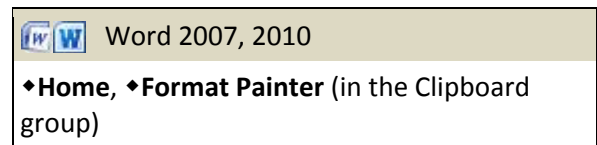
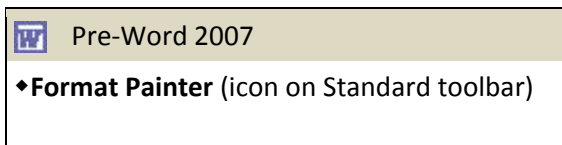
The Ruler

If the ruler is not visible, you can turn it on with the button at the top of the scrollbar on the right side of the screen. It contains a surprising number of formatting controls:



Format Painter

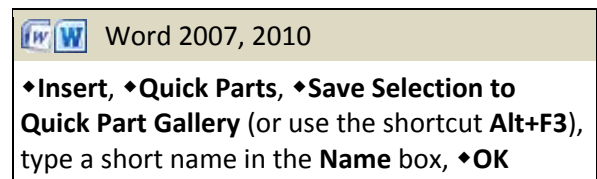
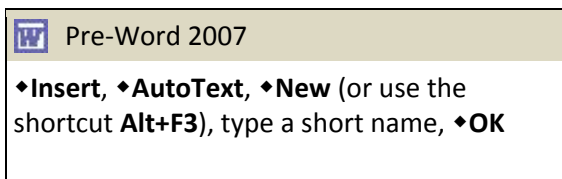
The Format Painter is a two-click fix for many of the most stubborn formatting problems you will encounter. Just select some text that's formatted correctly, click the Format Painter, then click in (or drag across) the text that's formatted incorrectly. If you double-click the button, you can then select a whole series of locations in the document where the format should be painted -- press **Esc** when you're done.



AutoText/Quick Parts

In recent versions of Word the AutoText feature has been a bit buried in the menus, but it is still extremely useful, especially for short pieces of text like signature blocks, bar numbers, and common phrases. Other AutoText favorites include section symbols, paragraph symbols, interrogatories, and requests for admission/production. Note that AutoText is stored locally on your computer and not shared with others in your office.

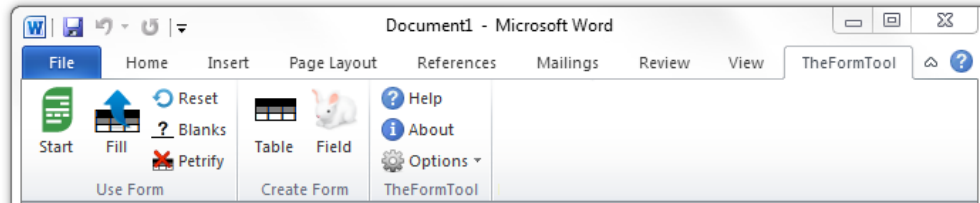
Creating AutoText: First select the text to be stored, then:



Using AutoText: Type the short name of an AutoText and press **F3**. (Do not type a space before pressing **F3**.)

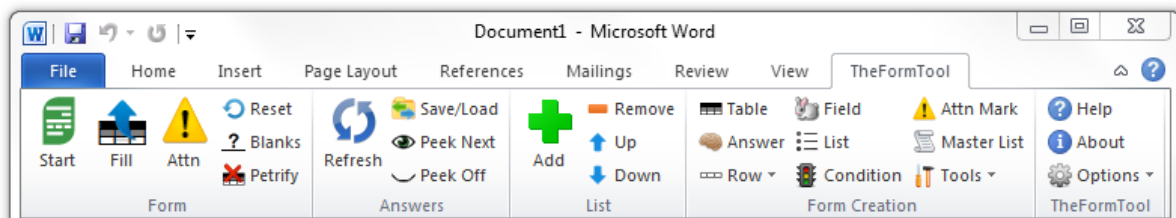
Feature	TheFormTool	TheFormTool PRO
Q & A Table makes data entry simple, fast and accurate	✓	✓
Fill, Reset, Blanks & Petrify buttons fill in forms several different ways	✓	✓
Text Fields include full sets of capitalization options	✓	✓
Number Fields provide a dozen ways to format numbers	✓	✓
Date Fields allow you to format dates any way that best suits your form	✓	✓
Microsoft Word commands mean a learning curve measured in minutes, not months	✓	✓
Quick-Start Guide and free support	✓	✓
Expert User Guide		✓
Conditions create completely dynamic forms, with appropriate words, phrases, sentences, paragraphs and entire pages automatically selected depending on the user's response to simple questions		✓
Math functions include Absolute, Constant, Days, Field, Integer, List functions, Logarithm, Maximum, Minimum, Months, Now, Payment, Raise to Power (Exponentiation), Remainder, Root and Years. Each can be nested almost without limit to perform complex calculations.		✓
Smart Answers make it even faster and easier to fill in forms correctly: Text with Pronoun, List, Choice/Multiple Choice, and Yes/No logic		✓
List Answers can be nested and linked, formatted in narrative paragraphs, stacked signatures, tables, or customized for any circumstance		✓
Attention Markers flag areas of a form for special attention		✓
Master Lists store frequently-used information in one place for use in multiple forms. Great for signature blocks!		✓
Network Support means saved information, answer files, master lists and saved Q&A Tables can be shared with other users		✓
Save/Load allows you to save answers used in one document for use in another document in the same matter, case, patient or deal. Great for complex matters, patient intake, client workups!		✓
Pronoun, Singular/Plural and Count Fields automate forms even further		✓
Peek button allow users to take a quick peek at the location(s) in the document where their answers will be used		✓
Save Q&A Tables to build a library of standards for various types of forms		✓
Check Form catches and fixes errors. How cool is that?		✓
Lock Down prevents users from making unauthorized changes to the Q&A Table		✓

Fantastic Freebie: TheFormTool



The free version of TheFormTool lets you automate basic forms so they can be used to easily create error-free new client letters, fee schedules, notices, and hundreds of other documents with just a click or two. Used in thousands of firms around the world, TheFormTool boasts a learning curve measured in minutes, not months.® Download your free version of TheFormTool now, complete with a lifetime license, at www.theformtool.com and start benefiting today with its automated data re-entry, number and date formatting, and date precedents functions.

Smarter Sibling: TheFormTool PRO



TheFormTool PRO is the fastest growing, most user-friendly and powerful software in the world to create forms or automate documents in Microsoft Word. TheFormTool PRO adds a dozen powerful features and functions to the basic version of TheFormTool, including Math, Lists, Conditions, Derived Answers, Network Support and the ability to share data. TheFormTool PRO speeds through even your most complex documents. Whether you work with one-page notices or 200-page estate forms or PPMs, TheFormTool PRO reduces your time invested by at least 90% while reducing errors to zero. Still just \$89 at www.theformtool.com.



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