Expert User Guide

Folios

Detailed Examples

Doxserá™

powered by TheFormTool

Expert User Guide

Version 2.2

One-Page Cheat Sheet

For those who are driven to get started *right now,* without filler or fluff:

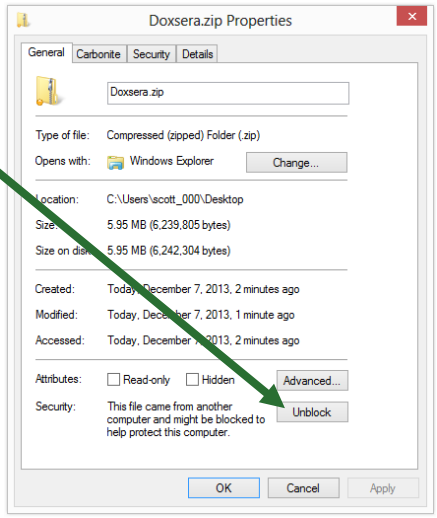
1. **Install Doxserá**

   Right-click the **Doxsera.zip** file you downloaded and choose **Properties**. If you see an **Unblock** button, click it to unblock the file, then click **Apply**.

   Click **OK** to close the Properties screen.

   Double-click the same **Doxsera.zip** file to see the files it contains.

   Double-click the **Doxsera.docm** file to install the program.



2. **Activate it**

   Go to the new **DOXSERÁ** tab in Microsoft Word, click **Options**, **License Code**, and enter the Registered Name and License Code we emailed to you.

Quick Tip: Watch our videos instead of Steps 3 and 4: www.theformtool.com/video-demonstration-of-theformtool

3. **Create a form**

   Open a document or form you've used in the past, and save a copy wherever you like to store forms.

Older Files: If you're starting with an older document (created in Word 2003 or earlier), be sure to save it in one of Word's new formats (.docx or .dotx) with the **Maintain Compatibility** checkbox UNCHECKED.

Add a Questionnaire at the bottom of the form by clicking **Questionnaire** on the **DOXSERÁ** tab.

Type questions in the Question column and a short label for each question in the Label column, like so:

		Doxserá (c) 2014 Snapdone, Inc.
Label	**Question**	**Answer**
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Add Fields to the form by placing the cursor wherever a Field is needed and clicking **Field** on the **DOXSERÁ** tab. The result will look something like this:

My name is {Signer}. I was born on {DOB}.

Signed: _____
{SIGNER}

Save and close the finished form.

4. **Use your new smart form to create a document**

   Open the form you created in Step 3. Type answers in the Questionnaire and click **Fill** on the **DOXSERÁ** tab. Done!

5. **For later:** This manual and the Quick-Start Guide are available at www.doxsera.com, along with videos, program support, and forums where you can ask questions, report problems, make suggestions, and exchange tips with the authors and other users of **Doxserá**.

Foreword

Although this is a manual that focuses exclusively on forms – how to make them more intelligent, more productive and more useful – this Expert Guide is really all about people.

It's written to help three groups in particular: a form's audience, its author and its user.

First of all, of course, are the Readers, the form's ultimate audience, those seeking information. In the final analysis, Doxserá is ultimately about clients and their opposition; judges and court officials; regulators and special interest groups; media and the general public. We hope Doxserá will improve communication between you and everyone you hope to influence with the written word in a written document environment, whether digital or paper.

This guide is written from the perspective of the Form Author, the expert who wishes to expand the influence of his or her expertise by making it easier for others to complete a complex form quickly, accurately and as expertly as would the Author merely by answering a few questions. Doxserá allows the expert Author to lay out the exact circumstances where "A" is appropriate, the exceptions where "B" or "C" should apply, and the gray areas where "A" should be modified but not replaced. Since forms are by definition useful in repetitive similar-but-not-identical circumstances, the number of alternatives for consideration and inclusion are finite and therefore manageable by software.

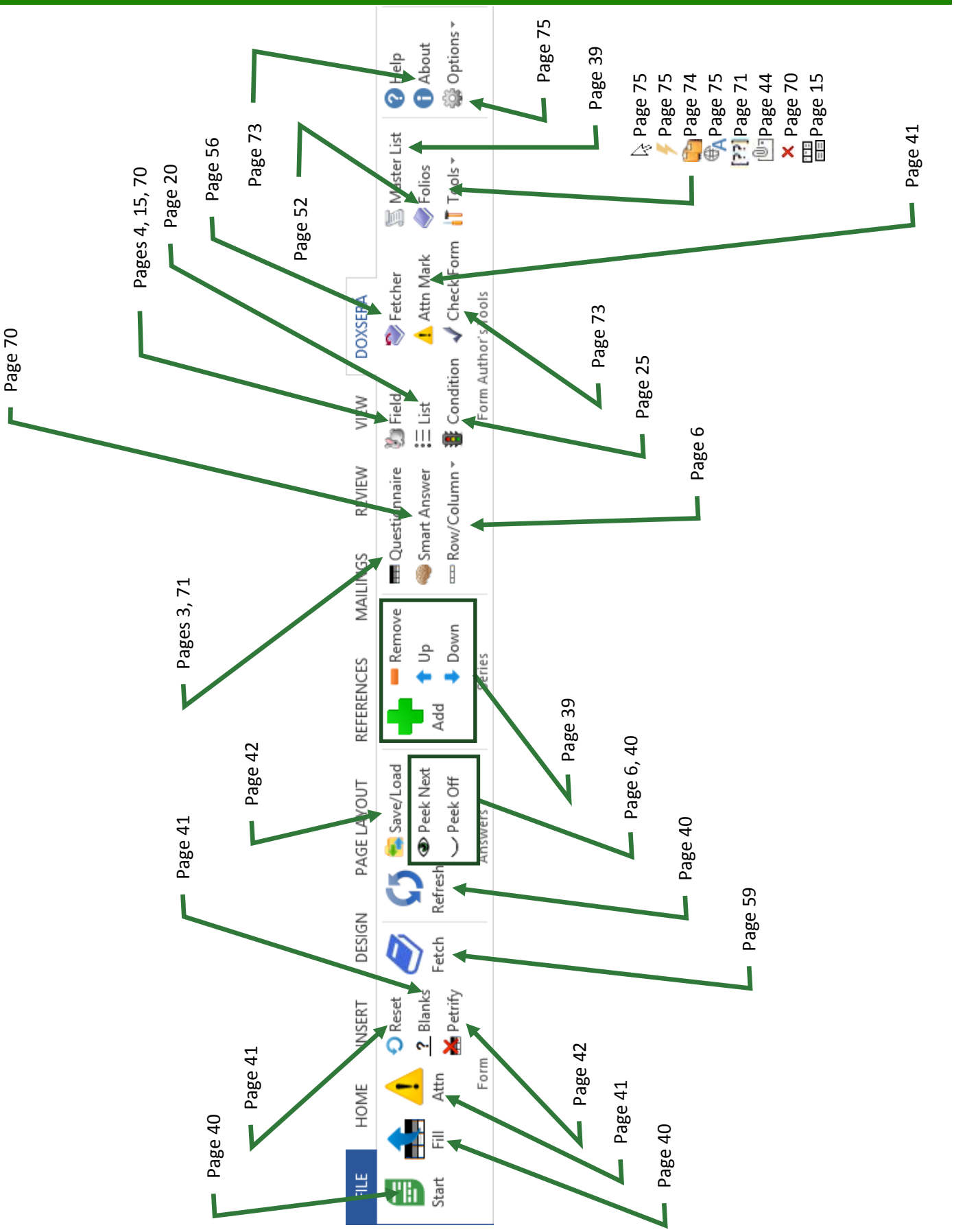
Finally, Doxserá is designed to make a real difference to the Form Users, the men and women tasked with merging current information into pre-created documents that can at once be simplistic and complex, literal and figurative, static and dynamic. Doxserá works so well because it uses technology to make the dynamically complex alternatives built into a form simple enough to be exactly, accurately and quickly replicable by non-experts. The expert determines the outcome he or she intends; then the non-expert furnishes the input in one-fifth the time otherwise required.

We invite you to use Doxserá to give yourself an unfair advantage over your competition by allowing your forms to work intelligently for you. Follow these three steps to a smarter future:

1. "Brilliantize" a few of your forms with Doxserá, then put them into practice.
2. Use an alternative fee arrangement to hold your revenue constant, and
3. Watch your net earnings mount.

Contents

Meet the Buttons



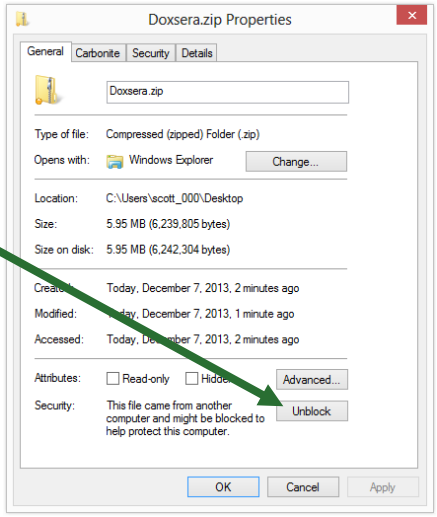
Installing Doxserá

Step 1: Is the File Blocked?

Windows sometimes blocks downloaded files to protect you from viruses.

Right-click the **Doxsera.zip** file you downloaded and choose **Properties**.
If you see an **Unblock** button, click it to unblock the file, then click **Apply**.

Click **OK** to close the Properties screen.

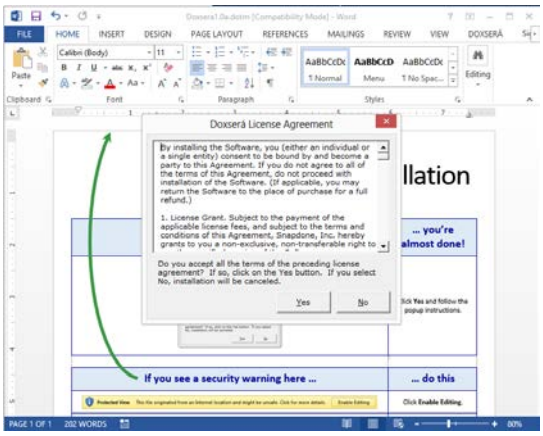


Step 2: Open the Installation File

Open the file you downloaded to see its contents. Double-click on the **Doxsera.docm** file. (Depending on your computer's configuration, you might not see the **.docm** part of the filename.)

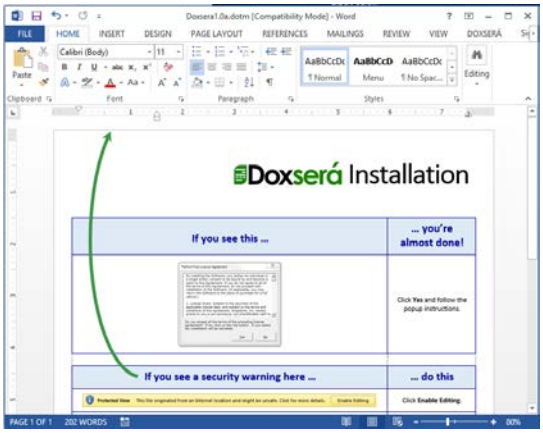
Step 3: Security Warnings?

Depending on Windows and MS Word settings, you may need to respond to one or more security warnings before installation can proceed.



If you see this ...

You're almost done. Click **Yes** to the license agreement, then **OK** to install.

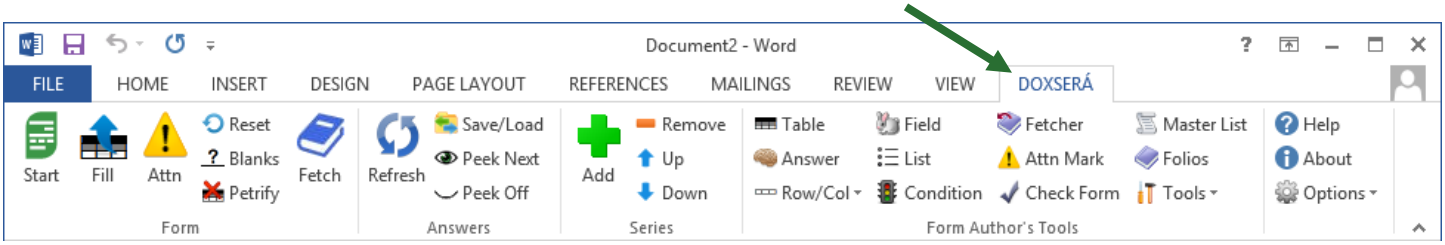


If you see this ...

Follow the on-screen instructions to respond to your computer's security warnings.

Step 4: Close and Reopen Word

Close MS Word completely, including all open documents. When you reopen MS Word, you'll find a new tab on Word's ribbon menu labeled **DOXSERÁ**. Click that tab to reveal **Doxserá** commands.



If the **DOXSERÁ** tab does not appear, try restarting your computer. If that doesn't work, please contact us so we can help get you up and running (www.doxsera.com/resources).

Step 5: Enter License Code

To activate **Doxserá**, click **Options**, **License code** and enter the registered name and license code we emailed to you. If you need to buy a license, visit www.doxsera.com. If you've lost your license code, please contact us (www.doxsera.com/resourcesmailto:support@theformtool.com).

Step 6: Sharing Information on a Network

If you own multiple licenses for **Doxserá**, see Sharing Information on page 76.

Step 7: Updates

Check for updates periodically at the **Doxserá** website To be notified when updates are available, subscribe to our newsletter at www.doxsera.com/newsletter.

The Basics

What's It Do?

Think of the process of filling in a form as a series of questions and answers. The form author asks a question ("What's the name of the Grantor?"), and the form user answers the question ("Gretel Purcell").

Doxserá makes it easy for the form author to ask a series of questions, and easy for form users to answer those questions.

Creating a Basic Form

We'll turn this document into a form. If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Step 1: Create the Questionnaire

Click **Questionnaire** to add a Questionnaire to the end of the form.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**

Type a series of questions, and give each question a short label. For example:

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

For longer labels, be sure to omit space characters. For example, **SignerName** and **Signer_Name** are both okay, but don't use **Signer Name** with a space in the middle. Also avoid special characters like brackets, slashes, and braces. But don't worry too much – if you try to use a character that's not allowed, **Doxserá** will automatically remove it for you during Step 2 below. The **Check Form** command (page 73) also catches labeling problems and is a great tool for every form author's belt.

Meet the Questionnaire! Take a moment to get familiar with the three-column layout of the Questionnaire. Once you're comfortable with the Label/Question/Answer pattern, guru status is within reach.

Adding Rows to the Questionnaire

When first creating the Questionnaire, add rows just as you would in any other Word table – by pressing **Tab** when your cursor is in the table's last cell.

Later on, **Doxserá** "locks" the Questionnaire so form users can't accidentally alter it. But you can still add a row by clicking **Row/Column**, **Add**.

Step 2: Add Fields to the Form

In the body of the form, add Fields wherever answers need to be inserted. For example, this form needs three Fields.

My name is [1]. I was born on [2].

Signed:

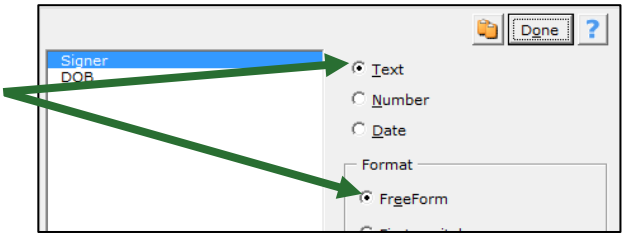
_____

[3]

To add a Field, place the cursor in the desired location and click **Field** (yes, it's the friendly Field Bunny) to open this screen.

All the questions in the Questionnaire are listed here, using the labels you provided. In this example, there are only two: **Signer** and **DOB**. Select **Signer** and click **Insert Field**.

Various Field formats appear. In this example, the default format is correct (**Text**, **FreeForm**), but sometimes you will choose another format here.



Click **Done** to finish.

Notice that the Field you added shows up as a gray bracketed item: {Signer}. Add two more Fields to finish the form.

My name is {Signer}. I was born on [2].

Signed:

_____

[3]

Formatting Fields. The "format" choices above actually change the text of a Field rather than using Word's font formatting feature – from **abc** to **ABC**, for example. But you can also apply any type of font formatting to a Field, using Word's ordinary formatting commands – bold, underline, font, small caps, color and shading, etc.

Insert the second Field by clicking **Field** and selecting **DOB**, **Date**.

And insert the third Field by clicking **Field** and selecting **Signer**, **UPPERCASE**.

After adding all three Fields, the finished form looks like this. The first Field uses **Text**, **FreeForm** format, the second uses **Date**, and the third uses **Text**, **UPPERCASE**.

My name is {Signer}. I was born on {DOB}.

Signed:

_____

{SIGNER}

Meet the Brackets. The gray bracketed items above ({Signer}, {DOB}, and {SIGNER}) will become a familiar sight. They mark where each answer in the Questionnaire belongs in the finished document. Once the novelty wears off, you'll find yourself comfortably deleting, copying and pasting these bracketed items just as you do other text, sometimes saving a few clicks by copying a Field rather than creating it from scratch.

Using a Basic Form

Open a form and click **Start** to move to the Questionnaire. Answer the questions, like so:

Doxserá (c) 2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the name of the signer?	Horace Blixt
DOB	What's the birthdate of the signer?	4/17/60

Then click **Fill** to fill in the form. Done!

My name is Horace Blixt. I was born on April 17, 1960.

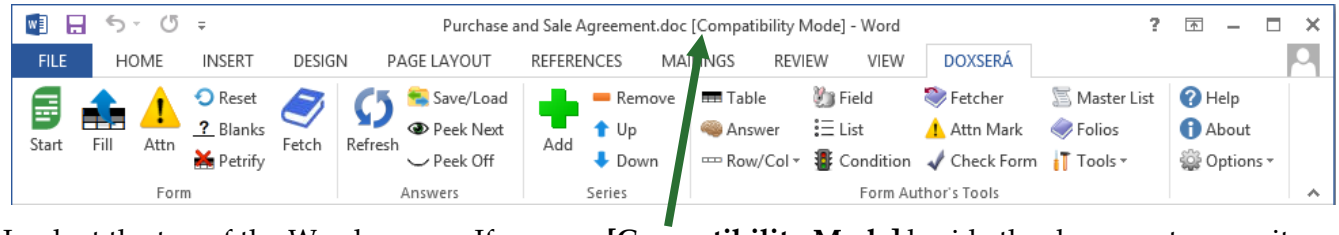
Signed: _____
HORACE BLIXT

Turning Old Files Into New Forms

Old File Formats

You're using Word 2007, 2010, or 2013 now, but some of your old documents and forms might have been created with earlier versions of Word. It's important to convert those old files to the new format so all **Doxserá** features are available.

Does it need to be converted?



Look at the top of the Word screen. If you see **[Compatibility Mode]** beside the document name, it needs to be converted by following the steps below.

Converting an old file

Open your old document or template in Word. Depending on what version of Word you use:

Word 2007	Word 2010 and Word 2013
1. Click the **Office** button (the round button in the top left corner), then click **Save As** and choose a file location and name. 2. In the **Save as type** box, choose **Word Document (.docx)** or **Word Template (.dotx)**. 3. Near the bottom of the screen, make sure the **Maintain compatibility with Word 97-2003** checkbox is **UNCHECKED**. 4. Click **Save**.	1. Click **File**, **Save As** and choose a file location and name. 2. In the **Save as type** box, choose **Word Document (.docx)** or **Word Template (.dotx)**. 3. Near the bottom of the screen, make sure the **Maintain compatibility with previous versions of Word** checkbox is **UNCHECKED**. 4. Click **Save**. 5. If you still see **[Compatibility Mode]** at the top of the screen, click **File**, **Info**, **Convert**.

Documents Versus Templates

As you create forms, you can save them as documents (files that end with **.docx**) or templates (files that end with **.dotx**). **Doxserá** works fine with both types of files, but saving forms as templates does have one important advantage: When form users double-click a template file to open it, Word creates a *new unsaved document* based on that template. This makes it impossible for the form user to accidentally overwrite the original form – when they click **Save**, they are prompted to save their new document elsewhere.

As the form author, though, you will sometimes need to revise the original form. Instead of double-clicking the template file to open it, right-click the file and choose **Open**. This opens the form itself, rather than creating a new document, so you can make changes and save the revised form.

Creating Smarter Forms

Doxserá builds intelligence right into the form, automatically including or removing optional text, changing pronouns and plurals, converting date and number formats, performing math calculations, and more. A single click by the form user can change the entire landscape of the finished document.

Smart Answers

In the realm of form creation, different types of questions call for different types of answers. You might ask for a yes/no response ("Is the signer a U.S. citizen?"), or you might want to present choices ("In which of these counties is the property located?"), or you might ask for a series of items with a single question ("List all the shareholders.").

Doxserá provides several types of answers, making it easy for the form user to respond correctly and intuitively to every question. To turn a regular answer into a Smart Answer, first place the cursor in an answer box.

		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
Buyer	What's the name of the buyer?	
Seller	What's the name of the seller?	

These are answer boxes – one box for the Buyer question, and another for the Seller question.

To select the answer type for a particular question in the Questionnaire, place the cursor in its answer box and click **Smart Answer** to open the Smart Answer screen.

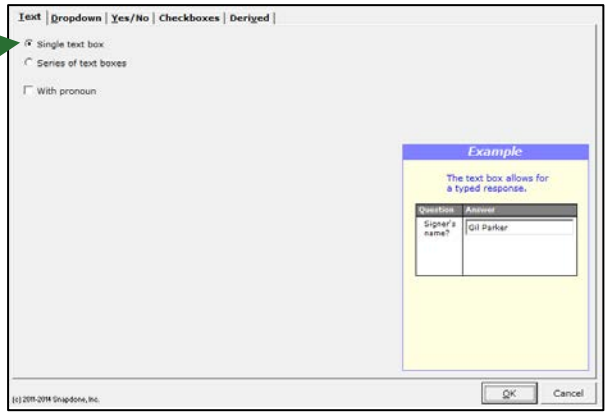
Tabs across the top of the screen allow you to choose one of five types of Smart Answer.

Text Answers

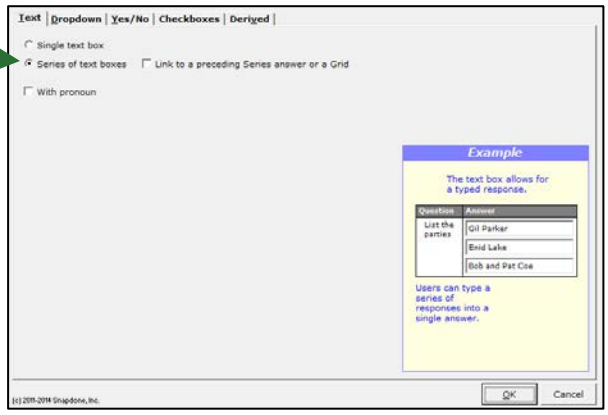
Each answer in the Questionnaire begins as a Text answer and stays that way unless you alter it. Text answers are appropriate for questions like: "What's the signer's name?" "What's the ID number?" "What was the date of the injury?" "What's the amount due?"

Single/Series

Select **Single text box** when you are asking for a single piece of information ("Who are you?").



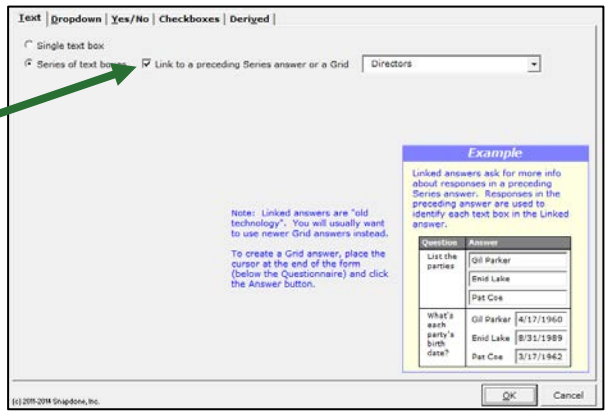
Select **Series of text boxes** to ask for several pieces of information ("What are the names of the shareholders?").



How many items in a Series? When using a Series-type answer, the form author need not specify the number of items. By default, the answer will be created with room for three items, but the form user can click the ✚ Add button to create additional slots as needed.

Linked Series: If the form includes another Series answer or a Grid (page 15), you have the option of linking this answer to it: select **Link to a preceding Series answer or a Grid**, and select the other answer.

For example, the first question in your form might ask for a list of directors (a Series answer). The second question could be a Linked answer asking for each director's email address.

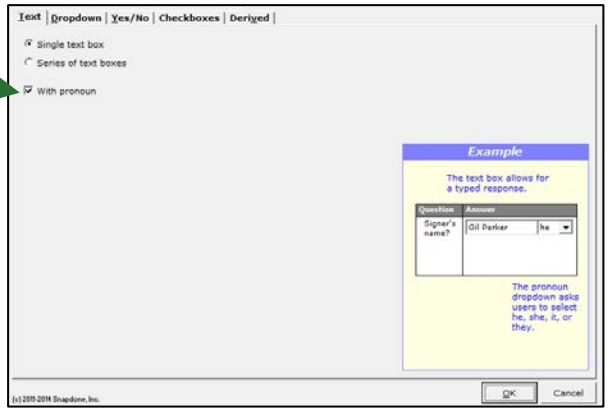


Note: Linked answers are "old technology". You will usually want to use newer Grid answers instead (page 15).

With Pronoun

To include a pronoun box alongside a Text answer, select **with pronoun**.

The pronoun box allows the form user to select a pronoun to go along with their answer: he, she, it, or they. The form author can make use of this information throughout the form, using Pronoun Fields (page 17).

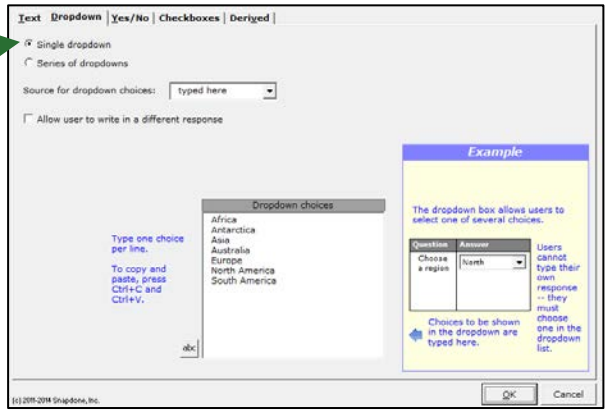


Dropdown Answers

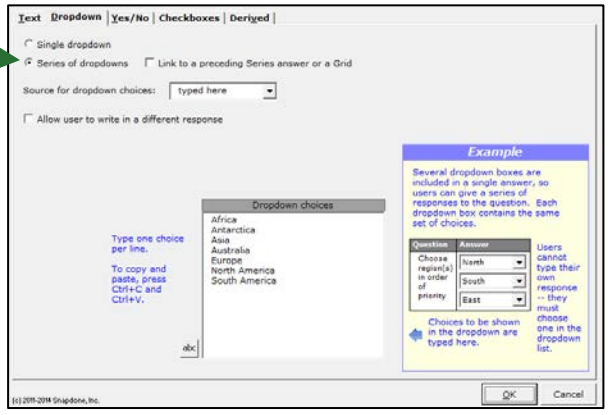
Dropdown answers present the form user with several choices in a dropdown list. The question "What's your favorite color?" could present a dropdown list of red, green, blue, and yellow. The question "What direction will you travel?" could present a dropdown list of north, south, east, and west.

Single/Series

Select **Single dropdown** when you are asking for a single piece of information ("On what continent do you live?").

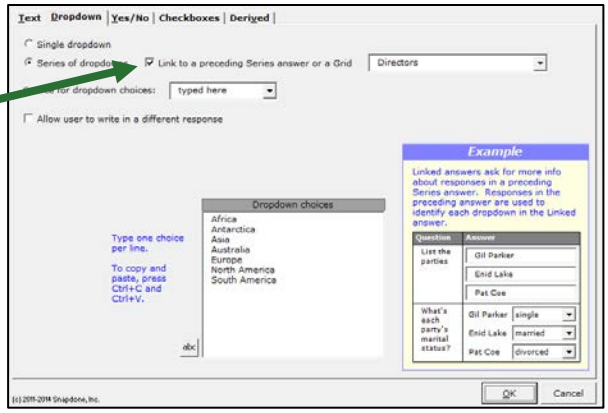


Select **Series of dropdowns** to ask for several pieces of information ("On what continents have you lived?").



Linked Series: If the form includes another Series answer or a Grid (page 15), you have the option of linking this answer to it: select **Link to a preceding Series answer or a Grid**, and select the other answer.

For example, the first question in your form might ask for a list of directors (a Series answer). The second question could be a Linked answer that asks in which continent each director resides.



Note: Linked answers are "old technology". You will usually want to use newer Grid answers instead (page 15).

Source for Dropdown Choices

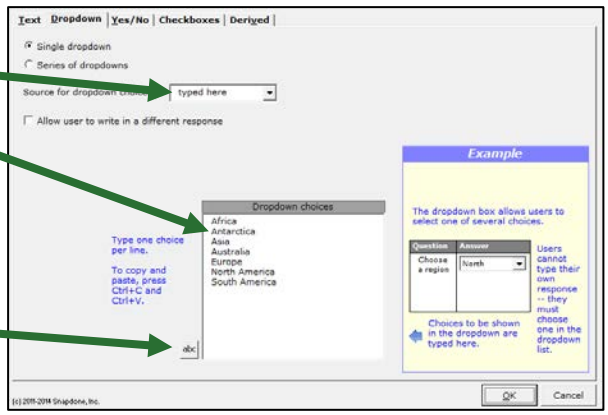
The list of choices in the dropdown box is drawn from one of four sources.

Source = Typed Here

The list of choices is typed right into the Smart Answer screen. Put each choice on a separate line.

You may rearrange items using **Ctrl+C**, **Ctrl+X**, and **Ctrl+P** to copy, cut, and paste.

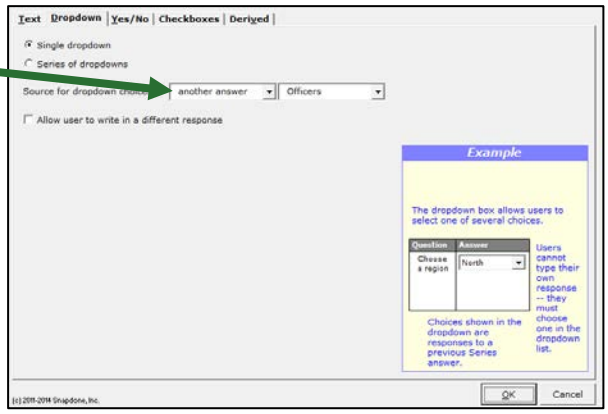
Click **abc** to sort items alphabetically.



Source = Another Answer

If the form includes another Series answer or a Grid (page 15), you have the option of using it as a source.

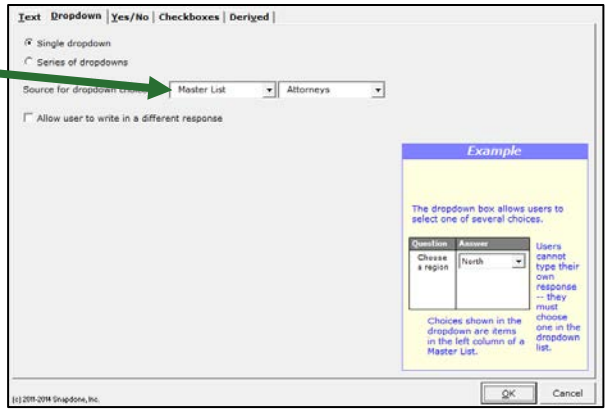
For example, the first question in your form might ask for a list of officers (a Series answer). The second question could ask who is the Treasurer, with a dropdown listing the officers identified in the previous answer.



Source = Master List

If you have created any Master Lists (page 73), you may select one as a source.

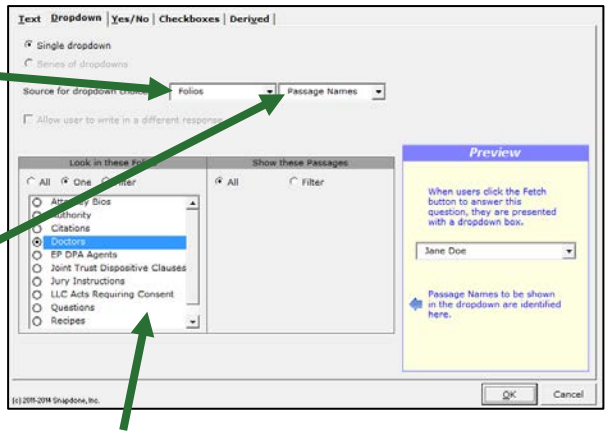
For example, a law office might have a Master List of member attorneys. A form could ask for the name of the attorney signing this document, with its Dropdown answer listing all the attorneys in that Master List.



Source = Folios

Folios (page 52) are "storage bins" where Passages can be stored and later inserted into forms when and where needed. Folios and Passages are categorized with Tags.

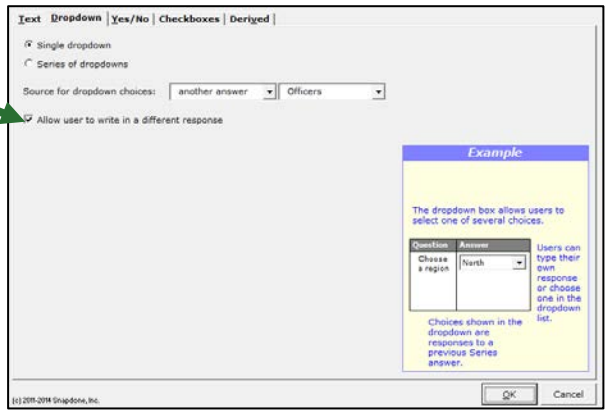
After choosing **Folios** as the dropdown source, you will choose either **Passage Names**, **Folio Names**, **Passage Tags**, or **Folio Tags** to populate the dropdown list.



The bottom left area of the screen identifies which names or tags will be included in the dropdown list. In the example pictured here, the dropdown list is composed of Passage names, and the Passages shown are the ones contained in the "Doctors" Folio.

Allow User to Write in a Different Response

When **Allow user to write in a different response** is selected,.users have the option of typing their own response instead of selecting one from the dropdown list.

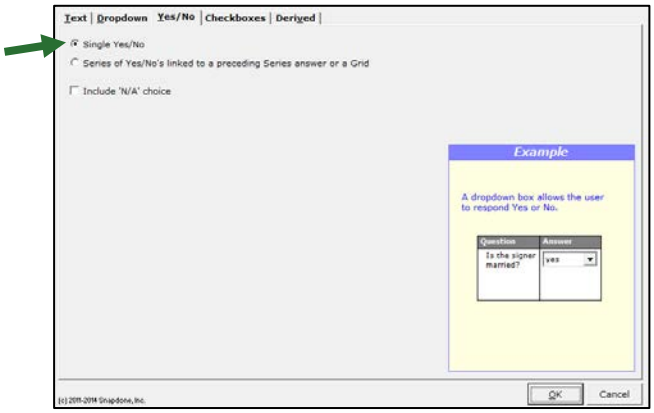


Yes/No Answers

Yes/No answers allow the form user to respond **yes** or **no** (and sometimes **n/a**).

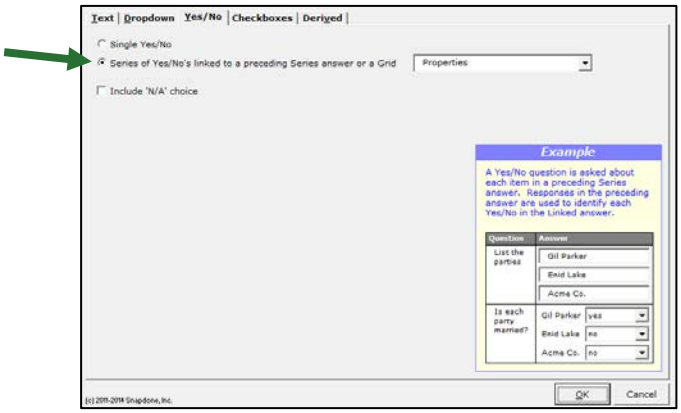
Single/Series

Select **Single Yes/No** when you are asking for a single yes/no response ("Is the property for sale?").



If the form includes another Series answer or a Grid (page 15), you have the option to choose **Series of Yes/No's linked to a preceding Series answer or a Grid**. This asks for a yes/no response regarding each item in the other answer.

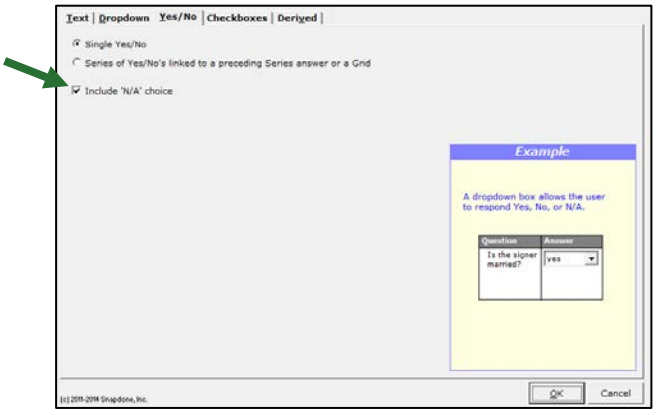
For example, the first question in your form might ask for a list of properties (a Series answer). The second could ask whether each of those properties is zoned for commercial use (a series of Yes/No's).



Note: Creating a series of Yes/No's this way is "old technology". You will usually want to use newer Grid answers instead (page 15).

Include 'N/A' Choice

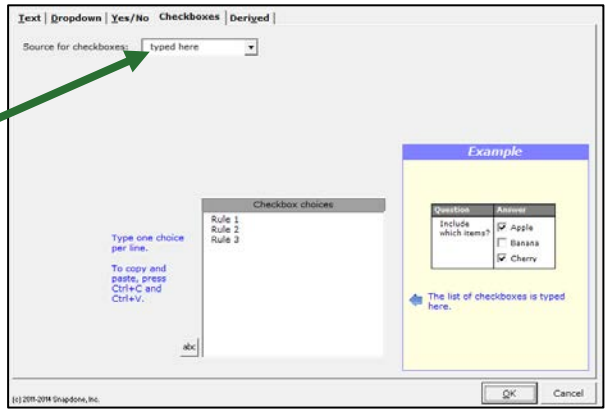
When **Include 'N/A' choice** is selected,.users have the option of responding **n/a** instead of **yes** or **no**. (N/A stands for "not applicable".)



Checkbox Answers

Checkbox answers allow the form user to check or uncheck a list of labeled checkboxes.

The list of checkboxes is drawn from one of four sources: **typed here**, **another answer**, **Master List**, or **Folios**. See page 10 for details about the four sources.

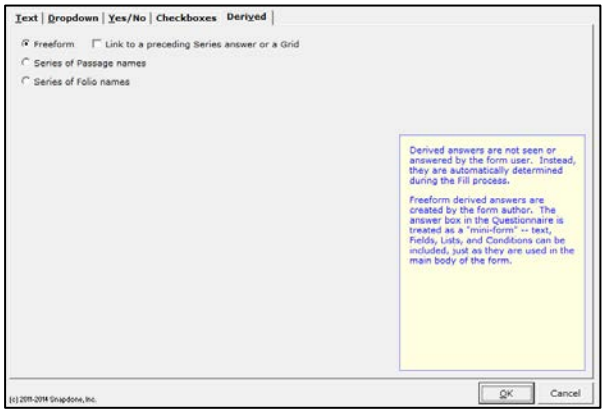


Derived Answers

Derived Answers automatically process other answers (and sometimes Folios) to create new answers without any further input from the form user. For example, if another answer provides the signer's birthdate, then a Derived Answer could perform a calculation to determine the signer's age.

Freeform

In a **Free-form** Derived Answer, the answer box becomes the form author's private workspace to perform complex calculations behind the scenes. This is useful for:



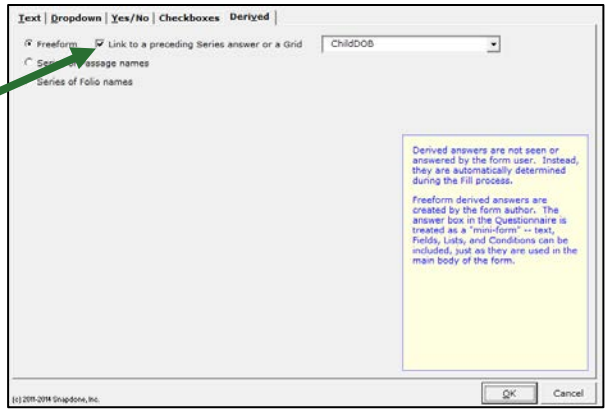
Conditions based on the results of math formulae, date offsets, or other Conditions. Given a person's birthdate, a Derived Answer can use date and math functions to calculate the person's age. That age can then be used as the basis for conditional text in the form that refers to the person as either an adult or a minor.

Improved readability. If the complexity of a particular passage makes a form difficult to read, it can be tucked away in a Derived Answer out of the form user's view.

Faster processing. Use a Derived Answers to perform complex calculations once instead of repeatedly. For example, given a list of shareholders and the number of shares held by each, **Doxserá** is able to determine the name of the largest shareholder. If that name appears many times in the form, put the calculation in a Derived Answer with the label LargestSH, then use simple LargestSH Fields wherever needed in the form, rather than repeating the whole calculation each time.

Use any combination of text, Fields, Lists, and Conditions in the answer box of a **Free-form** Derived Answer

Freeform Linked: If the form includes a Series answer or a Grid (page 15), you have the option of linking this answer to it: select **Link to a preceding Series answer or a Grid**, and select the other answer.

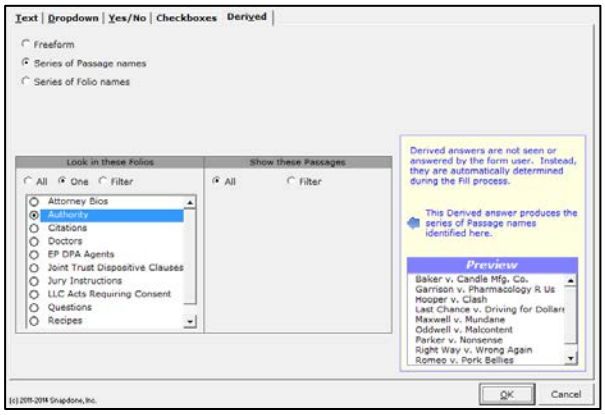


You can even chain-link answers. For example, the first question in your form might ask for a list of children (a Series answer). The second question could be a Linked answer that asks for each child's birthdate (a Linked Series). And the third question could be a derived answer that uses the second answer to calculate each child's age (Linked Derived).

Note: Linked answers are "old technology". You will usually want to use newer Grid answers instead (page 15).

Series of Passage Names or Folio Names

If you have created any Folios (page 52), a Derived answer can also be used to generate a list of Passage names or Folio names.



If you have created any Folios (page 52), a Derived answer can also be used to generate a list of Passage names or Folio names.

The bottom left area of the screen identifies which names will be included. In the example pictured here, the list is composed of Passage names, and the Passages shown are the ones contained in the "Authority" Folio.

The resulting Derived Answer can be used to create Fields, Lists, and Conditions throughout the form just as if it were an ordinary Series answer.

See the Folios in Derived Answers walkthrough for a demonstration.

Hiding Derived Answers

Since Derived Answers work automatically in the background, they can be hidden from form users to avoid confusion: after you've finished creating the Questionnaire, click **Row/Column**, **Show/Hide** to hide all Derived Answers. If you need to revise Derived Answers later, click the same button again to make them visible.

Grid Answers

Grids are a special type of answers that appear at the bottom of the Questionnaire.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
DateSign	Date of signing?	12/29/2012

Grid

List all the parties:

Name	Street	City	State	ZIP
Terry Porter	555 Main Street	Seattle	Washington	98101
Garth Blinth	123 Sycamore Lane	Chicago	Illinois	50103
Eva Roette	868 Meridian Drive	Houston	Texas	76023

To add a Grid, place the cursor *below* the first table in the Questionnaire (either above or below any preexisting Grids), click **Smart Answer**, and enter the number of columns desired (up to 63 columns are allowed, but you would have to use a *very small font!*).

Grids can contain Smart Answers. When you apply a Smart Answer in a Grid, you are choosing a Smart Answer for an *entire column.* To add a Smart Answer, place the cursor anywhere in the desired column and click **Smart Answer**. You will see that some options in the Smart Answer screen are not available for Grids. For example, the *first* column of a Grid can only be a **Text** answer or a **Text with pronoun** answer.

Converting Linked answers to Grids. Linked answers are "old technology" and are generally inferior to Grid answers. If you previously created a Linked answer and have now decided you'd like to use a Grid answer instead, **Doxserá** can automatically perform that conversion for you. Place the cursor in the answer box of the Series answer to which other Linked answers are linked, and click **Tools**, **Convert to Grid**. The Series answer and its Linked answers are removed from the top part of the Questionnaire, and a brand new Grid is created.

Default Answers

To save typing for the form user, provide default answers whenever practical. For example, if your office is in Washington State, it's helpful to partially pre-fill the Questionnaire as shown below – the form user can always type a different state if necessary.

Doxserá (c) 2014 Snapdone, Inc.		
Label	**Question**	**Answer**
SigName	What's the signer's name?	
SigState	What's the signer's state of residence?	Washington

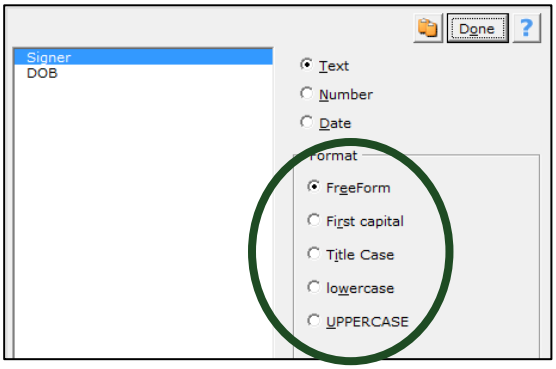
Fields

Several types of Fields are available when creating forms. Each type has its own set of formatting options, so a single answer in the Questionnaire can be used many different ways throughout the form. To insert a Field in a form, place the cursor where the Field belongs, click **Field**, select the desired Field, and click **Insert Field**.

Text Fields

Text Fields are the most common type. Use the five Format options to control how each Field is capitalized in the document.

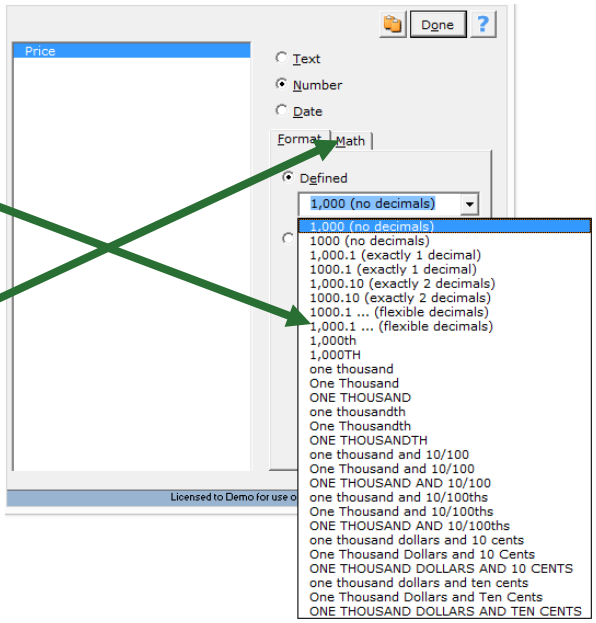
Choose **FreeForm** to capitalize text exactly as it was typed in the Questionnaire, or one of the other formats to enforce a particular type of capitalization: **First capital**, **Title Case**, **lowercase**, or **UPPERCASE**.



Number Fields

As this dropdown box shows, **Number** Fields can be formatted as numerals with or without commas and with various numbers of decimal places, as ordinals (1st, 2nd, 3rd …), or as upper- or lowercase words (one, Two, THREE), ordinal words (first, second, third), or dollar amounts in several formats (such as Three Dollars and 38 cents).

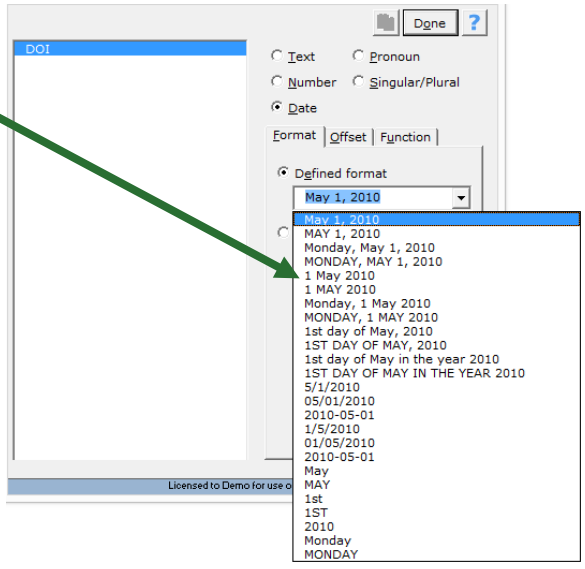
Number Fields can be further automated with math functions. Click **Math** to open the Math screen, discussed on page 29.



Date Fields

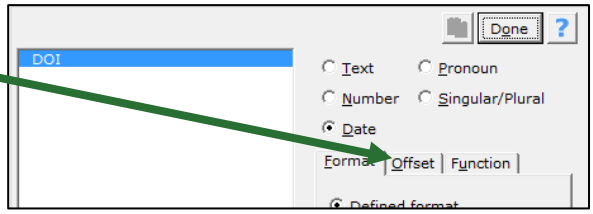
Date Format

Date Fields can also be formatted many ways, using both words and numbers. You may even choose to display only a portion of the date that's typed into a Questionnaire, like the name of the month or day of the week.



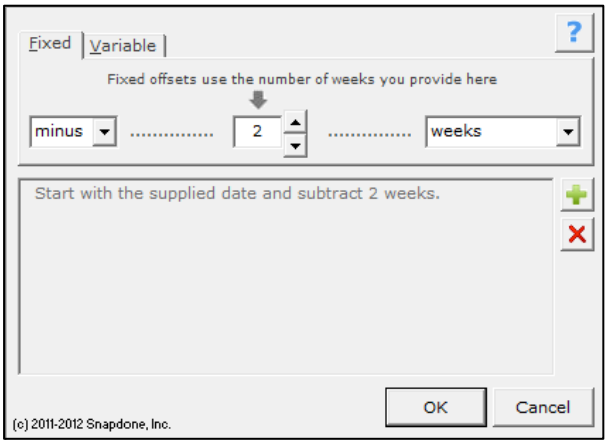
Date Offset

Date Fields can be further manipulated with Date Offsets. Click **Offset** to open the Date Offset screen.



In this screen, related dates can be calculated from a date typed in the Questionnaire by the form user.

For example, the Questionnaire might ask for a trial date, and the form could calculate several other dates, such as a meeting scheduled two weeks before trial, or a phone call scheduled for the weekday preceding trial.

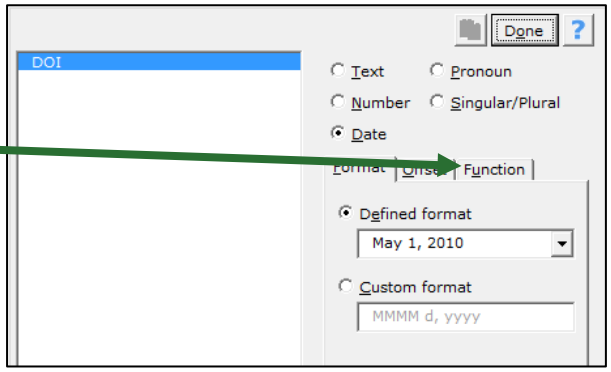


Date Function

Doxserá includes several date functions that are not offsets: **FirstDate**, **LastDate**, **Now**, and others To use one of these functions, click **Function** to open the Math screen.

See page 29 for a full discussion of the Math screen.

You may assign both a function and an offset to a Date Field. The offset will be applied to the result of the function.

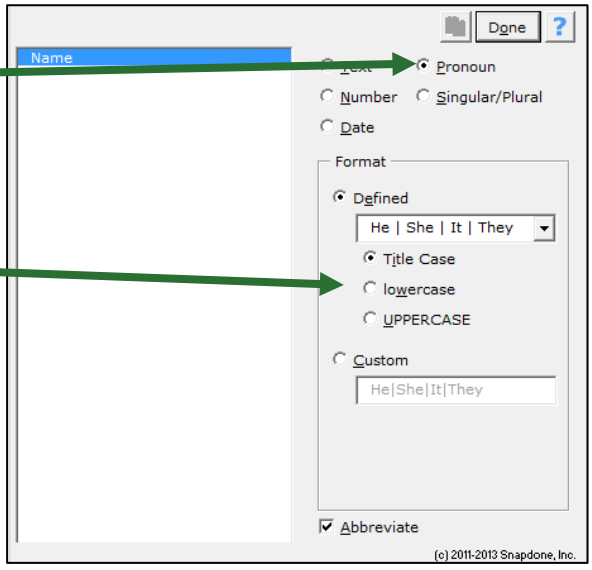


Pronoun Fields (Got Grammar?)

Pronoun Fields automatically choose the proper word based on a Pronoun answer – words like "he/she" and "him/her". They also automate gender words like "husband/wife" "son/daughter", and "testator/testatrix".

As you place Fields in a form, select **Title Case** for pronouns at the beginning of a sentence, **lowercase** for pronouns in the middle of a sentence, or **UPPERCASE** when needed.

> If you don't see the **Pronoun** option in this screen, add a pronoun to this answer box (see "With Pronoun" on page 9).

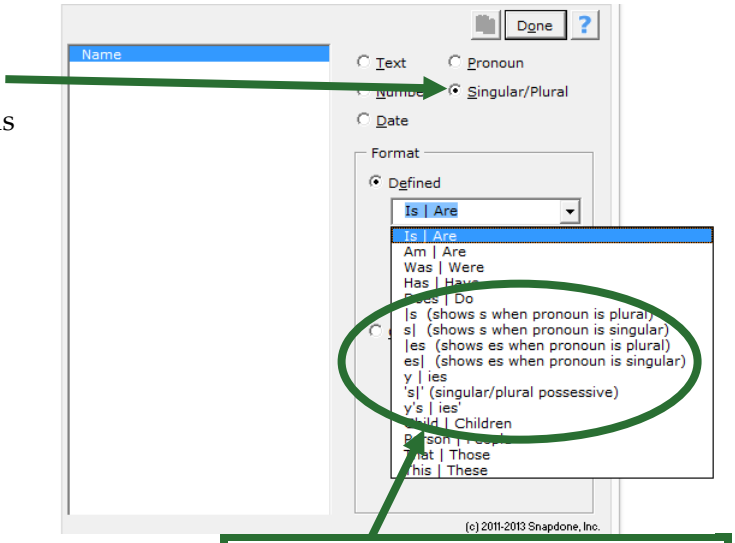


The **Abbreviate** checkbox in the above screenshot has no effect on finished documents, but improves form readability by contracting four-part Fields (like "he/she/it/they" or "husband/wife/spouse/spouses") to show only two parts ("he/she" or "husband/wife"). If you prefer to see all four parts displayed in your form, turn off this checkbox.

Singular/Plural Fields

Singular/Plural Fields automatically choose the proper word depending on (1) which pronoun is selected in a Pronoun answer; or (2) how many items appear in a Series, Checkboxes, or Grid answer.

If you don't see the **Singular/Plural** option in this screen, change this question's answer box in the Questionnaire to a Pronoun answer (page 9), Series answer (pages 8 and 9), or Checkboxes answer (page 13).



|s (shows s when pronoun is plural)
s| (shows s when pronoun is singular)
|es (shows es when pronoun is plural)
es| (shows es when pronoun is singular)
y | ies
's|' (singular/plural possessive)
y's | ies'

Word pairs like "is/are" and "was/were" are great when a specific word is needed, but the options shown here and described below are flexible enough to be used in lots of different situations.

|s (shows s when pronoun is plural): Use this Field to tack an "s" onto the end of any word (usually a noun) when the answer is plural – for example, after "defendant" in this form.

The defendant{s} allege{s} as follows…

s| (shows s when pronoun is singular): Use this Field to tack an "s" onto the end of any word (usually a verb) when the answer is singular – for example, after "allege" in this form.

|es (shows es when pronoun is plural): Use this Field to tack an "es" onto the end of any word (usually a noun) when the answer is plural – for example, after "breach" in this form.

When the contract breach{es} reach{es} a combined total of…

es| (shows es when pronoun is singular): Use this Field to tack an "es" onto the end of any word (usually a verb) when the answer is singular – for example, after "reach" in this form.

y|ies: Use this Field at the end of words that end with Y, as shown here.

These facts are agreed upon by the above-named part{ies}.

s|' (singular/plural possessive): Use this Field at the end of a word to form a possessive. The example shown here uses two Singular/Plural Fields – the first shows an **s** when the pronoun is plural, and the second shows either **'** or **'s**. This results in "The defendant's rights…" when there is one defendant, or "The defendants' rights…" for multiple defendants.

The defendant{s}{'s} rights have been violated.

y's|ies': Use this Field at the end of words that end with Y to form a possessive, as shown here.

The above-named part{ies'} rights have been violated.

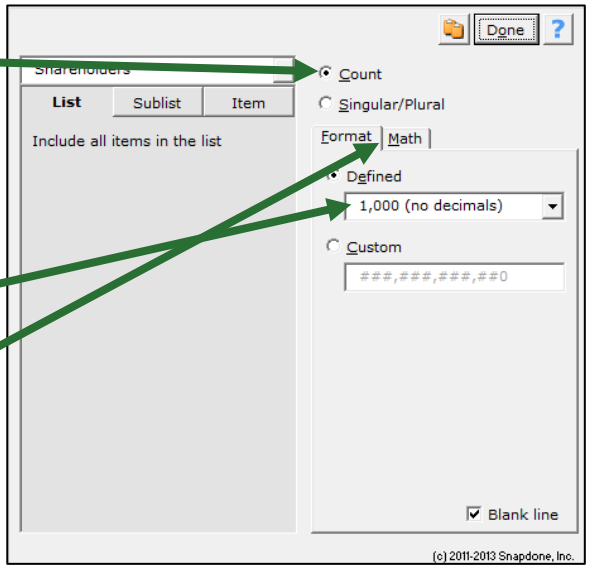
Count Fields

Count Fields refer to the number of items in a Series answer, Checkboxes answer, or Grid ("The company has three shareholders" or "I have one child").

If you don't see the **Count** option in this screen, change this question's answer box in the Questionnaire to a Series answer or Checkboxes answer.

Count Fields can be formatted as numbers, words, or ordinals, in upper- or lowercase.

Count Fields can be further automated with math functions. Click **Math** to open the Math screen, discussed on page 29.

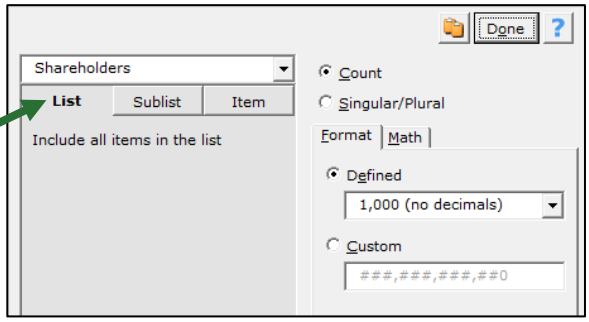


Fields for Series and Grids

When a Field is inserted for a Series answer or a Grid answer, three additional choices appear:

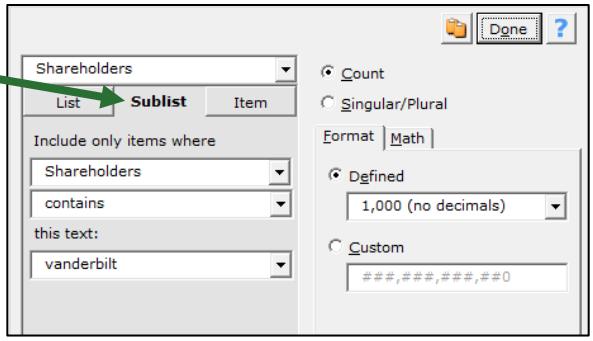
List: Inserts either a **Count** Field that counts the total number of items in the answer, or a **Singular/Plural** Field that provides a singular or plural word, depending on whether the entire Series contains one or more items.

The Field shown here provides the number of people in the entire Shareholders answer.



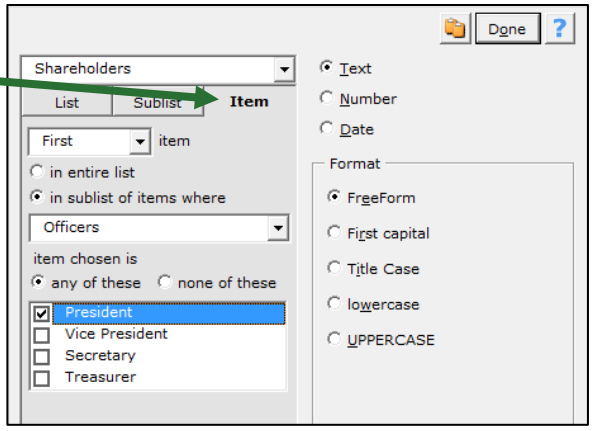
Sublist: Allows you to specify a Sublist of items from the Series provided by the form user. As with the **List** choice above, you can then insert either a **Count** Field that counts the items in that Sublist, or a **Singular/ Plural** Field that depends on whether that Sublist contains one or more items.

The Field shown here counts the number of people in the Shareholders answer who are named Vanderbilt.



Item: Inserts a particular item in the Series – the first item, last item, 8th item, etc. You can also select an item that meets particular criteria: the first item in a series of names that contains "John"; the 2nd item in a series of numbers that's more than 100; the last item in a series of dates that's earlier than 1/1/2000; etc.

The Field shown here provides the name of the first person in the Shareholders answer who is designated President in the Officers answer.

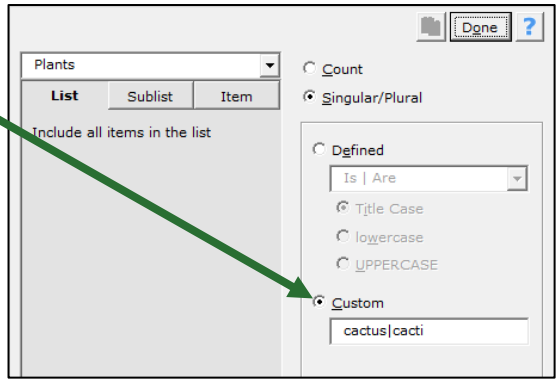


Custom Field Formats

On rare occasions, you may want to create your own custom Field format. For example, plurals of most words can be created with the built-in Singular/Plural Fields described above, but you could also create your own custom Singular/Plural Fields for unusual word pairs like "index|indices" or "cactus|cacti" as the need arises.

To create a custom Field, select **Custom** and edit the contents of the Custom box.

This example shows a custom Singular/Plural Field, but you may also create custom formats for Number Fields, Date Fields, and Pronoun Fields.



Modifying Fields

You can go back and make changes to an existing Field at any time. Just place the cursor in the Field and click **Field** to return to the Field building screen.

Conditions

Conditional Text

Conditions are the intelligent worker bees of the form world. The form author makes some decisions about how a form should work, and then adds Conditions to automatically implement those decisions each time the form is used.

Use Conditions to include or exclude text depending on the form user's response to a question in the Questionnaire. The conditional text can be a word, phrase, paragraph, or even multiple paragraphs or pages. Lots of Conditions can be tied to one response, causing the finished document to change dramatically based on a single mouse click by the form user.

For example, consider this form.

My name is {Signer}. I am married, and my spouse's name is {Spouse}.

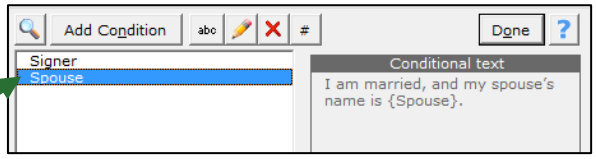
Doxserá (c) 2011-2014 Snapdone, Inc.

Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

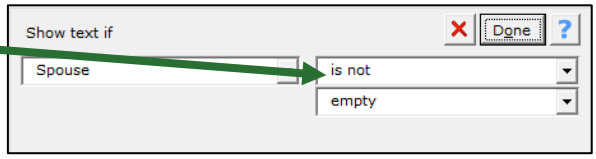
If the signer is not married, then the second sentence should be removed. In other words, the second sentence is *conditional*, depending on whether or not the answer to the Spouse question is empty.

To accomplish that, you would:

1. Select the conditional text (the second sentence).
2. Click **Condition** to create a Condition.
3. Select the **Spouse** answer, since the Condition depends on that response, and click **Add Condition**.



4. Choose to show the selected text if the answer **is not empty**.
5. Click **Done**.

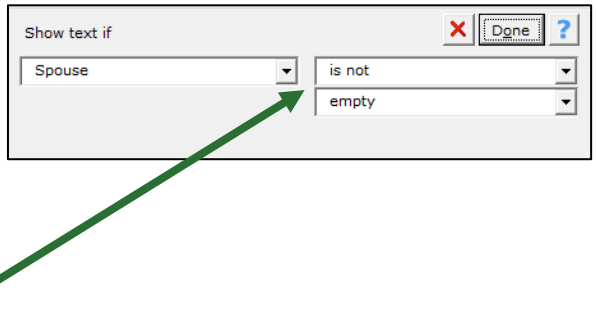


The resulting form looks like this. The beginning of the conditional text is marked with {if: and the end is marked with }. Everything between the two markers will be included in the finished document only if the Condition is met (i.e., only when a Spouse's name is provided).

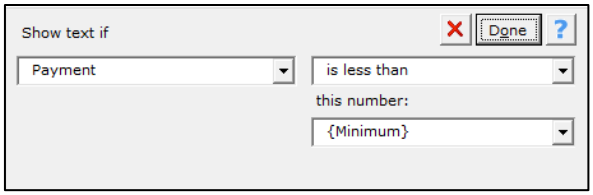
My name is {Signer}. {if:I am married, and my spouse's name is {Spouse}.}

The appearance of the Condition screen varies depending on what type of answer is selected.

Conditions based on Text answers can depend on all sorts of criteria. The one shown here checks to see if the answer is empty, but you can create Conditions that check whether or not an answer starts with "Fred", ends with "x", contains "pop", or equals "Lilith"; whether it's a number less than 38 or more than 16, whether it's a date earlier or later than May 11, 2012; whether it's alphabetically before "possum" or after "flan" – take a minute to experiment with the two drop-down boxes to see the endless possibilities.

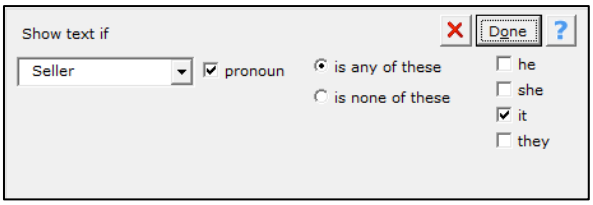


You can even compare two answers. In this example, the selected text will be included in the finished document only if the answer to the Payment question is less than the answer to the Minimum question.



Conditions based on Text-With-Pronoun answers include all the possibilities of Text answers shown above, plus some additional options that depend on the selected pronoun.

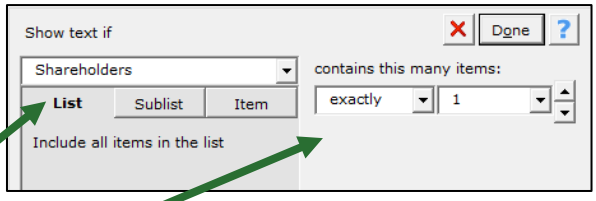
In this example, the selected text will be included in the finished document only if the Seller is an "it" – a corporate entity.



Conditions based on Series answers, Checkboxes answers, and Grids present all sorts of possibilities for Conditions, depending on whether List, Sublist, or Item is chosen.

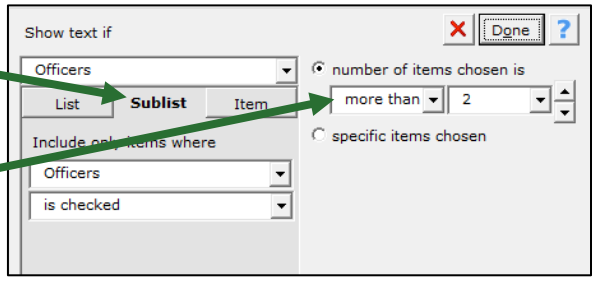
List: This Condition depends on the total number of items in the Shareholders answer (a Series answer).

The selected text will be included in the finished document only if there is exactly 1 shareholder.



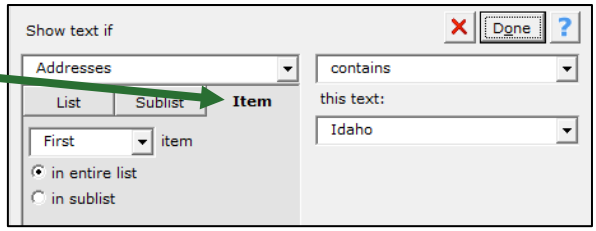
Sublist: This Condition depends on the number of checkboxes checked in the Officers answer (a Checkboxes answer).

The selected text will be included in the finished document only if there are more than 2 officers.



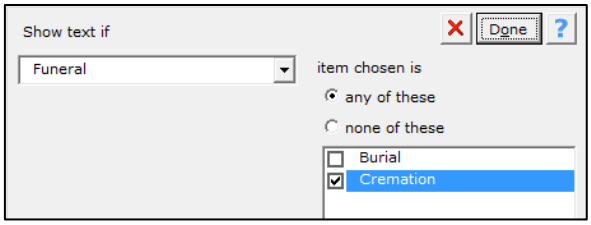
Item: This Condition depends on the contents of a particular item in the Addresses answer (a Series answer).

The selected text will be included in the finished document only if the first address is in Idaho.



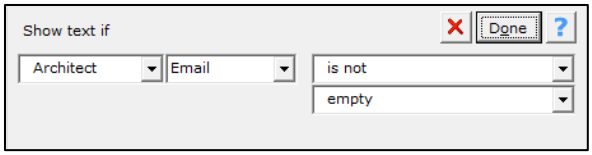
Conditions based on Dropdown answers depend on the choice that is made.

In this example, the selected text will be included in the finished document only if Cremation is chosen in the Funeral answer.



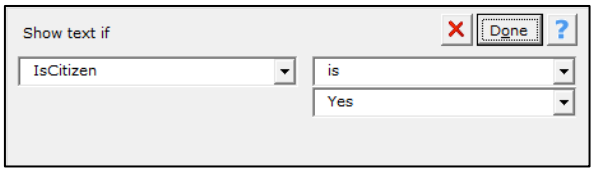
If the answer uses a Master List as the source of its choices, you can select any column of the Master List to be used in the Condition.

In this example, the selected text will be included in the finished document only if an email address for the selected architect is provided in the Email column of the Master List of architects.



Conditions based on Yes/No answers depend on the form user's response.

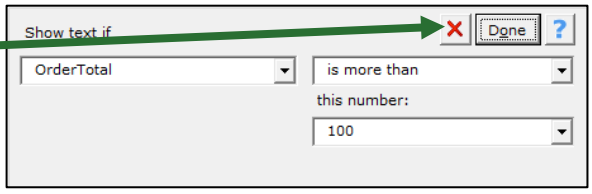
In this example, the selected text will be included in the finished document only if the answer to the IsCitizen question is Yes.



Modifying or Removing Conditions

You can go back and modify an existing Condition at any time. Just place the cursor in the **{if:** marker and click **Condition** to return to the Condition building screen.

While in this screen, you can click ✕ to remove the Condition from the form, leaving its contents intact. In other words, click ✕ to remove the **{if:** marker from the beginning of the conditional text and the **}** marker from the end of the conditional text without removing anything between the markers.



Compound Conditions (a/k/a Boolean Conditions)

A single Condition may depend on multiple criteria.

Example 1: The sentence "Please call us at your earliest convenience to avoid debt collection proceedings" might be used only when (1) the account is more than 3 months overdue; AND (2) the amount due is greater than $1,000.

Example 2: The sentence "You qualify for free shipping" might be used only when (1) the total order is over $100; OR (2) the shipping address is in Oregon.

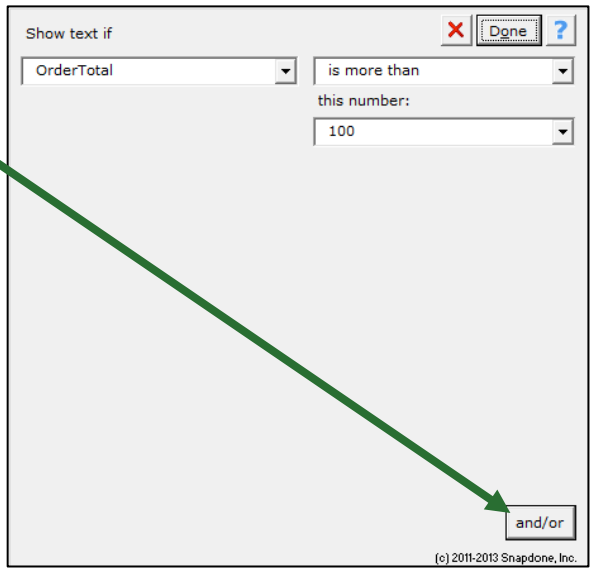
The AND and OR above are sometimes called Boolean operators. **Doxserá** includes three Boolean operators:

AND: For the Condition to be true, both of the criteria must be true.

OR: For the Condition to be true, one or both of the criteria must be true.

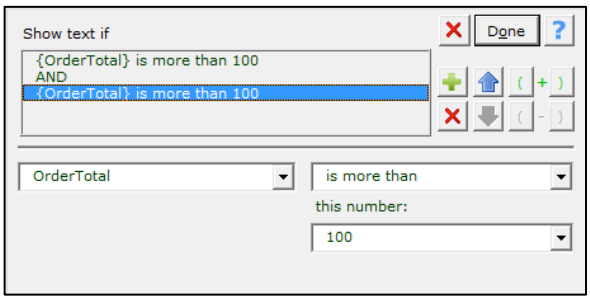
XOR (exclusive or): For the Condition to be true, exactly one of the criteria must be true.

To create a compound Condition, create the first part of the Condition normally, then click **and/or** to add an additional criterion.



The top part of the screen shows the criteria contained in this Condition. To modify a criterion, select it in the top part of the screen and make changes in the bottom part.

In the example shown here, the first criterion has been copied to create a second criterion, which can now be modified in the bottom part of the screen.



Use the buttons in the top-right part of the screen to manage criteria:

Add or remove criteria with ✚ and ✖.

Move the selected criterion up or down in the list with the ⬆⬇ arrows.

Control the order in which criteria are evaluated by ( ) adding or ( ) removing parentheses.

Nested Conditions

Conditions can be nested inside other Conditions. You might create an agreement form in which Article III is optional, contained within one great big Condition. Within that article, several paragraphs might also be conditional, either as a group or individually. And within each of those paragraphs other Conditions may apply. There is no limit to how deeply Conditions may be nested.

Conditional A/An and Period

Doxserá also includes two special conditional Fields: **a/an** and **period**. Consider the sentence shown here.

The company is a {State} corporation named {Company}.

If the state is "Texas" and the company is "Acme", the resulting document looks like this – no problems.

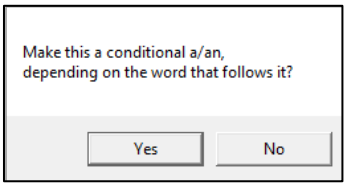
The company is a Texas corporation named Acme.

But if the state is "Idaho" and the company is "Acme, Inc.", the resulting document looks like this.

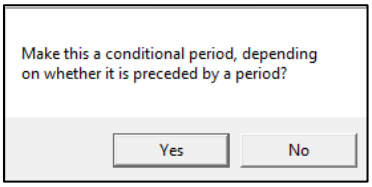
Problems! The "a" should be "an", and one of the two periods at the end of the sentence should be removed.

The company is a Idaho corporation named Acme, Inc..

To solve these problems, first select the word "a" in the form, click **Condition**, and click **Yes**.



Then select the period at the end of the sentence, click **Condition**, and click **Yes**.



When finished, the form looks like this. The **a/an** and **period** Conditions respond appropriately in all situations. And we all breathe a collective sigh of relief.

The company is {a} {State} corporation named {Company}{.}

Conditional Row in Table

When a form includes tables, you may want to remove an entire table row under certain conditions. For example, in this form the Tax and Subtotal rows should be removed when tax is equal to 0.

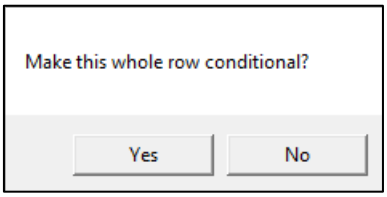
Your purchases are:

Item	Price
Widgets	
Thingies	
SUBTOTAL:	
Tax	
TOTAL:	

Thank you for shopping with us.

To make the Subtotal row conditional, place the cursor anywhere in that row (but don't select any text) and click **Condition**.

Click **Yes** to open the Condition screen, and create the Condition as you ordinarily would.



When finished, a RemoveRow marker is added to the form, as shown here.

Your purchases are:

Item	Price
Widgets	
Thingies	
SUBTOTAL: {if:[RemoveRow]}	
Tax	
TOTAL:	

Thank you for shopping with us.

Since the Tax row is also conditional, add the same Condition to it. (Or just copy the first Condition and paste it into the Tax row.)

Your purchases are:

Item	Price
Widgets	
Thingies	
SUBTOTAL: {if:[RemoveRow]}	
Tax {if:[RemoveRow]}	
TOTAL:	

Thank you for shopping with us.

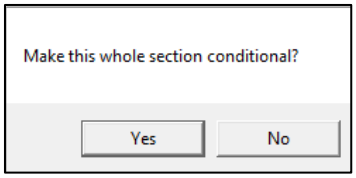
Unlike other Conditions that are fully processed during the **Fill** step, conditional rows are merely marked for deletion and are not removed from the document until it is finalized with the **Petrify** command. A message notifies form users of this requirement at the end of the **Fill** step.

Conditional Section in Document

When a form is divided into sections using Word's Section Break feature, you may want to remove an entire section under certain conditions.

To make a section conditional, place the cursor anywhere in that section (but not in a table, and don't select any text) and click **Condition**.

Click **Yes** to open the Condition screen, and create the Condition as you ordinarily would. A RemoveSection marker is added to the form, similar to the RemoveRow marker described above.



Like conditional rows (described above), conditional sections are merely marked for deletion during the **Fill** step and are not removed from the document until it is finalized with the **Petrify** command.

Lists

The Difference Between Fields and Lists

When inserting information from a Series answer into a form, it makes a big difference whether you click **Field** or **List**. Fields fetch *information about the Series* (e.g., the number of shareholders) or *a particular item* in the Series (e.g., the name of the largest shareholder); and Lists fetch *a set of items* from the List (e.g., the name of each shareholder). Since Lists can fetch multiple items, the options for arranging those items are extensive.

For example, to turn this sentence into a form you would create a Questionnaire with just one question, using a Series answer (described on page 8):

> I have three children: Sue, Tom, and Mary.

Doxserá (c) 2014 Snapdone, Inc.

Label	Question	Answer
Kids	List all the children.	[??] [??] [??]

Then insert a Field in the form to provide the number of children *(information about the Series).*

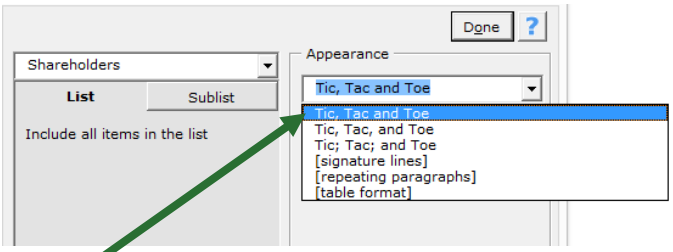
> I have {#} children: Sue, Tom, and Mary.

And insert a List to provide the names of the children *(a set of items from the Series).*

> I have {#} children: {List:{Kids#X}|, {Kids#X}| and {Kids#X}}.

Inserting a List

To insert a List in a form (shareholders, signers, children, executors, etc.), click **List**, select an answer label, and click **Insert List**.



> When inserting a List, you can only select Series answers, Checkboxes answers, and Grid answers. If the answer you want is missing, change it to a Series answer (pages 8 and 9), Checkboxes answer (page 13), or Grid answer (page 15).

Select one of the built-in List formats and click **Done**. The formats are described below.

Tic, Tac and Toe creates a narrative List separated by commas, without a comma before the last item.

> Griselda Pugh, Horace Blixt, Eunice Brimley and Bertrand Guff

Tic, Tac, and Toe creates a narrative List separated by commas, with a comma before the last item.

> Griselda Pugh, Horace Blixt, Eunice Brimley, and Bertrand Guff

Tic; Tac; and Toe creates a narrative List separated by semicolons.

Griselda Pugh; Horace Blixt; Eunice Brimley; and Bertrand Guff

The **[signature lines]** format is a handy way to create tidy signatures for a List of people.

Griselda Pugh

Horace Blixt

Eunice Brimley

Bertrand Guff

The **[repeating paragraphs]** format repeats a paragraph for each item in a List.

Sample paragraph about Griselda Pugh.

Sample paragraph about Horace Blixt.

Sample paragraph about Eunice Brimley.

Sample paragraph about Bertrand Guff.

Choose **[table format]** to arrange List items in a Word table.

Choose the number of **Columns** in the table.

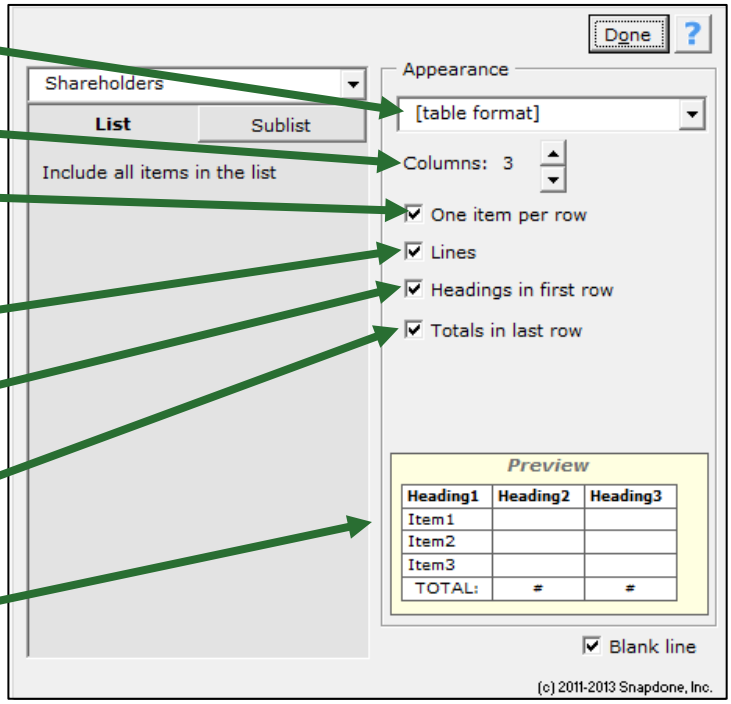
If **One item per row** is checked, each List item appears in the left column, and the remaining columns can be used for other information.

The **Lines** checkbox determines whether border lines appear in the table.

Turn on **Headings in first row** to include headings for each column in the table.

Turn on **Totals in last row** to create an additional row under the List items that automatically generates totals for each column.

See a preview of your choices here.



After adding a table-formatted List to a form, you can further customize the table – type your own headings, remove totals from columns where they don't apply, add shading or other formatting, etc.

In fact, you can customize any of the List formats shown above to fit your exact needs. For a detailed discussion of List customization, see Example 7 in the **Doxserá** Detailed Examples manual.

Sublists

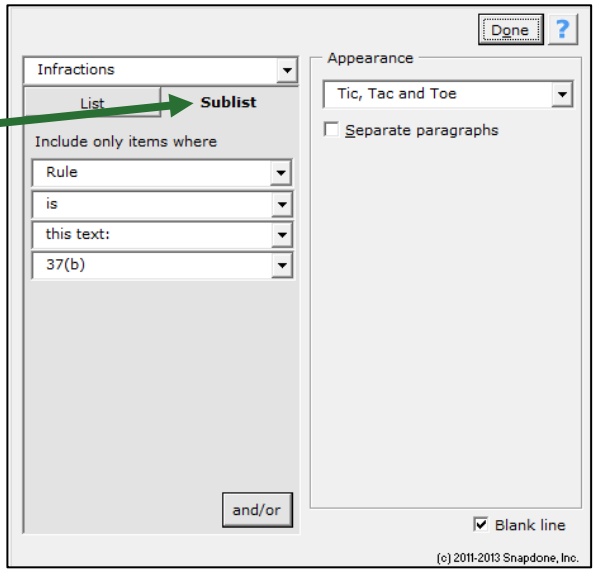
You may also create a List that includes only some of the items typed by the form user.

To insert a Sublist in a form, click **List**, select an answer label, click **Insert List**, then click **Sublist**.

Use the boxes on the left side of the screen to choose which items should be included in the Sublist.

In the example shown here, the Questionnaire includes a Series answer labeled **Infractions**, and a Linked answer labeled **Rule**. The Sublist being created will only include infractions that violate Rule 37(b).

If additional criteria are required to create your Sublist, click **and/or** to create a compound Condition. See page 23 for further discussion of compound Conditions.



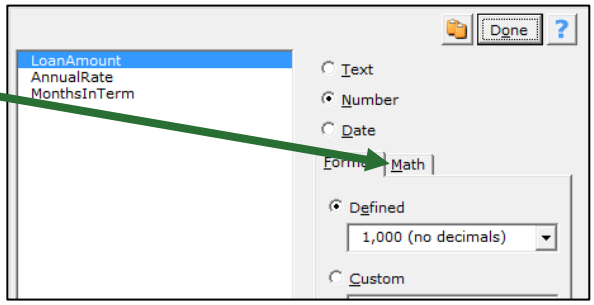
Math

Doxserá includes math functions to perform calculations automatically. For example, given a Series of shareholders and the number of shares held by each, the form can calculate the total number of outstanding shares and the percentage of the company owned by each shareholder.

Adding Math to a Field

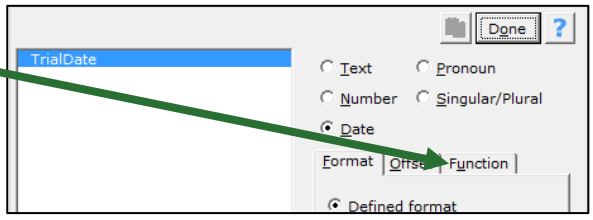
Number and Count Fields

Begin by creating a Number field (page 16) or a Count Field (page 19). Then click **Math** to open the Math screen.

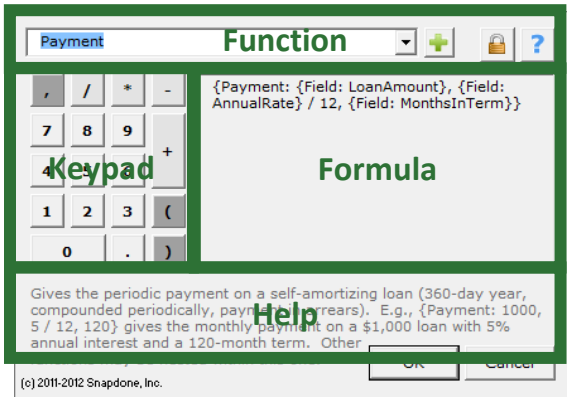


Date Fields

Begin by creating a Date field (page 16). Then click **Function** to open the Math screen.



The Math Screen



Formula. Build your math formula here. The formula can as simple as **1 + 2** or might contain functions within functions within functions.

Function. Functions perform special math duties, like **Days** to count the number of days between two dates, or **Round** to round off a number. To add a function to the formula, select it from the dropdown menu and click plus.

Keypad. Click these buttons to add numbers and operators (plus, minus, etc.) to the formula. You may also type numbers and symbols on your keyboard. Use ***** for multiplication and **/** for division.

Help. This area describes the currently selected function and gives pointers on its use.

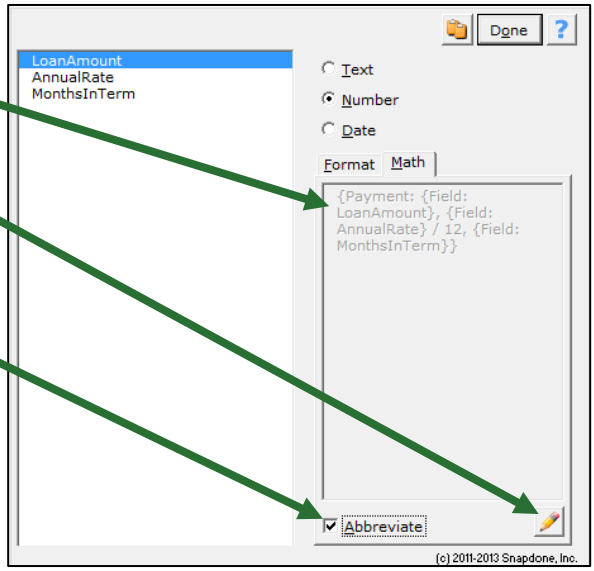
Unlocking. Click the unlock button in the top right corner to turn on freeform editing mode. Expert users may find this mode more convenient so they can type the formula directly (or copy and paste from another source) rather than selecting functions from a menu.

The Math Tab

After a formula is created in the Math screen, it appears here on the Math tab (or the Function tab for Date Fields).

Click the pencil to return to the Math screen if more editing is needed.

The **Abbreviate** checkbox has no effect on finished documents, but improves form readability by displaying **{###}** instead of the full formula.



What's With All the Curly Braces? You may have noticed that math formulae contain lots of curly braces: **{ }**. They show where each math function begins and ends. But you don't need to worry about typing the curly braces – they are automatically included each time you add a function to the formula.

Math Functions

Math mavens read on for a complete catalog of **Doxserá** math functions. (Those of us who napped through Algebra might want to skip this bit.)

Add, Subtract, Multiply, Divide

Symbols for basic math are just as you expect:

- **+** Addition. For example: 5 + 2 = 7.

- **-** Subtraction. For example: 5 - 2 = 3.
- ***** Multiplication. For example: 5 * 2 = 10.
- **/** Division. For example: 5 / 2 = 2.5
- **( )** Parentheses control the order of operations. For example: (1 + 2) * 3 = 9; and 1 + (2 * 3) = 7.

> **Dates Are Not Numbers**
>
> You might be tempted to use addition and subtraction to calculate date offsets, but don't – the result would be a "MATH ERROR" message. Instead, use Date Offsets (page 17), which are waaaay more flexible than **+** and **-**.

Absolute

The **Absolute** function gives the absolute value of a number, turning negative numbers into positive numbers. For example, **{Absolute: -3.8}** = 3.8. Other functions may be nested within this one. For example, if the Questionnaire asks for PriceA and PriceB, the difference between the two prices is **{Absolute: {Field: PriceA} - {Field: PriceB}}**.

In the Formula	Plain English
{Absolute: ***number*****}**	The absolute value of a number

Constant

The **Constant** function gives one of two math constants (*e* or *pi*), accurate to the 14th decimal place.

In the Formula	Plain English
{Constant: ***name*****}**	A mathematical constant

Days

The **Days** function gives the number of days between two dates. For example, **{Days: 1/31/2011, 2/3/2011}** = 3. Dates should use month/day/year format; both two-digit and four-digit years are allowed. If date1 is the same as date2, the result is zero. If date2 is earlier than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **Now**, and others) may be nested within this one. For example, if the Questionnaire asks for a ClosingDate, then **{Days: {Now}, {Field: ClosingDate}}** gives the number of days between the closing date and the date on which the form is used. (This will be a negative number if the closing date precedes the date when the form is used.)

In the Formula	Plain English
{Days: ***date1*****,** ***date2*****}**	The number of days between two dates

DerivedCount

The **DerivedCount** function is only available if the Questionnaire contains a Derived answer. It gives the number items in a Derived answer. Items must be separated by hard returns (each item on a separate line).

In the Formula	Plain English
{DerivedCount: *label*}	Count the number of items in a Derived answer

DerivedFirstDate

The **DerivedFirstDate** function is only available if the Questionnaire contains a Derived answer. It gives the earliest date in a Derived answer. Dates must be separated by hard returns (each date on a separate line).

In the Formula	Plain English
{DerivedFirstDate: *label*}	The earliest date in a Derived answer

DerivedLastDate

The **DerivedLastDate** function is only available if the Questionnaire contains a Derived answer. It gives the latest date in a Derived answer. Dates must be separated by hard returns (each date on a separate line).

In the Formula	Plain English
{DerivedLastDate: *label*}	The latest date in a Derived answer

DerivedMax

The **DerivedMax** function is only available if the Questionnaire contains a Derived answer. It gives the largest number in a Derived answer. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedMax: *label*}	The biggest number in a Derived answer

DerivedMin

The **DerivedMin** function is only available if the Questionnaire contains a Derived answer. It gives the smallest number in a Derived answer. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedMin: *label*}	The smallest number in a Derived answer

DerivedMultiply

The **DerivedMultiply** function is only available if the Questionnaire contains a Derived answer. It gives the product of all numbers in a Derived answer multiplied together. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedMultiply: *label*}	Multiply all the numbers in a Derived answer together

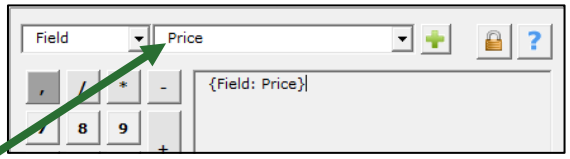
DerivedSum

The **DerivedSum** function is only available if the Questionnaire contains a Derived answer. It gives the sum of all numbers in a Derived answer added together. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedSum: *label*}	Add all the numbers in a Derived answer together

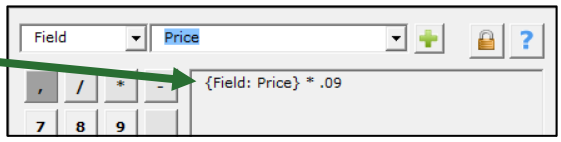
Field

The **Field** function gives an answer from the Questionnaire. If the answer is blank or non-numeric (for example, if someone types "five dollars" as the answer to your Price question), a "MATH ERROR" message appears.



After selecting **Field** in the first box, select a particular Field name in the second box.

For example, if the Questionnaire includes a question labeled **Price**, then sales tax could be computed with this formula (assuming the sales tax is 9%).



In the Formula	Plain English
{Field: *label*}	The answer to a question in the Questionnaire

FirstDate

The **FirstDate** function gives the earliest of a series of dates, ignoring items that are not dates. For example, **{FirstDate: 5/5/2011, 3/15/2011, 2/20/2012}** = 3/15/2011. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if today's date is 3/12/2012 and the CommencementDate in the Questionnaire is 4/1/2012, then **{FirstDate: {Now}, {Field: CommencementDate}, 3/15/2012}** = 3/12/2012.

In the Formula	Plain English
{FirstDate: ***date1*****,** ***date2*****, … *****dateX*****}**	The earliest of these dates

Integer

The **Integer** function gives the integer portion of a number, truncating any decimal portion. For example, **{Integer: 3.84}** = 3. Other functions may be nested within this one. For example, if the Questionnaire asks for an EggCount, the form can compute the number of 3-egg omelets with **{Integer: {Field: EggCount} / 3}**.

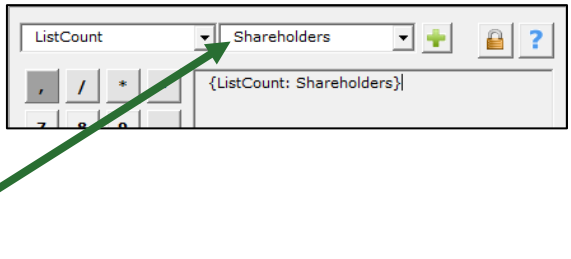
In the Formula	Plain English
{Integer: ***number*****}**	Convert a number to an integer, ignoring any fractional portion

LastDate

The **LastDate** function gives the latest of a series of dates, ignoring items that are not dates. For example, **{LastDate: 5/5/2011, 2/20/2012, 3/15/2011}** = 2/20/2012. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if today's date is 3/12/2012 and the CommencementDate in the Questionnaire is 4/1/2012, then **{LastDate: {Now}, {Field: CommencementDate}, 3/15/2012}** = 4/1/2012.

In the Formula	Plain English
{LastDate: ***date1*****,** ***date2*****, … *****dateX*****}**	The latest of these dates

ListCount



The **ListCount** function is only available if the Questionnaire contains a Series answer. It gives the number of items in a Series answer, not counting any items that are blank. If all items are blank, the result is zero.

When one of the List functions is selected (**ListCount**, **ListFirstDate**, **ListItem#**, **ListLastDate**, **ListMax**, **ListMin**, **ListMultiply**, **ListSum**), choose a particular Series in the second box.

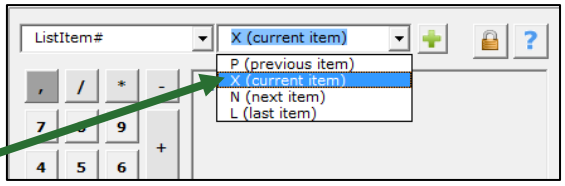
In the Formula	Plain English
{ListCount: ***label*****}**	Count the number of items in a Series answer

ListFirstDate

The **ListFirstDate** function is only available if the Questionnaire contains a Series answer. It gives the earliest date in a Series answer, ignoring items that are not dates. If none of the items in the Series is a date, an "ERROR - DATE FORMAT" message appears.

In the Formula	Plain English
{ListFirstDate: ***label*****}**	The earliest date in a Series answer

ListItem#



The **ListItem#** function is only available when creating or editing a Field in a List. It gives the sequential position of a List item, not counting blank items.

Use **X** for the position of the current item; **P** for the previous item; **N** for the next item; and **L** for the last item in the List.

For example, if a Series answer in the Questionnaire contains 5 non-blank items, **{ListItem#: L}** = 5.

In the Formula	Plain English
{ListItem#: ***item*****}**	The position of an item in a Series answer

ListLastDate

The **ListLastDate** function is only available if the Questionnaire contains a Series answer. It gives the latest date in a Series answer, ignoring items that are not dates. If none of the items in the Series is a date, an "ERROR - DATE FORMAT" message appears.

In the Formula	Plain English
{ListLastDate: *label*}	The latest date in a Series answer

ListMax

The **ListMax** function is only available if the Questionnaire contains a Series answer. It gives the largest number in a Series answer, ignoring items that are blank or non-numeric. If none of the items in the Series is a number, a "MATH ERROR" message appears.

In the Formula	Plain English
{ListMax: *label*}	The biggest number in a Series answer

ListMin

The **ListMin** function is only available if the Questionnaire contains a Series answer. It gives the smallest number in a Series answer, ignoring items that are blank or non-numeric. If none of the items in the Series is a number, a "MATH ERROR" message appears.

In the Formula	Plain English
{ListMin: *label*}	The smallest number in a Series answer

ListMultiply

The **ListMultiply** function is only available if the Questionnaire contains a Series answer. It gives the product of all numbers in a Series multiplied together, ignoring items that are blank or non-numeric. If none of the items in the Series is a number, a "MATH ERROR" message appears.

In the Formula	Plain English
{ListMultiply: *label*}	Multiply all the numbers in a Series answer together

ListSum

The **ListSum** function is only available if the Questionnaire contains a Series answer. It gives the sum of all numbers in a Series added together, ignoring items that are blank or non-numeric. If none of the items in the Series is a number, a "MATH ERROR" message appears.

In the Formula	Plain English
{ListSum: *label*}	Add all the numbers in a Series answer together

Logarithm

The **Logarithm** function gives the base *n* logarithm of a number. For example, **{Logarithm: 10, 100}** gives the base 10 logarithm of 100. Other functions may be nested within this one. To calculate natural logarithms, use the **{Constant: e}** function as the base number. For example, the natural logarithm of 100 is **{Logarithm: {Constant: e}, 100}**.

In the Formula	Plain English (sort of)
{Logarithm: *n*, *number*}	The base *n* logarithm of a number

Maximum

The **Maximum** function gives the largest of a series of numbers. For example, **{Maximum: 5, 10, 3}** = 10. Other functions may be nested within this one. For example, if the Questionnaire asks for Income and two possible tax rates – TaxRateA and TaxRateB – then the largest possible amount of tax owed is **{Maximum: {Field: TaxRateA} * {Field: Income}, {Field: TaxRateB} * {Field: Income}}**.

In the Formula	Plain English
{Maximum: *number1*, *number2*, … *numberX*}	The biggest of these numbers

Minimum

The **Minimum** function gives the smallest of a series of numbers. For example, **{Minimum: 5, 3, 10}** = 3. Other functions may be nested within this one. For example, if the shipping and handling fee is 3% of the purchase price, but not to exceed $7.50, use **{Minimum: {Field: Price} * .03, 7.50}**.

In the Formula	Plain English
{Minimum: *number1*, *number2*, … *numberX*}	The smallest of these numbers

Months

The **Months** function gives the number of months between two dates. *This function counts transitions from month to month; not the number of elapsed days divided by 30.* For example, **{Months: 1/31/2011, 3/3/2011}** = 2. If both dates occur in the same month, the result is zero. If date2 is in an earlier month than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if the Questionnaire asks for a ClosingDate, then **{Months: {Now}, {Field: ClosingDate}}** gives the number of months between the closing date and the date on which the form is used. (This will be a negative number if the closing date precedes the date when the form is used.)

In the Formula	Plain English
{Months: *date1*, *date2*}	The number of months between two dates

Now

The **Now** function gives the date when the form is filled in. It may be used by itself or inside a date function: **Days**, **Months**, **Years**, **FirstDate**, **LastDate**.

In the Formula	Plain English
{Now}	The date when the form is filled in

Payment (PMT)

The **Payment** function gives the periodic payment on a self-amortizing loan, assuming 360-day years, interest compounded periodically, payment in arrears. For example, **{Payment: 1000, 5 / 12, 120}** gives the monthly payment on a $1,000 loan with a 5% annual rate of interest and a 120-month term. Other functions may be nested within this one. For example, if the Questionnaire already asks for LoanAmount, AnnualRate, and MonthsInTerm, then the monthly payment could be computed as **{Payment: {Field: LoanAmount}, {Field: AnnualRate} / 12, {Field: MonthsInTerm}}**.

In the Formula	Plain English
{Payment: ***amount*****,** ***rate*****,** ***term*****}**	Calculates the periodic payment amount when given the loan amount, interest rate per period, and number of periods in the loan term

RaiseToPower

The **RaiseToPower** function performs exponentiation, multiplying a number by itself a number of times. For example, **{RaiseToPower: 8, 3}** = 512, because 8 x 8 x 8 = 512. Other functions may be nested within this one. For example, if the Questionnaire asks for the Length of a square plot of land, the acreage equals the Length squared: **{RaiseToPower: {Field: Length}, 2}**.

In the Formula	Plain English
{RaiseToPower: ***number*****,** ***exponent*****}**	Multiply a number by itself a number of times

Remainder (modulo)

The **Remainder** function gives the remainder value after division. For example, **{Remainder: 10, 3}** = 1, because 10 divided by 3 leaves a remainder of 1. Other functions may be nested within this one. For example, if the Questionnaire asks for a List of People to be split into 4 equal groups, the number of leftover people is **{Remainder: {ListCount: People}, 4}**.

In the Formula	Plain English
{Remainder: ***dividend*****,** ***divisor*****}**	The remainder that's left over after dividing a number by another number

Root

The **Root** function gives the *n*th root of a number (square root is 2nd root; cube root is 3rd root, etc.). For example, the square root of 9 is **{Root: 2, 9}**; and the cube root of 125 is **{Root: 3, 125}**. Other

functions may be nested within this one. For example, according to the Pythagorean Theorem, if the Questionnaire asks for the lengths of Leg1 and Leg2 of a right triangle, then the length of the hypotenuse is **{Root: 2, {RaiseToPower: {Field: Leg1}, 2} + {RaiseToPower: {Field: Leg2}, 2}}**.

In the Formula	Plain English (sort of)
{Root: *n*, *number*}	The *n*th root of a number

Round

The **Round** function rounds a number to the nearest integer. Halves are rounded down. For example, **{Round: 5.5}** = 5; and **{Round: 5.51}** = 6. Other functions may be nested within this one. For example, if the Questionnaire asks for a List of SharesHeld by each shareholder, then the average number of shares held by each shareholder is approximately **{Round: {ListSum: SharesHeld} / {ListCount: SharesHeld}}**.

In the Formula	Plain English
{Round: *number*}	Round off a number

Years

The **Years** function gives the number of years between two dates. *This function counts transitions from year to year; not the number of elapsed days divided by 365.* For example, **{Years: 12/31/2010, 1/1/2012}** = 2. If date1 is in the same year as date2, the result is zero. If date2 is in an earlier year than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one.

In the Formula	Plain English
{Years: *date1*, *date2*}	The number of years between two dates

Attention Markers

Occasionally you will want to draw the form user's attention to a particular portion of the form – perhaps a lengthy section needs to be drafted from scratch.

Select the location in the document, click **Attn Mark**, and type a message if desired.

When the form is used, the cursor jumps to the marked location and your message (if any) is presented. If you have marked several spots for attention, the form user clicks **Attn** to visit each of them.

Using Smarter Forms

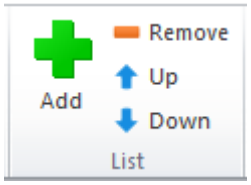
Answering Questions in the Questionnaire

Tabbing Is the Best!

When answering questions in the Questionnaire, press **Tab** to move from one answer to the next (**Shift+Tab** to move backwards). It's quicker than reaching for the mouse (quicker even than reaching for

the arrow keys on your keyboard). And it has an additional enormous advantage when the Questionnaire contains Smart Answers: it moves your cursor exactly where needed to respond to the next question, skipping over any extraneous text and preselecting the entire answer for easy type-over replacement. Just tab 'n type!

Series Answers and Grids



Several buttons on the **Doxserá** ribbon make it easy to work with Series answers and Grids.

If the Series answer or Grid doesn't contain enough empty boxes to type in, click **Add** to create more. Or click **Remove** to remove an item from the Series answer or a row from the Grid. (When working in a Series answer or Grid, a flag appears above the cursor, reminding you to click Add to add an item or row.)

Click **Up** or **Down** to rearrange items in the Series answer or Grid.

Dropdowns and Checkboxes

Some answers draw their choices from external sources, like Master Lists. To update them with current choices, click **Refresh**. (When working in one of these answers, a flag appears above the cursor, reminding you to "click Refresh to update choices".)

Fetch Answers

Resources: Fetch a Passage Walkthrough Video

Some answers draw their choices from Folios. When the cursor is in this one of these answers, a flag appears above the cursor, reminding you to "click Fetch to choose". Don't type a response in this answer box – instead, click **Fetch** and select an answer from the Fetch screen.

Peeking

While typing answers, you may want to peek at the location(s) in the form where your answer will be used. Click **Peek Next** to turn on a split-screen view showing where the current answer is used in the form. Click **Peek Next** again to advance to the next spot where the same answer is used, or click **Peek Off** when you're finished with the split-screen view.

Filling in the Form

Start

After opening a form, click **Start** to quickly move the cursor to the top of the Questionnaire, ready to start answering questions. (Form authors also use this button as a handy way to jump the cursor to the beginning of the Questionnaire.)

Fill

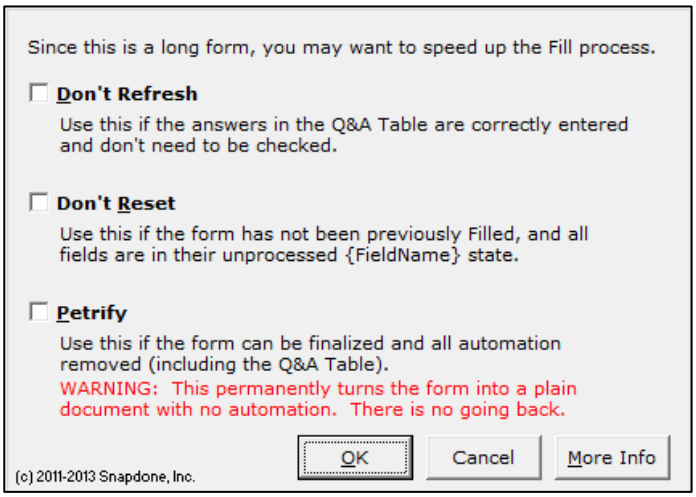
Normal Fill for Almost All Forms

After typing answers in the Questionnaire, click **Fill** to move all of the answers up into the form, automatically formatting Fields properly, changing pronouns and singular/plural words, calculating date offsets and math, and including or excluding conditional text as appropriate.

After filling in the form, you may save it in its "filled" state indefinitely. At some later date, if a misspelling is discovered or other information changes, simply make the revision in the Questionnaire then click **Fill** again to update the entire form.

Speedy Fill for Monster Forms

If your form is exceptionally large (over 1,000 codes), you qualify for Speedy Fill mode. After clicking **Fill**, the Speedy Fill screen appears, with three options:



Don't Refresh: This skips the Refresh step that ordinarily occurs at the beginning of the Fill process. That step fixes any answers that were entered incorrectly (outside the input boxes) in the Questionnaire. If you're comfortable with the Questionnaire and answers are entered correctly, then it's safe to use this option. If the Questionnaire contains a bajillion answers, this will save some time.

Don't Reset: This skips the Reset step that ordinarily occurs next in the Fill process. That step restores all Fields, Lists and Conditions to their original, pristine state, which is important if the form has been previously filled in with the **Fill** command or the **Blanks** command (page 41). Only use this option if you're certain the form is in its pristine state, with Fields that look like this: {FieldName}. If the form contains a ton of Fields, this will save some time.

Petrify: When this option is selected, the form is both Filled and Petrified, just as if you clicked the **Petrify** button (page 42) immediately after Filling. If the form contains a great big buncha Conditions, this will save a *lot* of time. But remember: This step is irreversible. All automation (including the Questionnaire) is removed from the form, so you cannot go back and change your answers later.

Attention Markers

If a form contains an Attention Marker, it will automatically be selected when you click **Fill**, and its message (if any) displayed. To move on to other Attention Markers in the same form, click **Attn**.

Reset

After filling in a form with the **Fill** button, you may want to return to the original unfilled view. Click **Reset** to return the form to its original state, without disturbing the contents of the Questionnaire.

This is especially important for form authors when testing a form. After clicking **Fill** to test a form, always **Reset** before making changes to the form; otherwise your changes might be lost.

Blanks

Click **Blanks** to replace Fields with blank lines. This is handy if you want to print out a copy of the form so that it can be filled in by hand.

Petrify

After finalizing a document, you may click **Petrify** to convert all Fields to plain text and remove the Questionnaire. The document is then an ordinary Word document stripped of **Doxserá** features, ready for emailing to a client or any other purpose.

Capturing and Reusing Data (Save/Load)

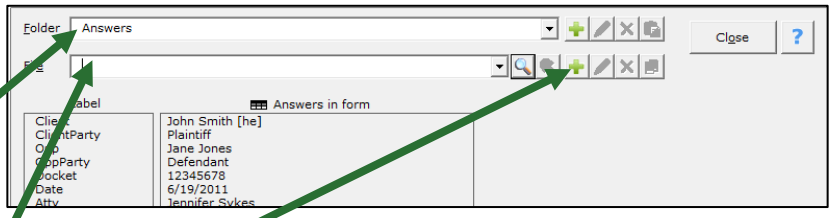
Many forms might be used in a single matter, and lots of information is repeated among those forms – the client's name, address, phone number, the spouse's name, and so on. Rather than retype all that information in each form, you can save answers from one form and reuse those answers in later forms.

Saving Answers

After typing answers in a Questionnaire, click **Save/Load** to open this screen.

Choose where the file will be saved in the **Folder** box. (See "Organizing Answer Files" on page 44 for more on creating, renaming, and deleting folders.)

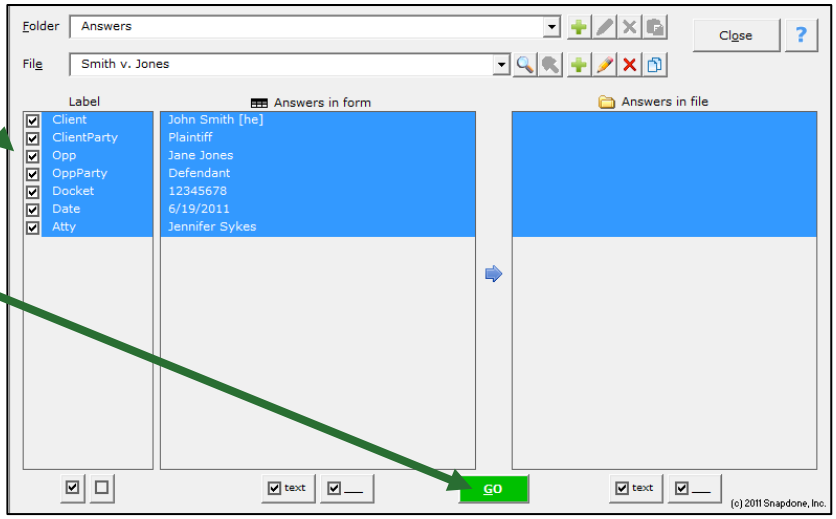
If a file has already been created for this matter, select it in the **File** box. If not, Click plus to create a new file.



After selecting (or creating) a file for this matter, click the right arrow to indicate answers should be copied *from the form to the file.*

Checkboxes show which answers will be copied to the file and give you a chance to refine the selection if needed.

Click **GO** to finish.



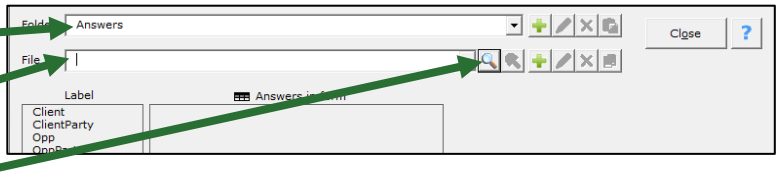
Loading Answers

Now suppose that you are working on a second form for the same matter. Instead of retyping answers into the second form's Questionnaire, simply load the answers you saved previously.

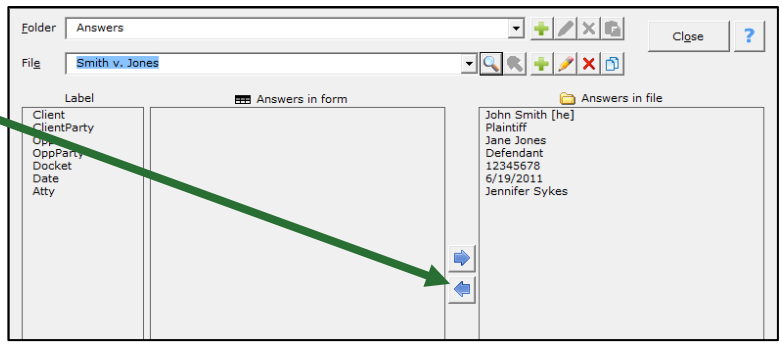
Click **Save/Load** and select the **Folder** where the matter file is saved.

Select a matter file in the **File** box.

If there are lots of matter files, use the search button for fast results.

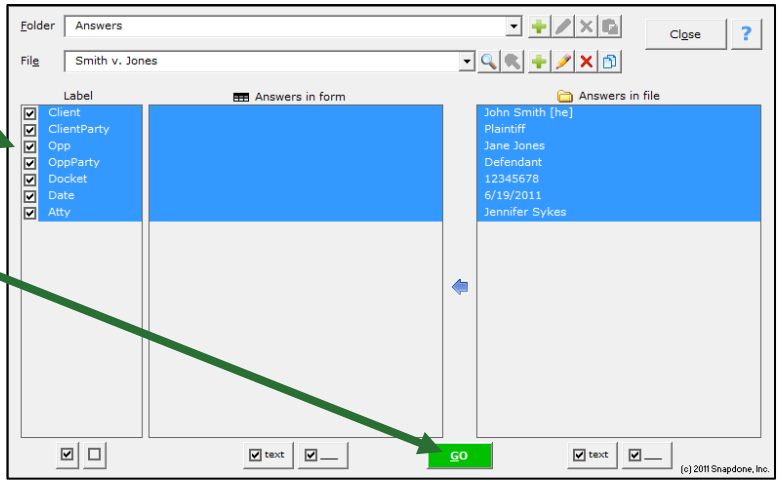


After selecting a matter file, click the left arrow to indicate answers should be copied *from the file to the form.*



Checkboxes show which answers will be copied to the form.

Click **GO** to finish.



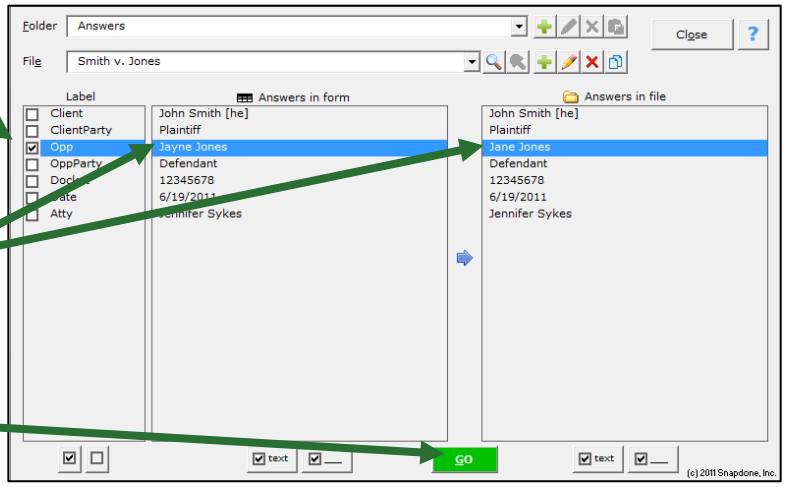
Updating Answers

You will frequently want to update the answers in a matter's answer file. Perhaps you corrected a name spelling, or maybe a new form asked questions that did not appear in earlier forms. With the current form on your screen (and accurate answers in the form's Questionnaire), click **Save/Load**, select the matter file, and click the right arrow to indicate answers should be copied *from the form to the file.*

Answers that differ between the form and the saved file are automatically selected.

In this example, the opposing party's name was spelled **Jane Jones** in the saved file, but it has been corrected to **Jayne Jones** in the form.

Click **GO** to finish, and the file is updated with the new name spelling.



Organizing Answer Files

When first installed, **Doxserá** stores all answer files in a single folder named "Answers". But you may want to subdivide that folder into several subfolders or even sub-subfolders.

Use the **Folder** buttons at the top of the **Save/Load** screen to organize the files where answers are saved in your office.

Click plus to create a subfolder within the selected folder, the pencil to rename a subfolder, or to remove a subfolder. The paste button is used to paste an answer file into the selected folder after copying it from another folder.

Use the **File** buttons at the top of the **Save/Load** screen to manage answer files.

Click search to find a file in the currently selected folder or its subfolders, and cancel search to return to a listing of all files. Click plus to create a new answer file within the selected folder, the pencil to rename a file, or to permanently remove an answer file and all the answers it contains.

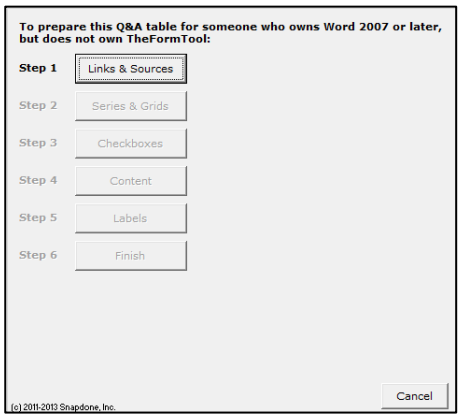
To use one answer file as a starting point for another (for instance, if two matters are related and share much of the same information), click copy to copy the first file, select the folder where the new file belongs, then click paste.

Sharing the Questionnaire

Rather than fill in the Questionnaire yourself, you can use it to collect answers from someone else, even if that person does not own **Doxserá** or **TheFormTool**. All they require is Microsoft Word, version 2007 or later.

1. Prepare and Send the Questionnaire

First open a form as if you were going to fill it in yourself, then click **Tools**, **Prepare to Share**.



This screen walks you through several steps to make the Questionnaire usable by anyone who owns Microsoft Word, version 2007 or later. Depending on your choices, it will:

1. Check Linked answers and Source answers (answers that use other answers as a source for choices). You are prompted to convert Linked Answers to Grids, while Source answers are automatically made sharable.
2. Adjust Series answers and Grids to include enough empty slots for complete answers.
3. Convert checkboxes to be compatible with Word 2007.
4. Remove the content of the form so the Questionnaire can be shared by itself.
5. Hide the Label column of the Questionnaire.

When finished, send the prepared Questionnaire to your target audience, asking them to return it to you after answering all the questions.

2. Save Answers

When the Questionnaire is returned to you, open it and click **Save/Load** to save the responses to an answer file (described on page 42). Then close the answered Questionnaire – it's not needed for Step 3.

3. Fill in the Form

Use the original form to start a fresh document, and click **Save/Load** to load the responses you saved in Step 2. Click **Fill**, and the form is complete.

Form Sets

Form Sets organize forms into groups that fit your needs, and allow you to create batches of related documents all at once. For example, suppose you're a car dealer and you need to complete these three forms every time you sell a car:

Proof of Sale

This document proves that {Buyer} is the legal owner of a {Model} automobile, VIN #{VIN}, purchased on {Date}.

_____

{Seller}

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Buyer	Name of buyer?	
Seller	Name of seller?	
Model	Model of car?	
VIN	VIN number of car?	
Date	Date of sale?	

Emissions Certificate

On {Date}, the automobile with VIN No. {VIN} passed its emissions test with a carbon monoxide rating of {Rating}.

_____

{Seller}

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Date	Date of sale?	
VIN	VIN number of car?	
Rating	Carbon monoxide rating?	
Seller	Name of seller?	

License Application

{Buyer} hereby applies to the Department of Transportation for a vehicle license.

Vehicle Model: {Model}
Vehicle Color: {Color}
VIN No.: {VIN}

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Buyer	Name of buyer?	
Model	Model of car?	
Color	Color of car?	
VIN	VIN number of car?	

Rather than fill out each form separately, **Doxserá** allows you to create a Form Set so the whole batch of documents can be completed in one go. Note that the three Questionnaires vary from each other but have several fields in common. When the Form Set is used, **Doxserá** builds a ***compiled*** Questionnaire that includes all relevant questions for the selected forms and no duplicates, so the form user can work with one Questionnaire instead of three:

FORM SET

C:\My Forms\Emissions Certificate.dotx
C:\My Forms\License Application.dotx
C:\My Forms\Proof of Sale.dotx

		Doxserá (c) 2011-2013 Snapdone, Inc.
Label	**Question**	**Answer**
Date	Date of sale?	[??]
VIN	VIN number of car?	[??]
Rating	Carbon monoxide rating?	[??]
Seller	Name of seller?	[??]
Buyer	Name of buyer?	[??]
Model	Model of car?	[??]
Color	Color of car?	[??]

Creating Form Sets

In your role as a form author, you will create Form Sets that are later used to create batches of finished documents. This involves telling **Doxserá** one or more Locations where forms are stored, then assigning a group of forms to a particular Form Set.

1. Open the Form Sets Screen

Make sure no forms are open in your Word screen, then click **Start** to open the Form Sets screen.

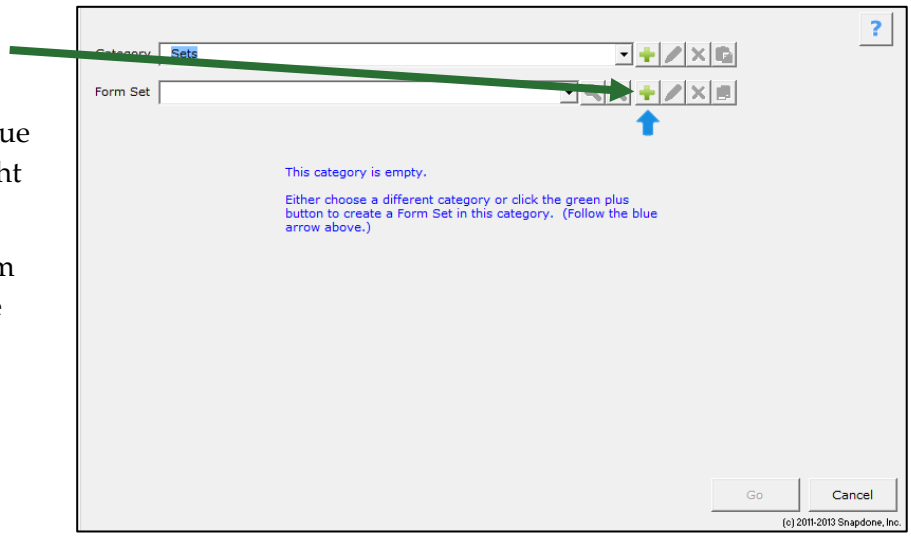
> Note that the **Start** button has two functions. If a form is open, it moves the cursor to the beginning of the Questionnaire. If a form is not open, it opens the Form Sets screen, where sets can be created or used.

2. Create a Form Set

Click plus to create a new Form Set.

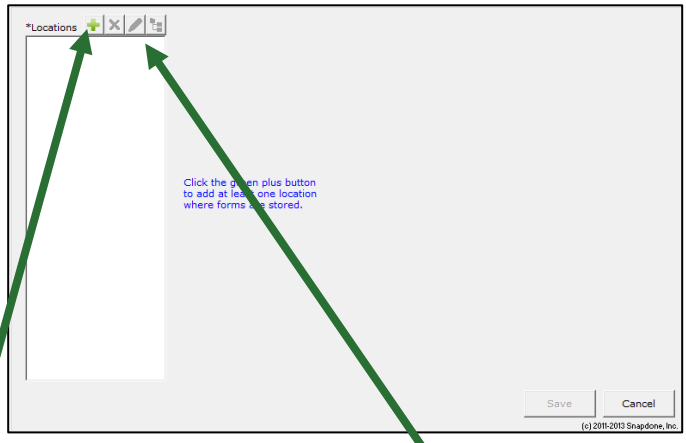
(If this is your first Form Set, the blue arrow gives you a nudge in the right direction.)

You will be asked to name the Form Set. For this example, we'll use the name **Car Sale**.



> **Categories:** Large offices may want to subdivide their collection of Form Sets into various categories. If so, read "Organizing Answer Files" on page 44 to learn how to use the category controls at the top of this screen.

3. Add Locations If Necessary



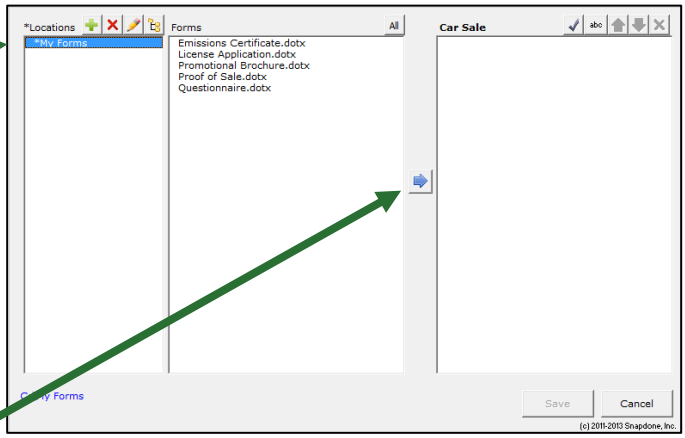
When you first use **Doxserá**, this list of Locations is empty. That's because **Doxserá** doesn't know where you store forms. Maybe you keep them all in a single folder on your computer. Or maybe they're spread out among several different folders on your computer, your server, and other computers on your network.

Before **Doxserá** can help you build a Form Set, we need to tell it one or more Locations where your forms are stored.

Click plus to add a Location to this list, and select a folder where forms are stored. You will be asked to give the Location a short name.

Offices that store all their forms in one place will only need one Location in this list. But if your forms are all over the place and you're managing several Locations, the other buttons at the top of this screen will be useful. Click to remove a Location (this breaks any Form Sets that use that location); to rename a Location; or to change the path of a Location (so you can easily adjust if the IT Department decides to changes your server location).

4. Add Forms to the Set



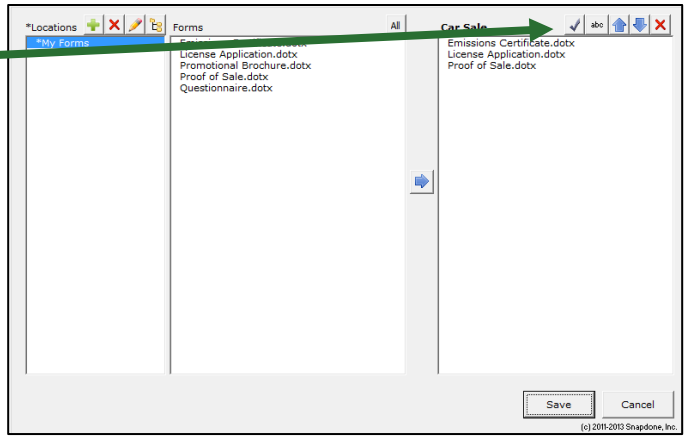
Here a Location named **My Forms** has been added in the left panel.

The center panel shows all the forms that exist in the selected Location, and the right panel shows all the forms that have been added to the **Car Sale** Form Set (none so far).

A Form Set can include as many or as few forms as you like. And the forms in a set can be drawn from multiple Locations.

In this example we will include three forms in our **Car Sale** set by selecting each desired form and clicking the arrow to add it to the set.

The five buttons above the Form Set provide further control.



Click ✓ to check the set, making sure the answers contained in the forms are compatible with each other.

Click **abc** to sort the forms alphabetically.

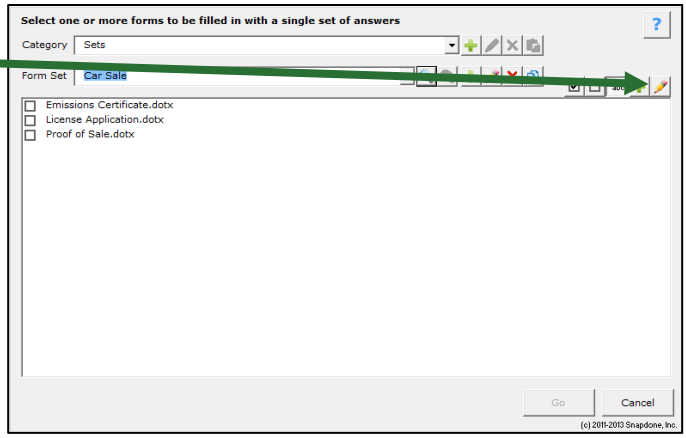
Select a form and click an arrow ⬆⬇ to move the form up or down in the list.

Click ✕ to remove a form from the set. (This does not delete the form wherever it's stored; it only removes the form from this Form Set.)

Compatible Answers: It's possible to create a Form Set that doesn't work due to incompatible answers. For example, if Form A includes a question labeled **Invntry** that asks for the name of a particular inventory item (a Text type answer), and Form B includes an identically labeled **Invntry** question that asks for a list of all inventory items (a Series type answer), those answers are incompatible – one is a single item, and the other is a series of items. This would cause an error message when the forms are used. When in doubt, use the ✓ check button above to make sure all the answers in your Form Set are compatible.

Once the Form Set is to your liking, click **Save** to return to the previous screen.

If you need to make changes to the Form Set later, click the ✎ pencil to return to the Form Set editing screen.



5. Determining the Order of Questions

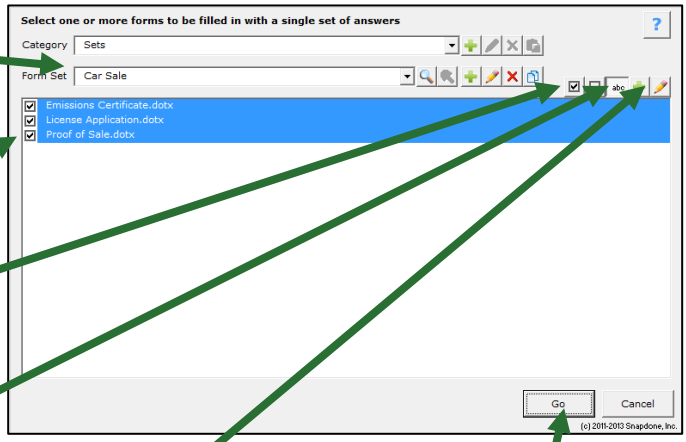
Remember that when a Form Set is used, **Doxserá** examines each of the Questionnaires contained in those forms and compiles the questions into a single Questionnaire. The order of questions in that compiled Questionnaire is controlled by the order of forms in the Form Set. For example, if a particular question appears early in one form's Questionnaire but late in another form's Questionnaire, the ultimate placement of that question in the compiled Questionnaire will be determined by the form that appears higher in the Form Set list. So a good rule of thumb is to put your biggest, most well-organized form at the top of the list, and all the others will fall in line.

Dividers (described on page 45 of the Expert Guide) also control the arrangement of answers in the compiled Questionnaire. If you use identical Divider headings in multiple forms, then **Doxserá** will group those questions together when it creates the compiled Questionnaire.

Using Form Sets

1. Select the Forms

To use a Form Set, make sure no forms are open in your Word screen (either by closing any open forms or by creating a blank document), then click **Start** to open the Form Sets screen.



Select a Form Set. If there are lots and lots of sets, you can use the search button to find it more quickly.

Select the forms you want to use. You don't have to use *all* the forms in the set – just pick the ones you want.

Use the checkbox buttons to quickly select or deselect *all* of the forms.

By default, the forms are presented in the order determined by the author of the Form Set. But you can click **abc** to sort them alphabetically if you prefer.

Occasionally, you might want to add a form "just this once" that's not included in the selected Form Set. You can do this by clicking plus and browsing to the form, wherever it may be stored on your computer or server. But if you find yourself doing this repeatedly, you should really consider adding the form to the Form Set so that it's easier to select when you need it.

After selecting the forms you want to use, click **Go** to create a compiled Questionnaire that includes all of the questions contained in each of the selected forms, with no duplicates.

FORM SET

C:\My Forms\Emissions Certificate.dotx

C:\My Forms\License Application.dotx

C:\My Forms\Proof of Sale.dotx

Doxserá (c) 2011-2013 Snapdone, Inc.

Label	Question	Answer
Date	Date of sale?	[??]
VIN	VIN number of car?	[??]
Rating	Carbon monoxide rating?	[??]
Seller	Name of seller?	[??]
Buyer	Name of buyer?	[??]
Model	Model of car?	[??]
Color	Color of car?	[??]

2. Answer the Questions

Fill in the compiled Questionnaire just as you would any other Questionnaire. You can even save and load answers into it. (**Save/Load** is described on page 39 of the Expert Guide.)

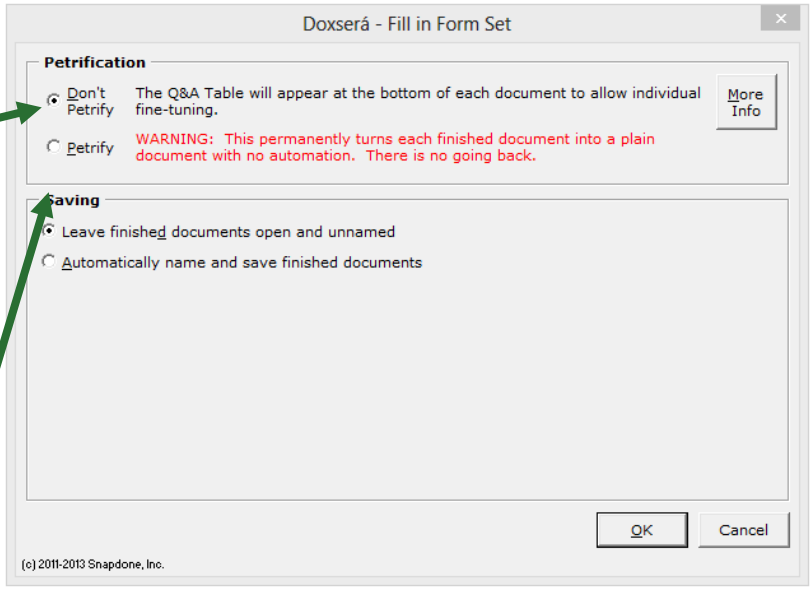
3. Fill in the Forms

When the answers are complete, click **Fill** to display the screen below.

Petrification

If you expect to further revise the individual documents, choose **Don't Petrify**. This appends a functional Questionnaire at the bottom of each finished document, so you can make changes and individually tweak each one. This should be your choice if you like to retain a "live" copy of each finished document with the Questionnaire intact.

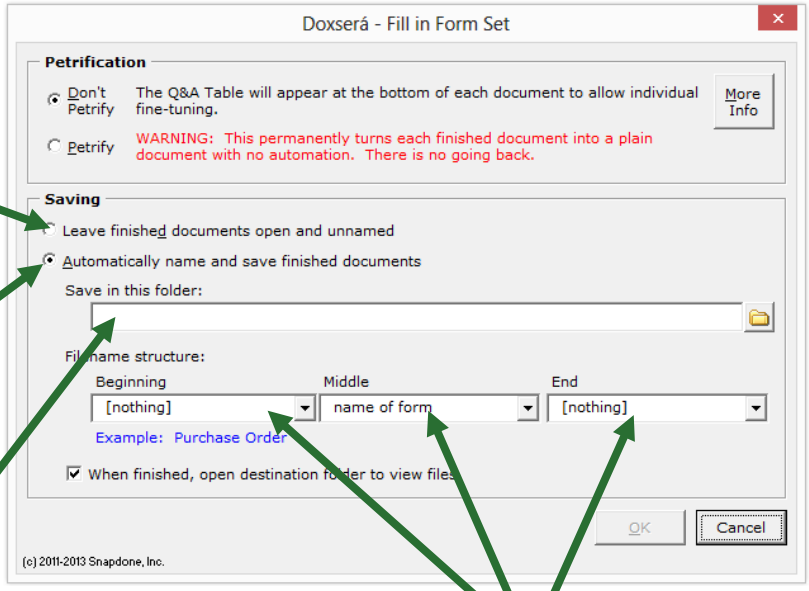
If you don't need to adjust the finished documents and don't want to retain a "live" copy, choose **Petrify**. This removes all Questionnaires and converts all fields to plain text, just as if you had used the Petrify command (page 42) on each finished document.



Saving

You may choose to **Leave finished documents open and unnamed**. When the Fill process is finished, each finished document will remain open in Word, and you can print, save, and/or edit each one individually.

Or you may prefer to have **Doxserá Automatically name and save finished documents**. The finished documents will be named and saved according to your specifications:



Folder: Choose a folder where the finished documents will be saved.

Filename: Filenames are constructed from three parts: Beginning, Middle, and End. Each of the three parts may be (a) nothing; (b) today's date; (c) the filename of the original form; (d) a sequential number; or (e) text that you specify.

These building blocks can be rearranged in whatever configuration suits your needs. For example, suppose you're using a Form Set to create four documents for client Smith: a Lease Agreement, Bill of Sale, Property Description, and Certificate of Insurance. You could choose to number the finished documents and include the client name on each:

Filename structure	
Beginning	sequential number
Middle	text: Smith
End	[nothing]

Resulting filenames
001 Smith.docx 002 Smith.docx 003 Smith.docx 004 Smith.docx

Or you could choose to name each finished document with today's date, the name of the original form, and identification number 86A423X in parentheses:

Filename structure	
Beginning	date
Middle	name of form
End	text: (86A423X)

Resulting filenames
2014.01.19 Lease Agreement (86A423X).docx 2014.01.19 Bill of Sale (86A423X).docx 2014.01.19 Property Description (86A423X).docx 2014.01.19 Certificate of Insurance (86A423X).docx

Click **OK** when ready, and the selected forms are used to create a series of finished documents, using answers provided in the single compiled Questionnaire.

Folios

Resources: Folio Overview

Folios store multiple texts, called *Passages*, that can be brought into documents manually with the *Fetch* command or into forms automatically with the *Fetcher* command.

A Folio could contain boilerplate paragraphs or pages, employee biographies, parts lists, jury instructions, interrogatories, letterheads, captions, or any set of text passages, even if they include graphics, formatting, footnotes, hyperlinks, special characters, and other non-text features.

Consider using Folios if:

- You use standardized blocks of text in multiple forms.
- You want to create a library of information that can be searched and selected for insertion at any point in any document.
- You want to create forms that intelligently select and insert blocks of external text. Decisions made by the form can be based responses to questions in the Questionnaire combined with internal logic.

Learn Quick: If you prefer short-format walkthroughs, videos, and lessons, a complete online Folios curriculum can be found here: Folio Overview.

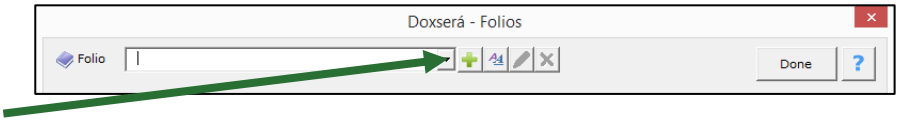
Creating Folios

Basic Folios

Resources: Create a Folio Walkthrough Video

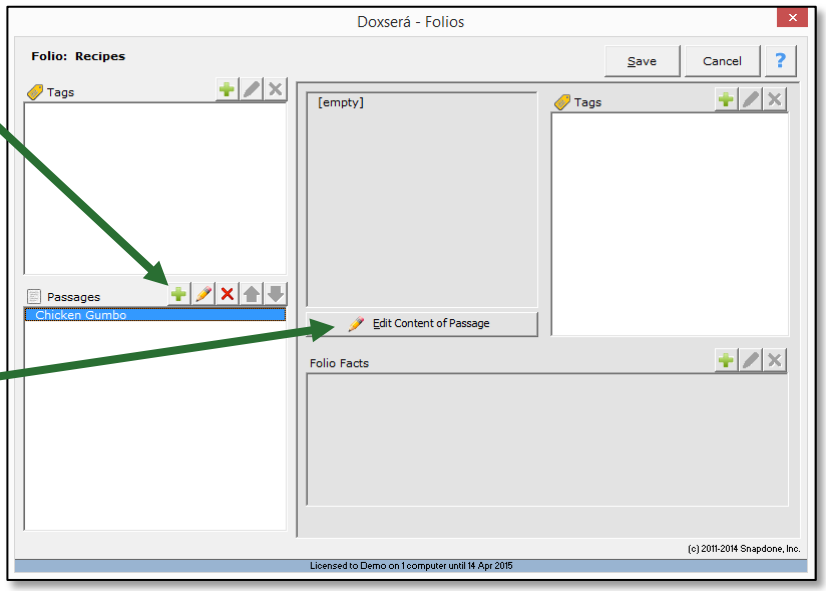
To create a Folio, first click **Folios** to open the Folios screen.

Click the **new Folio** icon. You will be asked to name the Folio and the first Passage. (For example, a Folio of recipes might be named "Recipes," and the first Passage might be named "Chicken Gumbo".)



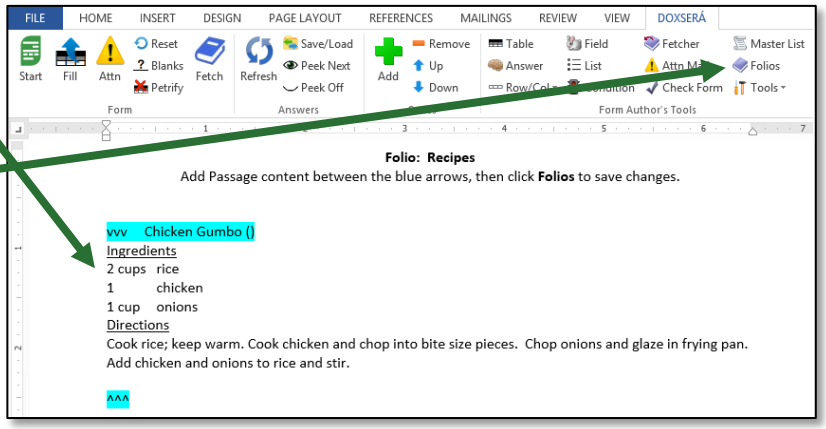
Click the **new Folio** icon to add additional Passages.

To add text to a Passage, select it and click **Edit Content of Passage** to open a Folio editing document.



The content of each Passage is typed (or copied and pasted) between the blue vvv and ^^^ markers.

When finished, click **Folios** to return to the Folios screen, then click **Save** to save your changes.



Folio and Tags

Resources: Tag Passages Walkthrough Video

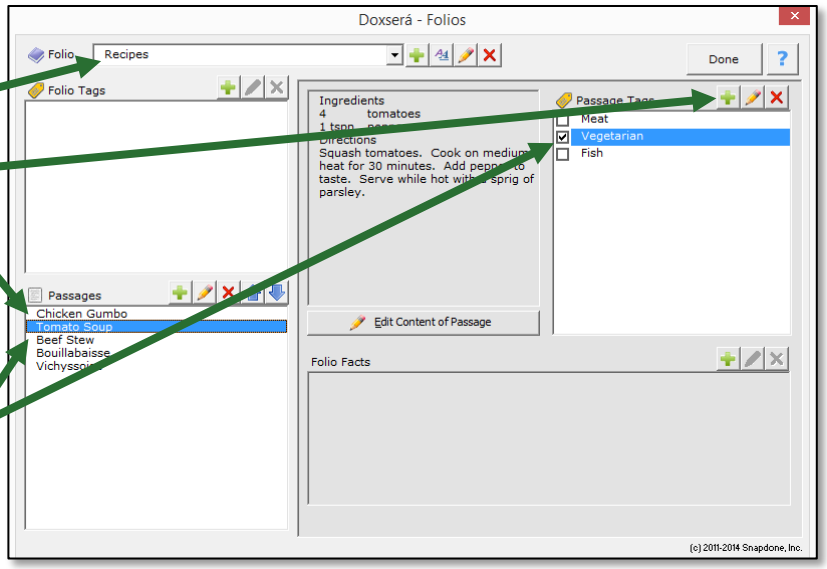
Tags are most commonly used to earmark Passages in a Folio. They can make it easier to find Passages, and are also used when creating forms that automatically insert tagged Passages.

To tag Passages in a Folio, click **Folios** to open the Folios screen.

Select a Folio and any Passage.

Click the **new Passage Tag** icon to add a new Passage Tag.

To tag a particular Passage with a particular Tag, select the Passage and add a checkmark to the Tag. Note that a single Passage may be tagged with multiple Tags.



After making changes to a Folio, **Save** and **Cancel** buttons appear. Be sure to click **Save** to save your changes.

Folio Facts

Resources: Folio Facts Walkthrough Video
Folio Facts in Lists Walkthrough Video

Folio Facts add supplemental information to Passages. They are useful when, in addition to inserting a Passage into a form, form authors also need to insert information about that Passage. For example:

- A form that inserts biographies from a Folio could also include a separate listing of each person's name and profession.
- The same Passages and Facts might be arranged differently in two forms. For example, a catalog might show a product's name in a large font above its description. But the same product could appear in a two-column invoice with the name on the left and description on the right.

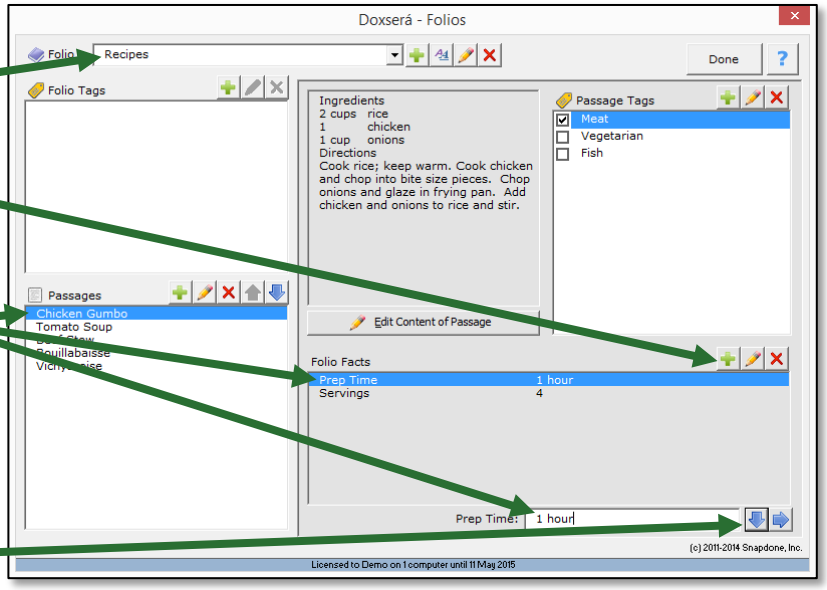
To add Facts to a Folio, click **Folios** to open the Folios screen.

Select the Folio.

Click the **new Fact** icon to add a new Fact label for the whole Folio.

To fill in a Fact for a particular Passage, select the Passage (Chicken Gumbo) and label (Prep Time), then type the Fact (1 hour).

When typing Facts, click **down arrow** (or press **Enter**) to advance to the next Fact; click **right arrow** (or press **Alt+N**) to advance to the next Passage.



After making changes to a Folio, **Save** and **Cancel** buttons appear. Be sure to click **Save** to save your changes.

Advanced Folio Editing

Resources: Advanced Folio editing Walkthrough Video

Once you understand the format of Folio documents, you may find it quicker to make extensive revisions directly to the Folio document rather than through the **Folios** screen.

First open a Folio document: click **Folios**, select a Folio, select any Passage, and click **Edit Content of Passage**.

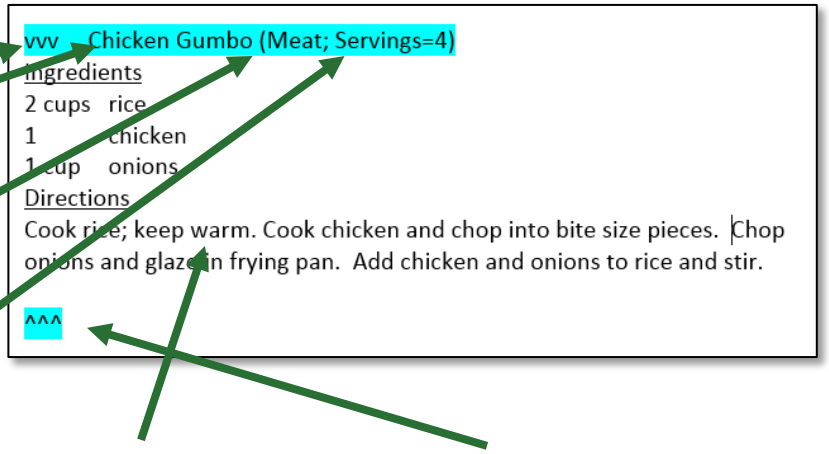
Each Passage in a Folio follows this format:

The Passage begins with **vvv**.

The Passage name.

Parentheses enclose a list of Tags and Facts separated by semicolons.

Facts are distinguished from Tags with an "**=**" symbol. The Fact label appears on the left, and info on the right.



The Passage contents appear between the two blue blocks. The Passage ends with **^^^**.

Following those rules, you can rename Passages; edit Passage contents; add, rename, and delete Tags; add, relabel, and delete Facts; and change Fact info -- all directly within the Folio document rather than through the Folios screen.

After making revisions, click **Folios** to return to the Folios screen, then **Save** to save your changes.

Import and Export Folios

When **Doxserá** is installed on a network, Folios are shared among all users. But you may wish to download and install sample Folios or share Folios with **Doxserá** users at other offices.

To import a Folio: Open the Folio document that you downloaded or received, click **Folios** to open the Folios screen, and click **Save**. **WARNING:** If you already have a Folio with the same name as the Folio being imported, it will be overwritten with the imported Folio.

To export a Folio: Click **Folios** to open the Folios screen, select a Folio, select any Passage, and click **Edit Content of Passage**. Save the resulting Word document and send it to the recipient.

Creating Forms that Use Folios

Resources: A form where the user selects Passages Walkthrough Video
A form where the user selects a Tag Walkthrough Video

Form authors have full access to Folios, Passages, and Tags to further automate their form library and add even more flexibility. Possibilities include:

- A form for jury instructions, where the user selects instructions from a full list of jury instructions.

- A lease agreement composed of clauses selected from a Folio of boilerplate paragraphs.
- An invoice form where parts are chosen from a Folio containing the entire inventory.

The usual approach is to (1) create a Smart Answer that asks the form user to select Folios, Passages, or Tags; then (2) add Fetchers to the form that use those responses to find and fetch particular Passages at particular locations in the finished document.

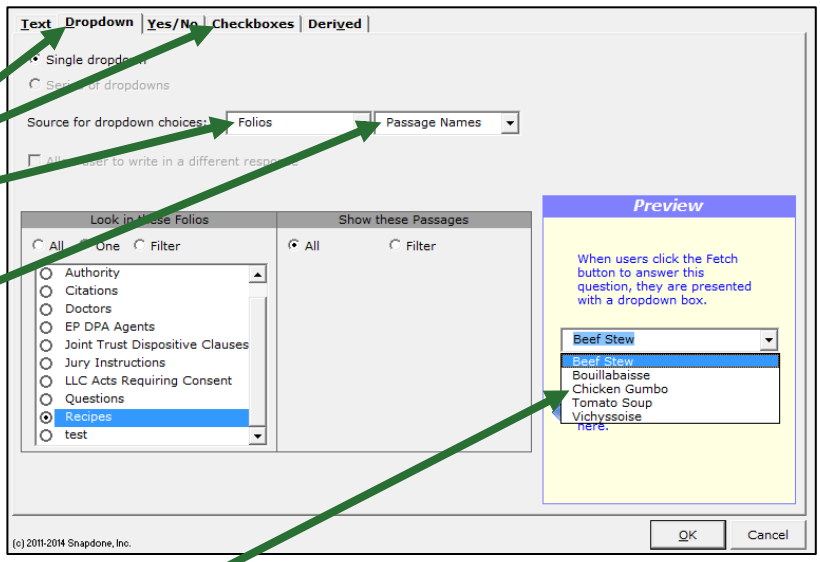
Smart Answers that Use Folios

Place the cursor in an answer box and click **Smart Answer** to open the Smart Answer screen.

Select **Dropdown** or **Checkboxes**.

Choose **Folios** as the source.

You will most frequently ask the form user to choose **Passage Names** ("Which of these articles?"), but you may also ask for **Folio Names** ("Which collection of articles?"), **Folio Tags** ("Which type of collection of articles?"), or **Passage Tags** ("Which type of articles?").



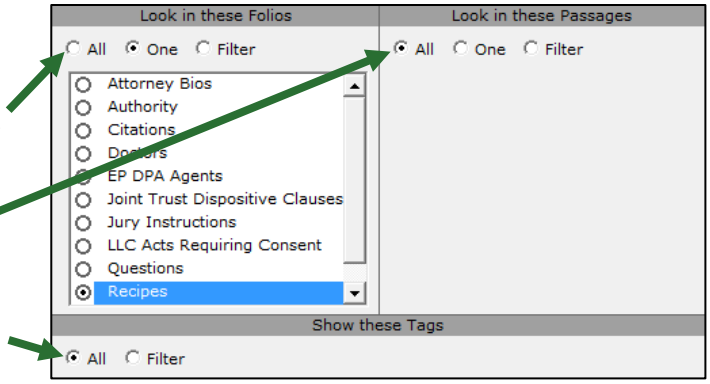
The Preview shows choices that would be presented to a form user *right now;* when the form is used in the future, the choices will reflect the then-current state of the source Folio(s), which might be edited in the meantime.

This panel controls which choices are shown to the form user.

Select which Folios are shown: **All**, **One**, or **Filter** by Folio name or Folio Tags.

Select which Passages are shown: **All**, or **Filter** by Passage name or Passage Tags.

If asking the form user to choose Tags, select which Tags are shown: **All**, or **Filter** by Tag name.



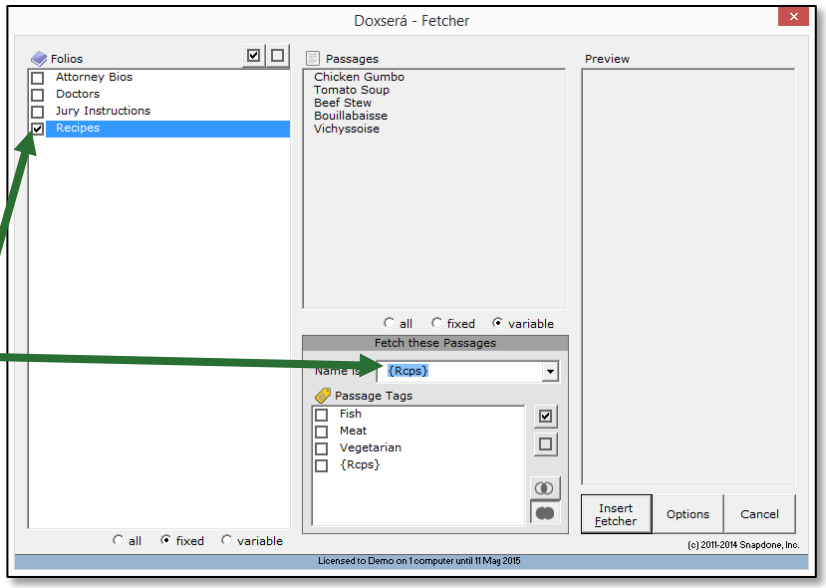
Fetchers

A Fetcher is a marker in a form that automatically finds and fetches Folio Passages when a form is used. It could be relatively static (find our current disclaimer and fetch it into this footer) or highly adaptive (the form user has selected a disease and a treatment; find and fetch all medical authority that justifies the use of that treatment for that disease).

To create a Fetcher, place the cursor in the form where the Passage(s) will appear and click **Fetcher** to open the Fetcher screen.

Using the same filtering methods described above, select the Passage(s) that will be fetched.

In the example shown here, Passages will be fetched from the **Recipes** Folio. The names of the Passages to be fetched are determined by the form user's response to the **{Rcps}** question in the Questionnaire.



Questionnaires in Folios

Resources: Questionnaires in Folios Walkthrough Video

Coordinating Questionnaires between forms and Folios can lead to astounding results:

- When boilerplate paragraphs are fetched into a document, language within the boilerplate can be customized with information from the Questionnaire of the target document.
- Passages in Folios can contain Conditions that resolve according to answers in the target form's Questionnaire.

Before adding Fields, Lists, and Conditions within Folio Passages, you will need to add a Questionnaire to the Folio document. First open the Folio document: click **Folios**, select a Folio, select any Passage, and click **Edit Content of Passage**. Then add a Questionnaire by any of the usual means: (1) click **Questionnaire** to load a previously saved Questionnaire or create one from scratch; or (2) copy and paste the Questionnaire from a form to the bottom of the Folio document.

Once the Questionnaire is in place, you can add Fields, Lists, and Conditions throughout its Passages just as if you were adding them to an ordinary form. Note that, just like a form, a Folio may only contain *one* Questionnaire, so it's wise to group related Passages in a single Folio where they all share access to the same Questionnaire.

Important: Be sure answer labels in the Folio's Questionnaire correspond to answer labels in forms where the Folio's Passages will be used. For example, suppose your Real Estate Agreement form fetches Passages from the "RE Provisions" Folio. The form includes a question labeled **OwnerName** and **{OwnerName}** fields. To include the owner's name within Passages in the "RE Provisions" Folio, make sure its Questionnaire includes a matching **OwnerName** question. When the form is used, the response to the **OwnerName** question in the form's Questionnaire will be used to fill in **{OwnerName}** fields in both the original form and in inserted Passages.

Folios and Lists

Resources: Passages in Lists Walkthrough Video
Folio Facts in Lists Walkthrough Video
Folios in Derived Answers Walkthrough Video

Some forms require not only that Passages be inserted, but that they be arranged in a particular way and perhaps embellished with additional material before and after. This can be accomplished by arranging the Passages in a **List**.

The walkthroughs and videos above demonstrate this three-step process: (1) create a Smart Answer that allows the form user to select Passages (either directly or indirectly); (2) add a List to the form that lists the Passage names; and (3) customize the List by adding Fetchers.

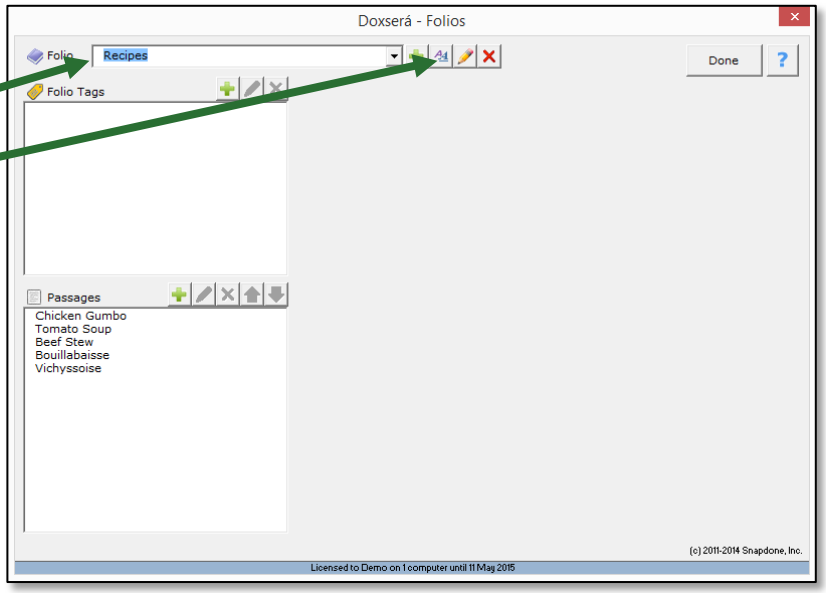
Folios and Styles

Microsoft Word's "styles" feature is often used to format text. It's possible for the format of identically named styles in two documents to differ. For example, the "Heading 1" style in Folio X might be **bold and underlined**, while the "Heading 1" style in Form Y might be *italic and blue*. When a Passage from Folio X is inserted into Form Y, headings that were **bold and underlined** in the source Folio become *italic and blue* in the target form. This effect is often undesirable, and can be managed by making styles in the Folio and the target form identical.

Open a target form into which Passages will be inserted. Click **Folios** to open the Folios screen.

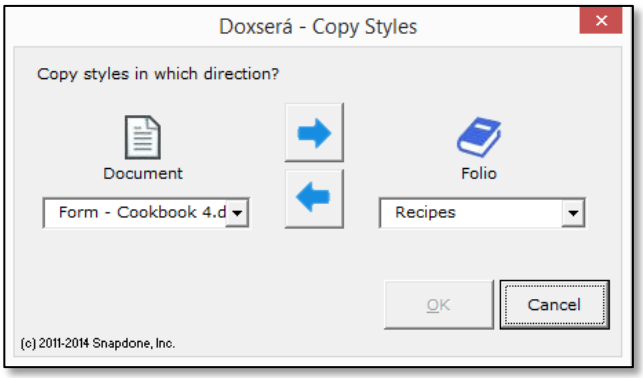
Select the source Folio.

Click the **styles** icon.



Click **right arrow** to copy styles from the form to the Folio, or **left arrow** to copy styles from the Folio to the form, then click **OK**.

If there are lots of styles and the form and Folio are large, it will take a while – don't be alarmed.



Finding and Fetching Passages

Resources: Fetch a Passage Walkthrough Video
Find a Passage Walkthrough Video

The **Fetch** command makes it quick and easy to find text that's been stored in a Folio and insert it at any location in a document.

Place the cursor in a document where you want to insert text and click **Fetch** to open the Fetch screen.

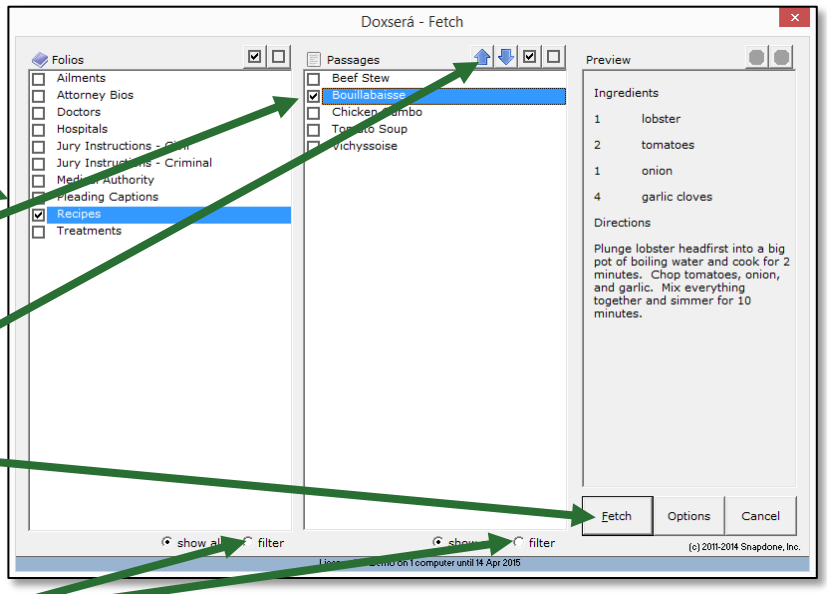
Select one or more Folios to see the Passages they contain.

Select one or more Passages to be inserted in the document.

Use the arrows to change the order of Passages if desired.

Click **Fetch** to insert the selected Passages.

For advanced searching techniques, click **filter** to reveal the Folio search panel or Passage search panel, shown below.



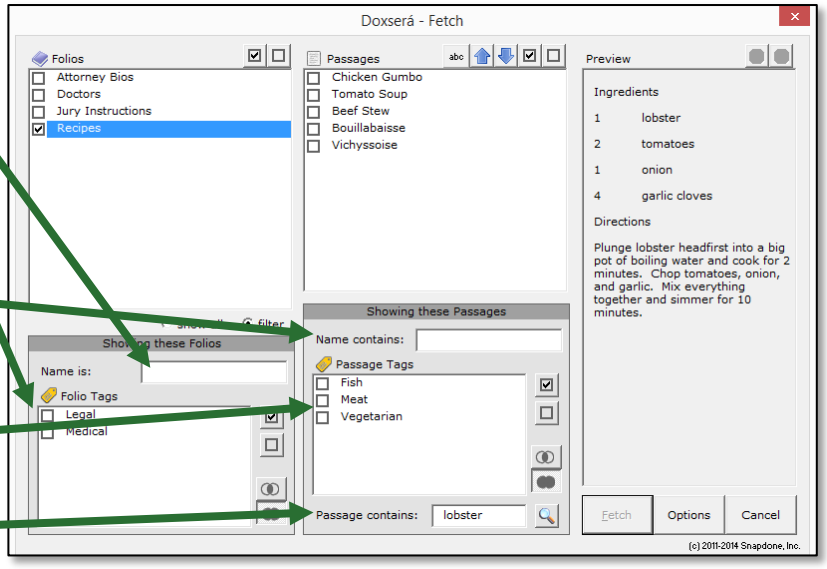
Type a word in the Folio **Name contains** box to show only Folios that include that word in their name.

Select one or more Folio Tags to show only Folios that are so tagged.

Type a word in the Passage **Name contains** box to show only Passages that include that word in their name.

Select one or more Passage Tags to show only Passages that are so tagged.

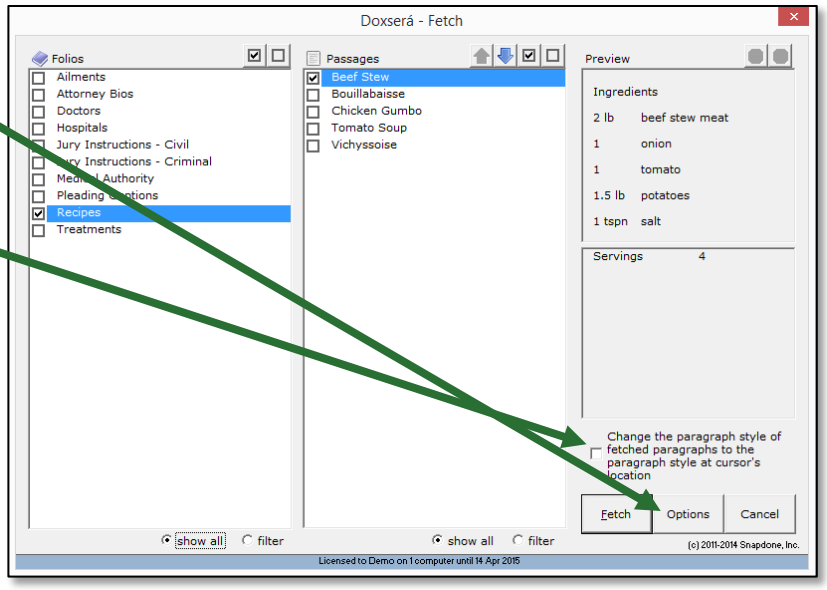
To search for text contained within a Passage, type a word in the **Passage contains** box and click the **search** icon.



If style formatting is an issue, click **Options** to reveal an additional checkbox.

When this box is **unchecked** (the default), paragraph styles assigned in the Folio are retained. So a paragraph that uses Heading 1 style in the Folio still uses Heading 1 style after it is inserted in the document. (But if the format of Heading 1 in the Folio differs from that in the document, the inserted text will conform to the format defined in the document.)

When this box is **checked**, paragraph styles assigned in the Folio are abandoned, and all inserted paragraphs are instead formatted with the style at the cursor's location in the document.



Answering Fetch Questions

Resources: Answer a "Fetch" question - Passages Walkthrough Video
Answer a "Fetch" question - Tag Walkthrough Video

When answering Questionnaire questions, you will sometimes encounter "Fetch" questions. You will recognize them because:

- The answer box has a red border (only if you are using Word 2013 or later).
- The flag above the answer box says **click Fetch to choose**.

To respond to a Fetch question, do not type in the answer box; instead, click **Fetch** to select your response in the Fetch screen.

Screen Details

Folios Screen

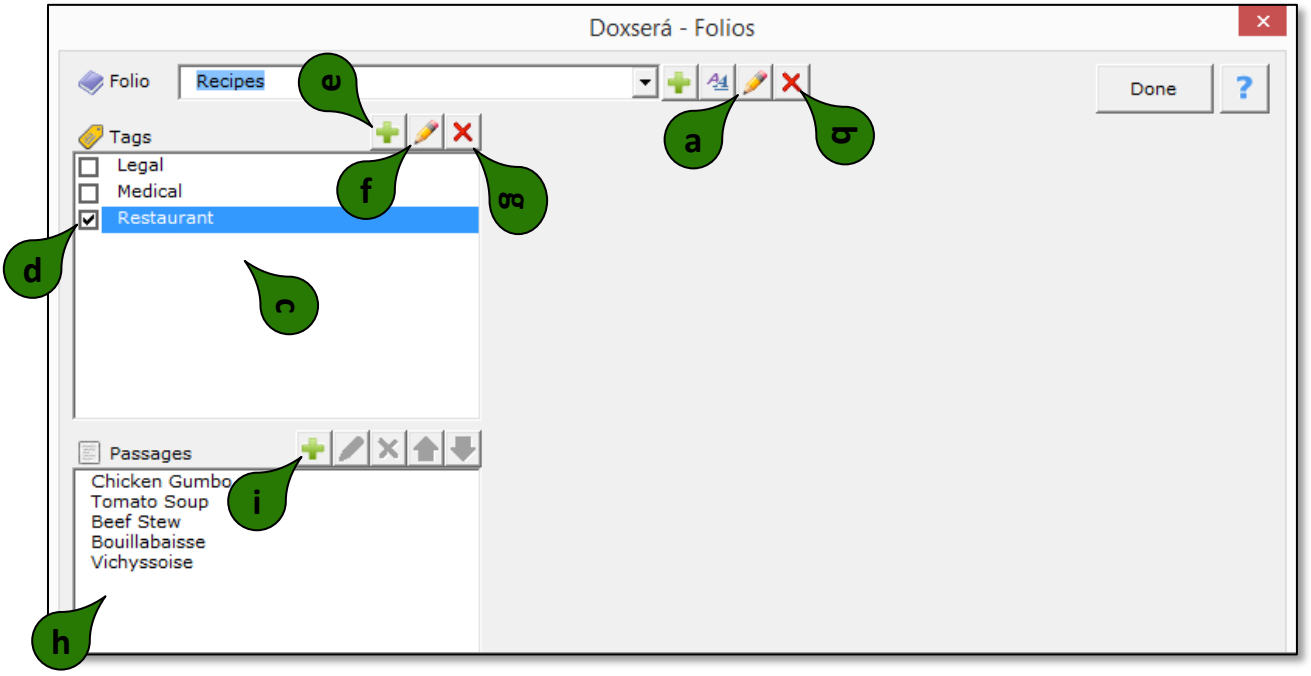
Click **Folios** to open the Folios screen.

a Select a Folio here

b Click to create a new Folio. **Note:** If a Folio is selected in box **a**, you will have the option to use it as a model for the new Folio, preserving styles and any Questionnaire contained in the source Folio.

c Click to reconcile styles in the selected Folio with another document (Folios and Styles).

After selecting a Folio:



a Click to rename the selected Folio. **Warning:** Any forms that refer to this Folio by name will need to be updated.

b Click to delete the selected Folio. **Warning:** Any forms that refer to this Folio by name will need to be updated.

c Like Passages, Folios can also be tagged. All available Folio Tags are listed here. **Note:** If a Tag is not assigned to any Folios, it will disappear from this list when this screen is closed.

d Assign a Folio Tag to the selected Folio by checkmarking it here. **Note:** Multiple Tags can be assigned to a single Folio.

e Click to add a new Folio Tag.

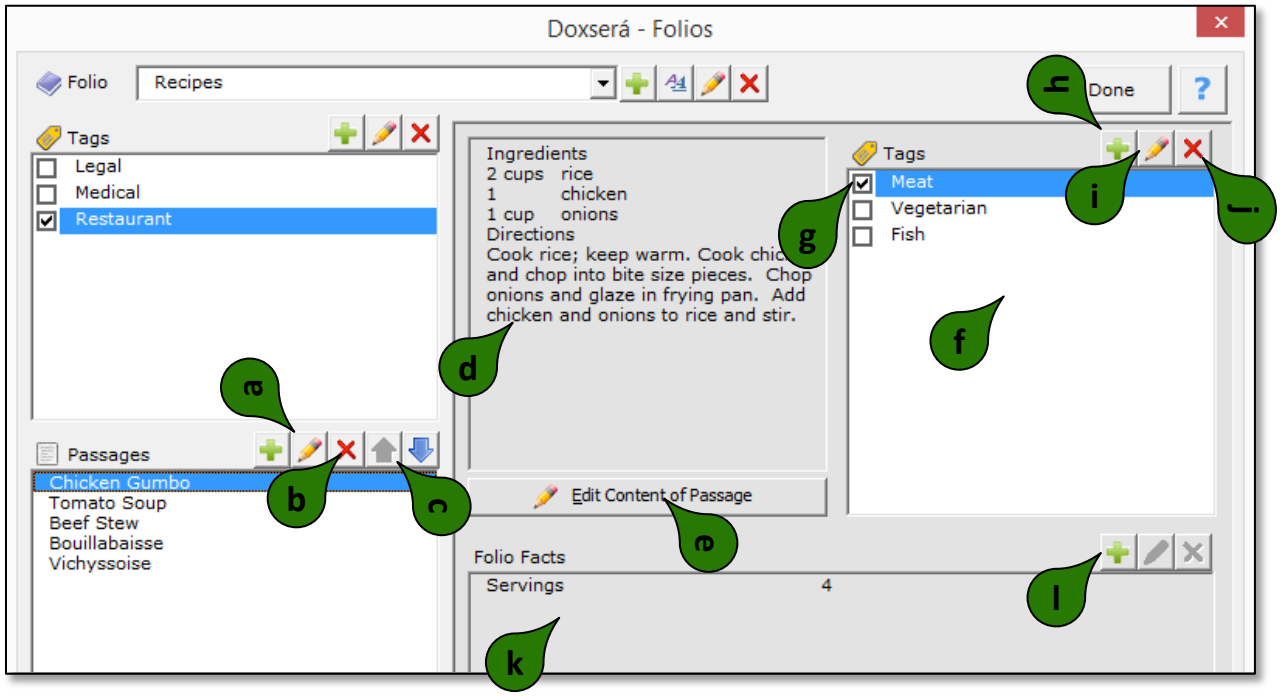
f Click to rename the selected Folio Tag. Any Folios that were previously tagged with this Tag will tagged with the new Tag name. **Warning:** Any forms that refer to this Tag by name will need to be updated.

g Click to delete the selected Folio Tag. Any Folios that were previously tagged with this Tag will no longer be so tagged. **Warning:** Any forms that refer to this Tag by name will need to be updated.

h All Passages contained in the selected Folio are listed here. Select a Passage to see its details.

i Click to add a new Passage to the selected Folio.

After selecting a Passage:



a Click to rename the selected Passage. **Warning:** Any forms that refer to this Passage by name will need to be updated.

b Click to delete the selected Passage. **Warning:** Any forms that refer to this Passage by name will need to be updated.

c Click the arrows to move the selected Passage up or down in the Folio. **Note:** Folio Passages are not necessarily alphabetized. In some cases, form authors may decide another arrangement is more useful.

d The content of the selected Passage is previewed here.

e Click to open a Folio document for the selected Folio, and move the cursor to the currently selected Passage. All editing of Passage contents occurs in the Folio document. When revisions are complete, click **Folios** to return to this screen.

f All Tags contained in the selected Folio are listed here.

g Assign a Passage Tag to the selected Passage by checkmarking it here. Note: Multiple Tags can

be assigned to a single Passage.

h Click to add a Tag to the list of Passage Tags. **Note:** If a Tag is not assigned to any Passages, it will disappear from this list when this screen is closed.

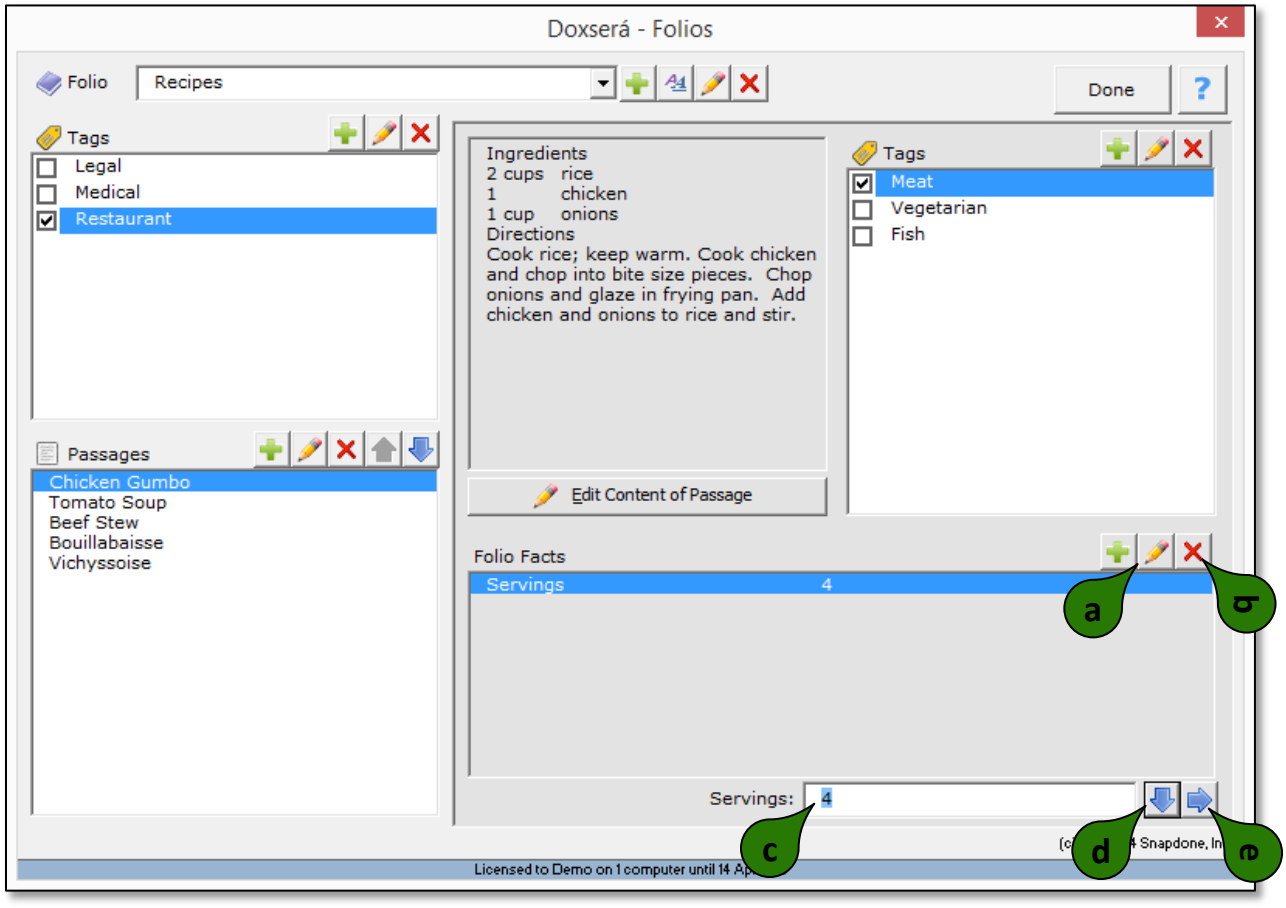
i Click to rename the selected Passage Tag. Any Passages that were previously tagged with this Tag will be tagged with the new Tag name. **Warning:** Any forms that refer to this Tag by name will need to be updated.

j Click to delete the selected Passage Tag. Any Passages that were previously tagged with this Tag will no longer be so tagged. **Warning:** Any forms that refer to this Tag by name will need to be updated.

k All Folio Fact labels that occur in the selected Folio are listed here. Facts that have been filled in for the selected Passage are also shown. Select a Fact to modify it. **Note:** If a Folio Fact is not filled in for any Passages in the selected Folio, it will disappear from this list when this screen is closed.

l Click to add a new label to the list of Folio Facts for the selected Folio.

After selecting a Folio Fact:



a Click to relabel the selected Fact in every Passages that contains it. **Warning:** Any forms that refer to this Fact by name will need to be updated.

b Click to delete the selected Fact from all Passages in this Folio. **Warning:** Any forms that refer to this Fact by name will need to be updated.

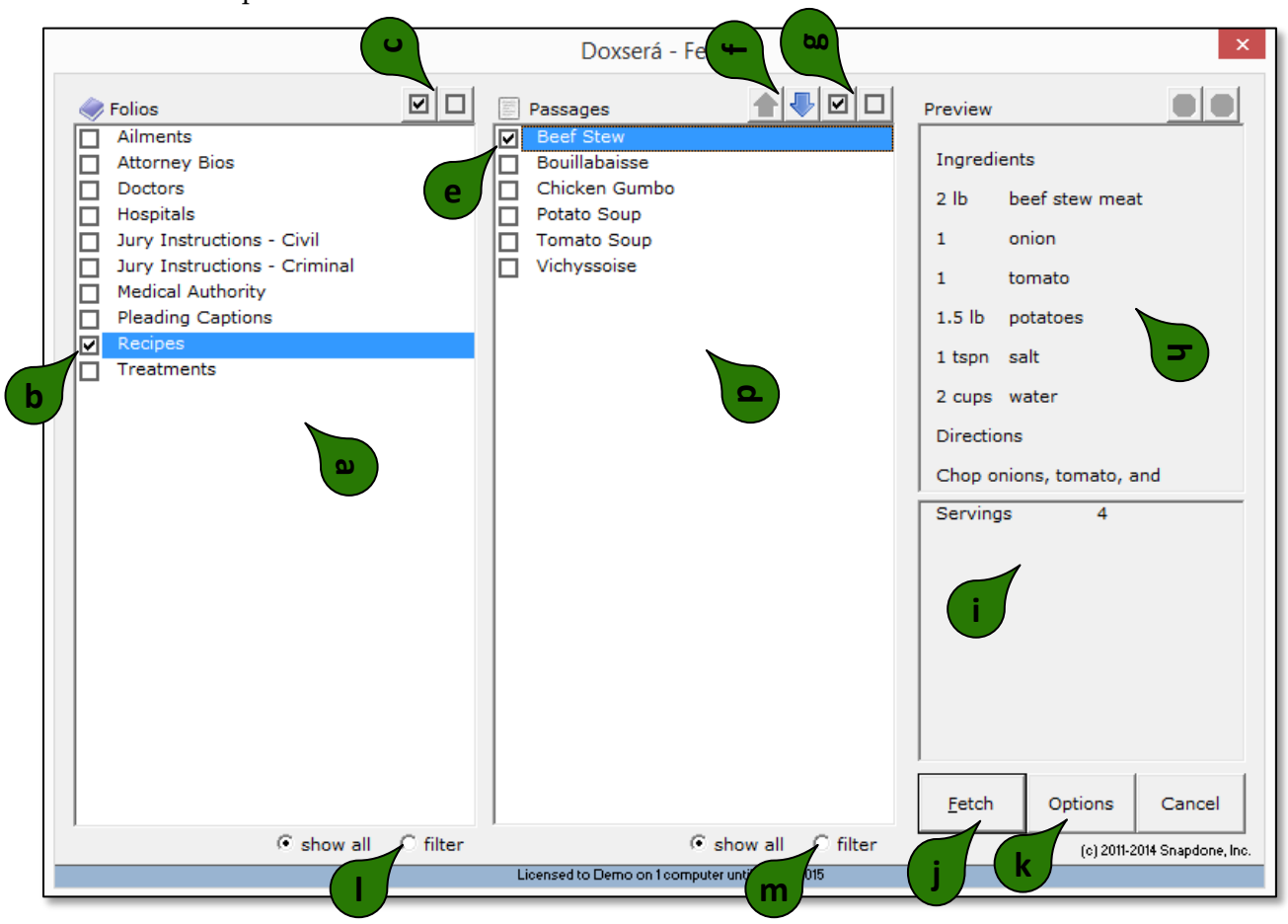
c Use this box to edit the selected Fact for the selected Passage.

d Click (or press **Enter**) to move to the next Fact in the list. **Note:** This button only appears when the cursor is in box **c**.

e Click (or press **Alt+N**) to move to the next Passage in the list. **Note:** This button only appears when the cursor is in box **c**.

Fetch Screen

Click **Fetch** to open the Fetch screen.



a All Folios are listed here.

b Checkmark one or more Folios to see the Passages they contain.

c Click the ☑ checked or ☐ empty box to select all Folios or no Folios.

d All Passages contained in the selected Folios are listed here.

e Checkmark one or more Passages to choose them, either for insertion into a document or to respond to a "Fetch" question.

f When fetching multiple Passages, you may want to insert them in a particular order. Click the **arrows** to move the selected Passage up or down in the list.

g Click the ☑ checked or ☐ empty box to select all Passages or no Passages.

h The contents of the currently selected Passage are previewed here.

i If the currently selected Passage includes Folio Facts, they are listed here.

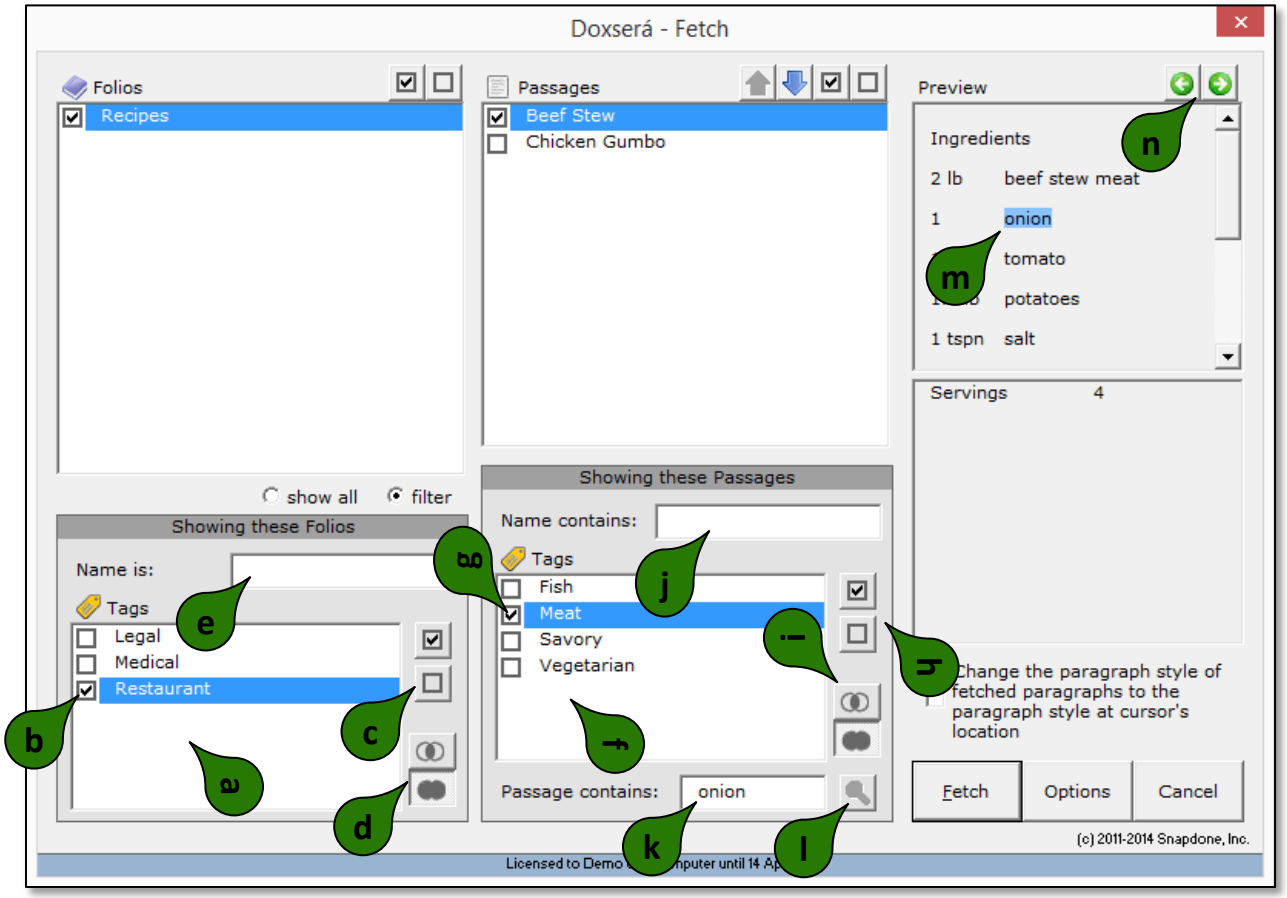
j After selecting Passages, click **Fetch** to either insert them in a document or respond to a "Fetch" question.

k Click **Options** to show formatting options for inserted Passages (see **2** below)

l Click **filter** to show the Folio filtering panel (see **2** below)

m Click **filter** to show the Passage filtering panel (see **2** below)

After turning on the option and filter panels (**k**, **l**, and **m** above):



a All Folios Tags are listed here.

b Checkmark one or more Folio Tags to choose which Folios are shown.

c Click the ☑ checked or ☐ empty box to select all Folio Tags or no Folio Tags.

d Click **all** or **any** to control how Tag filters are applied. When **all** is selected, only Folios tagged with *all* of the selected Tags are shown. When **any** is selected, Folios tagged with *any* of the selected Tags are shown.

e When text is typed here, only Folios that contain that text in their name are shown.

f All Passage Tags in the selected Folios are listed here.

g Checkmark one or more Passage Tags to choose which Passages are shown.

h Click the ☑ checked or ☐ empty box to select all Passage Tags or no Passage Tags.

i Click **all** or **any** to control how Tag filters are applied. When **all** is selected, only Passages tagged with *all* of the selected Tags are shown. When **any** is selected, Passages tagged with *any* of the selected Tags are shown.

j When text is typed here, only Passages that contain that text in their name are shown.

k To search the content of Passages, type a search term here and click the **search** icon to show Passages that contain it.

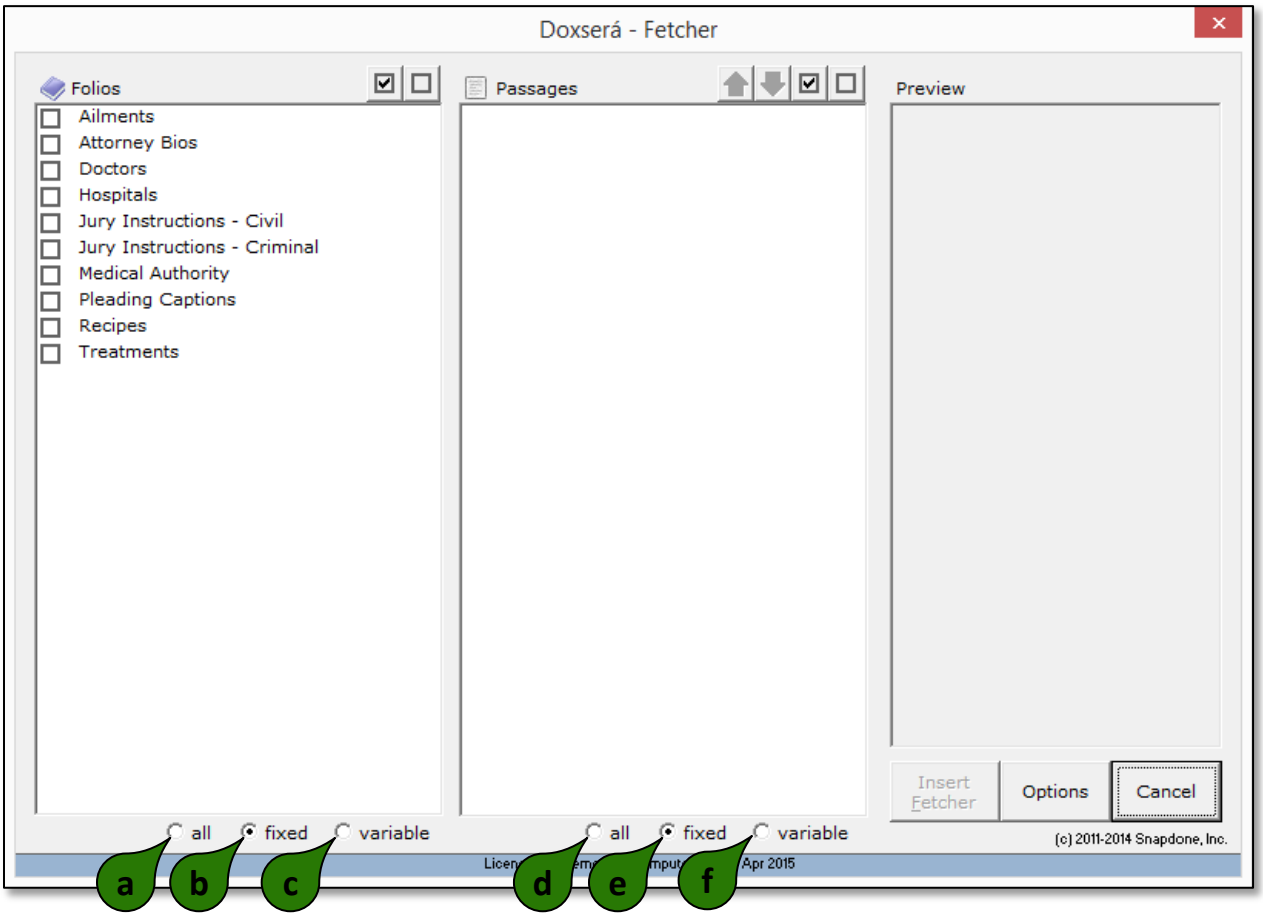
l This is the **search** icon. Click it after typing a search term in box **k**.

m After searching with **k** and **l**, the search term is highlighted in the preview of found Passages.

n After searching with **k** and **l**, click the arrows to highlight the next occurrence of the search term in the Preview panel.

Fetcher Screen

The Fetcher screen is identical to the Fetch screen (shown above), except as noted here. Click **Fetcher** to open the Fetcher screen.



a Click **all** if the Passages to be fetched are drawn from the pool of all Folios.

b Click **fixed** if the Passages to be fetched are drawn from a limited set of Folios that you can identify right now.

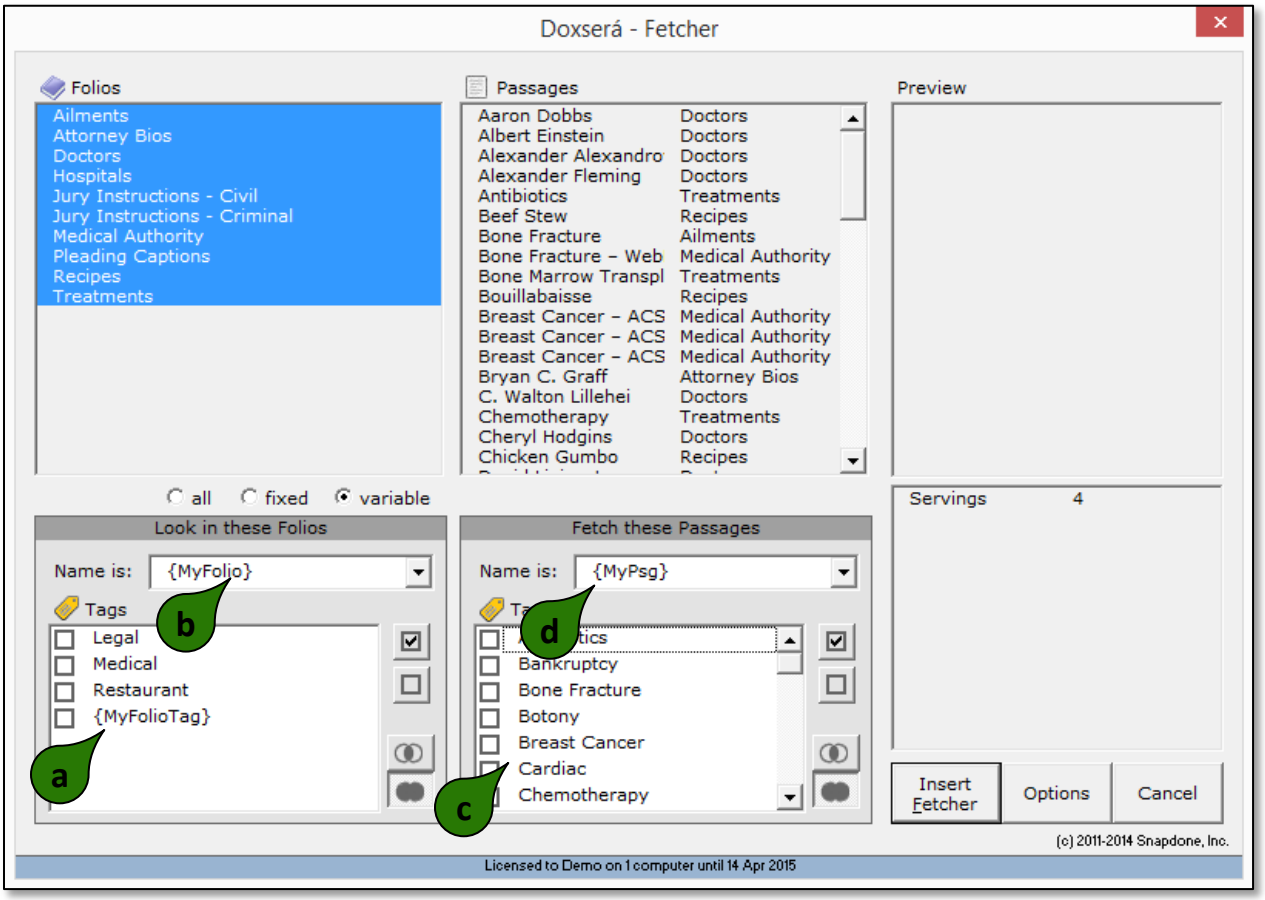
c Click **variable** if the Passages to be fetched are drawn from a set of Folios that depends on tagging and/or responses in the Questionnaire.

d Click **all** if all of the Passages in the selected Folios are to be fetched.

e Click **fixed** if the Passages to be fetched can be identified right now.

f Click **variable** if the Passages to be fetched depends on tagging and/or responses in the Questionnaire.

After turning on the variable panels (**c** and **f** above):



a The list of Folios Tags may include items in curly braces { }. They are Questionnaire questions that ask the form user to choose Folio Tags. Select one when you want the user's response to determine which Folio Tags are selected.

b This box may include items in curly braces { }. They are Questionnaire questions that ask the form user to choose Folio names. Select one when you want the user's response to determine which Folio names are selected.

c The list of Passage Tags may include items in curly braces { }. They are Questionnaire questions that ask the form user to choose Passage Tags. Select one when you want the user's response to determine which Passage Tags are selected.

d This box may include items in curly braces { }. They are Questionnaire questions that ask the form user to choose Passage names. Select one when you want the user's response to determine which Passage names are selected.

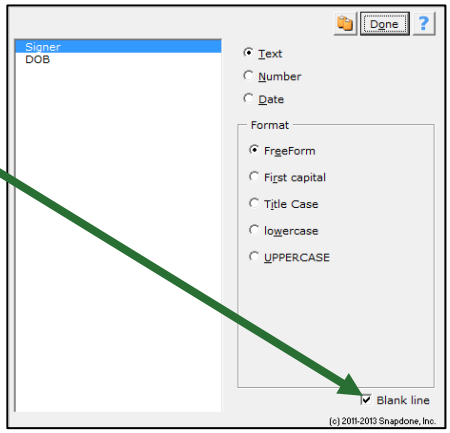
More Tools for the Form Author

The Field/List/Condition Screen

The Field/List/Condition screen (click **Field**, **List**, or **Condition** to open it) contains a few more features to make life easier for form authors.

Blank Lines

When inserting many types of Fields, a **Blank line** checkbox appears in the Format screen to determine how Fields are handled during the **Fill** step when answers are left empty in the Questionnaire.



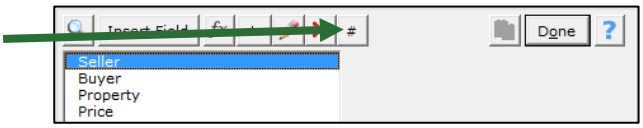
If **Blank line** is *checked* for a particular Field and its answer is left empty, the Field appears as a blank line in the finished document.

If **Blank line** is *unchecked* for a particular Field and its answer is left empty, the Field is removed from the finished document with no placeholder left behind.

Including blank lines is usually preferable, because they provide a visual cue when information is missing. But you may want to exclude blank lines for Fields in table cells, for instance, because the blank line looks confusing (and unattractive) next to the table grid lines.

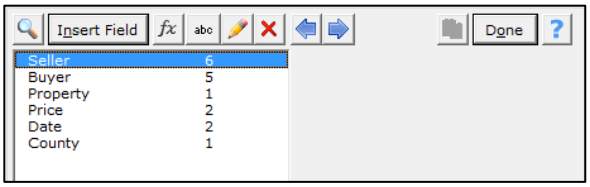
Field/List/Condition Count

Click the **#** button to count how many times each answer is used in the form, whether as a Field, List, or Condition.



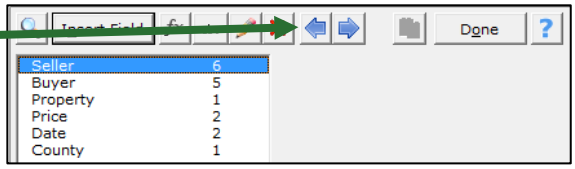
After clicking the **#** button, the column of numbers appears.

In this example, the answer to the Seller question is used 6 times in the form.



Move to Field/List/Condition in Form

After clicking the **#** button to count Fields, two ◀ ▶ arrow buttons appear.

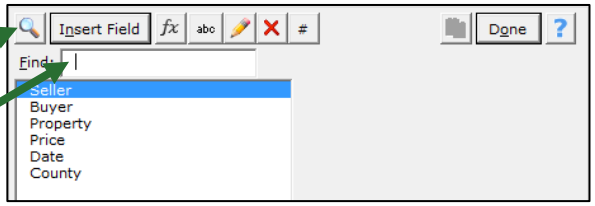


Click the ◀ ▶ arrows to move the cursor to the previous or next place in the form where the selected answer is used. This is handy when you want to review all places in the form that are affected by a particular answer (similar to Peeking, described on page 40).

Search for a Label

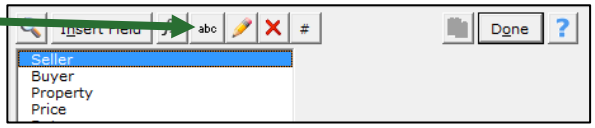
When the list of answers is long, it can be tough to find a particular label. Click the 🔍 magnifying glass to display the **Find** box.

Type any part of the label name in the box to locate the one you want.



Alphabetize

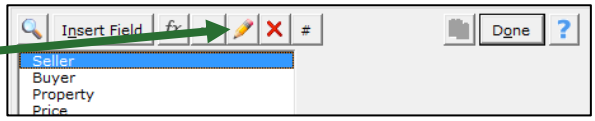
Click **abc** to toggle alphabetical sorting. With alphabetical sorting turned off, labels are listed in the same order that they appear in the Questionnaire.



Relabeling a Question and Renaming Fields

Click the ✎ pencil to change a question's label. This also renames any Fields in the form that are associated with that question.

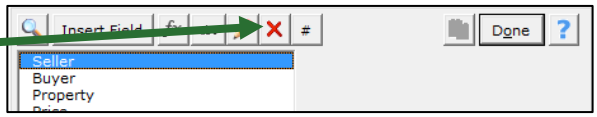
(You can also relabel a question by selecting a label in the Questionnaire and clicking **Field**.)



Removing a Question and Fields

Click ✕ to remove a question from the Questionnaire and its corresponding Fields from the form.

(You can also remove a question by selecting a row in the Questionnaire and clicking **Row/Column**, **Remove**.)



Find Other Locations to Paste Field

After inserting a Field, you may click the find-and-paste button to find other locations in the form where you want to paste the same Field.

You can also use the Find and Paste feature directly from the **Doxserá** menu by clicking **Tools**, **Find and Paste** (page 74).

Editing Questionnaires and Grids

The Questionnaire is "locked down" to prevent form users from accidentally changing the structure that was built by the form author. So you cannot use Word's ordinary table editing commands to delete a row, for example. But **Doxserá** provides several complementary commands so it's still easy to work with the Questionnaire.

Row/Column

Click **Row/Column** for a list of commands to manipulate rows in the Questionnaire or columns in a Grid. Add and remove rows/columns with **Add** and **Remove**. Copy a row/column with **Copy**. Rearrange rows/columns with **Move Up** and **Move Down**. Toggle the visibility of Labels and Derived Answers with **Show/Hide**. Organize long Questionnaires and colorize Grids with **Divider** (see page 71).

To remove an entire Grid, select all of its columns and click **Remove**. To remove an entire Questionnaire along with all of its supplemental Grids, select all answer rows in the Questionnaire and click **Remove**.

> Once a form is complete, you may want to hide the Label column of the Questionnaire so it does not distract form users. Click **Row/Column**, **Show/Hide** to toggle the visibility of that column.

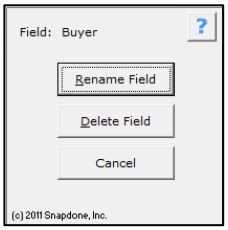
Empty Cells

When you need a clean slate, select any number of cells in the Questionnaire or a Grid and click **Tools**, **Empty Cells** to delete their contents.

> To delete the whole Questionnaire and all Grids and start over, click **Petrify** (this also removes all the Fields, Lists and Conditions in the document).

Relabeling and Deleting Questions

To relabel or delete a question in the Questionnaire or a column in a Grid, select its label and click **Field**. Relabeling or deleting a Questionnaire question or Grid column also relabels or deletes all of its associated Fields in the form.



Clearing Answers

While creating a form, you may type sample data into the Questionnaire for testing purposes. When the form is finished, you can empty out all of the sample data by clicking **Tools**, **Clear Answers**.

Dividers

Large Questionnaires can be organized with dividers. For example, we'll divide this one into "Buyer Info" and "Seller Info".

Place the cursor anywhere in the BuyerName row and click **Row/Column**, **Divider**, **Add** to insert a divider above that row.

Doxserá (c) 2011-2014 Snapdone, Inc.

Label	Question	Answer
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

Notice that **[type heading here]** is selected, ready for you to type a heading for this part of the Questionnaire. Type **Buyer Info**.

Move the cursor down to the SellerName row and insert another divider: click **Row/Column**, **Divider**, **Add**. Type **Seller Info** as a heading for the second divider.

Doxserá (c) 2011-2014 Snapdone, Inc.

Label	Question	Answer
[type heading here]		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

When finished, the Questionnaire looks like this.

If you change your mind, place the cursor in any divider row and click **Row/Column**, **Divider**, **Remove** to delete it.

Doxserá (c) 2011-2014 Snapdone, Inc.

Label	Question	Answer
Buyer Info		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
Seller Info		
SellerName	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

If corporate gray is not your thing, you can individually colorize any section by placing the cursor in it, clicking **Row/Column**, **Divider**, **Color**, and choosing a shade.

You can also colorize an entire Grid by placing the cursor in the Grid, clicking **Row/Column**, **Divider**, **Color**, and choosing a shade.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Buyer Info		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
Seller Info		
SellerName	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

Reusing Questionnaires

As you create more forms, you will find yourself asking the same types of questions in many different Questionnaires. For example, an attorney might have one set of questions that are typically used in Estate Planning matters, another set for Litigation matters, and another for Corporate matters. Rather than recreate those Questionnaires from scratch in each form (or finding an old form to copy-and-paste the Questionnaire), save your most often-used Questionnaires in a "bank" for future use.

Saving a Questionnaire

Note that this process is different than saving *answers* (see page 42). Here we're saving the *questions* in a Questionnaire so that they can be used to quickly create similar Questionnaires in other forms.

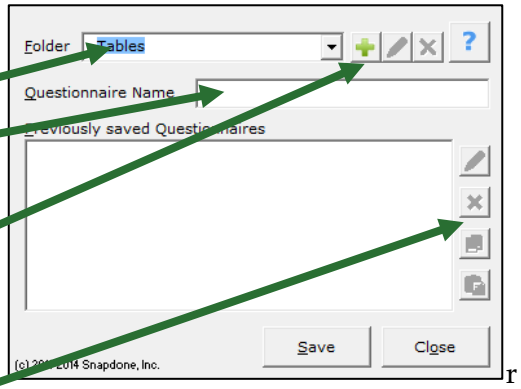
Open a form that contains a good Questionnaire and click **Questionnaire** to open this screen.

Choose a **Folder** in which to save the Questionnaire.

Type a **Questionnaire Name**, and click **Save**.

Other buttons in this screen work the same as those in the answer-saving screen (see "Organizing Answer Files" on page 44). Use the three buttons at the top to create, rename, and delete subfolders.

And use the four buttons on the right to rename, delete, copy, and paste previously saved Questionnaires.



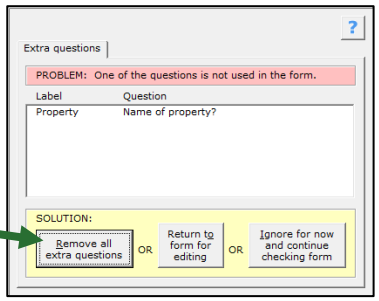
Reusing a Saved Questionnaire

Once you've saved a Questionnaire, it will be presented as a choice every time you add a Questionnaire in a new form. Just click **Questionnaire** as usual, and make your selection from this screen.

Checking Forms

After creating a form, it's a good idea to click **Tools**, **Check Form**. **Doxserá** checks for problems or inconsistencies and helps fix them.

In this example, the Questionnaire contains a question asking for the name of the property, but the form doesn't contain any Fields that use that question. Clicking **Remove all extra questions** would remove that question from the Questionnaire, since it is not used in the form.



Master Lists

Master Lists are great repositories for information that is used in multiple forms. For example, many firms maintain a Master List of employees, along with their direct dial numbers, email addresses, and other information. That information is then available in all forms to create signature blocks, personalized letterhead, etc. Rather than require the form user to type a name, create a Dropdown answer that uses a Master List as its source (described on page 10). Not only have you saved the form user the trouble of typing the name; they also don't have to type (or even remember) the email address and phone number. And when a new employee joins the firm, type the new name, direct dial number, and email address a single location – the Master List – and all of the forms using that Master List are updated with the new information.

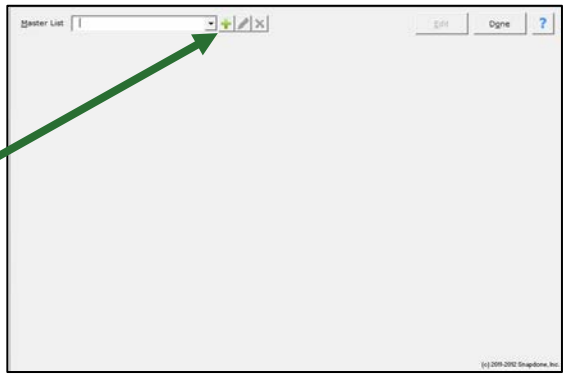
Creating a Master List

In this example, we'll create a Master List named "Employees" to store employee names, direct dial numbers, and email addresses.

Click **Master List** to open this screen, and click plus to create a new list.

When asked for the new list's name, type **Employees** and click **OK**.

When asked how many columns, type **3** and click **OK**.



A Word document is created. This is the Master List editing document – it's the workspace where you will create the list of attorneys.

MASTER LIST: Employees
After editing, click the **Master Lists** button on the Doxserá tab to save changes.

[type heading here]		

The Master List editing document uses an ordinary Word table, so you can use all of Word's built-in table editing commands to add, delete, and move rows and columns. A summary of handy keystrokes is included in the footer of the Master List editing document. You can also copy and paste data from an Excel spreadsheet (or other similar source).

Begin by typing a heading for each column: **Name**, **Ext**, and **Email**.

MASTER LIST: Employees
After editing, click the **Master Lists** button on the Doxserá tab to save changes.

Name	Ext	Email

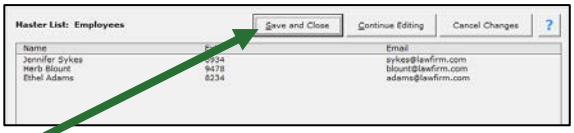
Then fill in as many rows as you like. To create a new row, press **Tab** when the cursor is in the last cell.

MASTER LIST: Employees
After editing, click the **Master Lists** button on the Doxserá tab to save changes.

Name	Ext	Email
Jennifer Sykes	8934	sykes@lawfirm.com
Herb Blount	9478	blount@lawfirm.com
Ethel Adams	8234	adams@lawfirm.com

IMPORTANT: Save your work!

When you're finished editing, click **Master List** to return to this screen. The list you created is summarized here.



Click **Save and Close** to save your work (or **Continue Editing** to return to the Master List editing document).

Click **Master List** at any time to return to the Master List screen and manage your lists.

After selecting a Master List, click the pencil to rename , or ✕ to permanently remove the whole list and all the data it contains.

Click **Edit** to open the selected list is a Master List editing document so you can make changes or additions.

Import and Export Master Lists

When **Doxserá** is installed on a network, Master Lists are shared among all users. But you may wish to download and install sample Master Lists or share Master Lists with **Doxserá** users at other offices.

To import a Master List: Open the Master List document that you downloaded or received, click **Master List** to open the Master List screen, and click **Save and Close**. **WARNING:** If you already have

a Master List with the same name as the Master List being imported, it will be overwritten with the imported Master List.

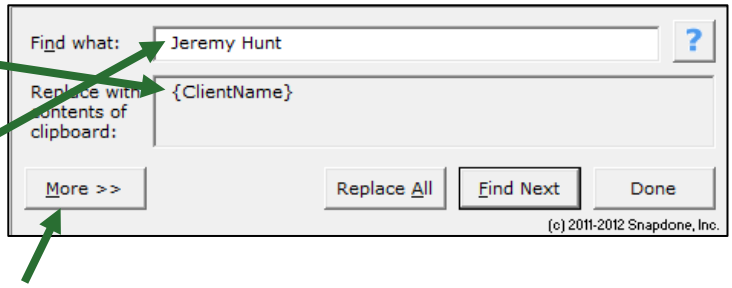
To export a Master List: Click **Master List** to open the Master List screen, select a Master List, and click **Edit**. Save the resulting Word document and send it to the recipient.

Find and Paste

The Find and Paste screen (click **Tools**, **Find and Paste**) allows you to search for any text and replace it with whatever you most recently copied to the Windows clipboard. It's most commonly used when creating forms from old documents – search for the old client's name everywhere it appears in the document, and replace it with a corresponding Field that you've copied.

In the example shown here, a **{ClientName}** Field was recently copied to the Windows clipboard (with **Ctrl+C** or any other copying method).

The Find and Paste command is being used to paste that copied Field everywhere the name Jeremy Hunt appears in the document.



Click **More** to see the same search options that appear in Word's search-and-replace screen: wildcards, sounds-like, special characters, etc. A shortcut to the Find and Paste screen also appears in the Field screen when inserting Fields (page 70).

Highlighting Conditions and Lists

In a complex form with lots of coding, it's sometimes difficult to see exactly where a particular Condition or List ends. To highlight a whole Condition, List or Sublist, place the cursor in the beginning marker – **{if:** or **{List:** or **{Sublist:** – and click **Tools**, **Highlight List/Condition**.

Quick Fill

When the **Fill** button is clicked to fill in a form, **Doxserá** takes a few moments to verify answers in the Questionnaire and make sure the form is ready to be filled. But when a form author is creating and testing a form, filling and re-filling, it might be more desirable to save some time by skipping those steps. If you're sure that (a) any answers that depend on Master Lists, Folios, or other answers are valid; and (b) the form is in an unfilled state (click **Reset** if you're not sure), then you can skip the preliminaries and fill the form more quickly by clicking **Tools**, **Quick Fill**.

Language for Date Fields

When Date Fields are processed, the language used for months is determined by the computer's language settings. But you can override that setting and dictate that English be used instead by clicking **Tools**, **Language, English**.

Options

Authoring

In an office where form users are not also form authors, you may wish to restrict non-authors from using **Doxserá**'s authoring commands. To restrict those commands for a particular user on a particular computer, click **Options**, **Authoring**, type a password, and click **Restrict Authoring**. If you later decide to unlock authoring for that user on that computer, click **Options**, **Authoring**, type the password, and click **Unlock Authoring**.

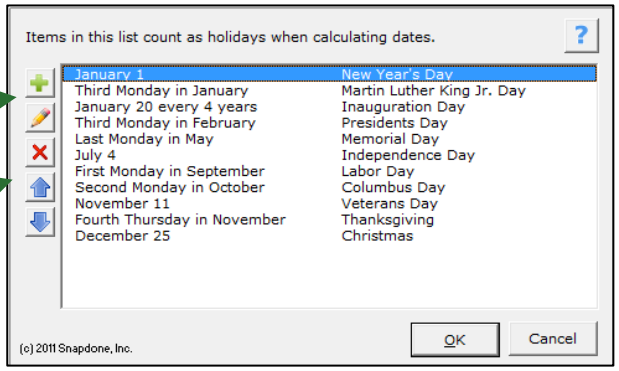
Holidays

When creating Date Offsets (described on page 17), you can choose to skip holidays. **Doxserá** initially includes the 11 official U.S. federal holidays, but you can add other holidays too.

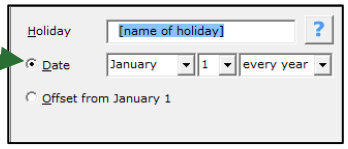
Click **Options**, **Holidays** to open this screen.

Clicking plus to create a new holiday or the pencil to modify an existing holiday opens the holiday editing screen, shown below.

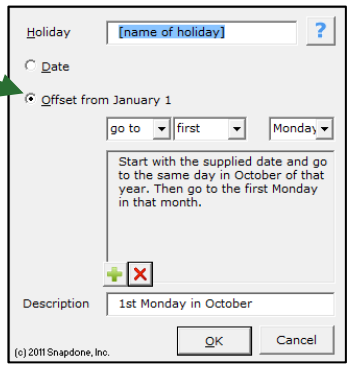
Click ✕ to remove a holiday or the arrows to reorder the list.



Select **Date** for holidays that occur on a specific date, either each year or in a particular year.



Select **Offset from January 1** for holidays that require a formula, like the first Monday in October.



Sharing Information

Doxserá initially saves program information (saved answers, saved Questionnaires, holidays, and Master Lists) on your local computer. But if your firm owns more than one license, you will likely want to share all of that information with other people in your office. To do so, click **Options**, **Path** and enter the path to a shared folder on your network. If you previously saved information on your local computer, you will be asked whether you want to copy that information to the shared folder.

If several people in your office have separately saved information on their local computers and you now want to combine the various collections of files in one shared folder, you will likely want to exercise some discretion over which files are copied from each user to avoid duplications and overwriting. To do that,

use Windows Explorer to browse to each user's local **Doxserá** file location (indicated in their **Options**, **Path** screen) and copy only the desired files from that user's local folder to the new shared folder.

Uninstalling

To uninstall **Doxserá** from a computer click **Options**, **Uninstall, Uninstall from this computer**. A message directs you to the file that needs to be deleted on your computer.

To remove a computer from **Doxserá**'s list of licensed computers so that the license may be used on another computer, click **Options**, **Uninstall, Remove computer(s) from list of licensed computers**.

Index

Here are some helpful online resources at www.doxsera.com:

All You Need to Know About Doxserá and TheFormTool engine that drives it	These quick videos show the basics.
Doxserá Quick-Start Guide	For those who prefer a quick written tutorial. A copy is included in each program download.
Doxserá Form Sets	A 12-minute video showcasing **Doxserá**'s Form Set feature.
Doxserá Folios	A complete online curriculum of videos, walkthroughs and lessons covering all aspects of **Doxserá** Folios.
And the kitchen sink	Find everything you need here.

Visit doxsera.com/support for access to all kinds of information and help with Doxserá and TheFormTool engine with which it is powered. You'll find a link to the Service Center, where you may search or browse hundreds of questions, answers, tips and suggestions, and contribute your own. You may also open a service ticket if you're having any trouble with the program.

If you haven't already done so, sign up for our newsletter to stay informed of updates and improvements: doxsera.com/newsletter.

Created by:

Distributed by:

Folios

TABLE OF CONTENTS

Folio Overview

Folios store multiple texts, called *Passages*, that can be brought into documents manually with the *Fetch* command or into forms automatically with the *Fetcher* command.

A Folio could contain:

- Boilerplate paragraphs or pages
- Biographies
- Parts lists
- Jury instructions, interrogatories
- Letterheads, captions

Consider using Folios if:

- You use standardized blocks of text (which may include graphics, formatting, footnotes, hyperlinks, etc.) in multiple forms.
- You want to create a library of information that can be searched and selected for insertion at any point in any document.
- You want to create forms that intelligently select and insert blocks of external text. Decisions made by the form can be based responses in the Questionnaire combined with internal logic.

Folio Basics

Authors

Create a Folio Walkthrough Video	Use the **Folios** command to create a Folio and add Passages
Tag Passages Walkthrough Video	Each Passage in a Folio can be marked with one or more Tags
A form where the user selects Passages Walkthrough Video	Use **Smart Answers** and **Fetchers** to insert Passages selected by the form user
A form where the user selects a Tag Walkthrough Video	Use **Smart Answers** and **Fetchers** to insert Passages marked with a Tag selected by the form user

Users

Fetch a Passage Walkthrough Video	Use **Fetch** to insert a Passage in any document
Find a Passage Walkthrough Video	Use Tags and full-text searching to find Passages
Answer a "Fetch" question - Passages Walkthrough Video	Click **Fetch** to respond to Fetch questions that ask for Passages
Answer a "Fetch" Question - Tag Walkthrough Video	Click **Fetch** to respond to Fetch questions that ask for a Tag

Advanced Folios

Authors

Passages in Lists Walkthrough Video	Use Lists to arrange fetched Passages
Folio Facts Walkthrough Video	Passages may include supplemental info
Folio Facts in Lists Walkthrough Video	Include extra info about fetched Passages
Folios in Derived Answers Walkthrough Video	A trick to use Lists with Passages that are selected by Tag
Advanced Folio editing Walkthrough Video	Speed up extensive Folio revisions
Questionnaires in Folios Walkthrough Video	Passages can include form automation
Import and export Folios Lesson	Downloaded or emailed Folio documents need to be imported
Folios screen details Lesson	Find out what all those little buttons do
Smart Answer screen details for Folios Lesson	Find out what all those little buttons do
Fetcher screen details Lesson	Find out what all those little buttons do

Users

Folios and styles Lesson	Make styles in Folios and target forms agree

Authors & Users

Fetch screen details Lesson	Find out what all those little buttons do

Create a Folio

Authors

In this walkthrough, you are a keeper of recipes, and you have decided to store them in a Folio for easy access.

You will:

- Create a Folio named “Recipes”
- Add recipes (Passages) to the Folio

Why store recipes in a Folio? After the Folio is created, you will be able to:

- Quickly and easily search for and insert recipes in any document (Fetch a Passage).
- Create a form that instantly builds custom tailored cookbooks (A form where the user selects Passages and A form where the user selects a Tag).

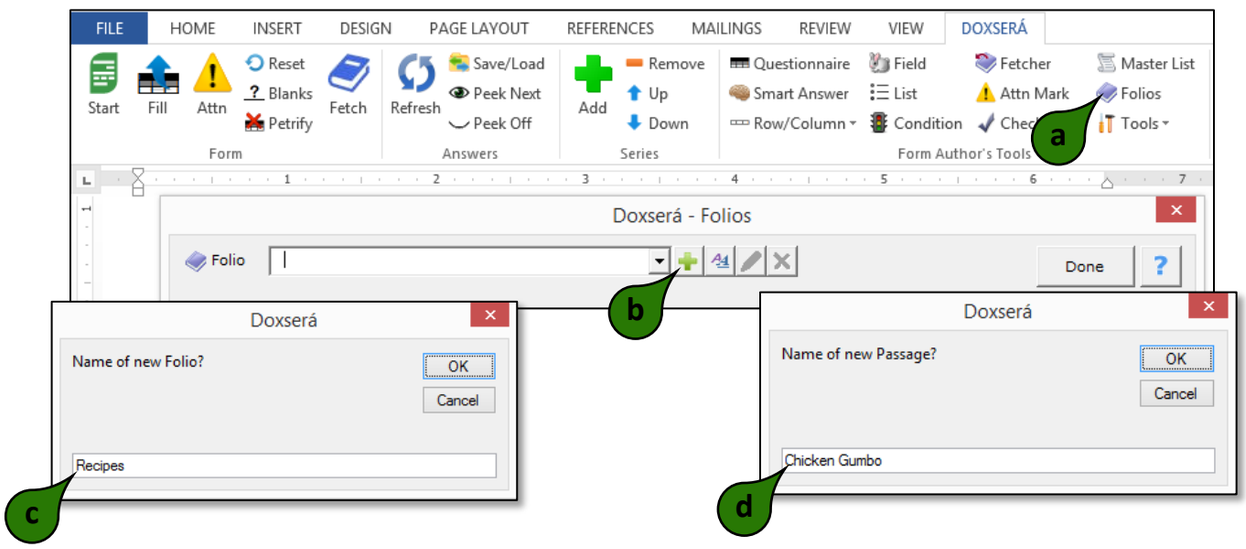
1 Create a Folio and its first Passage

a Click **Folios**

b Click the **new Folio** icon

c Type the Folio name **Recipes** and click **OK**

d Type the first Passage name **Chicken Gumbo** and click **OK**

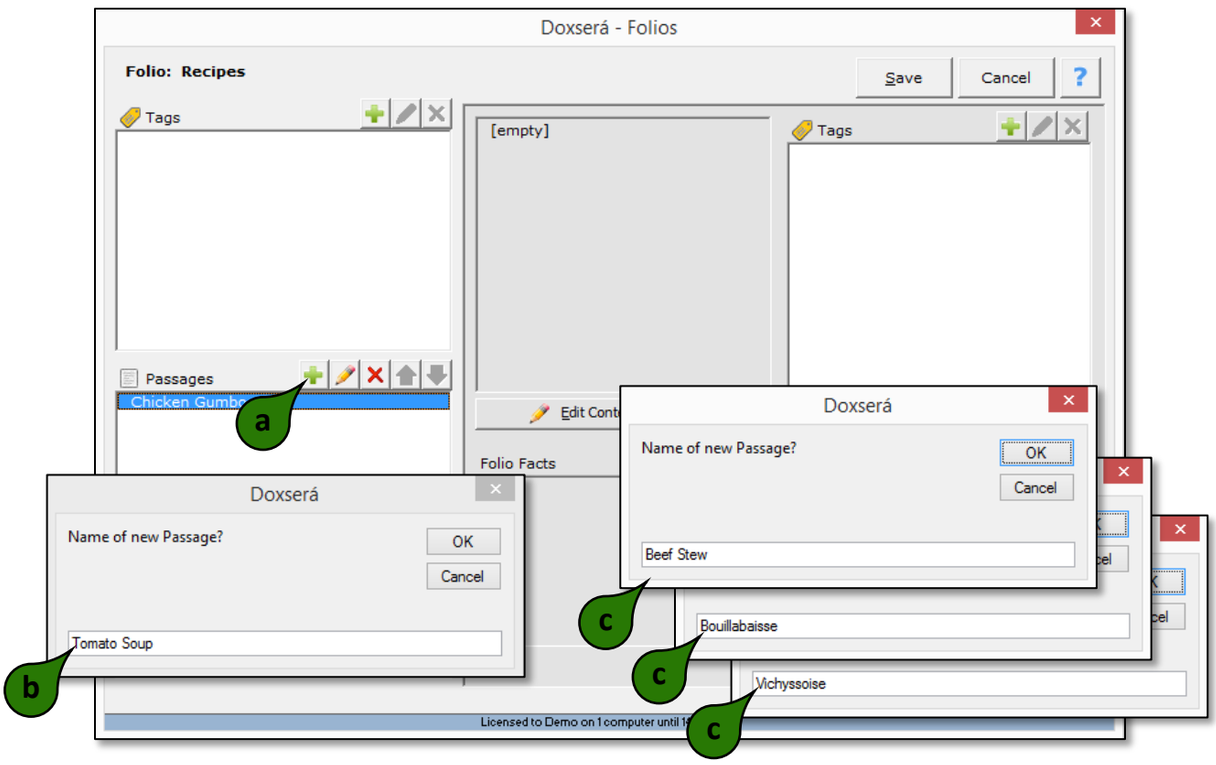


2 Add more Passages

a Click the **new Passage** icon

b Type the Passage name **Tomato Soup** and click **OK**

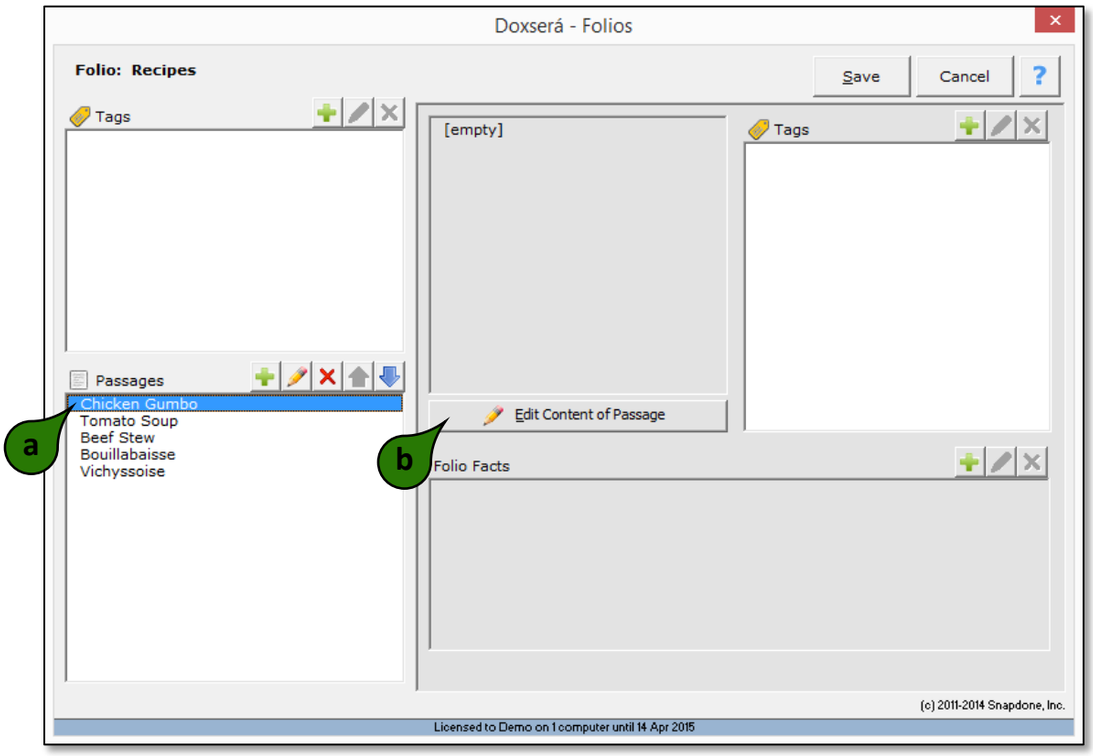
c Repeat steps **a** and **b** to create three more Passages: **Beef Stew**, **Bouillabaisse**, and **Vichyssoise**



3 Open the Folio document

a Select any Passage

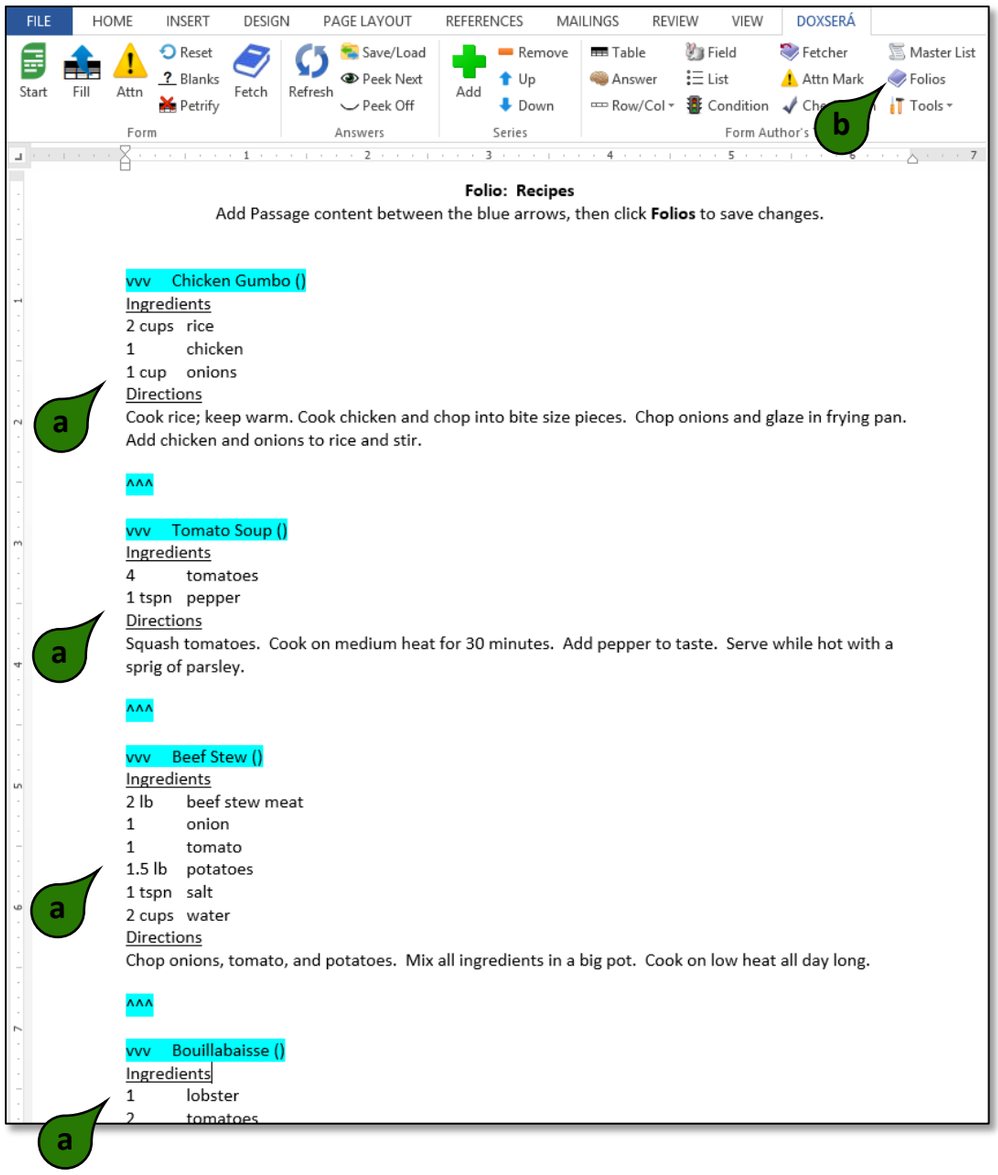
b Click **Edit Content of Passage**



4 Edit content of Passages

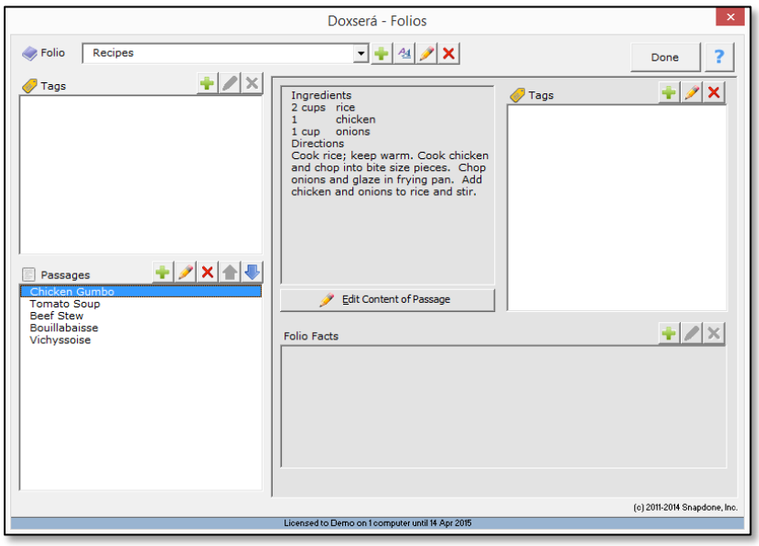
a Between the blue arrows, type or paste a recipe for each dish

b Click **Folios** to return to the Folios screen



5 **Save your work**	Click **Save** to save changes to this Folio

… and Presto	You've created a "Recipes" Folio containing 5 dishes



▲ **Create a Folio**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Creating a Folio
- Folios screen details

Users

Fetch a Passage

In this walkthrough, you are typing a letter and want to insert some recipes.

Prerequisites:

- The "Recipes" Folio from Create a Folio; **OR**
- Open this Folio document and import it

You will:

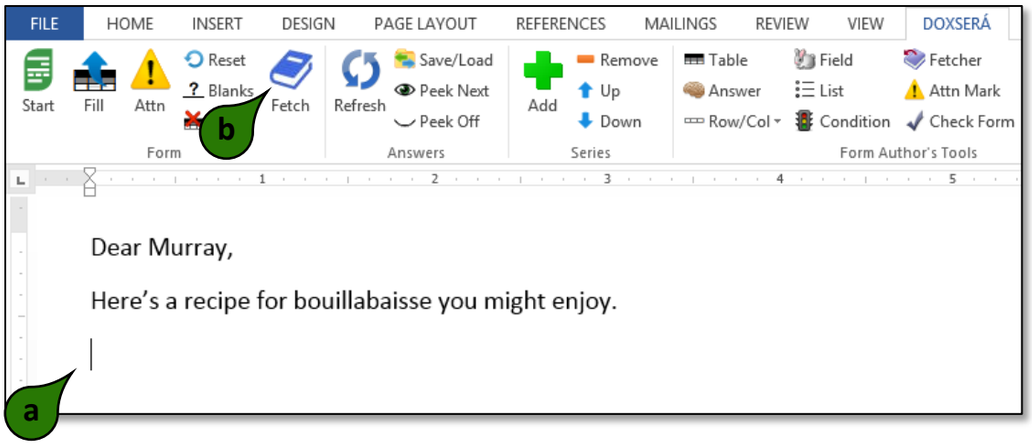
- Use the **Fetch** command to insert a Passage in a document

The **Fetch** command makes it quick and easy to find text that's been stored in a Folio and insert it at any location in a document.

1 Fetch a known Passage

a Select a spot in a document where you want to insert a recipe for bouillabaisse

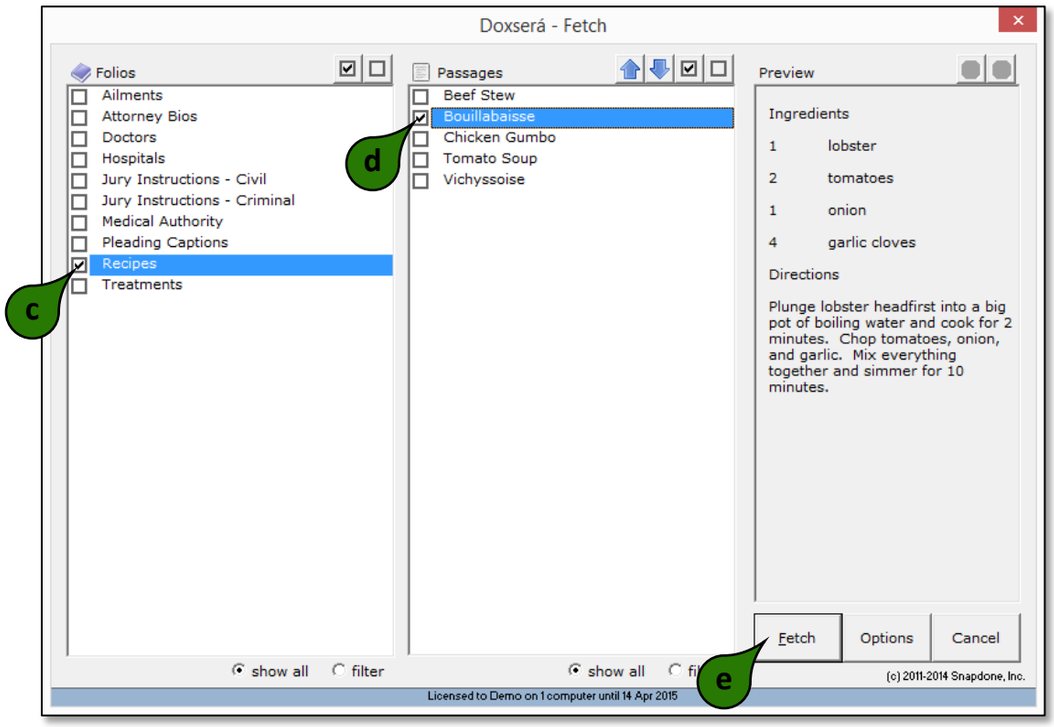
b Click **Fetch**



c Select the **Recipes** Folio

d Select the **Bouillabaisse** Passage

e Click **Fetch**



… and Presto

The recipe is inserted right where you want it

Dear Murray,

Here's a recipe for bouillabaisse you might enjoy.

Ingredients
1 lobster
2 tomatoes
1 onion
4 garlic cloves
Directions
Plunge lobster headfirst into a big pot of boiling water and cook for 2 minutes. Chop tomatoes, onion, and garlic. Mix everything together and simmer for 10 minutes.

▲ **Fetch a Passage**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview
Fetching Passages Manually
Find a Passage
Fetch screen details

Tag Passages

Authors

Tags are used to earmark Passages in a Folio.

Prerequisites:

- The "Recipes" Folio from Create a Folio; **OR**
- Open this Folio document and import it

You will:

- Add three Tags to the "Recipes" Folio
- Tag each recipe

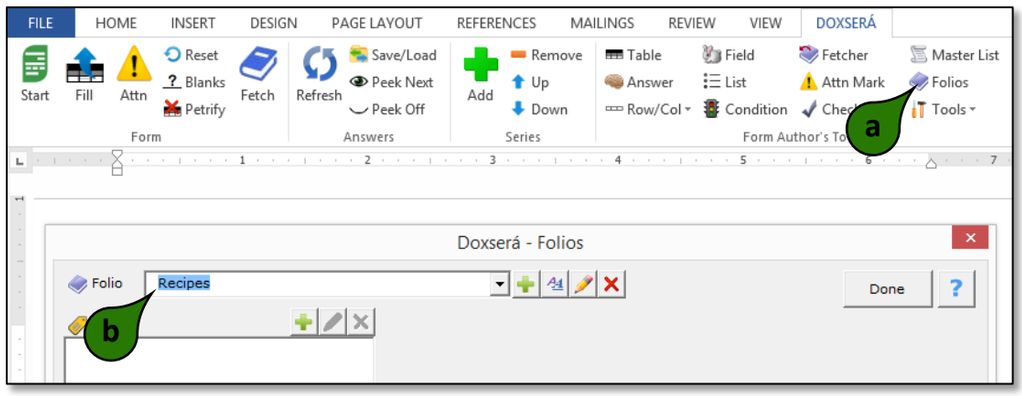
Tag the Passages in a Folio to:

- Make it easier to find Passages when fetching (Find a Passage).
- Create Smart Answers that allow users to choose Passages by category rather than individually (A form where the user selects a Tag).

1 Open the "Recipes" Folio

a Click **Folios**.

b Select the **Recipes** Folio.



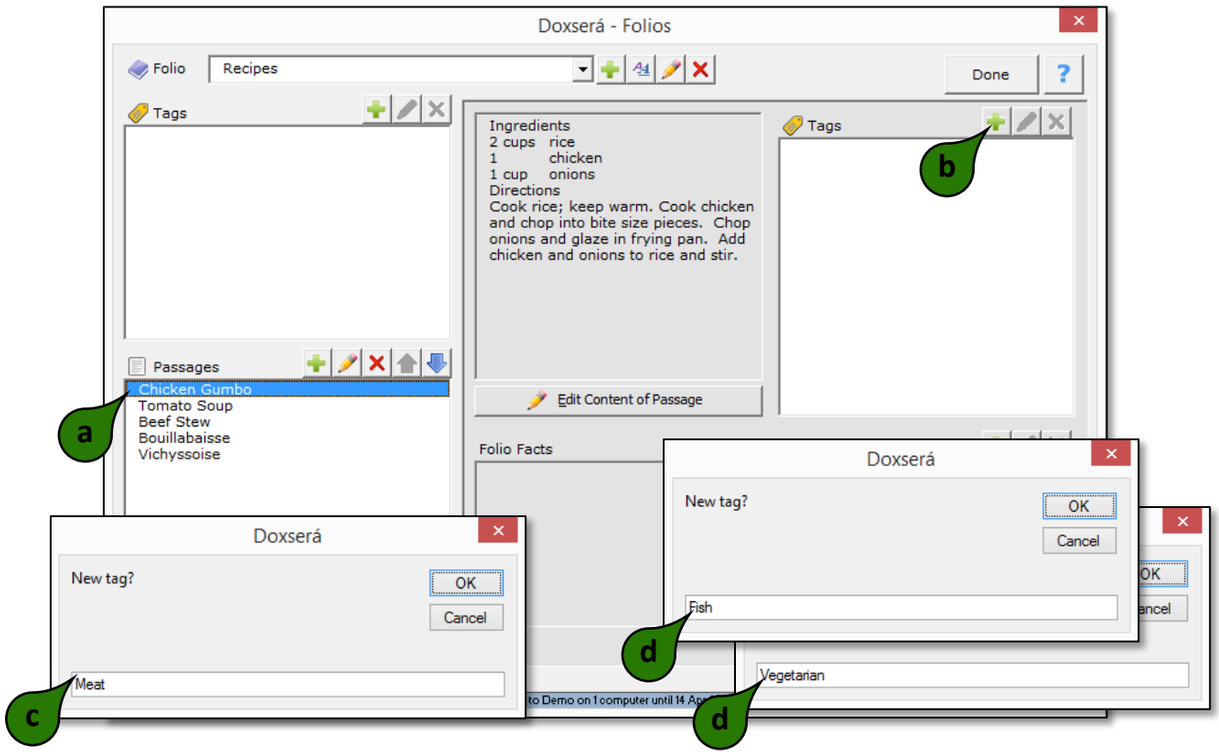
2 Add Passage Tags

a Select any Passage

b Click the ✚ **new Tag** icon

c Type the Tag name **Meat** and click **OK**

d Repeat steps **b** and **c** to create Tags named **Fish** and **Vegetarian**

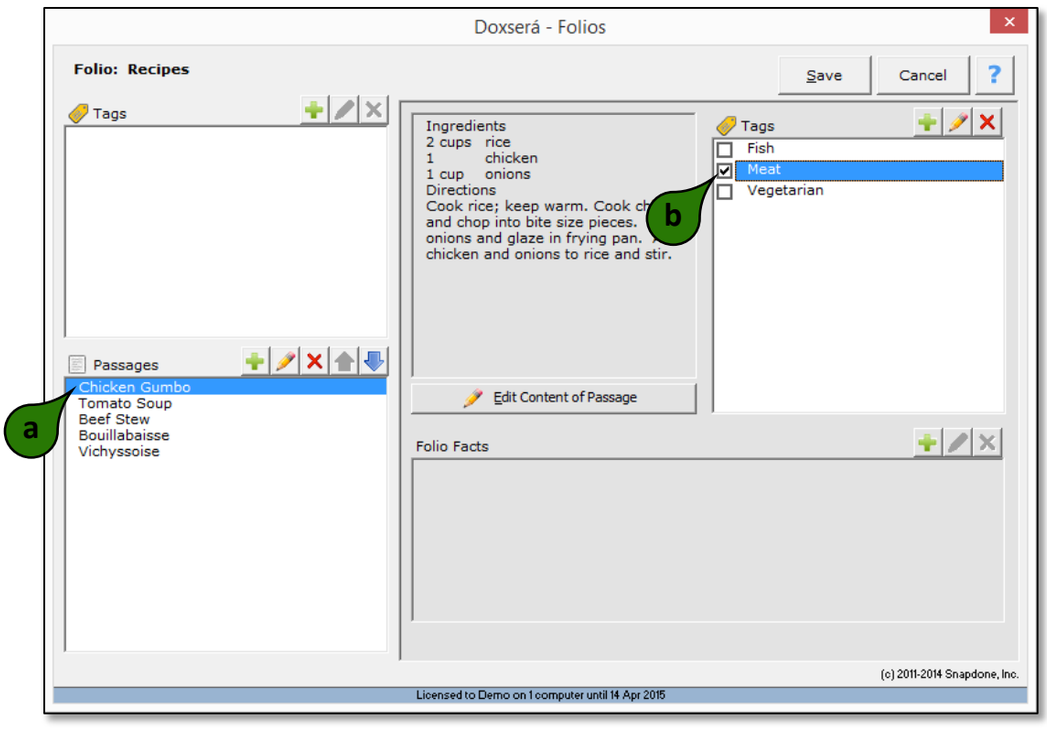


6 Tag each Passage

a Select the **Chicken Gumbo** Passage

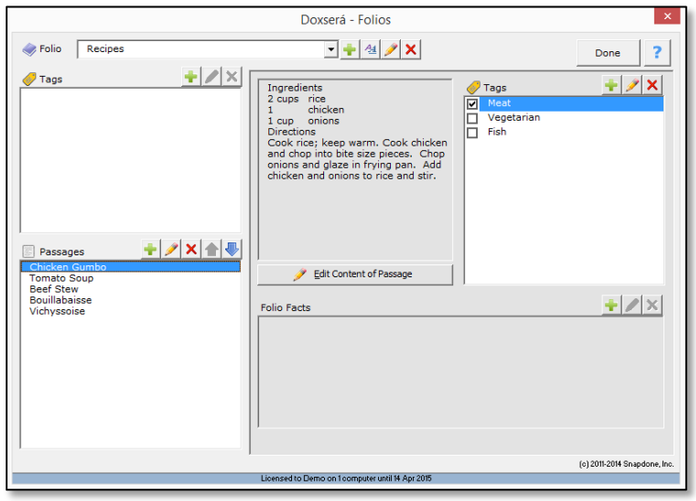
b Select the **Meat** Tag

- Repeat steps **a** and **b** to tag the remaining recipes: **Tomato Soup** is **Vegetarian**; **Beef Stew** is **Meat**; **Bouillabaisse** is **Fish**; and **Vichyssoise** is **Meat**



7 **Save your work**	Click **Save** to save changes to this Folio

… and Presto	Each dish in the “Recipes” Folio has been tagged with a food type



▲ **Tag Passages**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Tagging Passages
- Folios screen details

Find a Passage

Users

In this walkthrough, you are typing a letter and want to insert some recipes.

Prerequisites:

- The "Recipes" Folio from Tag Passages; **OR**
- Open this Folio document and import it

You will:

- Find a Passage with a Tag
- Find a Passage with full-text searching

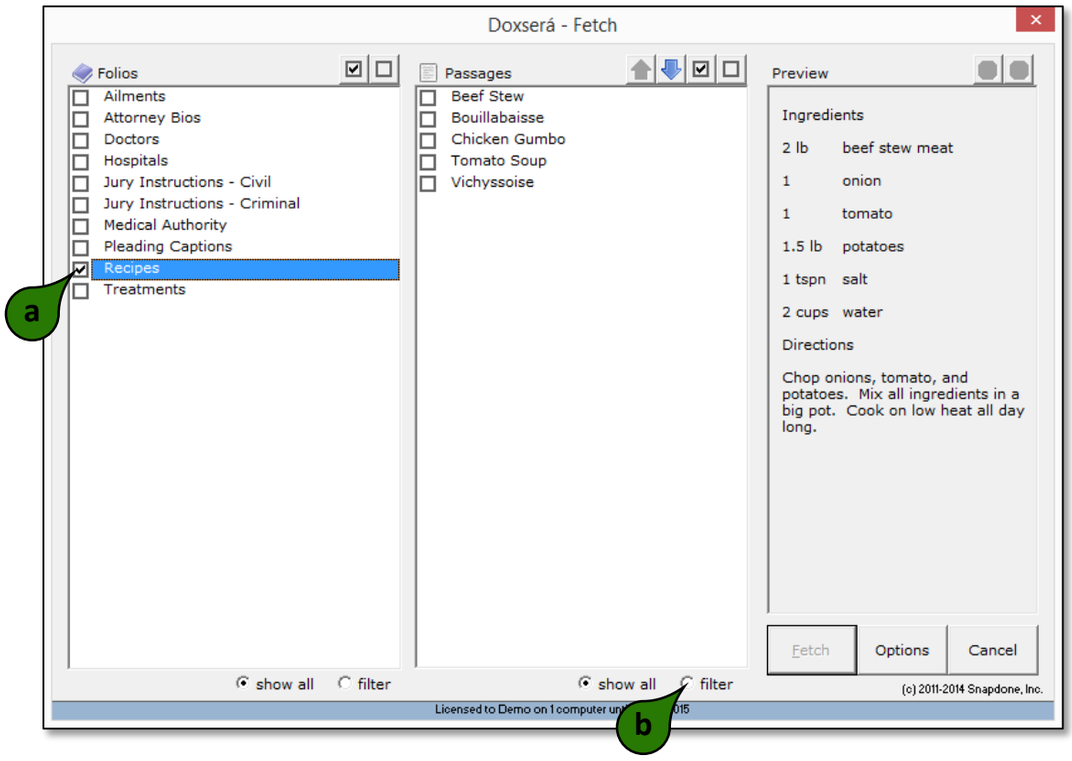
As your library of Folios and Passages grows, these searching techniques will become very useful.

1 Find a Passage with Tags

- Select a spot in a document where you want to insert a vegetarian recipe
- Click **Fetch** to open the Fetch screen

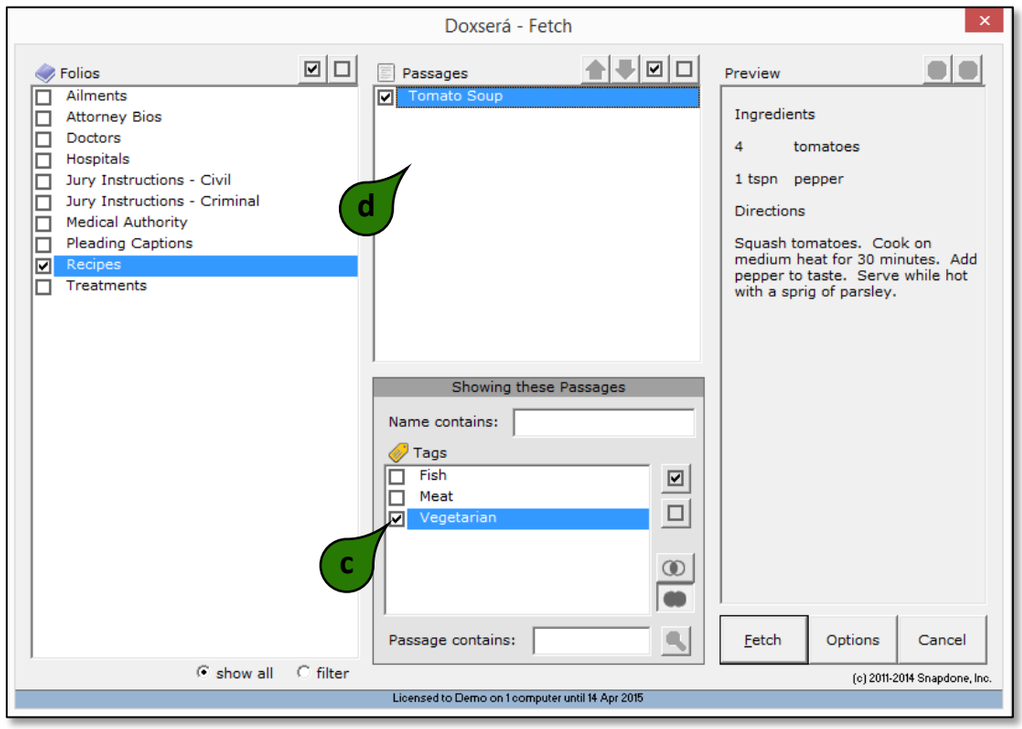
a Select the **Recipes** Folio

b Click **filter** to show the search panel



c Select the **Vegetarian** Tag

d The list is shorter now – it only shows Passages that are tagged **Vegetarian**

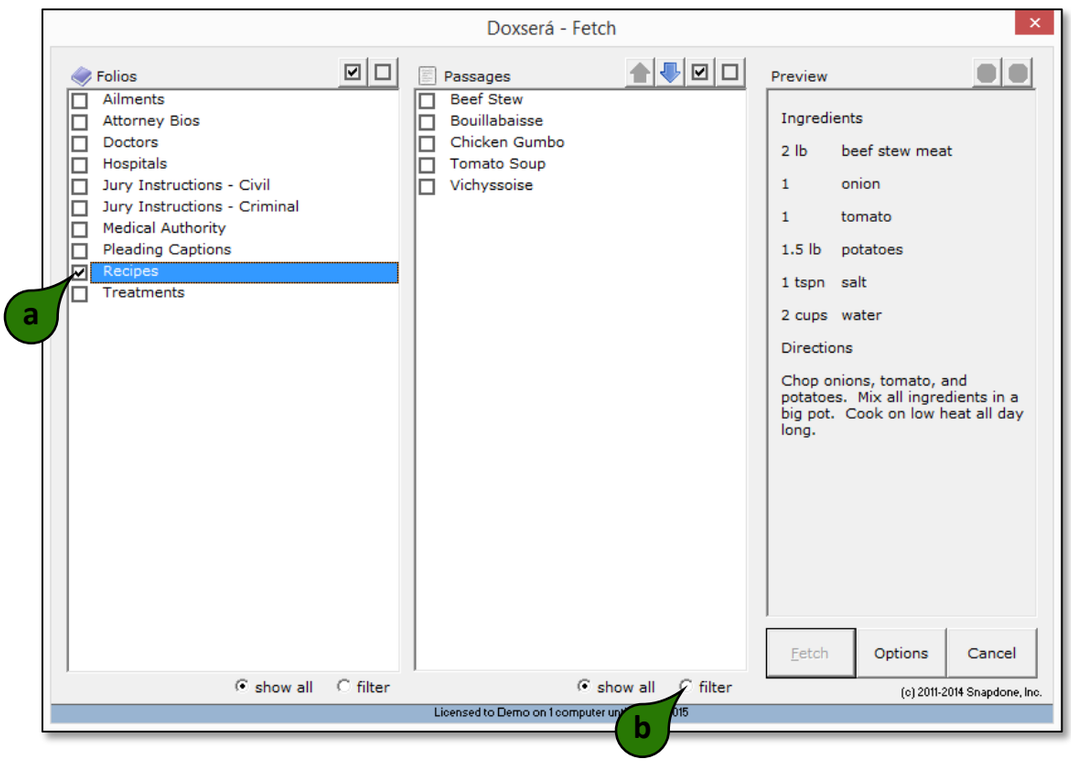


2 Find Passages with a text search

- Select a spot in a document where you want to insert multiple garlicky recipes
- Click **Fetch** to open the Fetch screen

a Select the **Recipes** Folio

b Click **filter** to show the search panel



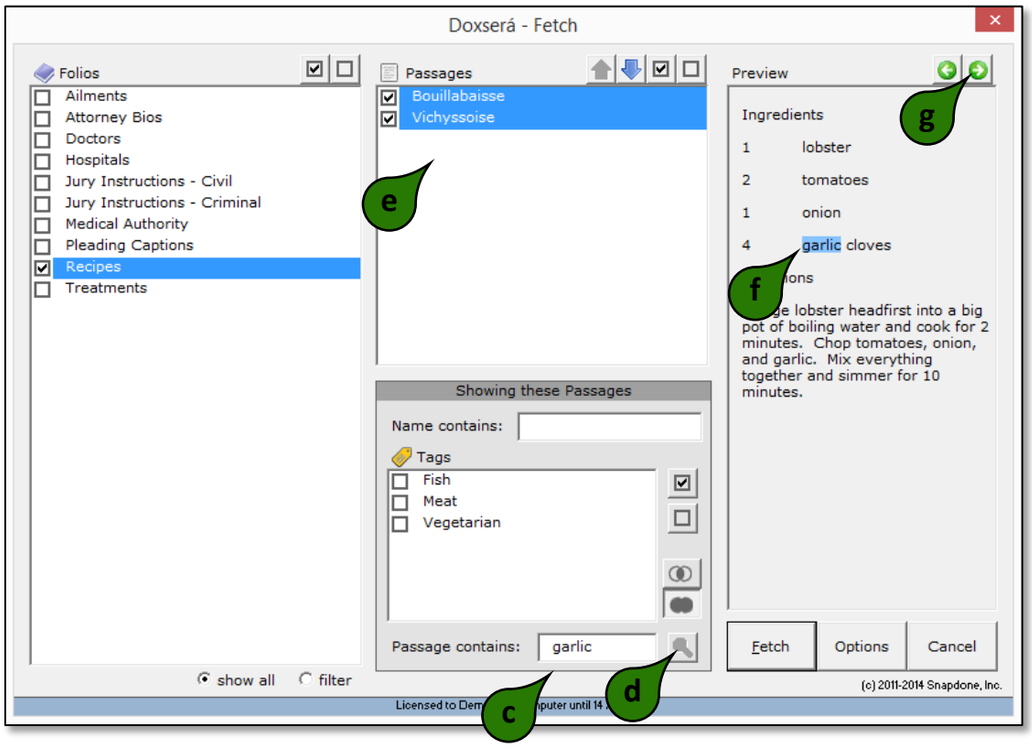
c Type **garlic** in the search box

d Click the **search** icon

e The list is shorter now – it only shows Passages that contain the word **garlic**

f The word **garlic** is highlighted in the Preview panel

g Click the **next** icon to find the next **garlic** in this Passage



▲ **Find a Passage**

Related Info

Overview Walkthrough Lesson Video Guide

Folio Overview
Finding Passages
Fetch a Passage
Fetch screen details

A form where the user selects Passages

Authors

In this walkthrough, you create a "Cookbook" form that asks the form user to individually select dishes from the "Recipes" Folio.

Prerequisites:

- The "Recipes" Folio from Create a Folio; **OR**
- Open this Folio document and import it

You will:

- Create a **Smart Answer** that lists dishes in the "Recipes" Folio as choices
- Create a **Fetcher** that inserts the selected dishes into the "Cookbook" form

The form in this walkthrough asks form users to select one or more Passages from a particular Folio. This method could be used in:

- A form for jury instructions, where the user selects instructions from a full list of jury instructions.
- A lease agreement composed of clauses selected from a Folio of boilerplate paragraphs.
- An invoice form where parts are chosen from a Folio containing the entire inventory.

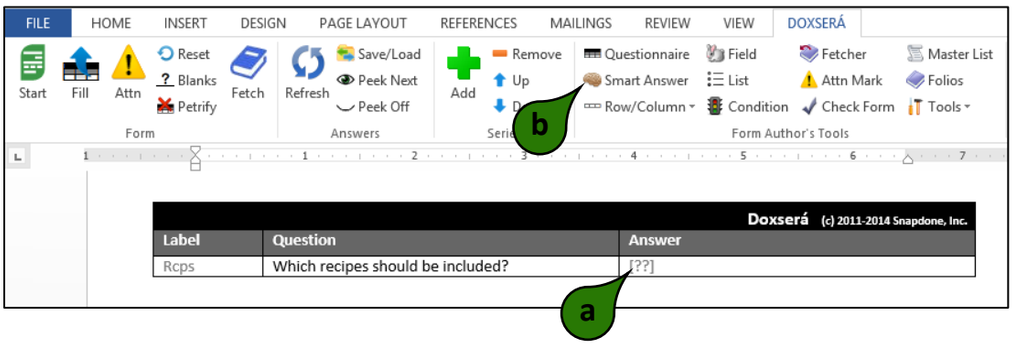
1 Quick Start

Open this partially completed form: Cookbook 1

2 Create a Smart Answer that selects Passages

a Place the cursor in the **Rcps** answer box

b Click **Smart Answer**



c Select **Checkboxes**

d Select **Folios**

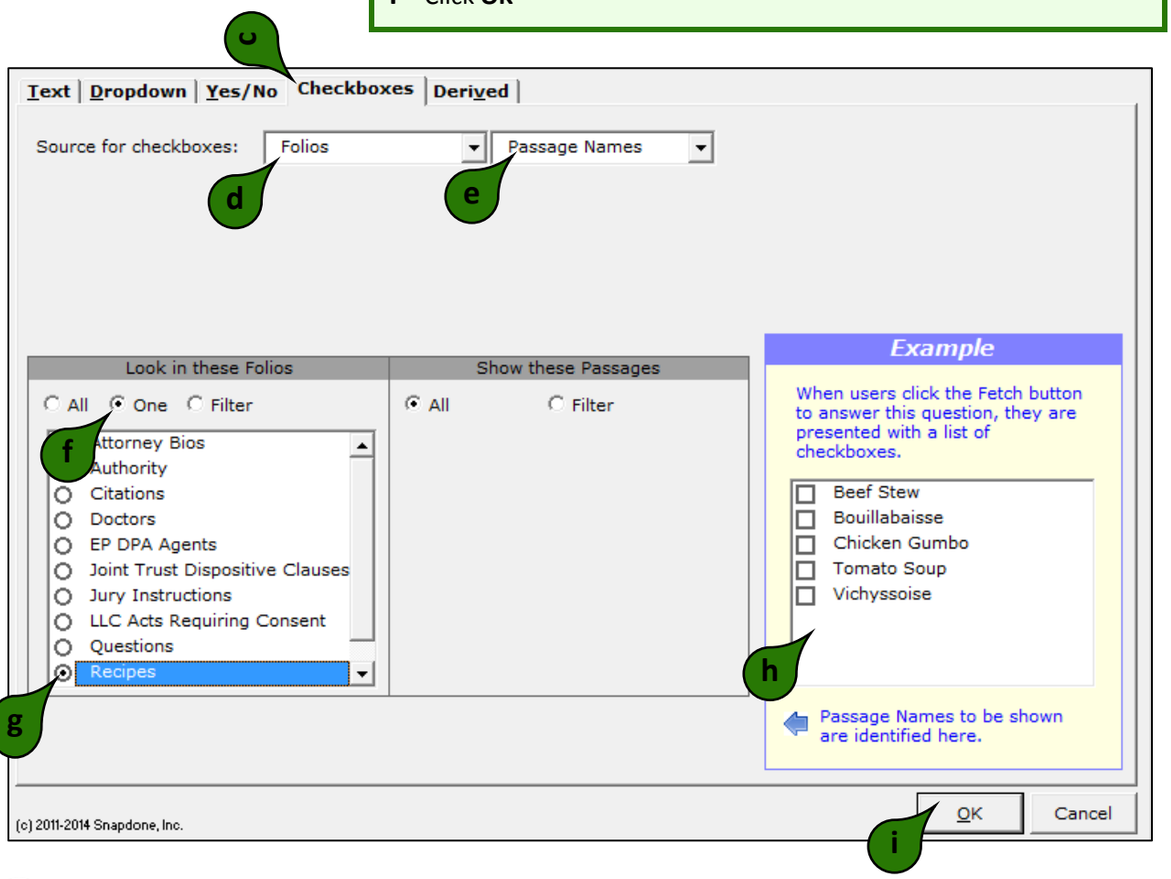
e Select **Passage Names**

f Select **One** Folio

g Select the **Recipes** Folio

h The Preview shows choices that will be presented to the form user as possible answers

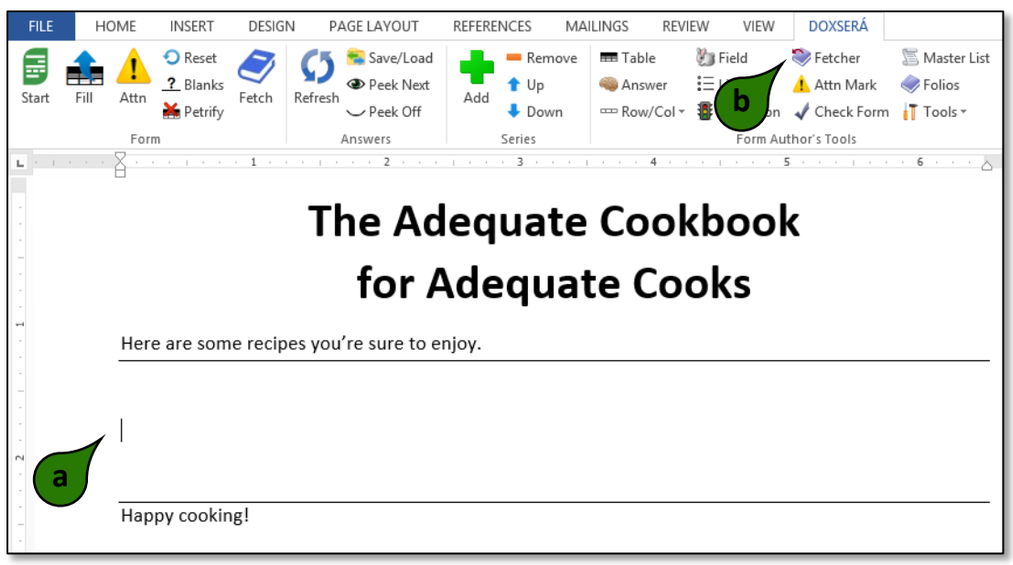
i Click **OK**



3 Add a Fetcher

a Select the spot in the form where recipes will be inserted

b Click **Fetcher**

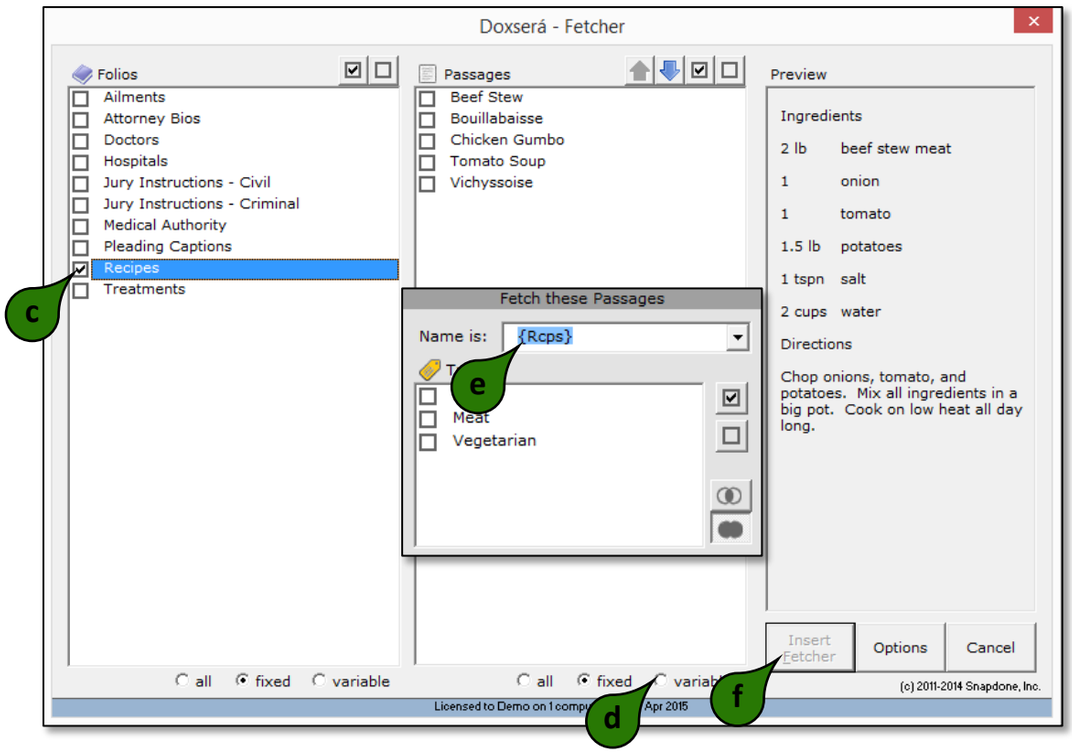


c Select the **Recipes** Folio

d Since we don't know in advance which Passages will be used, click **variable** to show the **Fetch these Passages** panel

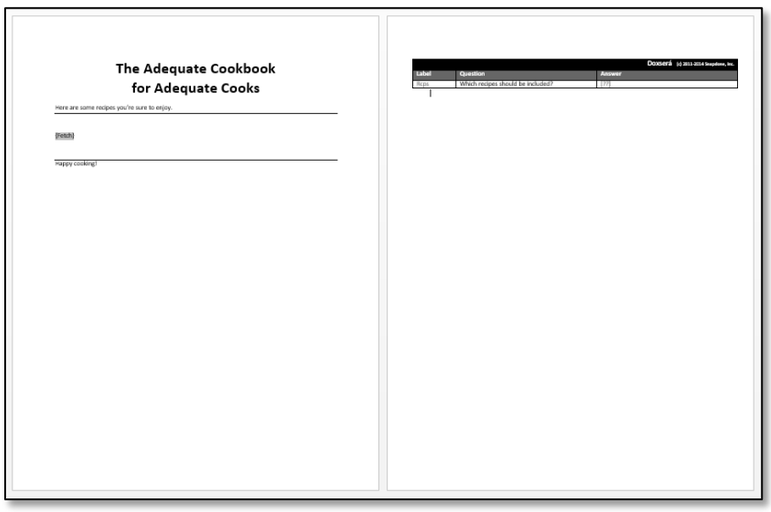
e The Passages to be fetched are chosen in the **Rcps** answer, so select the Passage name **{Rcps}**

f Click **Insert Fetcher**



… and Presto

The form is complete



▲ **A form where the user selects Passages**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview

Fetching Passages Automatically

Smart Answer screen details for Folios

Answer a "Fetch" question - Passages

Users

In this walkthrough you will use the "Cookbook" form to create a cookbook of individually selected recipes.

Prerequisites:

- The "Recipes" Folio from Create a Folio; **OR**
- Open this Folio document and import it

You will:

- Use the **Fetch** command to choose several recipes
- Use the **Fill** command to create a cookbook

When answering Questionnaires, you will sometimes encounter "Fetch" questions. You will recognize them because:

- The answer box has a red border (only if you are using Word 2013 or later).
- The flag above the answer box says **click Fetch to choose**.

1 Quick Start

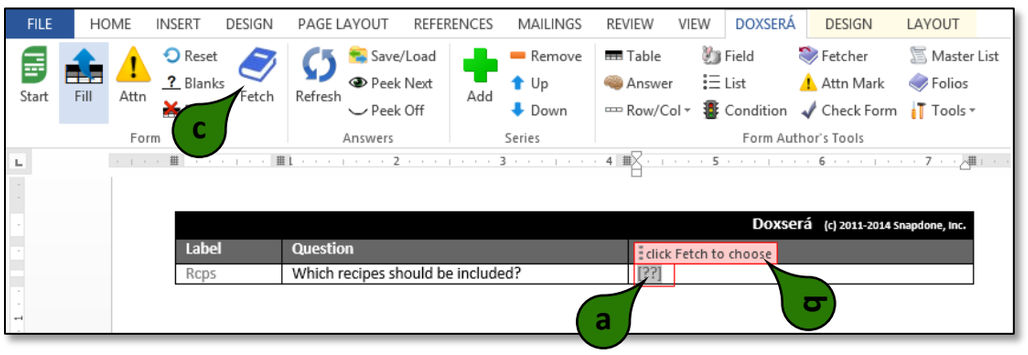
Open this form: Cookbook 2

2 Open the Fetch screen

a Place the cursor in the answer box

b The flag above the answer box says **click Fetch to choose**

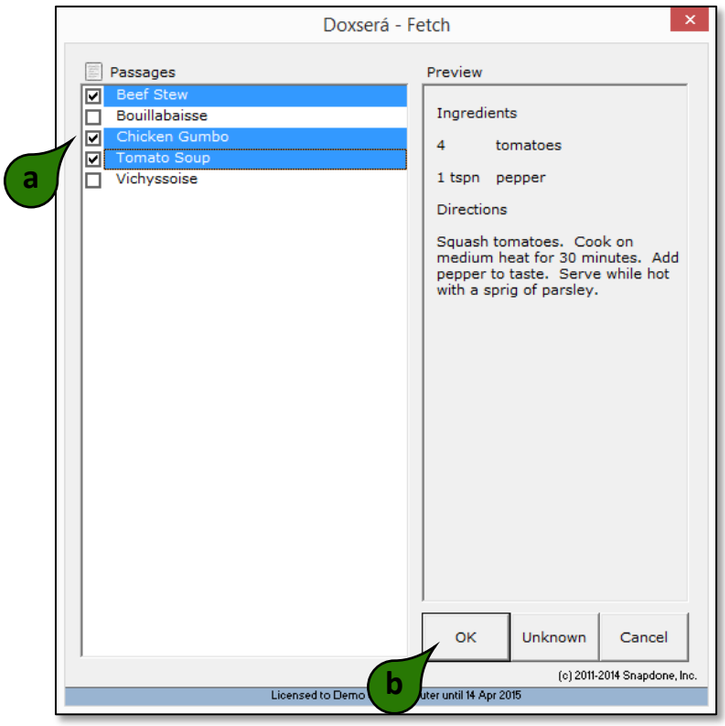
c Click **Fetch**



3 Make choices

a Select **Beef Stew**, **Chicken Gumbo**, and **Tomato Soup**

b Click **OK**

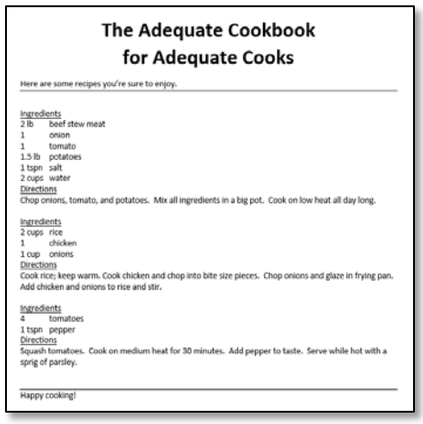


4 Quick finish

Click **Fill** to create the cookbook

… and Presto

The cookbook is complete *



The Adequate Cookbook for Adequate Cooks

Here are some recipes you're sure to enjoy.

Ingredients
2 lb beef stew meat
1 onion
1 tomato
1.5 lb potatoes
1 tspn salt
2 cups water
Directions
Chop onions, tomato, and potatoes. Mix all ingredients in a big pot. Cook on low heat all day long.

Ingredients
2 cups rice
1 chicken
1 cup onions
Directions
Cook rice; keep warm. Cook chicken and chop into bite size pieces. Chop onions and glaze in frying pan. Add chicken and onions to rice and stir.

Ingredients
4 tomatoes
1 tspn pepper
Directions
Squash tomatoes. Cook on medium heat for 30 minutes. Add pepper to taste. Serve while hot with a sprig of parsley.

Happy cooking!

* For now, don't worry that recipe names are missing. We'll add them in another walkthrough (Passages in Lists).

▲ **Answer a "Fetch" question - Passages**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Answering a Fetch Question (Passages)
- Answer a Fetch question - Tag
- Fetch screen details

A form where the user selects a Tag

Authors

This walkthrough creates a "Cookbook" form that asks the form user to choose a food type.

Prerequisites:

- The "Recipes" Folio from Tag Passages; **OR**
- Open this Folio document and import it

You will:

- Create a **Smart Answer** that lists Tags in the "Recipes" Folio as choices
- Create a **Fetcher** that inserts dishes from the "Recipes" Folio that are marked with the selected Tag

The form in this walkthrough asks form users to select a Tag from a particular Folio, then automatically fetches the corresponding Passages. This method could be used in:

- A form for jury instructions where the user selects a type of case, and relevant jury instructions are automatically found and inserted into the form.
- An engagement letter where the user selects the type of client, and biographies of relevant team members are automatically inserted into the form.

1 Quick Start

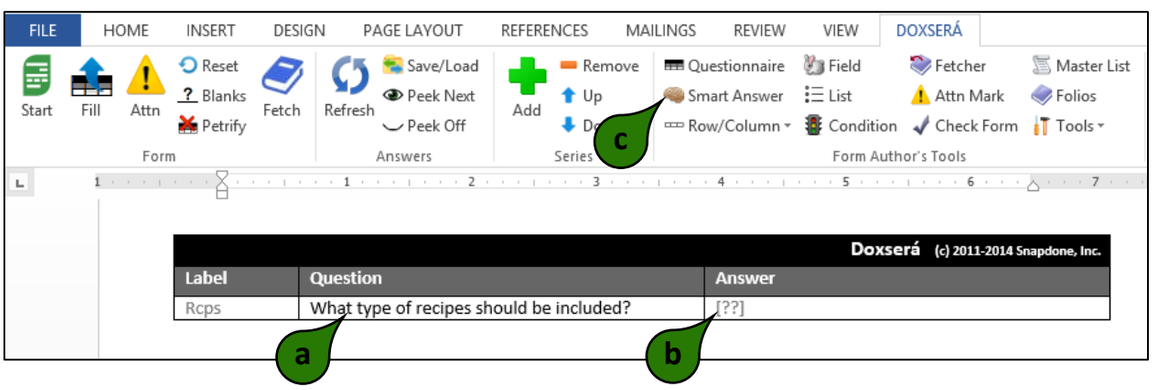
Open this partially completed form: Cookbook 1

2 Create a Smart Answer that asks for a Tag

a Change the question to **What type of recipes should be included?**

b Place the cursor in the answer box

c Click **Smart Answer**



d Select **Dropdown**

e Select **Folios**

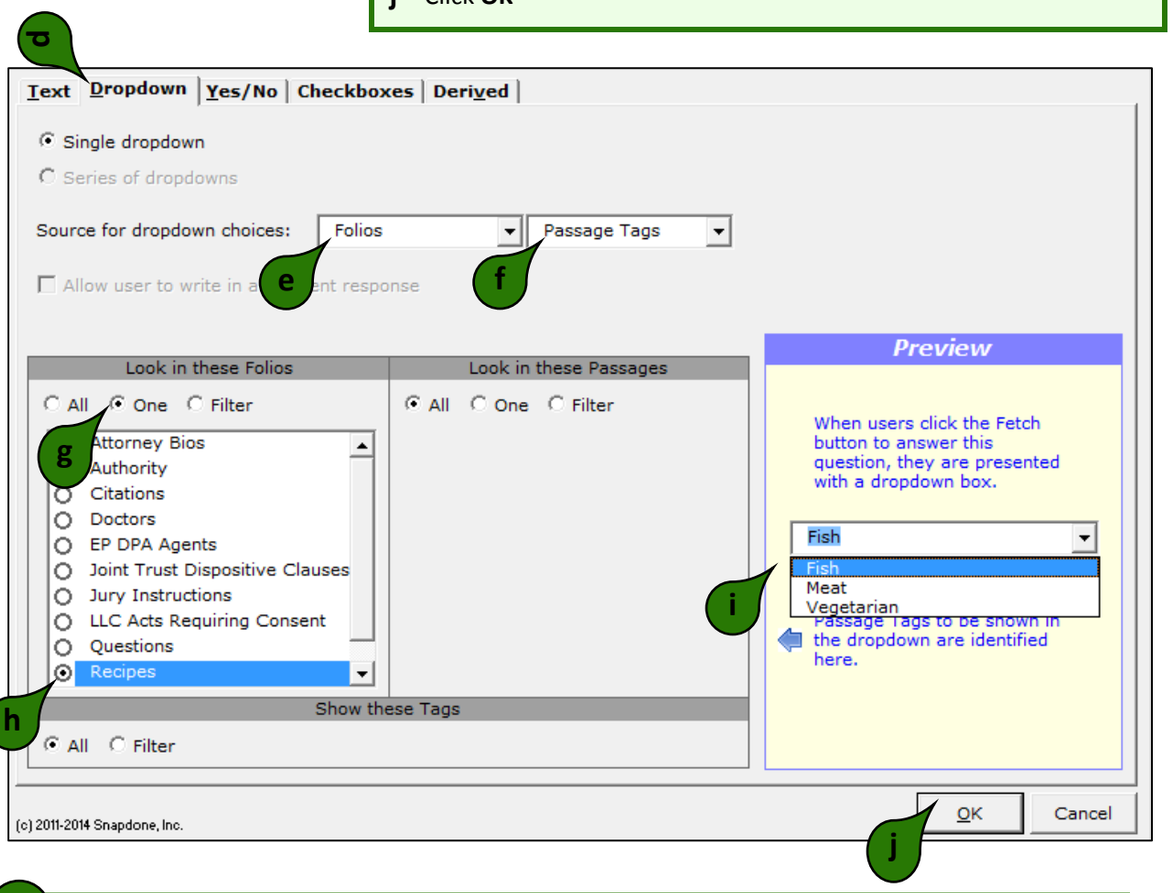
f Select **Passage Tags**

g Select **One** Folio

h Select the **Recipes** Folio

i The Preview shows choices that will be presented to the form user as possible answers

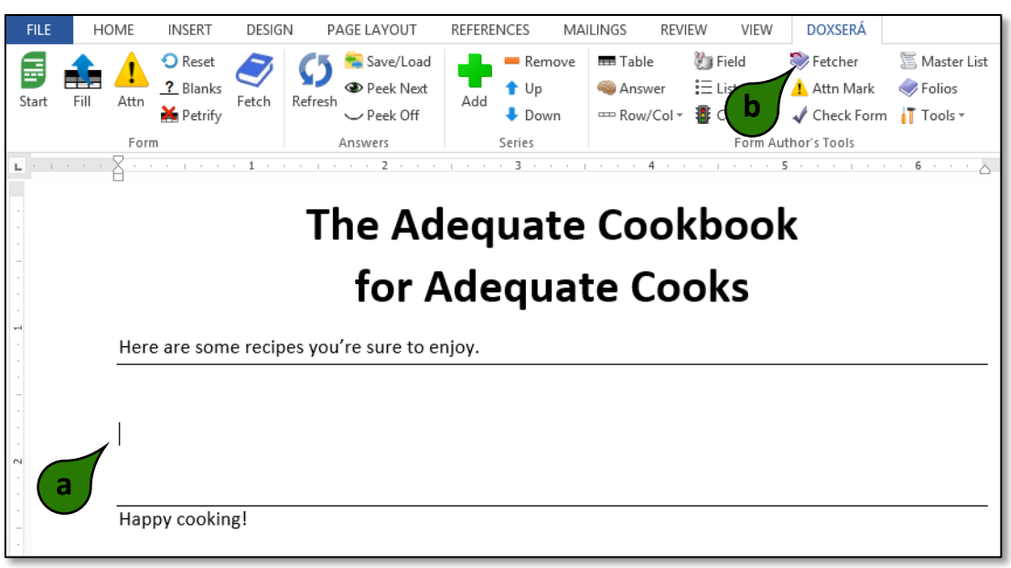
j Click **OK**



3 Add a Fetcher

a Select the spot in the form where recipes will be inserted

b Click **Fetcher**

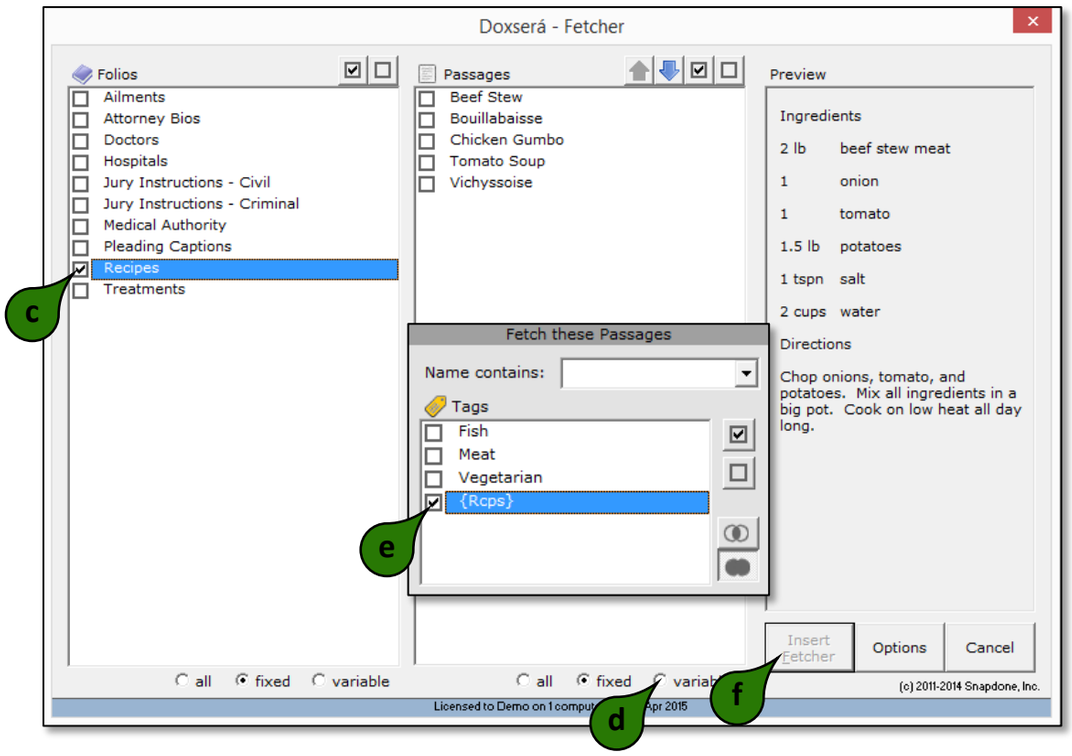


c Select the **Recipes** Folio

d Since we don't know in advance which Passages will be used, click **variable** to show the **Fetch these Passages** panel

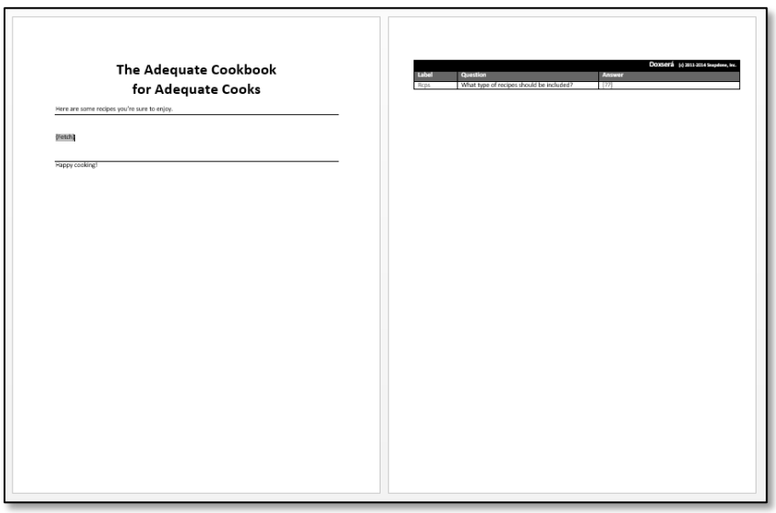
e Since we don't know in advance which Tag will be chosen, select **{Rcps}** to use the form user's response to the Rcps question

f Click **Insert Fetcher**



… and Presto

The form is complete



▲ **A form where the user selects a Tag**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview

Fetching with Tags

Smart Answer screen details for Folios

Answer a “Fetch” question - Tag

Users

In this walkthrough you will use the “Cookbook” form to create a cookbook of fish recipes.

Prerequisites:

- The “Recipes” Folio from Tag Passages; **OR**
- Open this Folio document and import it

You will:

- Use the **Fetch** command to choose a type of food: “Fish”
- Create a cookbook of fish recipes

Some Smart Answers ask the form user to choose a Tag from a Folio.

1 Quick Start

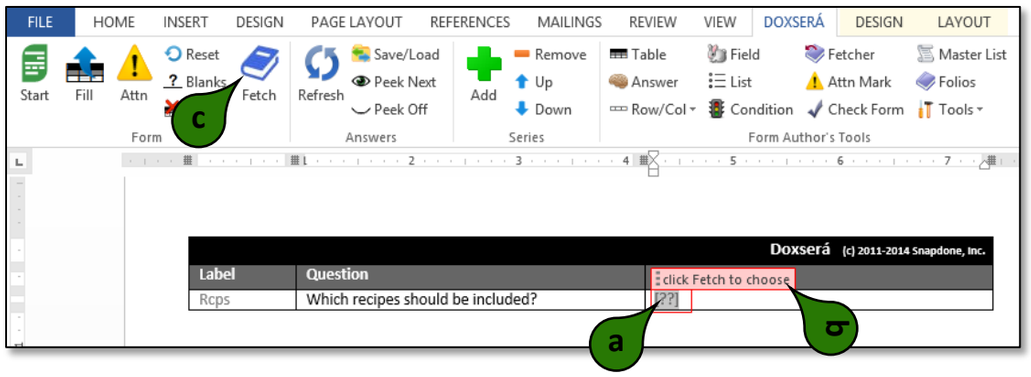
Open this form: Cookbook 3

2 Open the Fetch screen

a Place the cursor in the answer box

b The flag above the answer box says **click Fetch to choose**

c Click **Fetch**



3 Choose a Tag

a Select **Fish**

b Click **OK**

4 Quick finish

Click **Fill** to create the cookbook of fish dishes

… and Presto

The cookbook (though it contains only one recipe) is complete *

The Adequate Cookbook
for Adequate Cooks

Here are some recipes you're sure to enjoy.

Ingredients
1 lobster
2 tomatoes
1 onion
4 garlic cloves
Directions
Plunge lobster headfirst into a big pot of boiling water and cook for 2 minutes. Chop tomatoes, onion, and garlic. Mix everything together and simmer for 10 minutes.

Happy cooking!

* For now, don't worry that the recipe name is missing. We'll add it in another walkthrough (Passages in Lists).

▲ **Answer a "Fetch" question - Tag**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Answering a Fetch Question (Tags)
- Answer a Fetch question - Passages
- Fetch screen details

Passages in Lists

Authors

In this walkthrough, recipes are arranged in a **List**, which allows each Passage to be accompanied by surrounding text.

Prerequisites:

- The "Recipes" Folio from Tag Passages; **OR**
- Open this Folio document and import it

You will:

- Create a **List** of recipe names in the "Cookbook" form
- Customize the List with a **Fetcher** to fetch the content of each recipe

Some forms require not only that Passages be inserted, but that they be arranged in a particular way and perhaps embellished with additional material before and after. This can be accomplished by arranging the Passages in a **List**. You might use this method to create:

- A catalog of parts where each part appears in a table row.
- A series of quotations where each quote is followed by a citation.

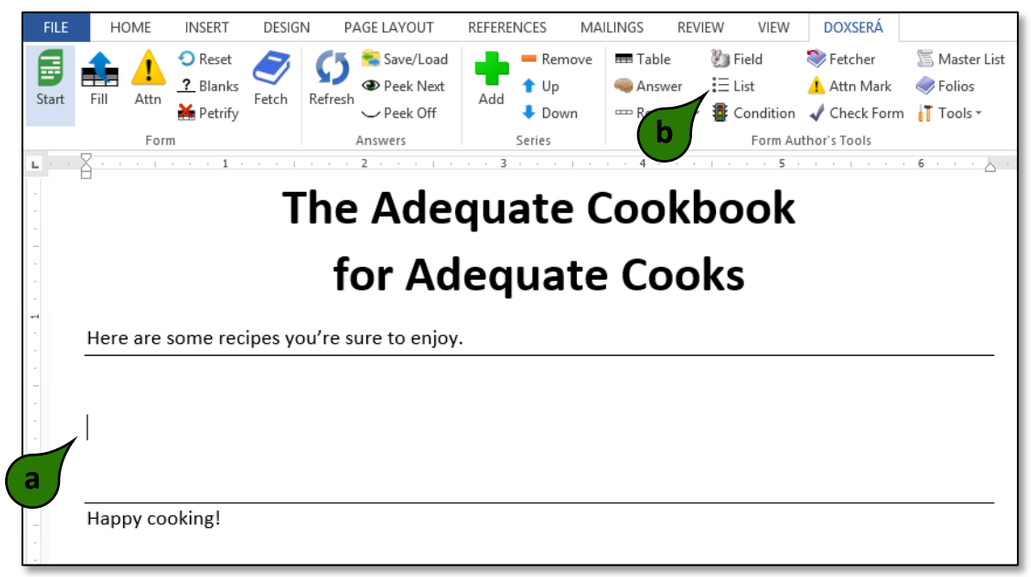
1 Quick Start

Open this partially completed form: Cookbook 4

2 Add a List

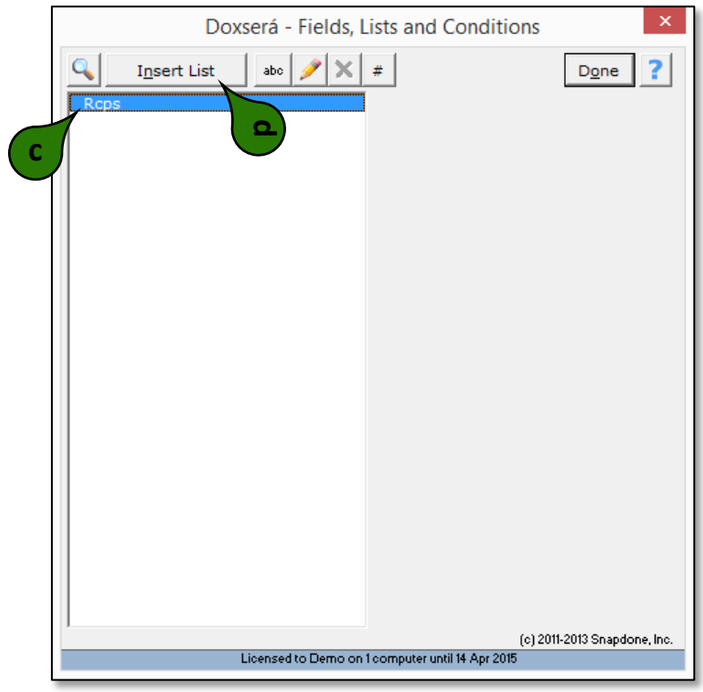
a Select the spot in the form where the List of recipes should appear

b Click **List**



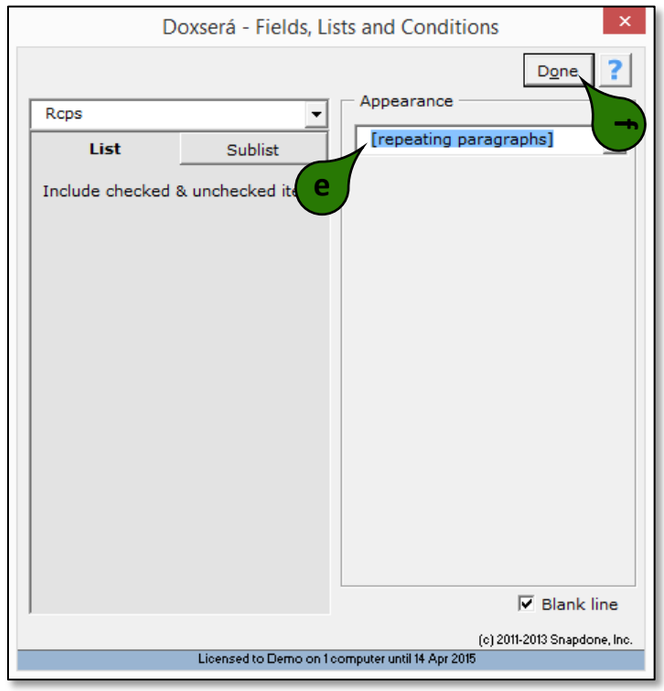
c The **Rcps** answer is already selected

d Click **Insert List**



e Select **[repeating paragraphs]**

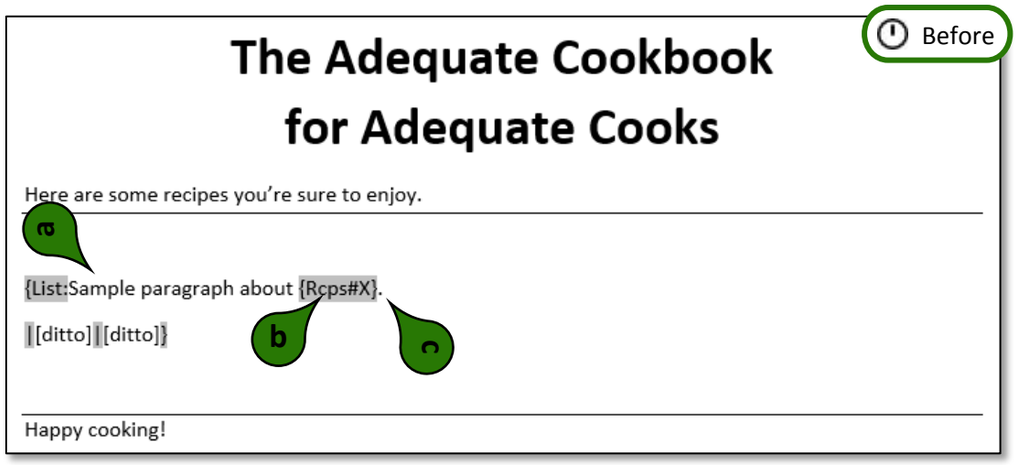
f Click **Done**



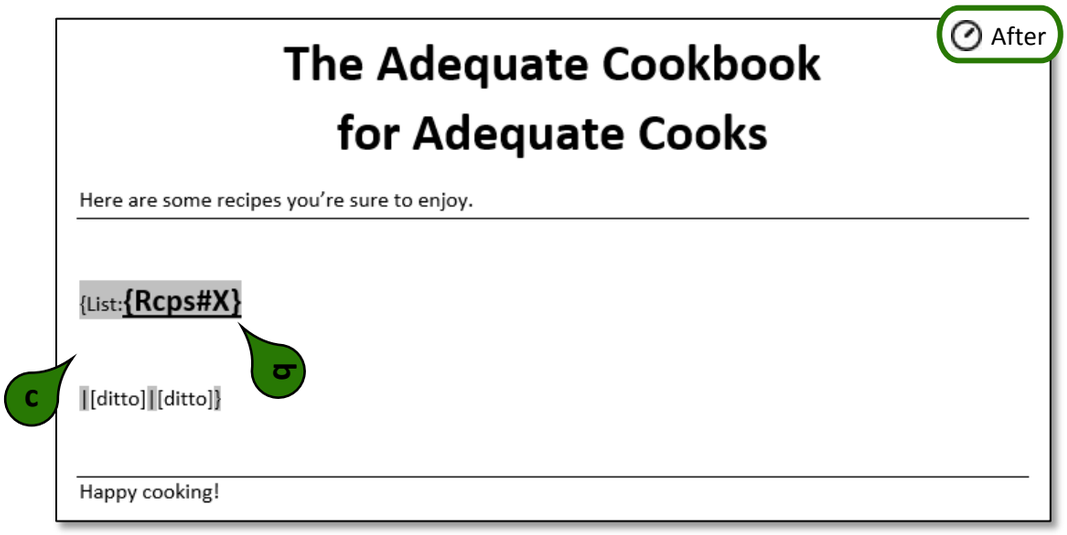
3 Customize the List

- **a** Delete the words **Sample paragraph about**
- **b** **{Rcps#X}** marks where each Passage's name will appear. Make it bold, underlined, and a larger font size.
- **c** Delete the period and add a hard return between the two paragraphs

Before

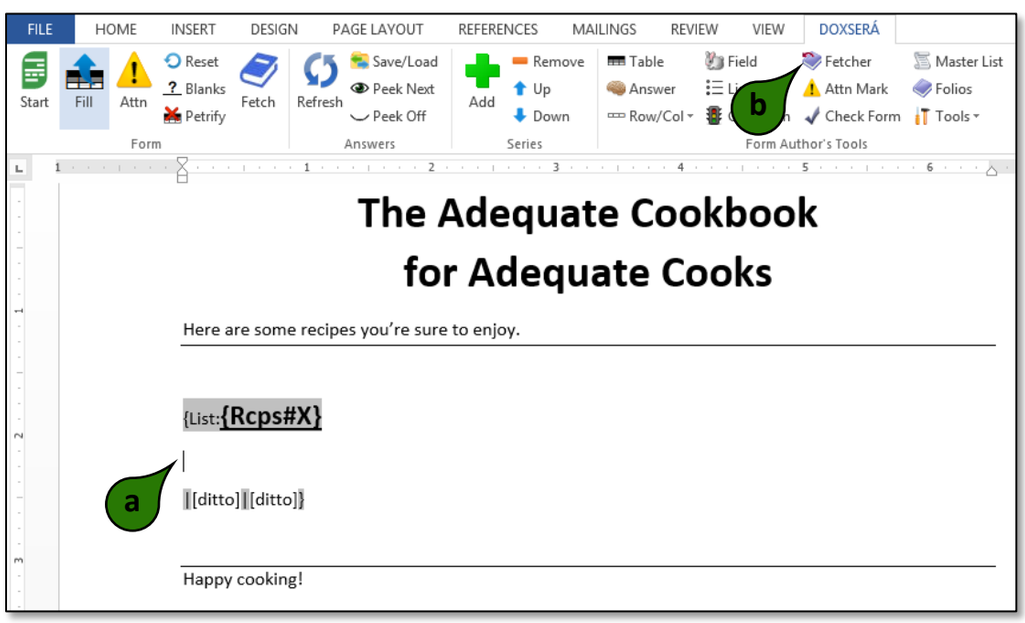


After



4 Add a Fetcher

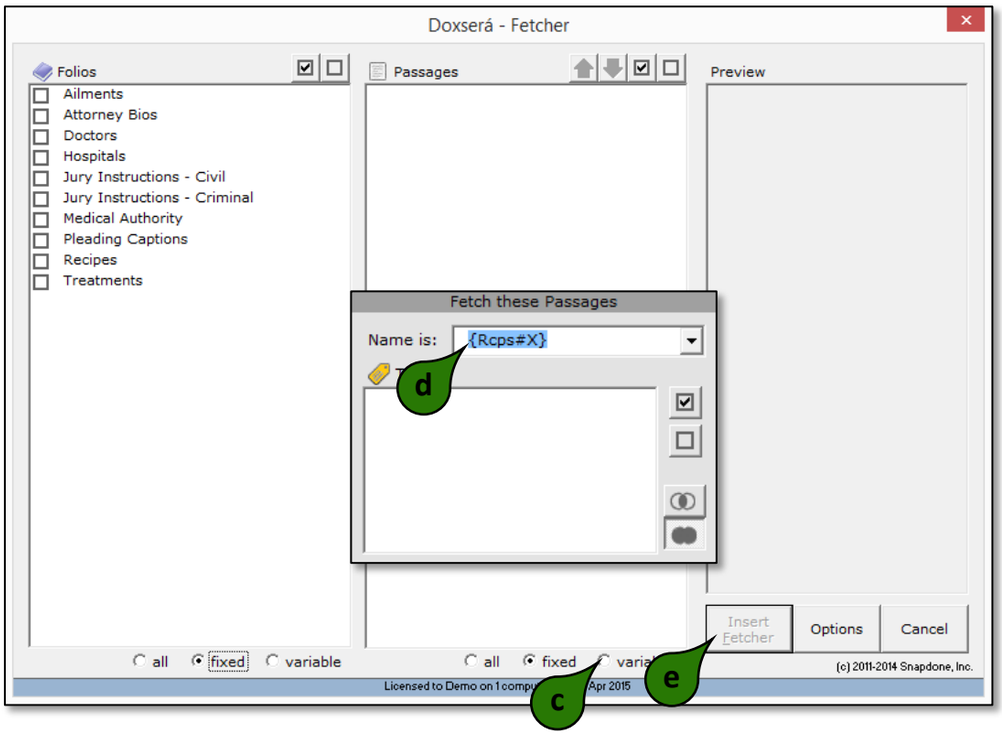
- **a** Place the cursor in the empty middle paragraph
- **b** Click **Fetcher**



c Select **variable** to show the **Fetch these Passages** panel

d Select **{Rcps#X}** to fetch the current item in the **Rcps** answer ✱

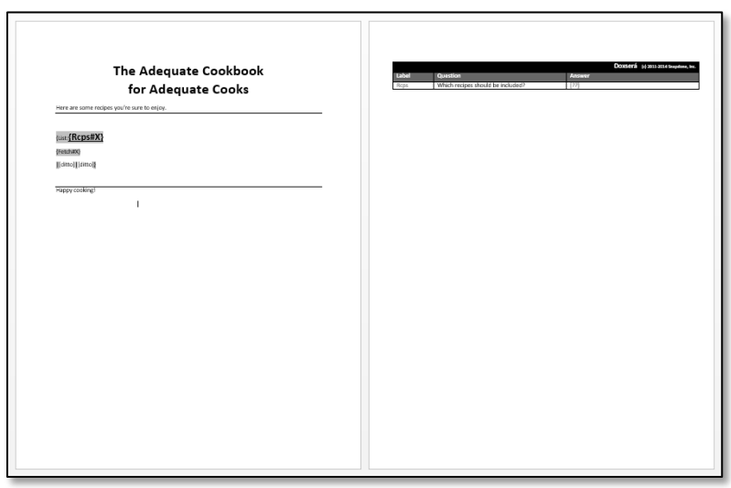
e Click **Insert Fetcher**



✱ When creating custom Lists, you will almost always use **#X**, which designates the *current* item in the list. In unusual situations, you might use **#F** to designate the *first* item, **#P** for the *previous* item, **#N** for the *next* item, or **#L** for the *last* item.

… and Presto

The form is complete



Related Info Overview Walkthrough Lesson Video Guide

Folio Overview

Passages in Lists

Folio Facts in Lists

Folios in Derived Answers

Folio Facts

Authors

In this walkthrough, you will add supplemental info to each dish in the "Recipes" Folio.

Prerequisites:

- The "Recipes" Folio from Tag Passages; **OR**
- Open this Folio document and import it

You will:

- Add a Fact to the "Recipes" Folio named "Servings"
- Enter a serving size for each recipe

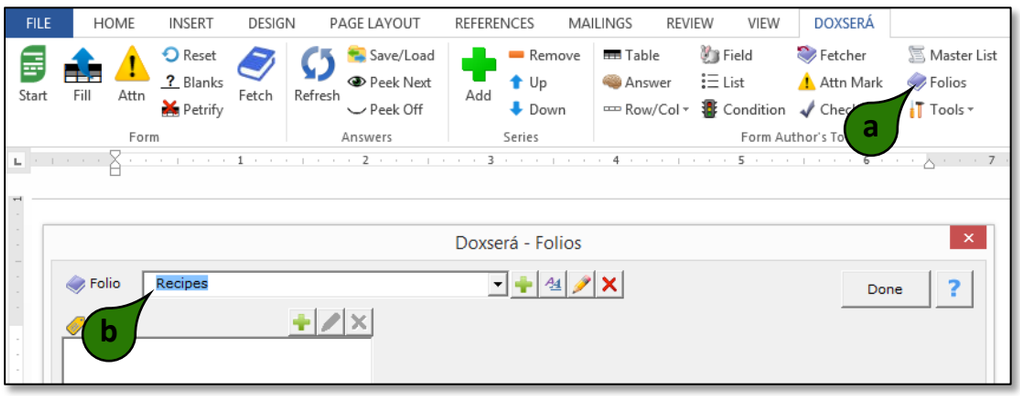
Folio Facts add supplemental information to Passages. They are useful when, in addition to inserting a Passage into a form, form authors also need to insert information about that Passage. For example:

- A form that inserts biographies from a Folio could also include a separate listing of each person's name and profession.
- The same Passages and Facts might be arranged differently in two forms. For example, a catalog might show a product's name in a large font above its description. But the same product could appear in a two-column invoice with the name on the left and description on the right.

1 Open the "Recipes" Folio

a Click **Folios**.

b Select the **Recipes** Folio.

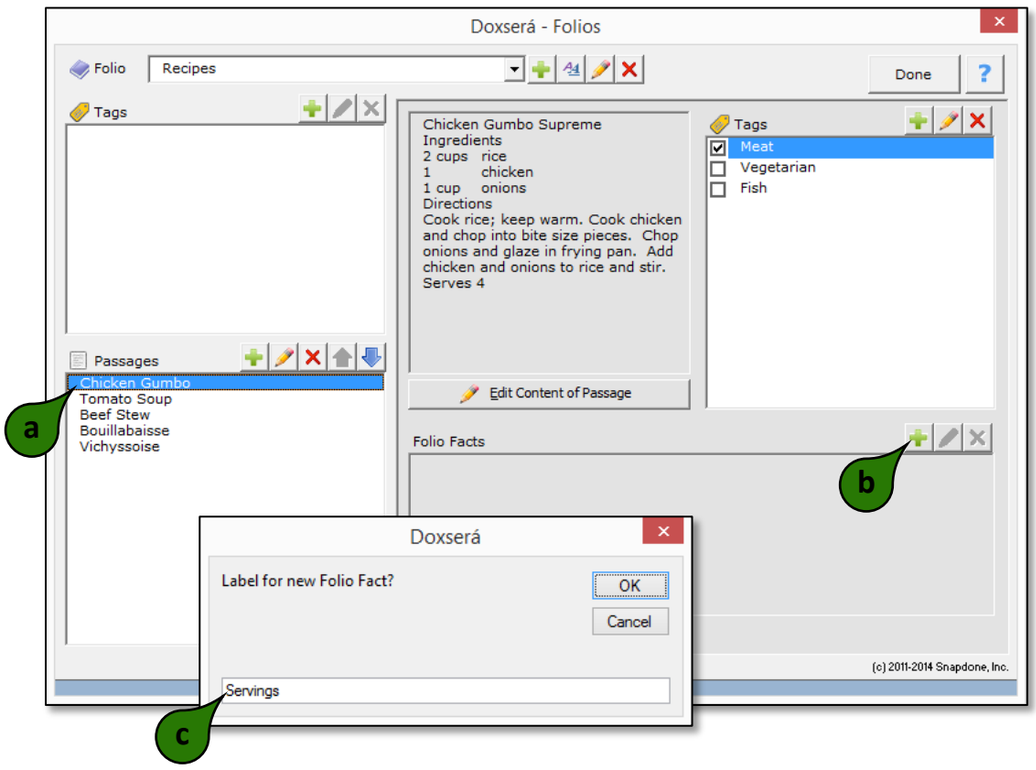


2 Add Fact label

a Select any Passage.

b Click the **new Fact** icon.

c Type the label **Servings** and click **OK**.



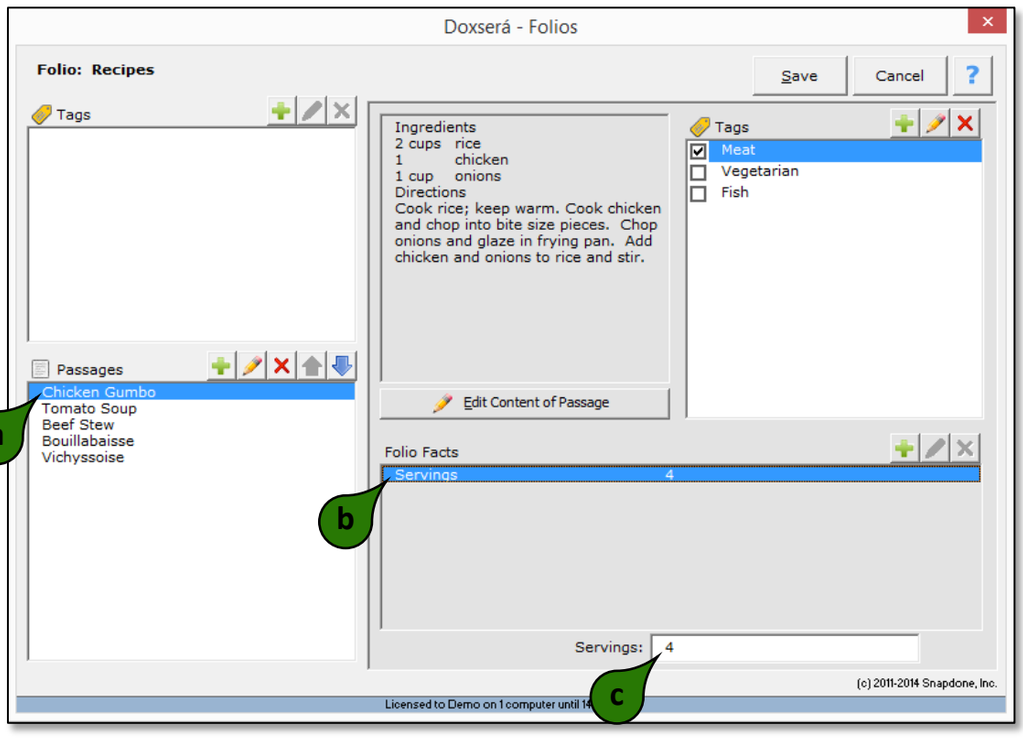
3 Enter Facts

a Select the **Chicken Gumbo** Passage

b Select the **Servings** Fact

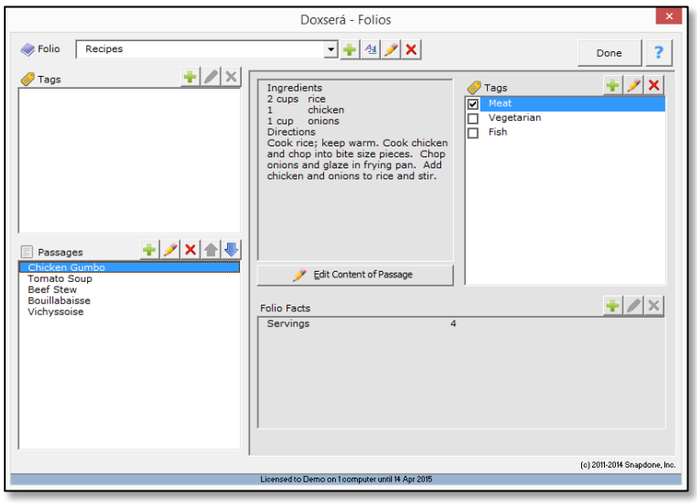
c Type **4** in the Servings box

- Repeat steps **a** to **c** for the remaining Passages: **Tomato Soup** serves **3**; **Beef Stew** serves **4**; **Bouillabaisse** serves **4**; and **Vichyssoise** serves **2**



4 **Save your work**	Click **Save** to save changes to this Folio

… and Presto	The dishes in your “Recipes” Folio now include serving size info



▲ **Folio Facts**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Folio Facts
- Folio Facts in Lists
- Folios screen details

Folio Facts in Lists

Authors

In this walkthrough, the "Cookbook" form's list of recipes is embellished with serving sizes

Prerequisites:

- The "Recipes" Folio from Folio Facts; **OR**
- Open this Folio document and import it

You will:

- Customize a List with an additional Field that refers to a Folio Fact

When Passages are used in a form, all of the Folio Facts related to those Passages can also be used. For example:

- When a selected doctor's bio is fetched from a Folio of bios, the doctor's first name and number of years in practice could be inserted elsewhere in the form.
- A catalog form that fetches part descriptions into the left column of a table could also insert part numbers and prices into the middle and right columns.

1 Quick Start

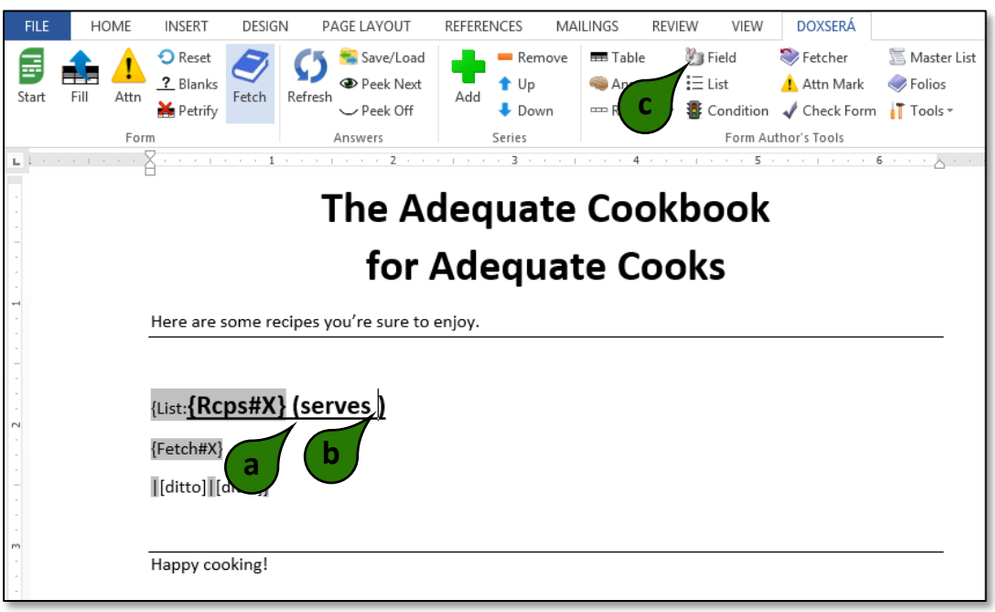
Open this partially completed form: Cookbook 5

2 Customize the List

a Type **(serves)** after the **{Rcps#X}** field

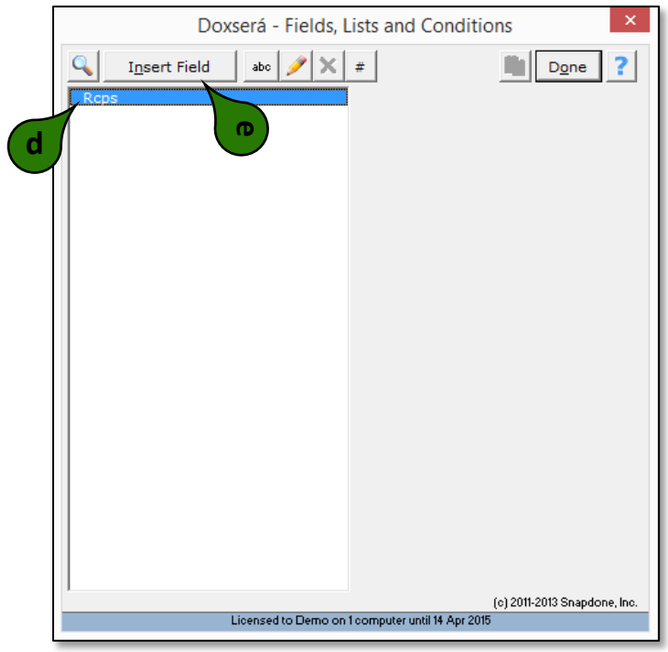
b Place the cursor where the serving number belongs

c Click **Field**



d The **Rcps** answer is already selected

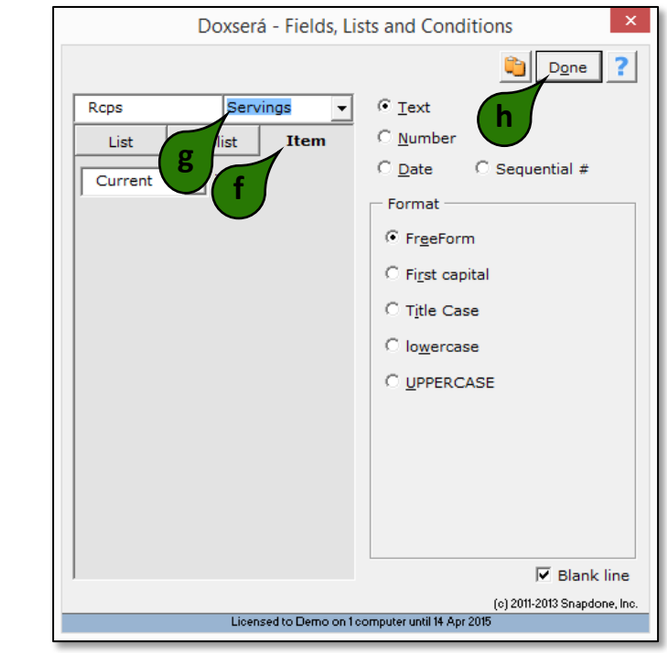
e Click **Insert Field**



f Click **Item**

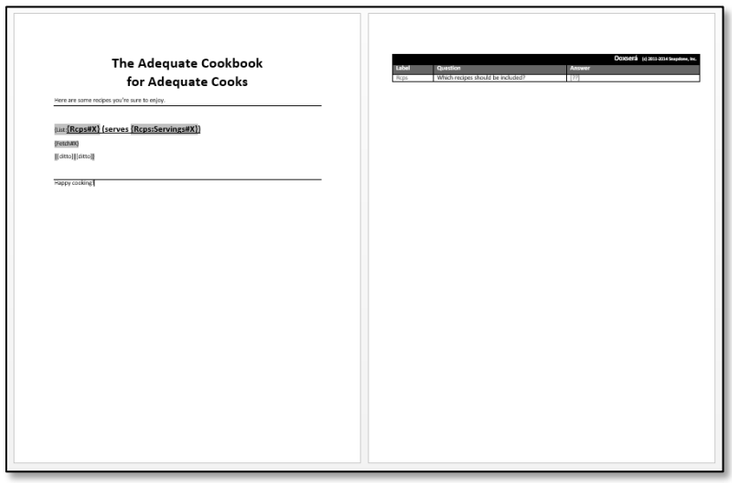
g Select the **Servings** Fact

h Click **Done**



… and Presto

The form is complete



▲ **Folio Facts in Lists**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Folio Facts in Lists
- Folio Facts

Folios in Derived Answers

Authors

This walkthrough uses a Derived Answer as an intermediary step to create a List of Passages that are selected with a Tag.

Prerequisites:

- The "Recipes" Folio from Tag Passages; **OR**
- Open this Folio document and import it

You will:

- Create a Derived Answer that determines which recipes have been selected
- Create a List that uses the results of the Derived Answer

The Passages in Lists walkthrough shows how to List Passages when each Passage is chosen by the form user. But how do you List Passages when the form user chooses a Tag without identifying particular Passages? You must create a Derived Answer that determines the selected Passages, then create a List that uses the results of the Derived Answer.

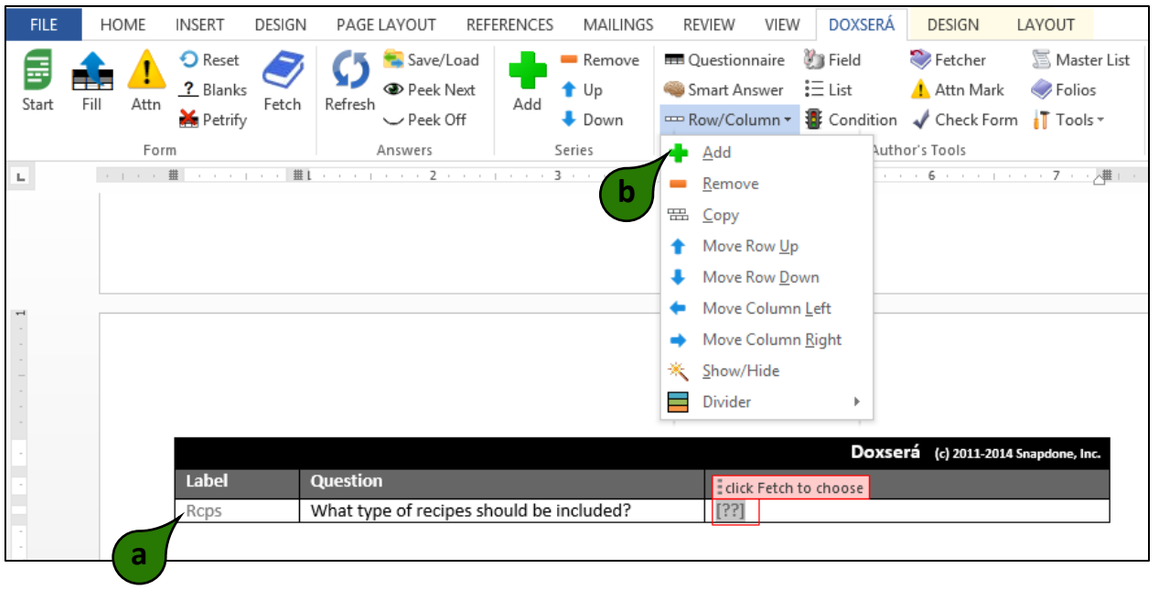
1 Quick Start

Open this partially completed form: Cookbook 6

2 Add a Derived Answer

a Place the cursor anywhere in the **Rcps** row

b Click **Row/Column**, **Add**

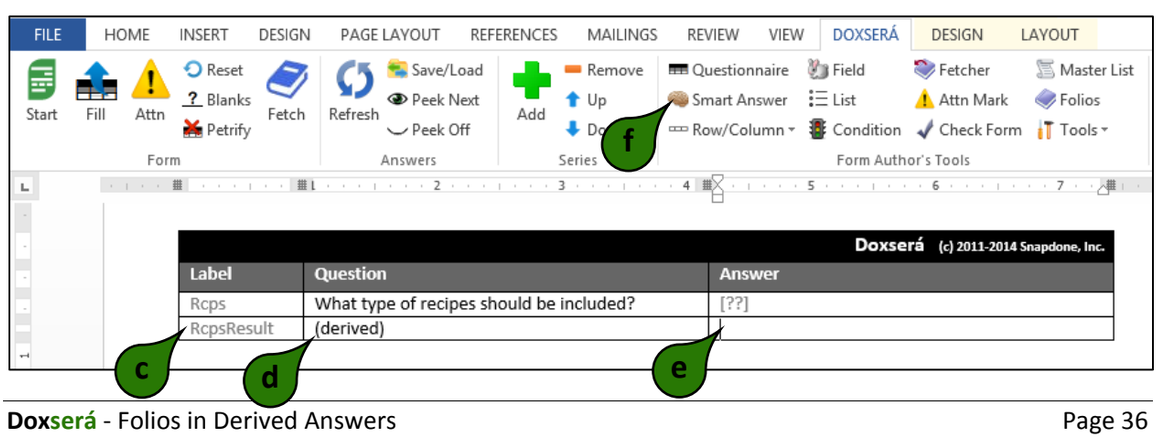


c Type the label **RcpsResult**

d Type the question **(derived)**

e Place the cursor in the **RcpsResult** answer box

f Click **Smart Answer**



g Select **Derived**

h Select **Series of Passage names**

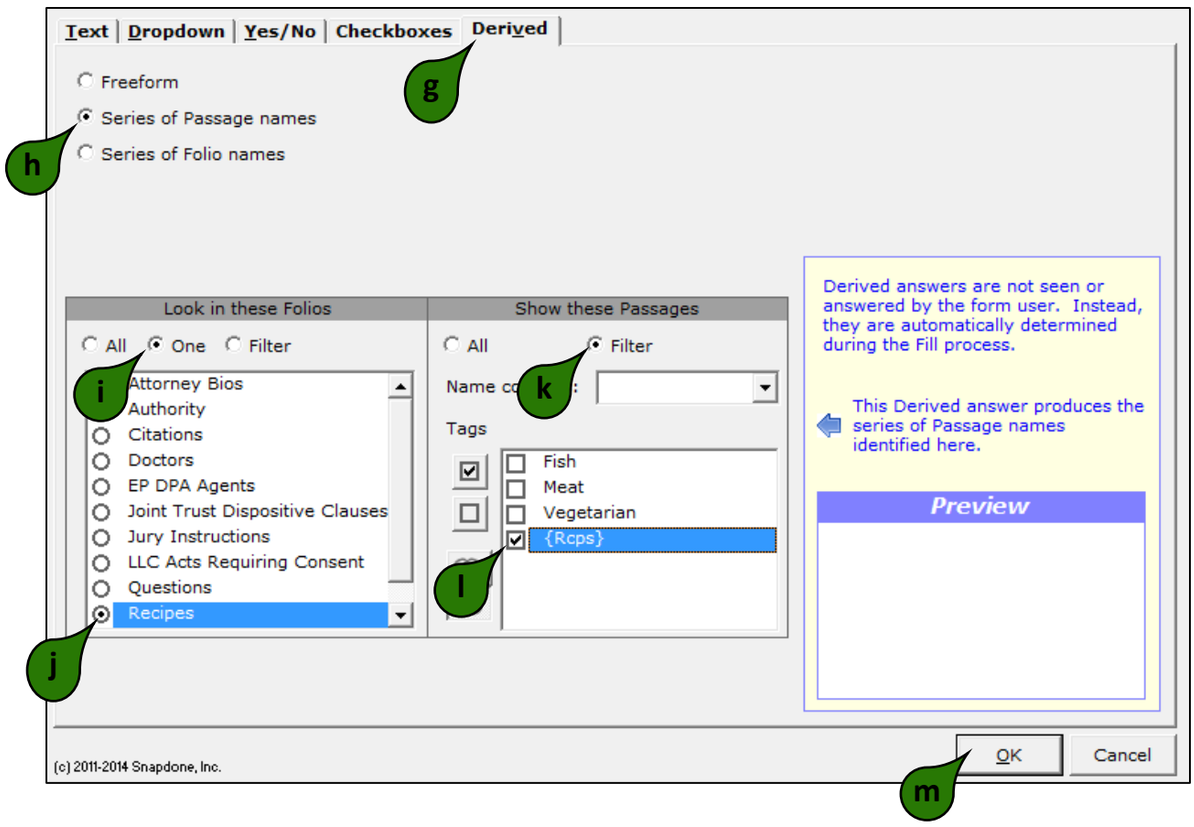
i Select **One** in the **Look in these Folios** panel

j Select the **Recipes** Folio

k Select **Filter** in the **Show these Passages** panel

l Since we don't know in advance which Tag will be chosen, select **{Rcps}** to use the form user's response to the Rcps question

m Click **OK**

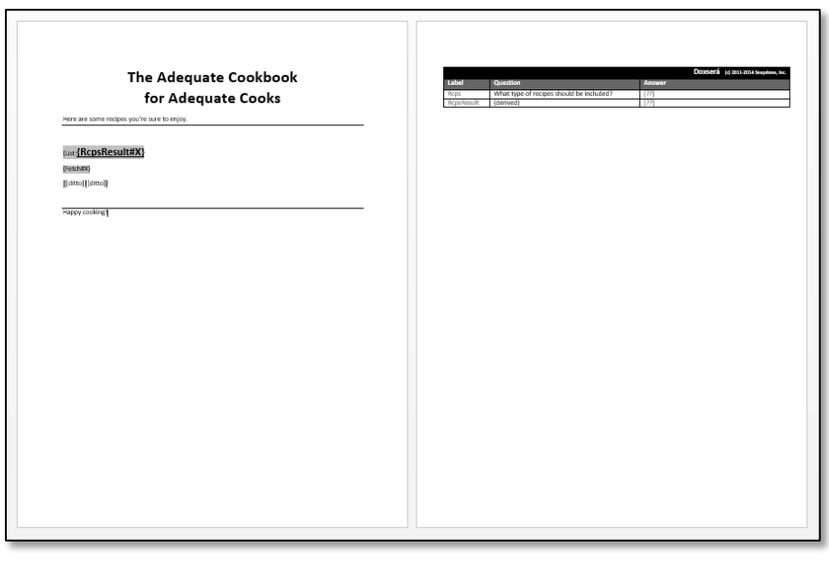


3 **Continue with…**

Pick up with Step 2 of Passages in Lists, but each time you see **Rcps**, replace it with **RcpsResult**

… and Presto

The form is complete



▲ **Folios in Derived Answers**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Folios in Derived Answers
- Passages in Lists
- Smart Answer screen details for Folios

Advanced Folio editing

Authors

In this walkthrough you will use advanced methods to expand the “Recipes” Folio

Prerequisites:

- The “Recipes” Folio from Folio Facts; **OR**
- Open this Folio document and import it

You will:

- Rename and revise the Chicken Gumbo recipe
- Tag the recipe as “Savory”
- Add a new Fact (Prep Time = 1 hour) to the recipe
- Copy the Tomato Soup recipe and use it to create a new recipe for Potato Soup

Once you understand the format of Folio documents, you may find it quicker to make extensive revisions directly to the Folio document rather than through the **Folios** screen. All of these chores can be performed directly in the Folio document:

- Add, rename, and edit Passages.
- Add, rename, edit, and delete Tags.
- Add, rename, edit, and delete Facts.

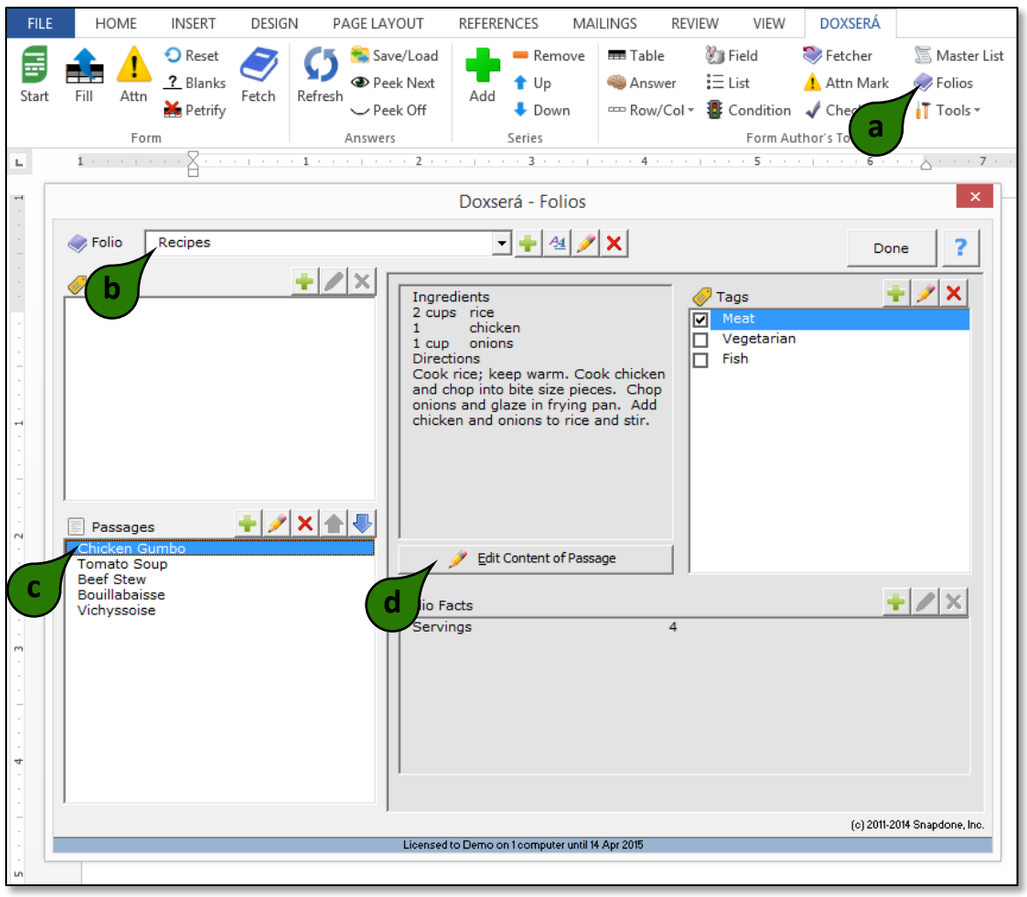
1 Open a Folio document

a Click **Folios**

b Select the **Recipes** Folio

c Select any Passage

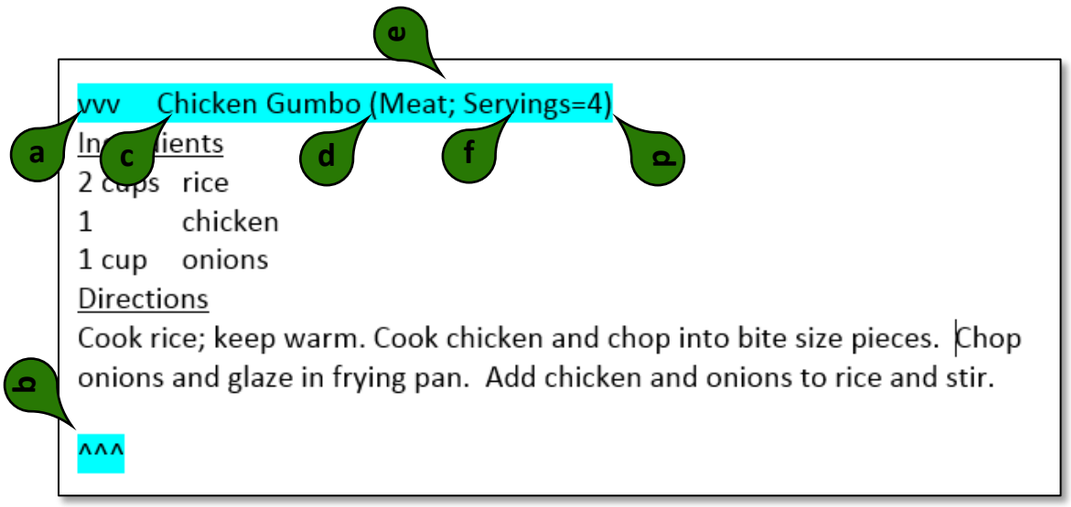
d Click **Edit Content of Passage**



2

Passage format rules

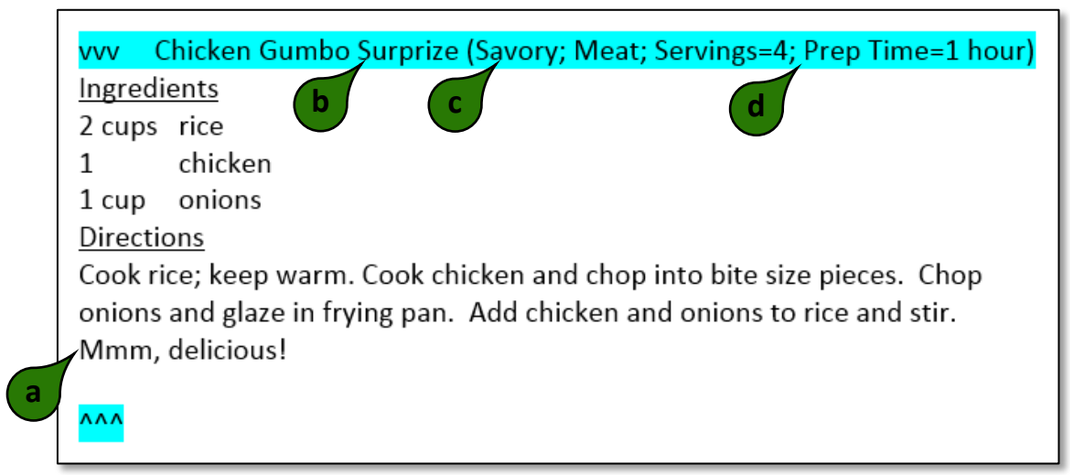
- **a** Each Passage is preceded by a blue **vvv**
- **b** Each Passage is followed by a blue **^^^**
- **c** The Passage name (**Chicken Gumbo**) appears after **vvv**
- **d** The Passage name is followed by parentheses
- **e** Tags (**Meat**) and Facts (**Servings=4**) appear within the parentheses, separated by semicolons
- **f** Facts are typed in the format **label=fact**. For example: **Servings=4**



3

Follow the rules to edit all aspects of a Passage *

- **a** Edit the *content* of the Passage by typing **Mmm, delicious!**
- **b** Edit the *name* of the Passage by typing **Surprize**
- **c** Add a *Tag* by typing **Savory;** (including the semicolon)
- **d** Add a *Fact* by typing ; **Prep Time=1 hour** (including the semicolon)

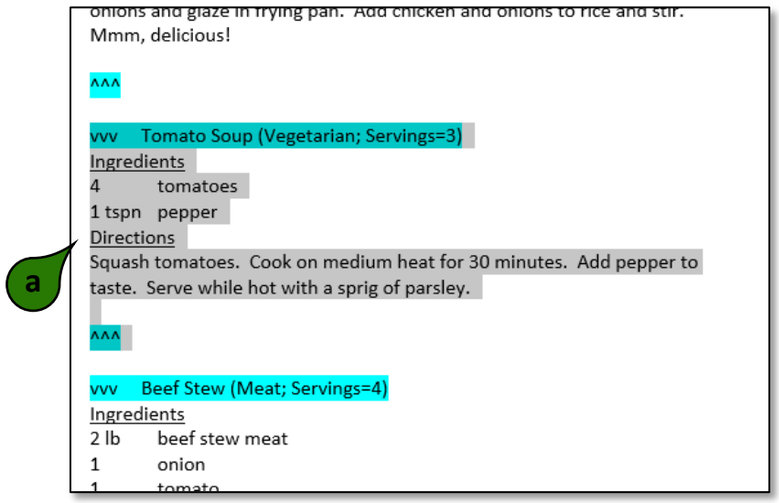


* Don't use these special characters in Passage names, Tags, or Fact labels: **; = ( )**

4 **Create a new Passage with copy/paste**

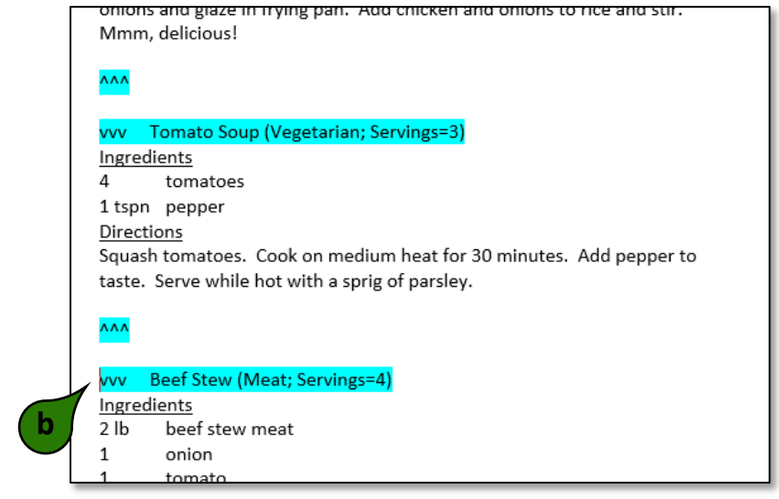
a Select the entire **Tomato Soup** Passage, making sure to include the **vvv** at the beginning and the **^^^** at the end

- Copy



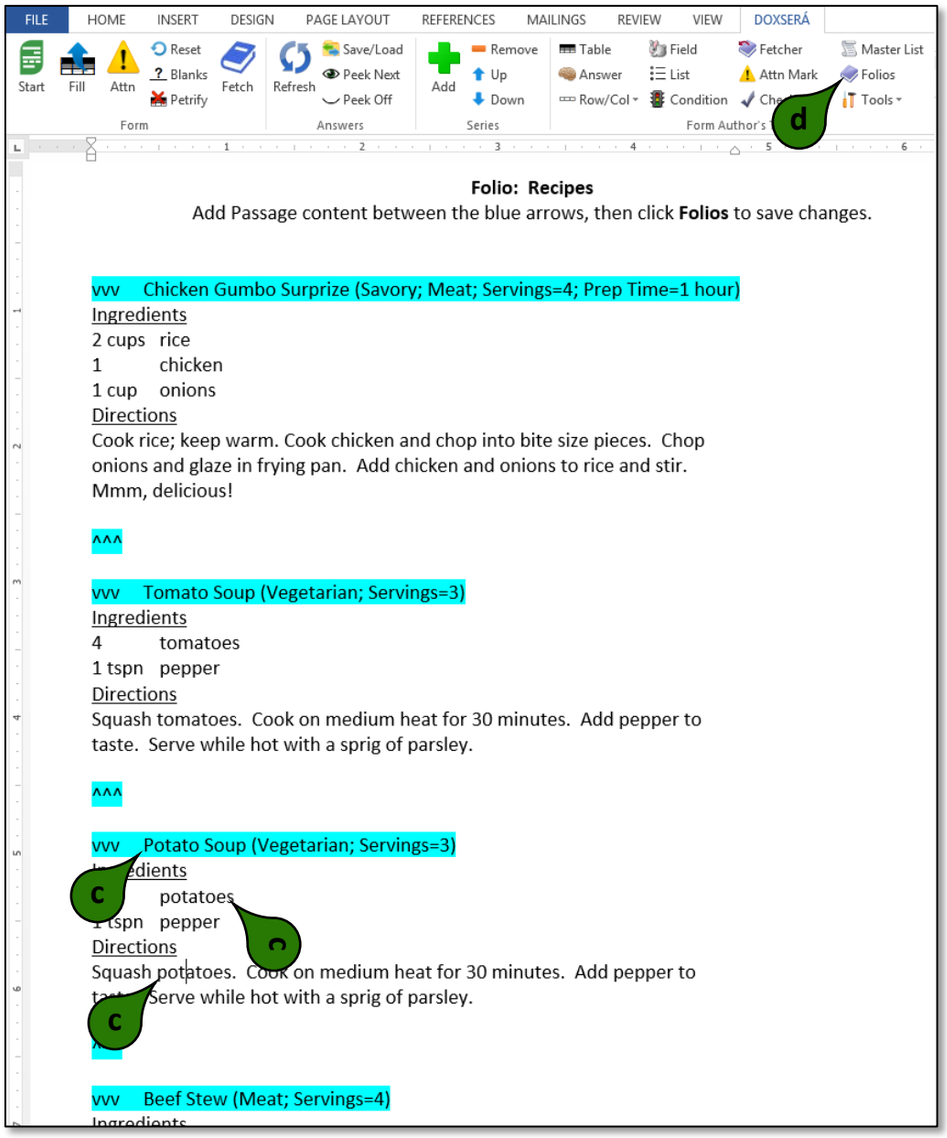
b Place the cursor before the **Beef Stew** Passage, making sure it's in front of the **vvv** that begins the Passage

- Paste



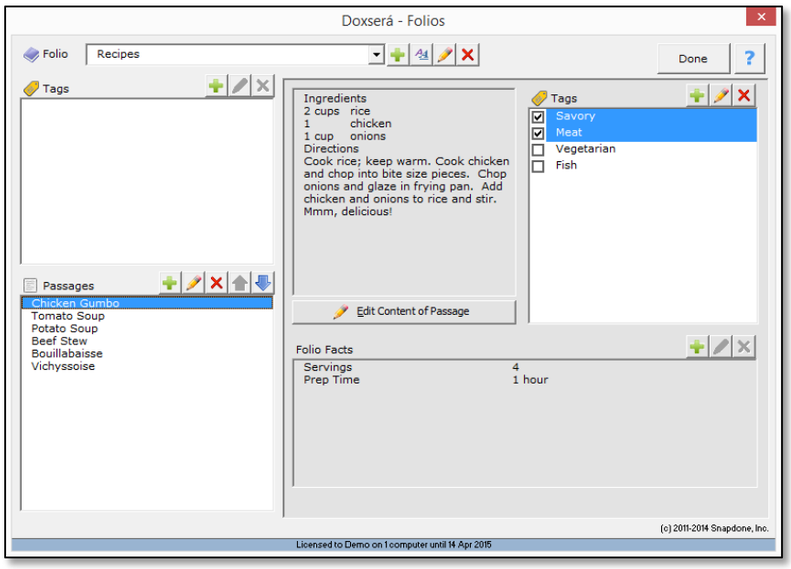
c Revise the copied recipe so it refers to **potatoes** instead of **tomatoes**

d Click **Folios** to return to the Folios screen



5 **Save your work** Click **Save** to save changes to this Folio

… and Presto	The “Recipes” Folio has been updated with a new Tag, new Fact, and new Passage



▲ **Advanced Folio editing**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Advanced Folio Editing
- Create a Folio

Questionnaires in Folios

Authors

In this walkthrough, a pleading form fetches its caption from a Folio of captions for various venues. You will add fields to the Folio so they can be filled in from the Questionnaire.

You will:

- Copy a Questionnaire into the "Sample Captions" Folio
- Automate the captions with Fields for client name, opponent name, cause number, and pleading title

Coordinating Questionnaires between forms and Folios can lead to astounding results:

- When boilerplate paragraphs are fetched into a document, language within the boilerplate can be customized with information from the Questionnaire of the target document.
- Passages in Folios can contain Conditions that resolve according to answers in the target form's Questionnaire.

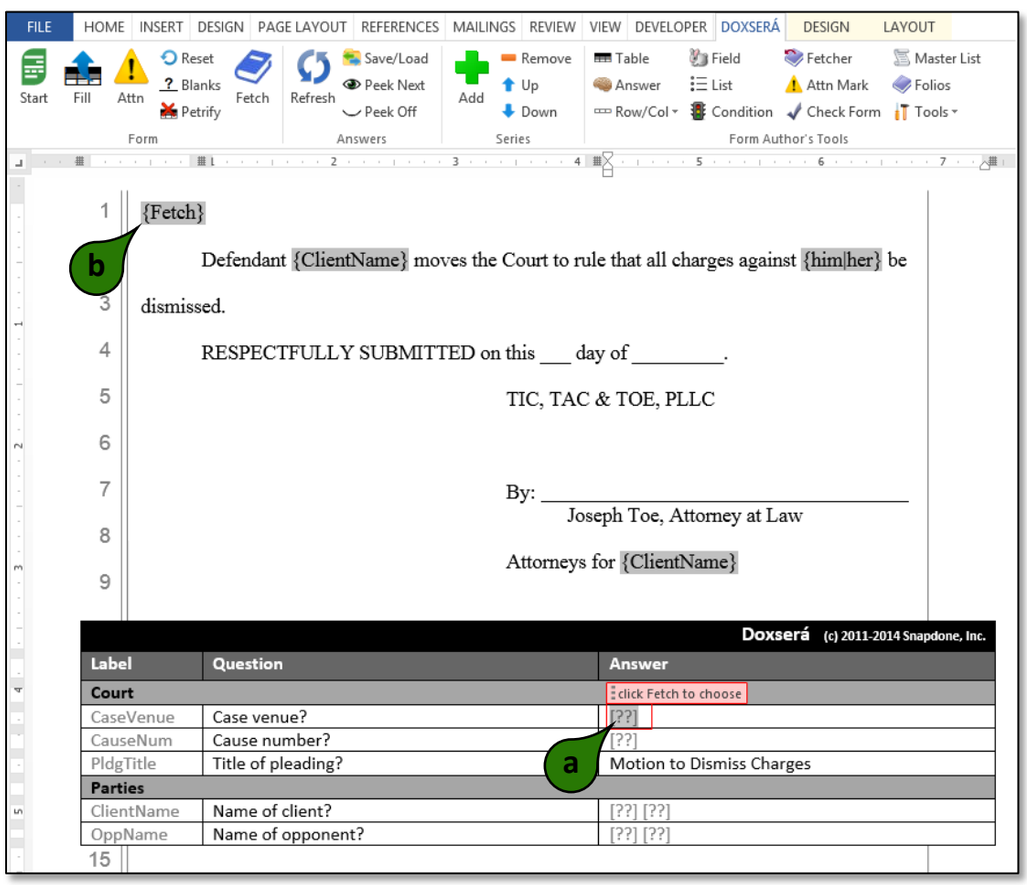
1 Quick Start

- Open this Sample Captions Folio document and import it
- Open this Motion form

2 Take a look at the form

a This "Fetch" answer asks the form user to choose a venue from the "Sample Captions" Folio

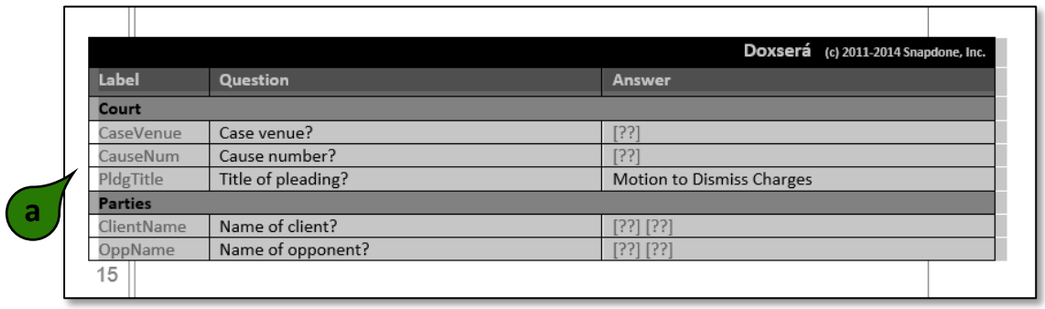
b When the form is **Fill**ed, the selected caption is fetched here.



3 Copy the Questionnaire

a Select the whole Questionnaire, making sure to include the "phantom" column along the right edge.

- Copy



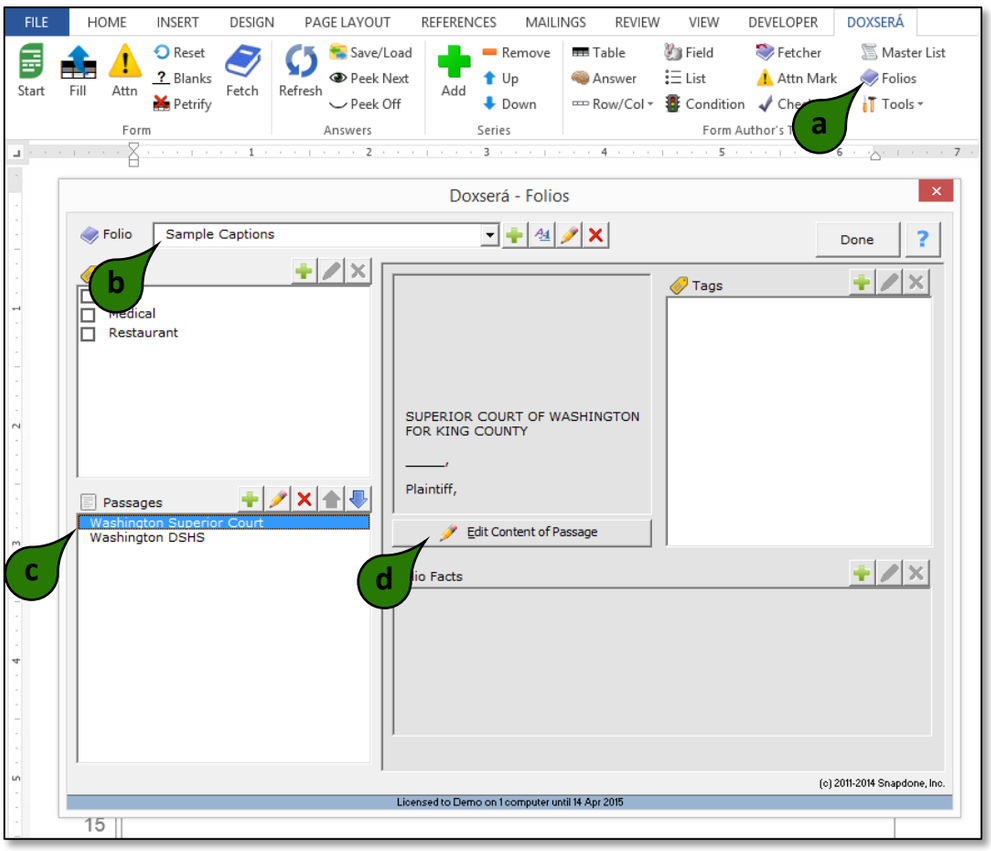
4 Open the Folio document

a Click **Folios**

b Select the **Sample Captions** Folio

c Select any Passage

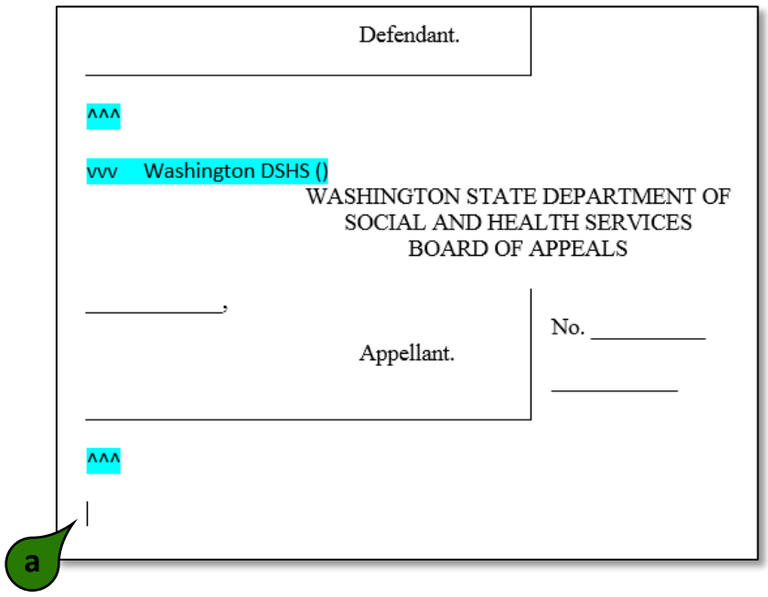
d Click **Edit Content of Passage**



5 Paste the Questionnaire

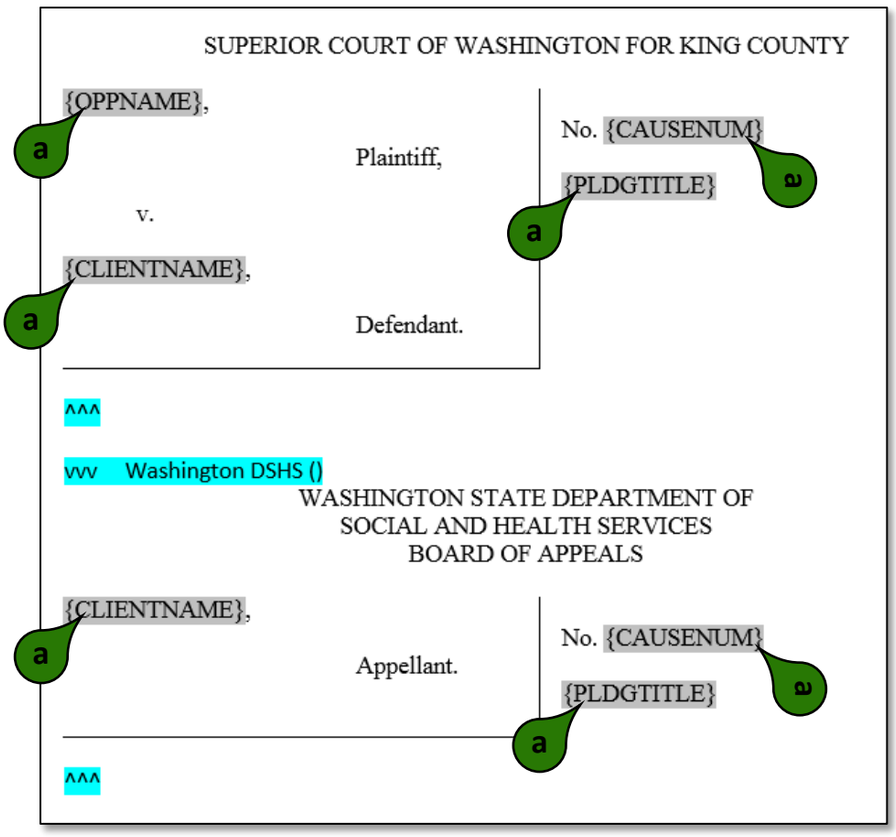
a Place the cursor at the end of the Folio document, making sure it is below the final blue **^^^**

- Add a hard page break (**Ctrl+Enter**), then Paste



6 Add Fields

a Use the **Field** command to replace all the blanks in the Passages with Fields

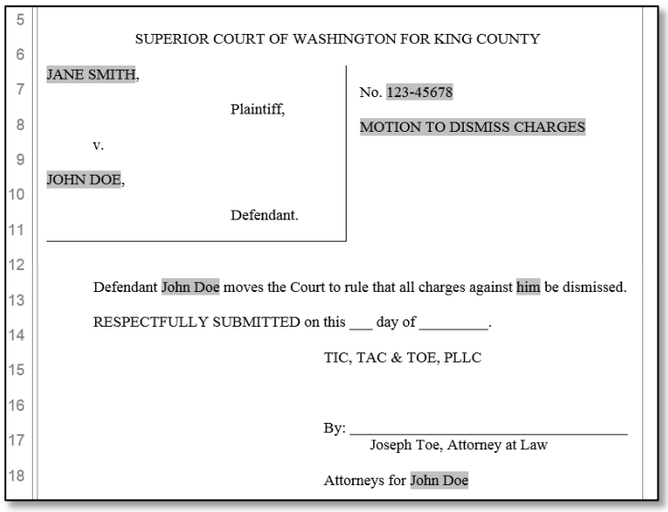


7 Save your work

Click **Folios** then **Save** to save changes to the Folio

… and Presto

The form and Folio are complete. When the form is **Fill**ed, answers from the Questionnaire are used to fill in not only the Fields in the original form, but also Fields in the fetched caption.



SUPERIOR COURT OF WASHINGTON FOR KING COUNTY

JANE SMITH,

Plaintiff,

v.

JOHN DOE,

Defendant.

No. 123-45678

MOTION TO DISMISS CHARGES

Defendant John Doe moves the Court to rule that all charges against him be dismissed.

RESPECTFULLY SUBMITTED on this ___ day of _____.

TIC, TAC & TOE, PLLC

By: _____
Joseph Toe, Attorney at Law

Attorneys for John Doe

▲ **Questionnaires in Folios**

Related Info Overview Walkthrough Lesson Video Guide

- Folio Overview
- Questionnaire in Folios
- Create a Folio

Import and export Folios

Authors

When **Doxserá** is installed on a network, Folios are shared among all users. But you may wish to download and install sample Folios or share Folios with **Doxserá** users at other offices.

You will learn how to:

- Import a Folio document that you downloaded or received from someone else so it can be used on your computer
- Export a Folio as a document so it can be shared with **Doxserá** users who are not on your computer network

To import a Folio

- Open the Folio document that you downloaded or received
- Click **Folios** to open the Folios screen
- Click **Save**

WARNING: If you already have a Folio with the same name as the Folio being imported, it will be overwritten with the imported Folio.

To export a Folio

- Click **Folios** and select a Folio
- Select any Passage and click **Edit Content of Passage**
- Save the resulting Word document and send it to the recipient

▲ **Import and export Folios**

Related Info

Overview Walkthrough Lesson Video Guide

Folio Overview

Folios and Styles

Authors & Users

If the format of a Passage changes when it is inserted into a document, styles are likely the culprit

You will learn how to:

- Copy styles between Folios and forms
- Control format when using **Fetch** or **Fetcher**

Microsoft Word's "styles" feature is often used to format text. It's possible for the format of identically named styles in two documents to differ. For example, the "Heading 1" style in Folio X might be **bold and underlined**, while the "Heading 1" style in Form Y might be *italic and blue*. When a Passage from Folio X is inserted into Form Y, headings that were **bold and underlined** in the source Folio become *italic and blue* in the target form. This effect is often undesirable, and can be managed in two ways:

- Make styles in the Folio and the target form identical.
- Choose formatting options as Passages are fetched.

1

To make styles identical

a Open a target form into which Passages will be inserted

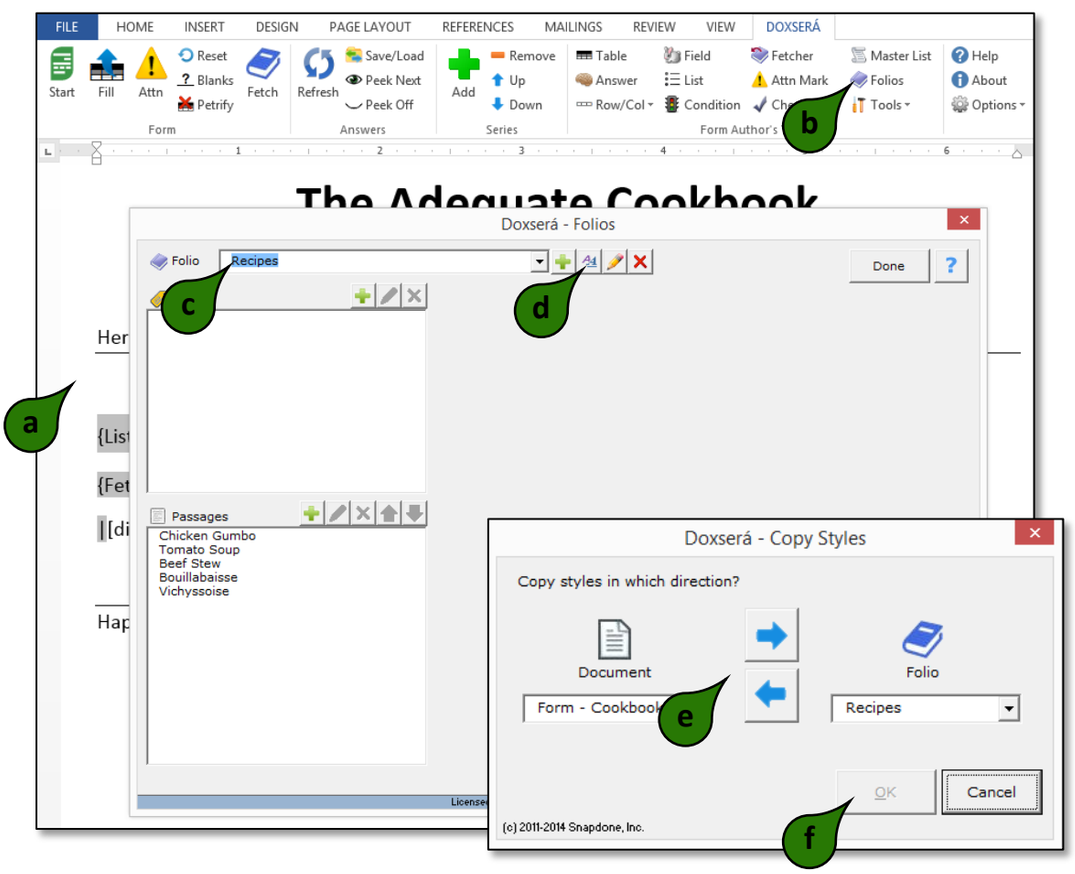
b Click **Folios**

c Select the source Folio

d Click the **styles** icon

e Click the right arrow to copy styles from the form to the Folio, or click the left arrow to copy styles from the Folio to the form

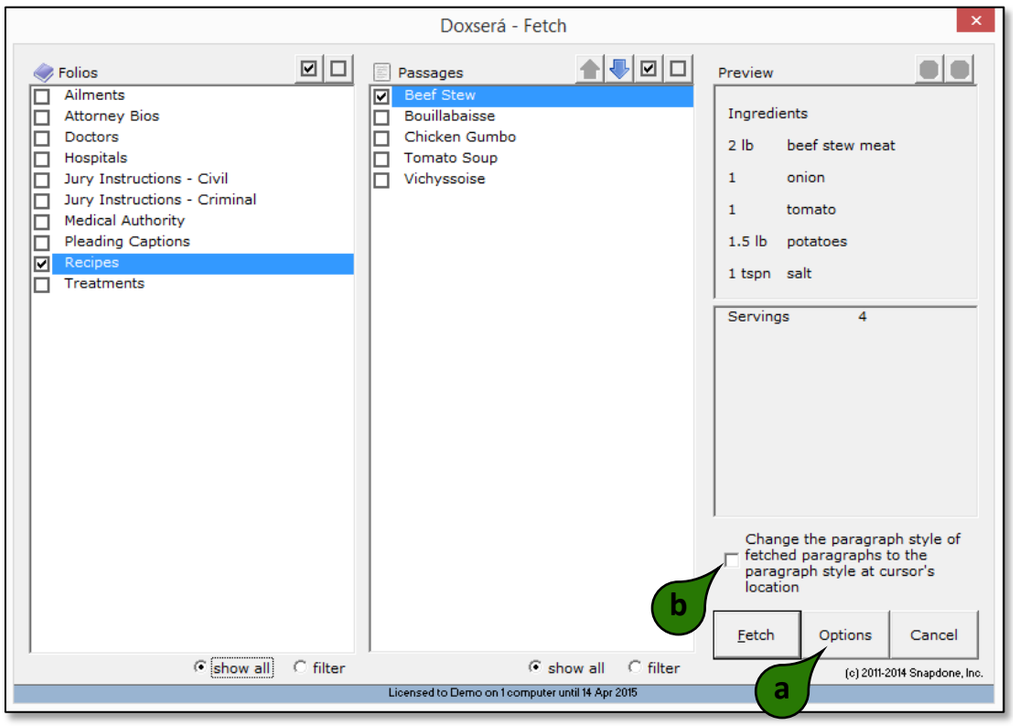
f Click **OK**



2 Styles while fetching

- Place the cursor in a form or document and click **Fetch** (if you are a form user) or **Fetcher** (if you are a form author)

a After selecting the Passages to be fetched, click **Options**



b When this box is **unchecked** (the default), paragraph styles assigned in the Folio are retained. So a paragraph that uses Heading 1 style in the Folio still uses Heading 1 style after it is inserted in the document. (But if the format of Heading 1 in the Folio differs from that in the document, the inserted text will conform to the format defined in the document.)

When this box is **checked**, paragraph styles assigned in the Folio are abandoned, and all inserted paragraphs are instead formatted with the style at the cursor's location in the document.

▲ **Folios and Styles**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview
Folios screen details
Fetch screen details

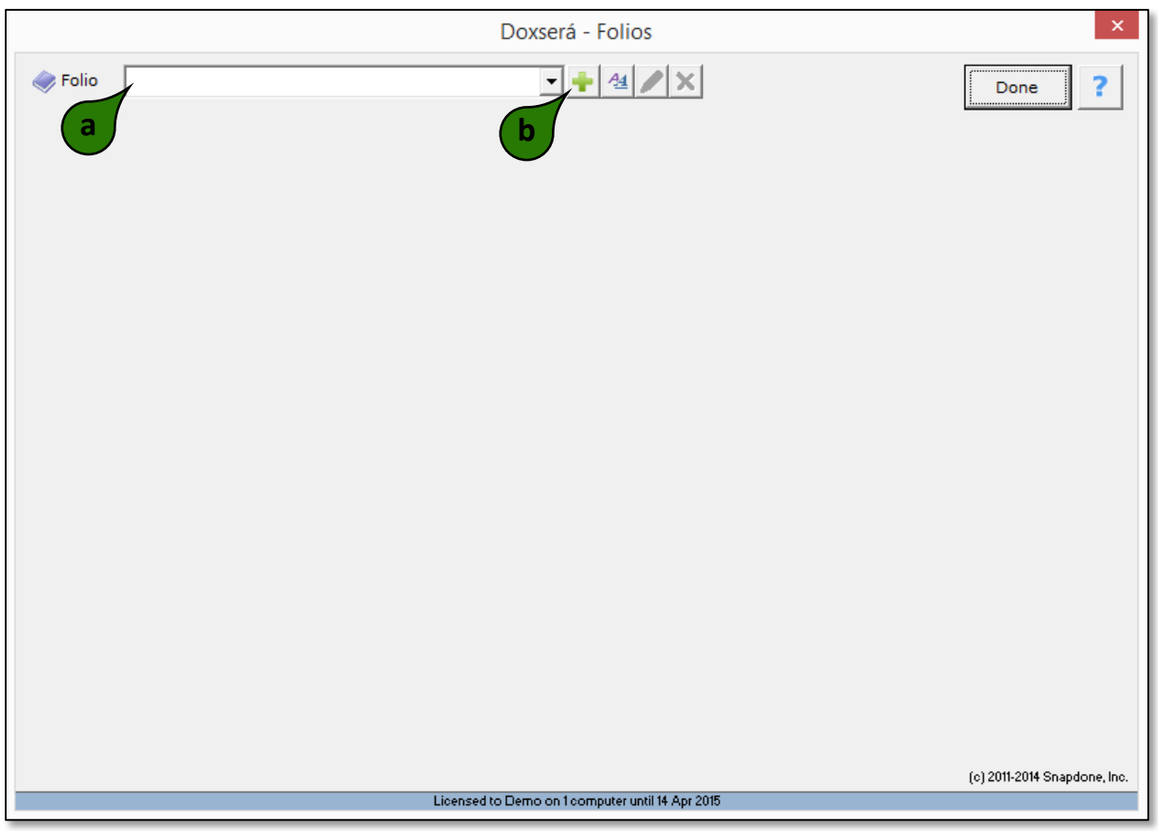
Folios screen details

Authors

Form authors use the Folios screen to manage Folios and the Passages they contain

1 Folios screen

Click **Folios** to open the Folios screen

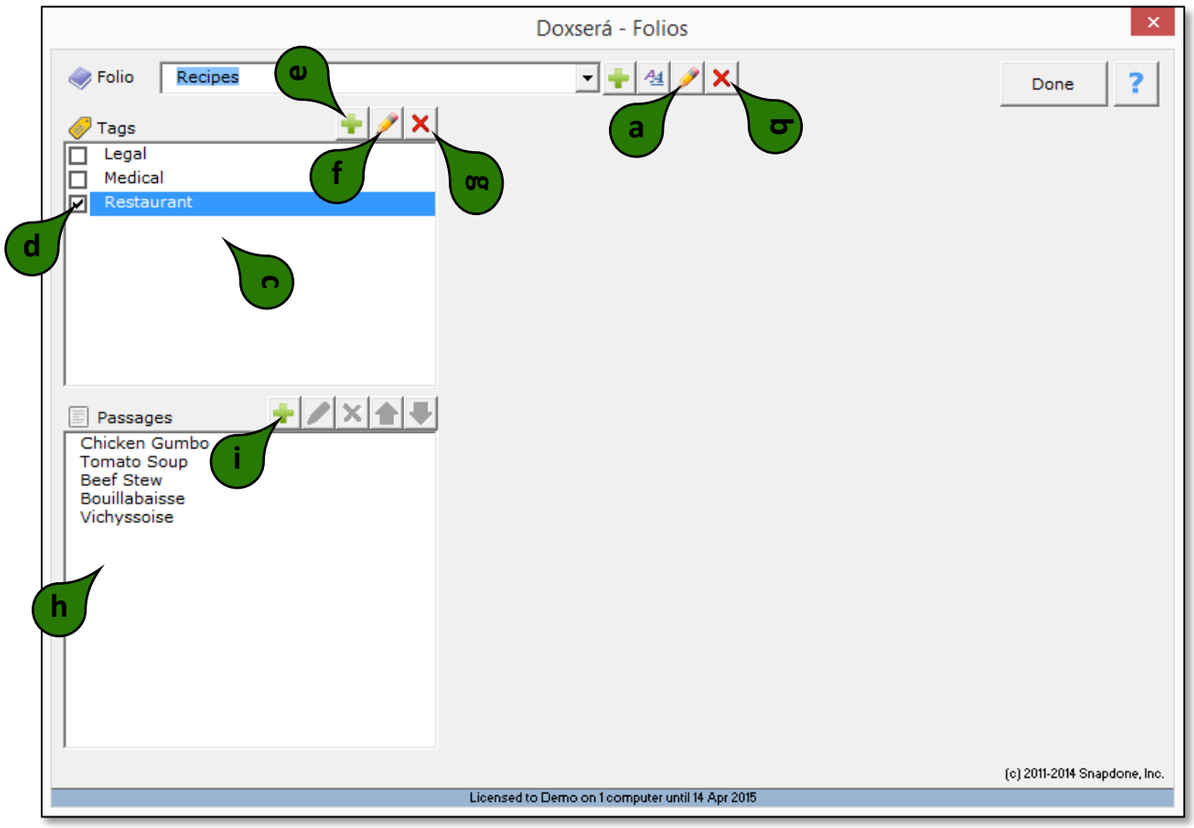


a Select a Folio here

b Click to create a new Folio. **Note:** If a Folio is selected in box **a**, you will have the option to use it as a model for the new Folio, preserving styles and any Questionnaire contained in the source Folio.

2 Folio details

After selecting a Folio:



a Click to rename the selected Folio. **Warning:** Any forms that refer to this Folio by name will need to be updated.

b Click to delete the selected Folio. **Warning:** Any forms that refer to this Folio by name will need to be updated.

c Like Passages, Folios can also be tagged. All available Folio Tags are listed here. **Note:** If a Tag is not assigned to any Folios, it will disappear from this list when this screen is closed.

d Assign a Folio Tag to the selected Folio by checkmarking it here. **Note:** Multiple Tags can be assigned to a single Folio.

e Click to add a new Folio Tag.

f Click to rename the selected Folio Tag. Any Folios that were previously tagged with this Tag will tagged with the new Tag name. **Warning:** Any forms that refer to this Tag by name will need to be updated.

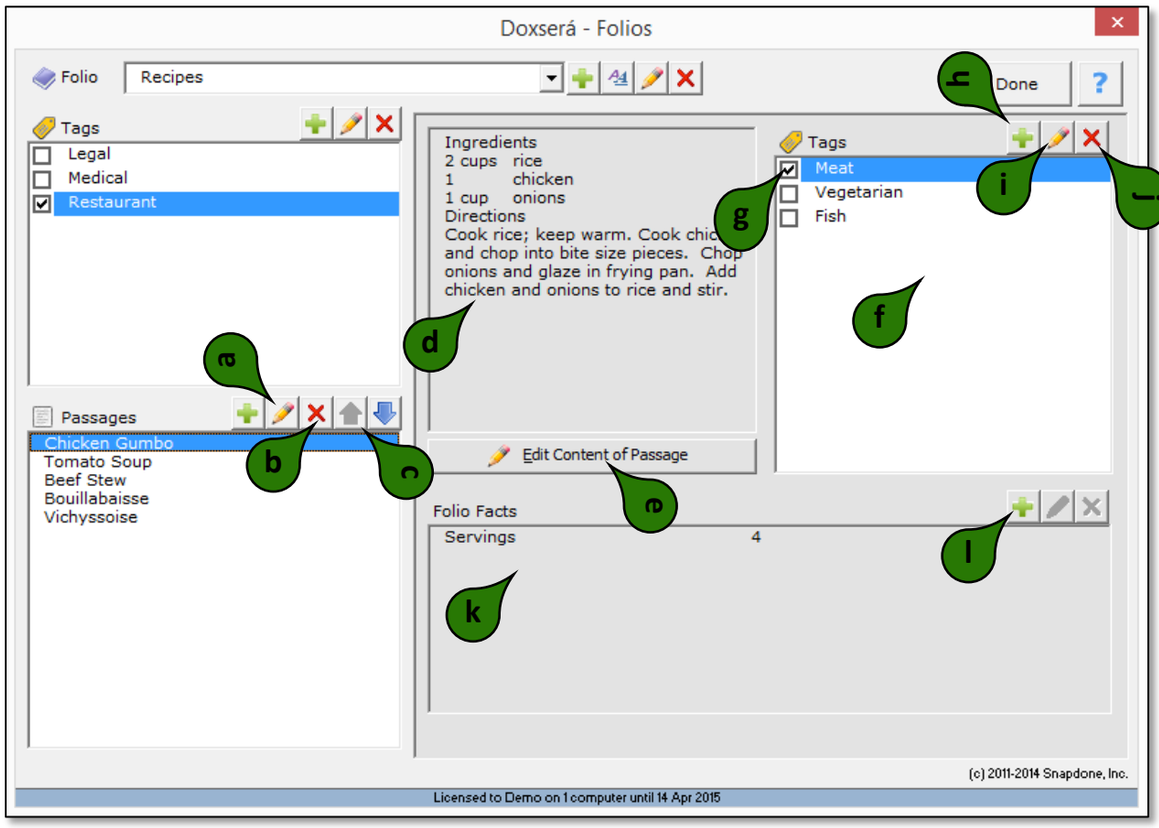
g Click to delete the selected Folio Tag. Any Folios that were previously tagged with this Tag will no longer be so tagged. **Warning:** Any forms that refer to this Tag by name will need to be updated.

h All Passages contained in the selected Folio are listed here. Select a Passage to see its details.

i Click to add a new Passage to the selected Folio.

3 Passage details

After selecting a Passage:



a Click to rename the selected Passage. **Warning:** Any forms that refer to this Passage by name will need to be updated.

b Click to delete the selected Passage. **Warning:** Any forms that refer to this Passage by name will need to be updated.

c Click the arrows to move the selected Passage up or down in the Folio. **Note:** Folio Passages are not necessarily alphabetized. In some cases, form authors may decide another arrangement is more useful.

d The content of the selected Passage is previewed here.

e Click to open a Folio document for the selected Folio, and move the cursor to the currently selected Passage. All editing of Passage contents occurs in the Folio document. When revisions are complete, click **Folios** to return to this screen.

f All Tags contained in the selected Folio are listed here.

g Assign a Passage Tag to the selected Passage by checkmarking it here. Note: Multiple Tags can be assigned to a single Passage.

h Click to add a Tag to the list of Passage Tags. **Note:** If a Tag is not assigned to any Passages, it will disappear from this list when this screen is closed.

i Click to rename the selected Passage Tag. Any Passages that were previously tagged with this Tag will be tagged with the new Tag name. **Warning:** Any forms that refer to this Tag by name will need to be updated.

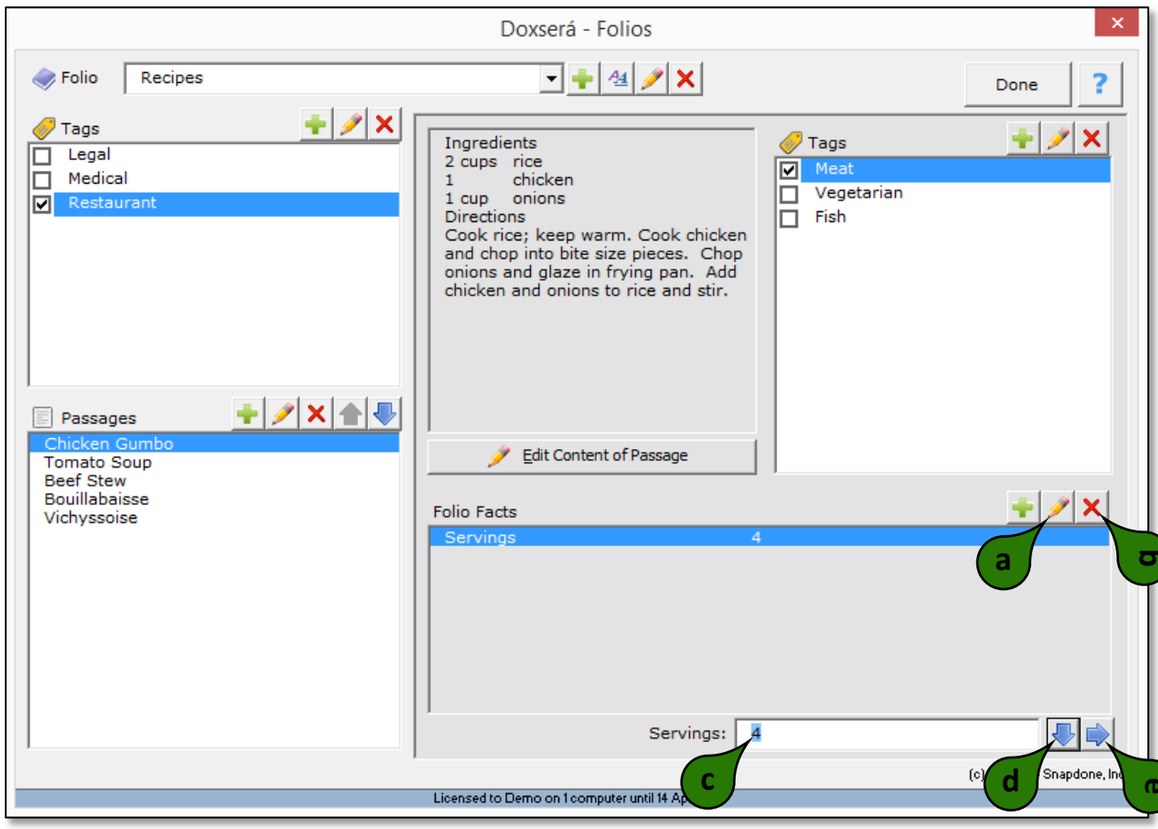
j Click to delete the selected Passage Tag. Any Passages that were previously tagged with this Tag will no longer be so tagged. **Warning:** Any forms that refer to this Tag by name will need to be updated.

k All Folio Fact labels that occur in the selected Folio are listed here. Facts that have been filled in for the selected Passage are also shown. Select a Fact to modify it. **Note:** If a Folio Fact is not filled in for any Passages in the selected Folio, it will disappear from this list when this screen is closed.

l Click to add a new label to the list of Folio Facts for the selected Folio.

4 Folio Fact details

After selecting a Folio Fact:



a Click to relabel the selected Fact in every Passages that contains it. **Warning:** Any forms that refer to this Fact by name will need to be updated.

b Click to delete the selected Fact from all Passages in this Folio. **Warning:** Any forms that refer to this Fact by name will need to be updated.

c Use this box to edit the selected Fact for the selected Passage.

d Click (or press **Enter**) to move to the next Fact in the list. **Note:** This button only appears when the cursor is in box **c**.

e Click (or press **Alt+N**) to move to the next Passage in the list. **Note:** This button only appears when the cursor is in box **c**.

▲ **Folios screen details**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview

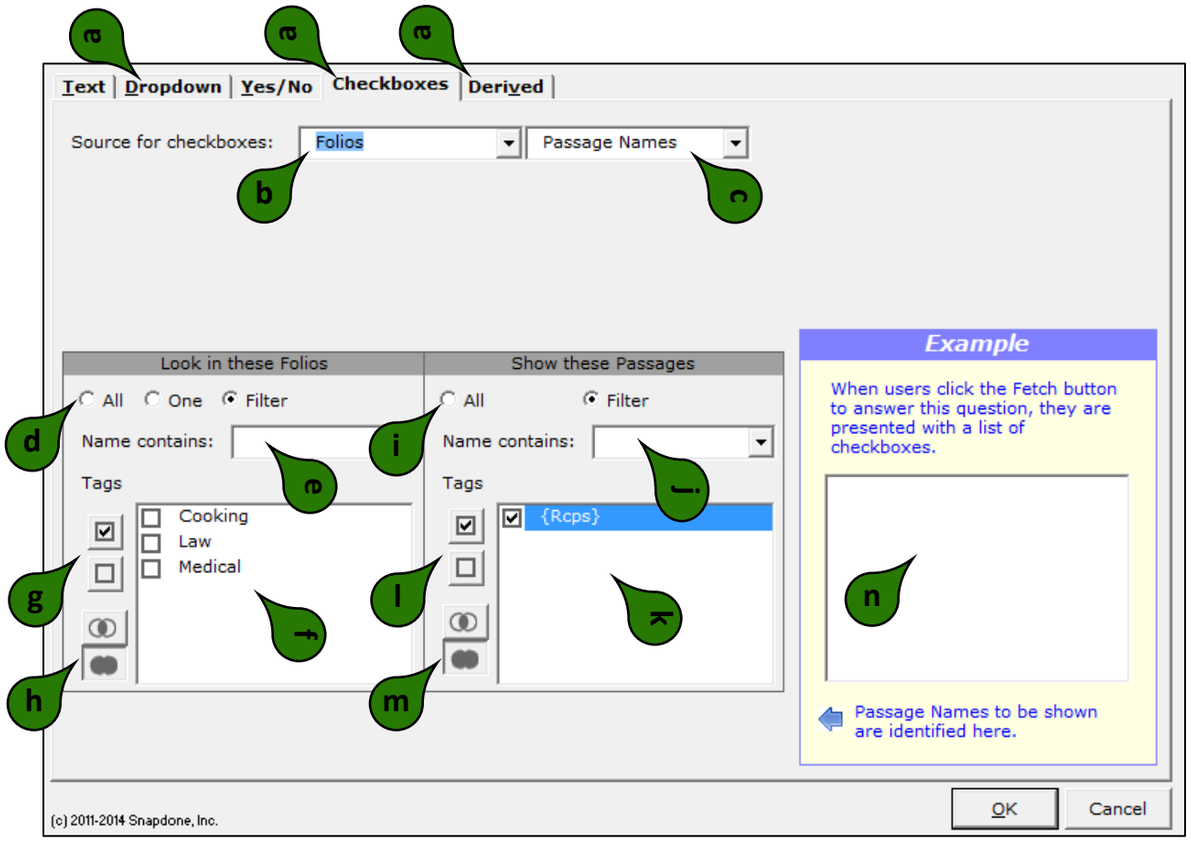
Smart Answer screen details for Folios

Authors

Form authors can create Smart Answers that prompt form users to choose from prescribed subsets of Folio names, Passage names, Folio Tags, or Passage Tags

1 Choice answers

Place the cursor in an answer box and click **Smart Answer** to open the Smart Answer screen



a Select **Dropdown** to ask the form user to select a single item, **Checkboxes** to ask for multiple items, or **Derived** to create a derived answer that generates a list of Folios names or Passage names (Folios in Derived Answers).

b Select **Folios** to draw choices from Folios and the Passages and Tags they contain.

c Select the type of choices presented to the form user: **Folio Names**, **Passage Names**, **Folio Tags**, or **Passage Tags**.

d Select **All** when the pool of choices is drawn from all Folios. Select **One** when the choices are all contained in a single Folio. Select **Filter** if the pool of choices is drawn from a set of Folios determined by Tags or by responses in the Questionnaire.

e When text is typed here, only Folios that contain that text in their name will be included as the source for choices. If the Questionnaire includes a Smart Answer that ask for Folio names, it is listed here in curly braces **{ }** -- select it if the form user's response should be used to determine Folio names.

f All Folios Tags are listed here. Checkmarked Tags determine which Folios will be included as the source for choices. If the Questionnaire includes a Smart Answer that ask for Folio Tags, it is listed here in curly braces **{ }** -- select it if the form user's response should be used to determine Folio Tags.

g Click the ☑ checked or ☐ empty box to select all Folio Tags or no Folio Tags.

h Click **all** or **any** to control how Tag filters are applied. When **all** is selected, only Folios tagged with *all* of the selected Tags are used. When **any** is selected, Folios tagged with *any* of the selected Tags are used.

i Select **All** to include all Passages in the selected Folios. Select **Filter** to include a subset of

Passages in the selected Folios.

j When text is typed here, only Passages that contain that text in their name will be included. If the Questionnaire includes a Smart Answer that ask for Passage names, it is listed here in curly braces **{ }** -- select it if the form user's response should be used to determine Passage names.

k Passage Tags in the selected Folios are listed here. Checkmarked Tags determine which Passages will be included. If the Questionnaire includes a Smart Answer that ask for Passage Tags, it is listed here in curly braces **{ }** -- select it if the form user's response should be used to determine Passage Tags.

l Click the ☑ checked or ☐ empty box to select all Passage Tags or no Passage Tags.

m Click **all** or **any** to control how Tag filters are applied. When **all** is selected, only Passages tagged with *all* of the selected Tags are included. When **any** is selected, Passages tagged with *any* of the selected Tags are included.

n The Preview shows choices that will be presented to the form user. **Note:** The choices shown reflect *current* Folio information. If Folio information has changed when the form is used, the user will see the new information.

▲ **Smart Answer screen details for Folios**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview

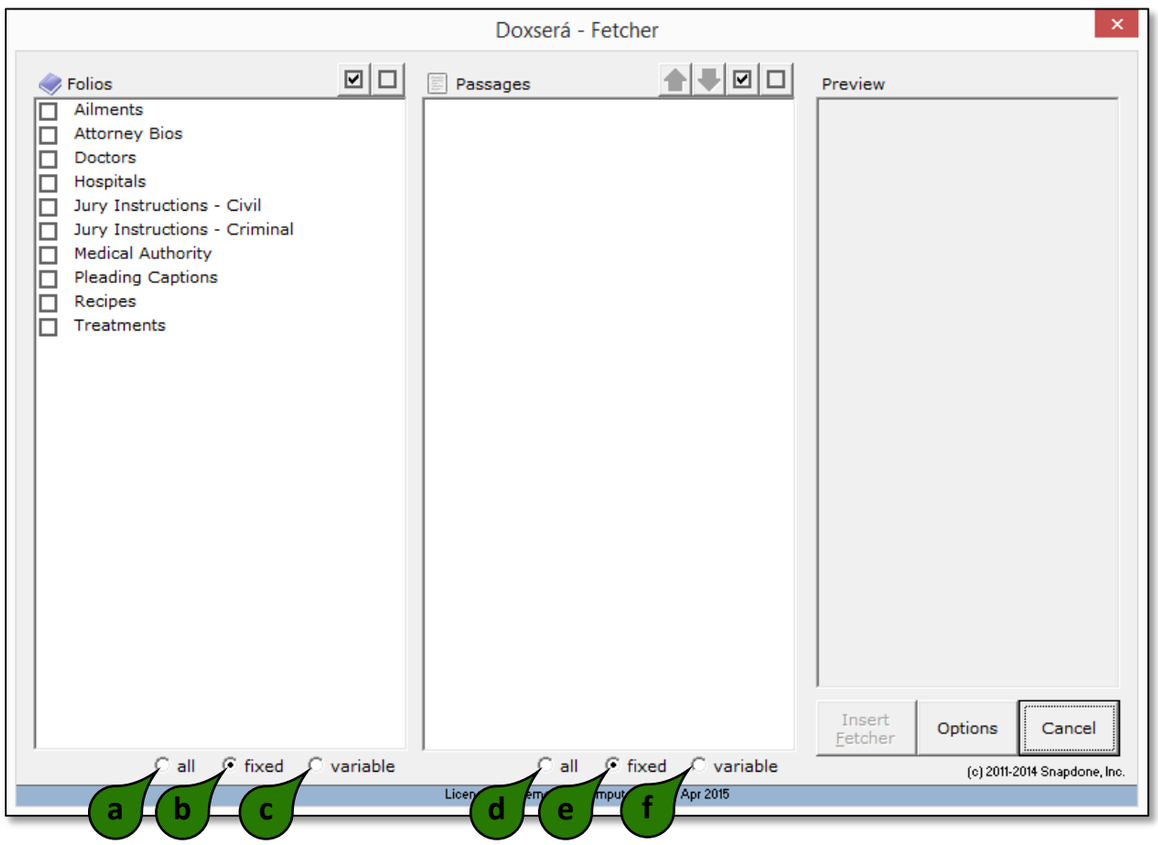
Fetcher screen details

Users

The Fetcher screen is identical to the Fetch screen (Fetch screen details), except as noted here

1 Fetcher screen

Click **Fetcher** to open the Fetcher screen



a Click **all** if the Passages to be fetched are drawn from the pool of all Folios.

b Click **fixed** if the Passages to be fetched are drawn from a limited set of Folios that you can identify right now.

c Click **variable** if the Passages to be fetched are drawn from a set of Folios that depends on tagging and/or responses in the Questionnaire.

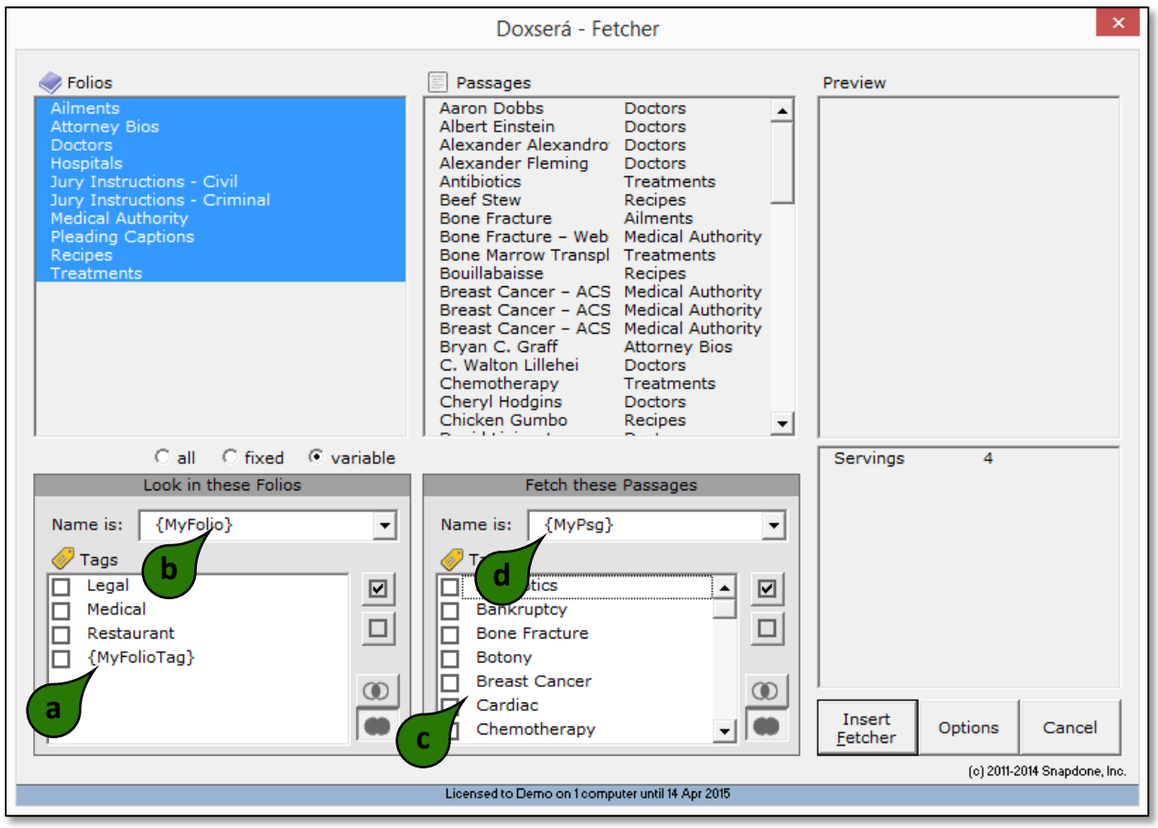
d Click **all** if all of the Passages in the selected Folios are to be fetched.

e Click **fixed** if the Passages to be fetched can be identified right now.

f Click **variable** if the Passages to be fetched depends on tagging and/or responses in the Questionnaire.

2 Filters and options

After turning on the variable panels (**c** and **f** above):



a The list of Folios Tags may include items in curly braces **{ }**. They are Questionnaire questions that ask the form user to choose Folio Tags. Select one when you want the user's response to determine which Folio Tags are selected.

b This box may include items in curly braces **{ }**. They are Questionnaire questions that ask the form user to choose Folio names. Select one when you want the user's response to determine which Folio names are selected.

c The list of Passage Tags may include items in curly braces **{ }**. They are Questionnaire questions that ask the form user to choose Passage Tags. Select one when you want the user's response to determine which Passage Tags are selected.

d This box may include items in curly braces **{ }**. They are Questionnaire questions that ask the form user to choose Passage names. Select one when you want the user's response to determine which Passage names are selected.

▲ **Fetcher screen details**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview

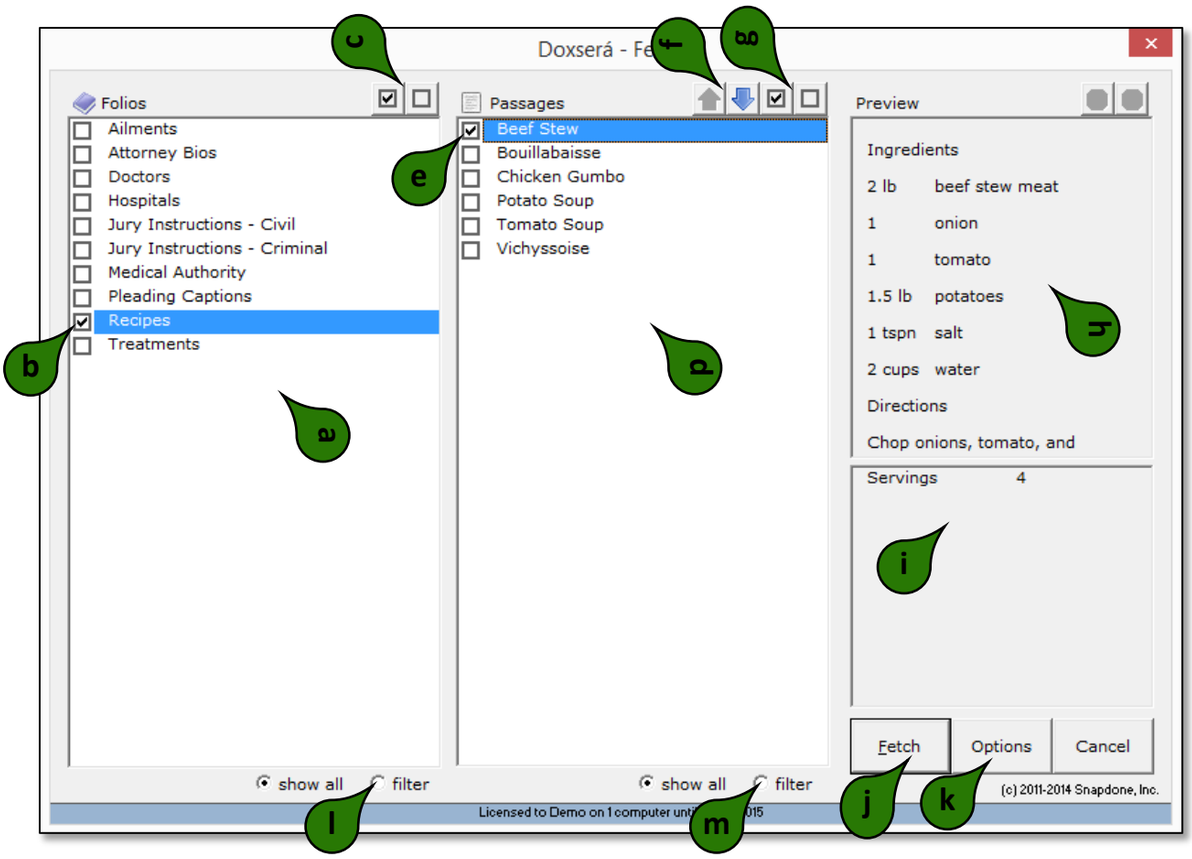
Fetch screen details

Users

The Fetch screen is used to insert Passages in a document (Fetch a Passage)

1 Fetch screen

Click **Fetch** to open the Fetch screen



a All Folios are listed here.

b Checkmark one or more Folios to see the Passages they contain.

c Click the ☑ checked or ☐ empty box to select all Folios or no Folios.

d All Passages contained in the selected Folios are listed here.

e Checkmark one or more Passages to choose them, either for insertion into a document or to respond to a "Fetch" question.

f When fetching multiple Passages, you may want to insert them in a particular order. Click the **arrows** to move the selected Passage up or down in the list.

g Click the ☑ checked or ☐ empty box to select all Passages or no Passages.

h The contents of the currently selected Passage are previewed here.

i If the currently selected Passage includes Folio Facts, they are listed here.

j After selecting Passages, click **Fetch** to either insert them in a document or respond to a "Fetch" question.

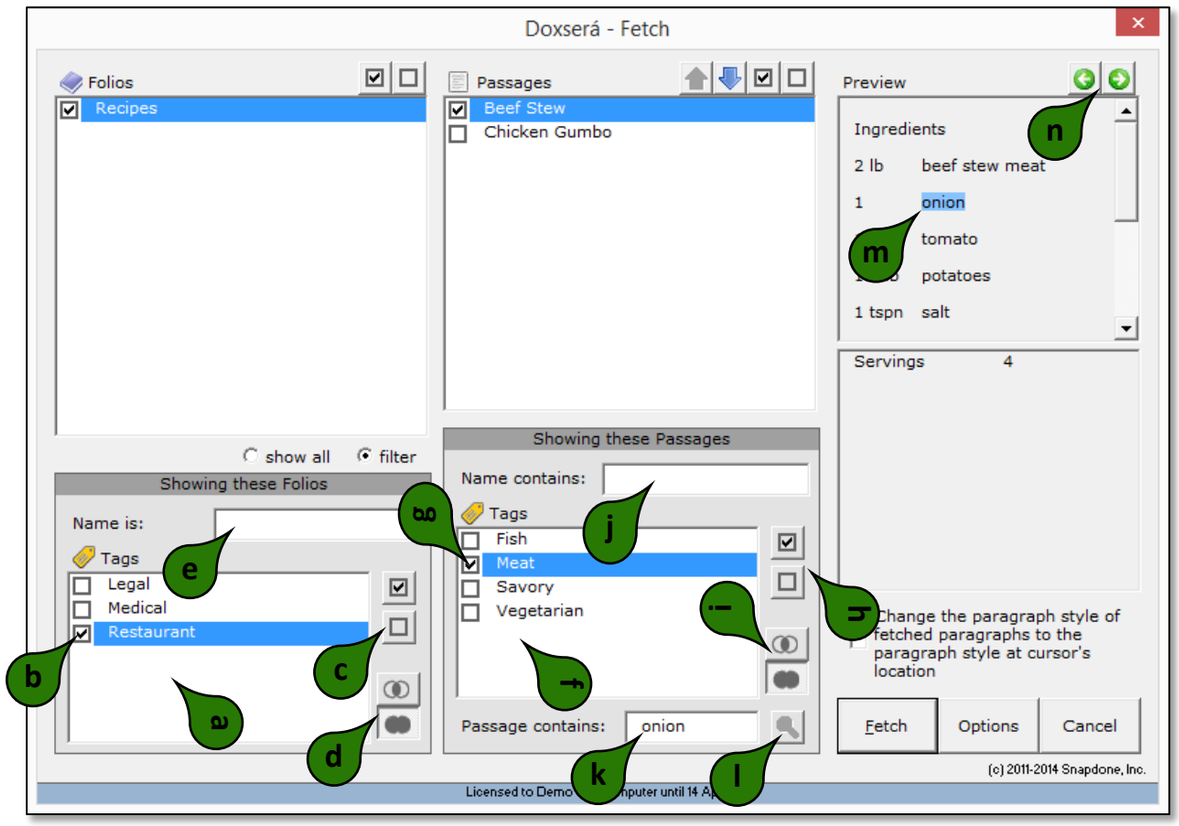
k Click **Options** to show formatting options for inserted Passages (see **2** below)

l Click **filter** to show the Folio filtering panel (see **2** below)

m Click **filter** to show the Passage filtering panel (see **2** below)

2 Filters and options

After turning on the option and filter panels (**k**, **l**, and **m** above):



a All Folios Tags are listed here.

b Checkmark one or more Folio Tags to choose which Folios are shown.

c Click the ☑ checked or ☐ empty box to select all Folio Tags or no Folio Tags.

d Click **all** or **any** to control how Tag filters are applied. When **all** is selected, only Folios tagged with *all* of the selected Tags are shown. When **any** is selected, Folios tagged with *any* of the selected Tags are shown.

e When text is typed here, only Folios that contain that text in their name are shown.

f All Passage Tags in the selected Folios are listed here.

g Checkmark one or more Passage Tags to choose which Passages are shown.

h Click the ☑ checked or ☐ empty box to select all Passage Tags or no Passage Tags.

i Click **all** or **any** to control how Tag filters are applied. When **all** is selected, only Passages tagged with *all* of the selected Tags are shown. When **any** is selected, Passages tagged with *any* of the selected Tags are shown.

j When text is typed here, only Passages that contain that text in their name are shown.

k To search the content of Passages, type a search term here and click the **search** icon to show Passages that contain it.

l This is the **search** icon. Click it after typing a search term in box **k**.

m After searching with **k** and **l**, the search term is highlighted in the preview of found Passages.

n After searching with **k** and **l**, click the arrows to highlight the next occurrence of the search term in the Preview panel.

▲ **Fetch screen details**

Related Info Overview Walkthrough Lesson Video Guide

Folio Overview

Doxserá™

powered by TheFormTool

Detailed Examples

Contents

Example 1: Pronouns and Plurals

What you will learn

- Smart Answer: Text-With-Pronoun
- Smart Answer: Dropdown
- Pronoun Fields
- Singular/Plural Fields

This deceptively short sample document is chock full of opportunities to try out Pronoun answers, Pronoun Fields, and Singular/Plural Fields.

We'll spend lots of time on these two sentences. When we're done, the form will adapt to every possible combination of plaintiff(s) and defendant(s) – whomever and whatever – with automatic and flawless grammatical shifts.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

> Bob Lobb ("Plaintiff") hereby requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

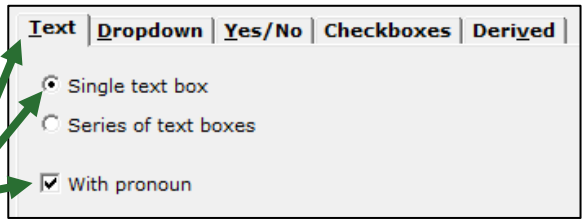
Step 1. Create the Questionnaire

		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
Client	Name of client?	
ClientParty	What party is the client?	
Opponent	Name of opponent?	
OppParty	What party is the opponent?	

Step 2. Create Smart Answers

When asking for the client's name, we also need to ask for a pronoun. Place the cursor in the answer box for the Client question and click 🧠 **Smart Answer**.

Select **Text**, **Single text box**, **With pronoun**, and click **OK**.



Do the same for the question labeled Opponent that asks for the opponent's name.

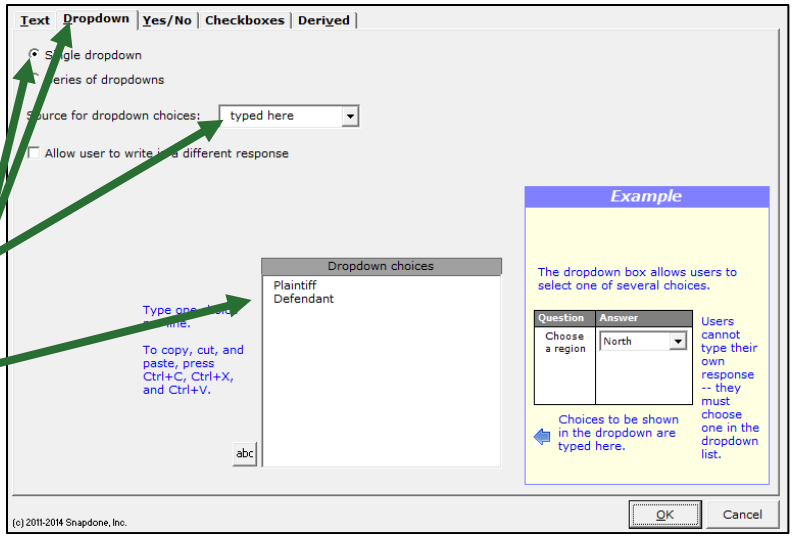
When asking for the client party, we'll offer two choices in a dropdown box.

Place the cursor in the answer box for the ClientParty question and click **Smart Answer**.

Select **Dropdown**, **Single dropdown**, **typed here**.

Dropdown choices are added here. Type **Plaintiff**, press **Enter**, then type **Defendant**.

Your end result should look like the screen shown here. Click **OK**.



Do the same for the question labeled OppParty that asks for the opponent's party.

Step 3. Add Basic Fields

Take another look at the document. We need to replace "Bob Lobb" with a Field for the client's name.

Select **Bob Lobb** and click **Field**, **Client**, **Insert Field**, **Done**.

Bob Lobb ("Plaintiff") hereby requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

With our first Field in place, the form looks like this.

Replace the word "Plaintiff" with a **{ClientParty}** Field (twice), the name "AAA Company" with an **{Opponent}** Field, and the word "Defendant" with an **{OppParty}** Field (twice).

{Client} ("Plaintiff") hereby requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

With all of those basic Fields in place, the form looks like this.

{Client} ("{ClientParty}") hereby requests that the Court grant his motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

Step 4. Add Pronoun Fields

To reap even more benefits, we want to make it smart enough to handle pronouns automatically, no matter whether our client is male, female, a married couple, or a business entity.

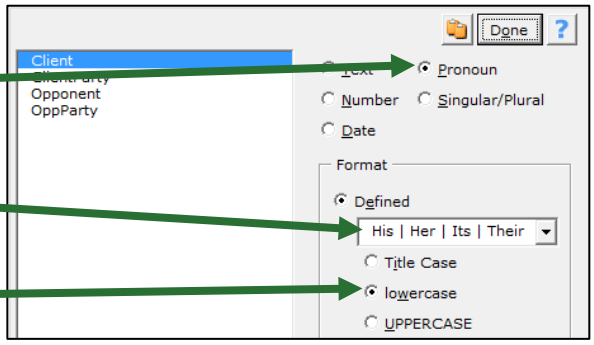
Select the word **his** and click **Field**, **Client**, **Insert Field**.

{Client} ("{ClientParty}") hereby requests that the Court grant his motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

Select **Pronoun**.

Select **His|Her|Its|Their** from the dropdown box.

Select **lowercase** and click **Done**.



After placing the first pronoun Field, the form looks like this. (Note the addition of the {his|her} pronoun Field.)

> {Client} ("{ClientParty}") hereby requests that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

Select the word **it** and make it a Pronoun Field too. This time, however, you'll select **Opponent** instead of **Client**, and select **He|She|It|They** instead of **His|Her|Its|Their**.

> {Client} ("{ClientParty}") hereby requests that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

With both pronoun Fields in place, the form looks like this.

> {Client} ("{ClientParty}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he|she} should be required to pay {ClientParty}'s attorney fees.

Step 5. Add Singular/Plural Fields

We want this form to give flawless results even when our client is a married couple. Note the differences in these two phrases:

Bertrand Loopin ("Plaintiff") hereby requests…

Bertrand and Agnes Loopin ("Plaintiffs") hereby request…

When there is one client, an **s** appears at the end of the verb **requests**. When there are two clients, an **s** appears at the end of the noun **Plaintiffs**. We'll use Singular/Plural Fields to handle this grammatical requirement.

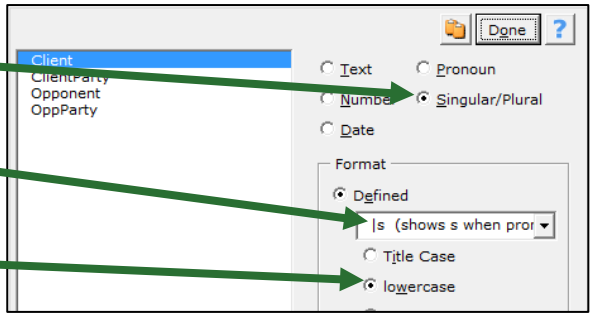
Place the cursor immediately after the first {ClientParty} Field and click **Field**, **Client**, **Insert Field**.

> {Client} ("{ClientParty}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}'s attorney fees.

Select **Singular/Plural**.

Select **|s (shows s when pronoun is plural)**.

Select **lowercase** and click **Done**.



After placing the first Singular/Plural Field, the form looks like this. (Note the addition of the {s} Field.)

{Client} ("{ClientParty}{s}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}'s attorney fees.

The same idea applies every time the {ClientParty} Field appears. Rather than creating another Singular/Plural Field from scratch, copy that first {s} Field and paste it near the end of the form as shown here.

{Client} ("{ClientParty}{s}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.

Now select the **s** at the end of **requests**. We're going to replace this character with another Singular/Pronoun Field.

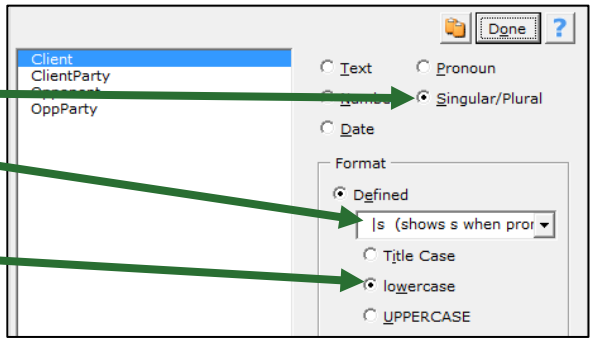
{Client} ("{ClientParty}{s}") hereby requests that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.

Click **Field**, **Client**, **Insert Field**.

Select **Singular/Plural**.

Select **|s (shows s when pronoun is singular)**. (Note that this is the opposite of our selection last time.)

Select **lowercase** and click **Done**.



After placing those three Singular/Plural Fields, the form looks like this. (Note the {s} Field at the end of **request**.)

{Client} ("{ClientParty}{s}") hereby request{s} that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.

Using the same methods, add Singular/Plural Fields after each of the two {OppParty} Fields. In the **Field** screen you'll be selecting **Opponent** and **|s (shows s when pronoun is plural)**.

Select the word "has" and replace it with a Singular/Plural Field. In the **Field** screen you'll be selecting **Opponent**, **has|have**, and **lowercase**. After all that, you'll be relieved to hear the form is nearly complete.

Notice the **'s** near the end of the form. When there is only one client, proper spelling requires an apostrophe and an **s**. But when there are two clients, only the apostrophe is required. We'll add one more Singular/Plural Field to handle this quandary.

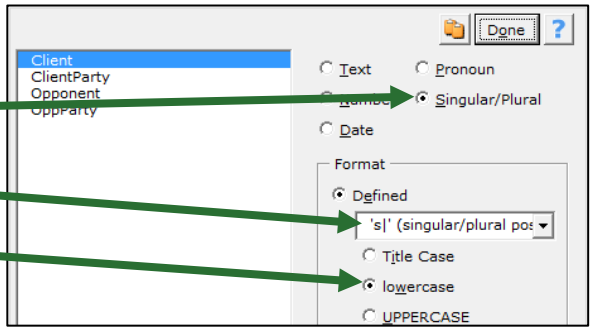
{Client} ("{ClientParty}{s}") hereby request{s} that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}{s}"). The {OppParty}{s} {has/have} produced no evidence, so {he/she} should be required to pay {ClientParty}{s}'s attorney fees.

Select both the apostrophe and the **s** and click **Field**, **Client**, **Insert Field**.

Select **Singular/Plural**.

Select **'s|' (singular/plural possessive)**.

Select **lowercase** and click **Done**.



And the form is complete. Be reassured that this is an unusually high concentration of Fields. Most forms you create will not contain 15 Fields in 2 sentences – this example was contrived to pack lots of stuff into a small space just to give you a good workout.

{Client} ("{ClientParty}{s}") hereby request{s} that the Court grant {his/her} motion and rule against {Opponent} ("{OppParty}{s}"). The {OppParty}{s} {has/have} produced no evidence, so {he/she} should be required to pay {ClientParty}{s}{'s} attorney fees.

Readability. You may have noticed that the three {s} Fields are visually indistinguishable, even though they are different – two of them add an **s** when the pronoun is *plural*, and the third adds an **s** when the pronoun is *singular*. **Doxserá** abbreviates Fields this way to keep the form readable, but you can always see the full details of any Field (and modify them if you like) by selecting the Field and clicking **Field**.

THE PAYOFF

Now that you've taken such care building this superbly intelligent form, look at how much time it saves the form user. The charts below show the end result when the Questionnaire is filled in several different ways. Note (1) how very little information is asked of the form user; and (2) how impeccably letter-perfect the end result is, each and every time.

Here the client/plaintiff is a human and the opponent/defendant is a business entity.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Client	Name of client?	Betty Fisk [she]
ClientParty	What party is the client?	Plaintiff
Opponent	Name of opponent?	AAA Company [it]
OppParty	What party is the opponent?	Defendant

Betty Fisk ("Plaintiff") hereby requests that the Court grant her motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

What if the client/defendant is a company and the opponent/plaintiff is a married couple?

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Client	Name of client?	Generics, Inc. [it]
ClientParty	What party is the client?	Defendant
Opponent	Name of opponent?	Bob and Kay Roe [they]
OppParty	What party is the opponent?	Plaintiff

Generics, Inc. ("Defendant") hereby requests that the Court grant its motion and rule against Bob and Kay Roe ("Plaintiffs"). The Plaintiffs have produced no evidence, so they should be required to pay Defendant's attorney fees.

Here the client/plaintiff is a whole mess of people, and the opponent/defendant is one person.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Client	Name of client?	John Does #1 through 38 [they]
ClientParty	What party is the client?	Plaintiffs
Opponent	Name of opponent?	Herb Chappe [he]
OppParty	What party is the opponent?	Defendant

John Does #1 through 38 ("Plaintiffs") hereby request that the Court grant their motion and rule against Herb Chappe ("Defendant"). The Defendant has produced no evidence, so he should be required to pay Plaintiffs' attorney fees.

Example 2: Conditions

What you will learn

- Adding Conditions
- Condition markers

Use Conditions to include or exclude text depending on the form user's response to a question in the Questionnaire. We'll turn this document into a form, adding Conditions to make it work even when the signer is not married. If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

My name is Terry Vance. My spouse's name is Gena Vance.

Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Step 2. Add Fields

Replace the names in the document with Fields:

Select **Terry Vance** and click **Field**, **Signer**, **Insert Field**, **Done**.

Select **Gena Vance and**, click **Field**, **Spouse**, **Insert Field**, **Done**.

My name is {Signer}. My spouse's name is {Spouse}.

Step 3. Add Conditions

Type an alternate second sentence that will be used when the signer is unmarried.

My name is {Signer}. My spouse's name is {Spouse}. I am not married.

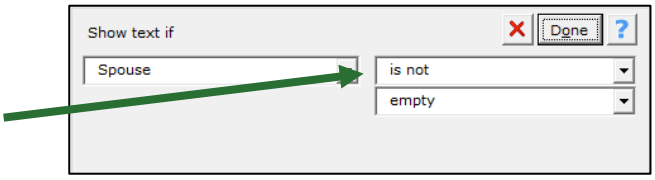
Finally, we'll add two Conditions so that the proper second sentence appears when the form is used.

Select the highlighted text (including the two spaces at the end of the sentence) and click **Condition**.

My name is {Signer}. My spouse's name is {Spouse}. I am not married.

Select **Spouse** and click **Add Condition**.

We only want this sentence to appear when there is a spouse, so select **is not empty** and click **Done**.



We'll treat the last sentence similarly, but with an opposite Condition.

Select the highlighted text and click **Condition**, **Spouse**, **Add Condition**. This time select **is empty** and click **Done**.

My name is {Signer}. {if:My spouse's name is {Spouse}. }I am not married.

Take a close look at the markers (colored red here) that now bracket the sentence:

{if:My spouse's name is {Spouse}. }

Begin Condition Marker — Conditional Text — End-of-Condition Marker

Everything between the markers is removed from the finished document unless the Condition is met. To review (or make changes to) the Condition, place the cursor in the beginning marker and click **Condition**.

Conditions Are Flexible. If you later change your mind about the material that should be contained within a Condition, feel free to edit it. Type or copy new material between the two markers, or move the markers themselves – there's no need to recreate the Condition from scratch. To remove a Condition, be sure to delete both the beginning marker and its corresponding end marker.

Conditions can be *nested* inside other Conditions, but not *overlapped*. That means the innermost end-of-Condition marker marks the end of the innermost Condition.

{if:I live in {if:{City}, }{State}. }

Outer Condition — Inner Condition — End of Inner Condition — End of Outer Condition

If the outer Condition is false, all of its contents are removed from the finished document – including the whole inner Condition, regardless of whether it's true or false.

Returning to our sample form, we'll give the last sentence the same treatment as the preceding one, but with an opposite Condition.

Select the highlighted text and click **Condition**, **Spouse**, **Add Condition**. This time select **is empty** and click **Done**.

My name is {Signer}. {if:My spouse's name is {Spouse}. }I am not married.

The finished form looks like this.

My name is {Signer}. {if:My spouse's name is {Spouse}. }{if:I am not married.}

THE PAYOFF

Now look at how the form responds to different circumstances when it is used. When a Spouse is typed, the result looks like this.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	Jerome Miller

My name is Betty Miller. My spouse's name is Jerome Miller.

And when the Spouse answer is left empty, the result looks like this.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

My name is Betty Miller. I am not married.

Example 3: Compound Conditions (aka Boolean Conditions)

Before you begin

- Example 2: Conditions ..... page 7

What you will learn

- Compound Conditions
- Boolean operators (AND, OR, XOR)
- Controlling order of operations with parentheses

Use compound Conditions when a decision depends on several pieces of information.

Example 3a: This AND That

In the document shown here, the second sentence should appear when (1) the total purchase price is more than $100; AND (2) the shipping address is in Oregon.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

> Your order totaling $___ will be shipped to ___. You qualify for free shipping!

Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Total	What's the total order amount?	
Addr	What's the shipping address?	

Step 2. Add Fields

Replace the blanks in the document with Fields:

Select the first blank and click **Field**, **Total**, **Insert Field**, **Number**, **1,000.00 (exactly 2 decimals)**, **Done**.

Select the second blank and click **Field**, **Addr**, **Insert Field**, **Done**.

> Your order totaling ${Total} will be shipped to {Addr}. You qualify for free shipping!

Step 3. Add the Condition

We'll create the compound Condition by first creating a Condition that checks to see if the Total is more than $100.

Select the second sentence and click **Condition**, **Total**, **Add Condition**.

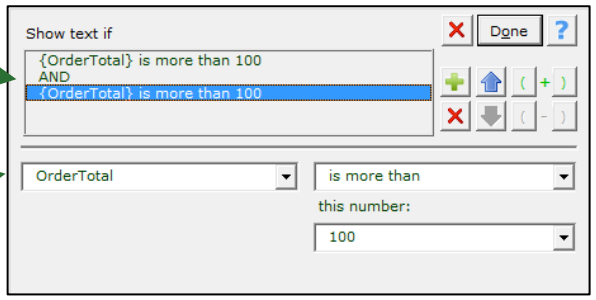
> Your order totaling ${Total} will be shipped to {Addr}. You qualify for free shipping!

Select **OrderTotal is more than 100**. That's the first of two criteria for this compound Condition.

Then click **and/or** to add a second criterion.

A list of this Condition's criteria appears in the top part of the screen, and a copy of the first criterion has been added as the second criterion.

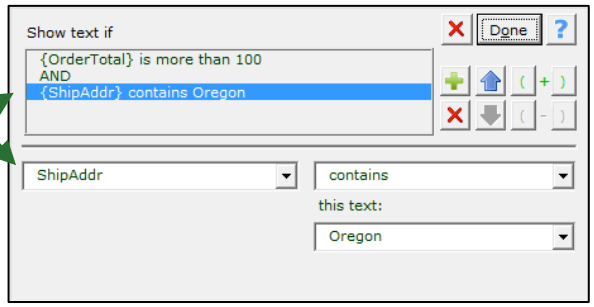
The second criterion is selected, so you can modify it in the bottom part of the screen.



Select **ShipAddr contains Oregon** in the bottom part of the screen.

Note that the second criterion in the top part of the screen now says **{ShipAddr} contains Oregon**.

When you need to adjust a criterion in the top part of the screen, simply select it then make changes in the bottom part of the screen.



Here's the finished form. The second sentence will only appear in the finished document when the total order is more than $100 AND the shipping address is in Oregon.

Your order totaling ${OrderTotal} will be shipped to {ShipAddr}. {if:You qualify for free shipping!}

THE PAYOFF

The form considers two answers when deciding whether to include the second sentence.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Total	What's the total order amount?	75
Addr	What's the shipping address?	111 Main Street, Bend, Oregon 88888

Your order totaling $75.00 will be shipped to 111 Main Street, Bend, Oregon 88888.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Total	What's the total order amount?	250
Addr	What's the shipping address?	111 Main Street, Bend, Oregon 88888

Your order totaling $250.00 will be shipped to 111 Main Street, Bend, Oregon 88888. You qualify for free shipping!

Example 3b: This OR That AND the Other Thing

Compound Conditions are not limited to two criteria – you may stack up as many criteria as you like. You could specify that a particular sentence should appear only when the month is January OR February OR March; AND the product ID number begins with "39"; AND the sale arose in either Region 3 OR Region 6. Constructing such elaborate compound Conditions requires judicious use of parentheses and three Boolean operators: AND, OR, XOR.

We'll create a past due notice that uses one of two sentences, depending three pieces information. The first sentence will be used when: (a) the total amount due is greater than $1,000 OR the last payment was more than 90 days ago; AND (b) the customer is not on our list of Preferred Customers.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

Past Due Notice

Please submit the total amount due ($____) within two weeks or we will commence legal action. The total amount due is $___. Please submit a minimum payment of half that amount at your earliest convenience.

Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
TotalDue	What's the total amount due?	
Over90	Is the last payment over 90 days old?	
IsPC	Is this a Preferred Customer?	

Step 2. Create Smart Answers

Make both the **Over90** answer and the **IsPC** answer Yes/No answers by placing the cursor in the answer box and clicking 🧠 **Smart Answer**, **Yes/No**.

Step 3. Add Fields

Replace the blanks in the document with Fields:

Select the first blank and click **Field**, **TotalDue**, **Insert Field**, **Number**, **1,000.00 (exactly 2 decimals)**, **Done**.

Copy the first Field and paste it to replace the second blank.

Your form should then look like this.

Past Due Notice

Please submit the total amount due (${TotalDue}) within two weeks or we will commence legal action. The total amount due is ${TotalDue}. Please submit a minimum payment of half that amount at your earliest convenience.

Step 4. Add Conditions

Select the first sentence and click **Condition**, **TotalDue**, **Add Condition**.

Past Due Notice

Please submit the total amount due (${TotalDue}) within two weeks or we will commence legal action. The total amount due is ${TotalDue}. Please submit a minimum payment of half that amount at your earliest convenience.

The inclusion of this sentence in the finished document depends on three criteria:

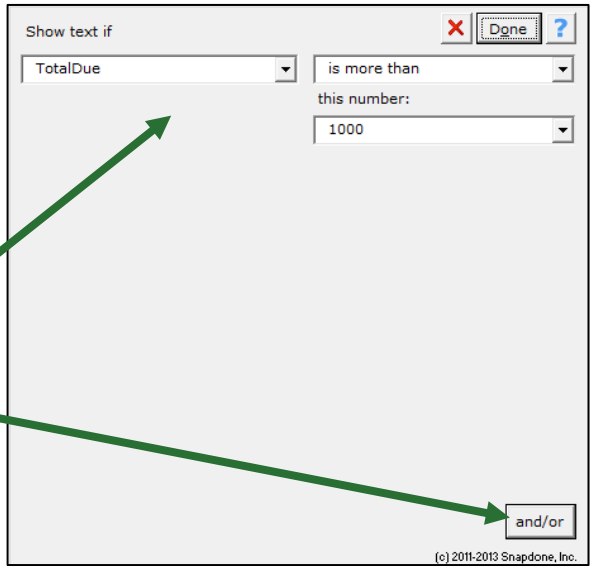
(1) The amount due is over $1,000.

(2) The last payment was more than 90 days ago.

(3) The customer is not Preferred.

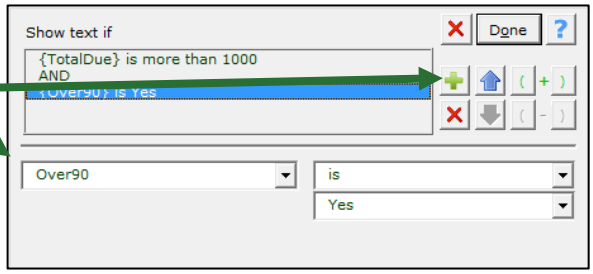
First we'll enter the first criterion: select **TotalDue is more than 1000**.

Then click **and/or** to add a second criterion.

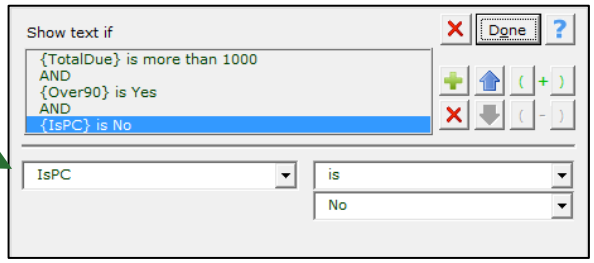


Change the second criterion to **Over90 is Yes**.

Click plus to add a third criterion.



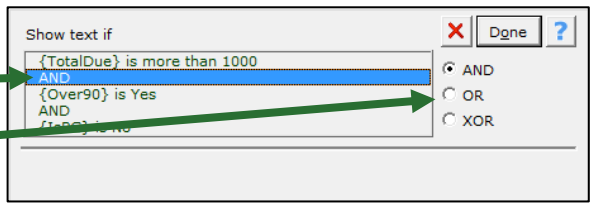
Change the third criterion to **IsPC is No**.



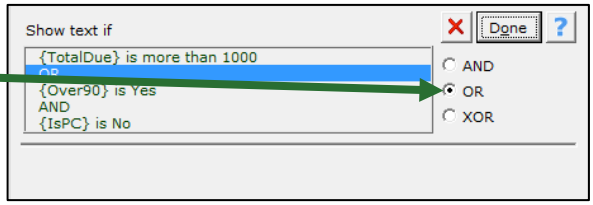
Now we'll change the first AND to OR.

Select **AND**.

New choices appear on the right side of the screen.



Select **OR** so the Condition will be true when (a) the total amount is more than $1,000; OR (b) the last payment is over 90 days old.



Parentheses and Order of Operation. Remember back in math class when you learned that **(1 + 2) x 3** is different than **1 + (2 x 3)**? The parentheses control the order of operations. So the first statement results in **9**, while the second statement results in **7**.

Well, parentheses are just as important in Boolean Conditions (Conditions that use AND, OR, and XOR). For example, suppose we wanted to find everyone with a first name of Jon or John, and a last name of Smith. This statement would work perfectly, finding John Smith and Jon Smith:

(<u>{FirstName} is John</u> **OR** <u>{FirstName} is Jon</u>) **AND** {LastName} is Smith

But this statement would fail, finding John Jones, John Adams, John Smith, and Jon Smith:

<u>{FirstName} is John</u> **OR** (<u>{FirstName} is Jon</u> **AND** {LastName} is Smith)

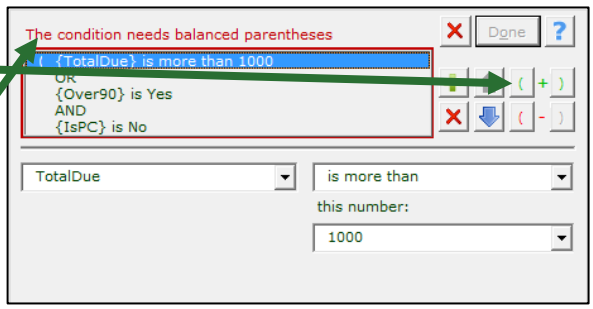
In our Past Due Notice example, we want to determine whether or not:

(<u>{TotalDue} is more than 1000</u> **OR** <u>{Over90} is Yes</u>) **AND** <u>{IsPC} is No</u>

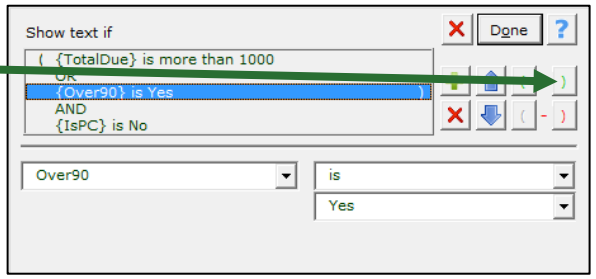
Note the placement of the parentheses above. They tell us that the first two criteria will be evaluated first. (Is the total due more than $1,000 **OR** the last payment older than 90 days?) If the answer to that is true AND the third criteria is true (not a Preferred Customer), then the whole Condition is true.

To add the left parenthesis at the beginning of the Condition, select the first criterion and click the (left parenthesis button.

A message at the top of the screen warns that the parentheses are now out of balance: 1 on the left and 0 on the right.



To add the right parenthesis where needed, select the second criterion and click the) right parenthesis button.



The out-of-balance warning disappears, since we now have 1 parenthesis on the left and 1 on the right.

Click **Done** and the Condition is complete.

Now we'll create a Condition to control when the second sentence appears. The second sentence should appear when:

{TotalDue} is less than $1,000.01 **OR** {Over90} is No **OR** {IsPC} is Yes

(Parentheses are not needed this time, since a true result for any one of the three criteria is by itself enough to make the entire Condition true – we don't care what order is used when the three criteria are evaluated.)

Select the second sentence and click **Condition**, **TotalDue**, **Add Condition**.

Past Due Notice

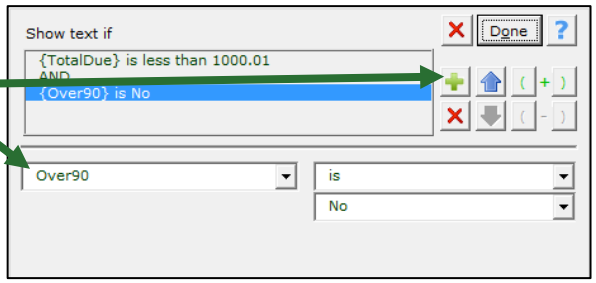
{if:Please submit the total amount due ($**{TotalDue}**) within two weeks or we will commence legal action. }The total amount due is ${TotalDue}. Please submit a minimum payment of half that amount at your earliest convenience.

For the first criterion, select **TotalDue is less than 1000.01**.

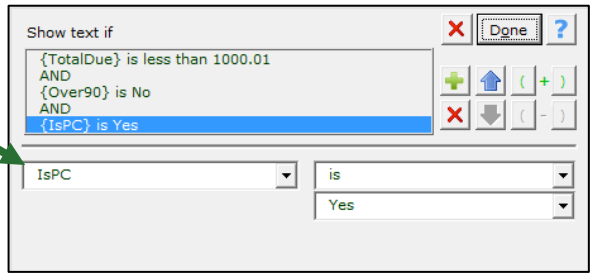
Then click **and/or** to add a second criterion.

Change the second criterion to **Over90 is No**.

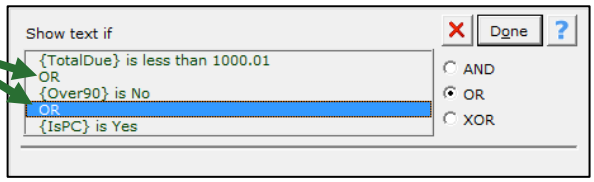
Click plus to add a third criterion.



Change the third criterion to **IsPC is Yes**.



Change both of the **AND**s to **OR**s, and click **Done**.



Here's the finished form.

Past Due Notice

{if:Please submit the total amount due (${TotalDue}) within two weeks or we will commence legal action. }{if:The total amount due is ${TotalDue}. Please submit a minimum payment of half that amount at your earliest convenience.}

THE PAYOFF

The form uses three answers to determine which of two sentences to include in the finished document.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
TotalDue	What's the total amount due?	8,500
Over90	Is the last payment over 90 days old?	Yes
IsPC	Is this a Preferred Customer?	Yes

Past Due Notice

The total amount due is $8,500.00. Please submit a minimum payment of half that amount at your earliest convenience.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
TotalDue	What's the total amount due?	2,200
Over90	Is the last payment over 90 days old?	Yes
IsPC	Is this a Preferred Customer?	No

Past Due Notice

Please submit the total amount due ($2,200.00) within two weeks or we will commence legal action.

Example 4: Lists

What you will learn

- Series answers
- Predefined List formats

We'll be turning this document into a form. It requires the name of the company president and includes a list of shareholders. Since the company president is one of the shareholders, we'll present the list of shareholders as choices when selecting the president.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document. For best results, change the left margin to indent the signatures rather than using tabs.

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley.

The shareholders unanimously elected Gretel Murphy as President of the Company.

Shareholders:

_____

Gretel Murphy

_____

Derek Wiley

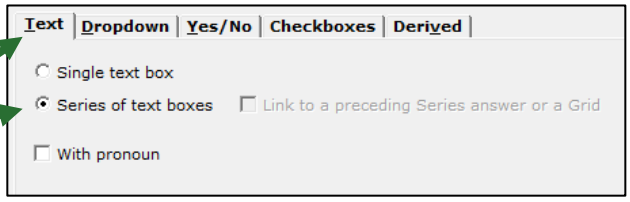
Step 1. Create the Questionnaire

		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
Shareholders	List all the shareholders.	
President	Who is the president of the company?	

Step 2. Create Smart Answers

In the Questionnaire, place the cursor in the answer box for the Shareholders question and click 🧠 **Smart Answer**.

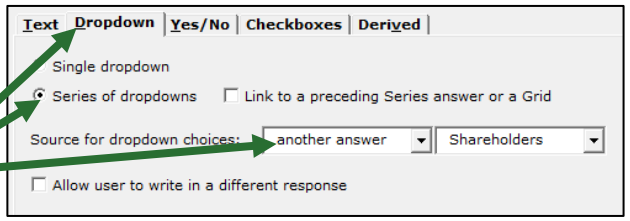
Select **Text, Series of text boxes**, and click **OK**.



Place the cursor in the answer box for the President question and click 🧠 **Smart Answer**.

Select **Dropdown**, **Series of dropdowns**, **another answer**, and note that **Shareholders** is the selected answer. (If this Questionnaire contained more Series answers, you'd be able choose any one of them.)

Click **OK**.



Step 3. Add a Field to the Form

We'll replace **Gretel Murphy** with a Field for the president's name:

Select **Gretel Murphy** in the second paragraph and click **Field**, **President**, **Insert Field**, **Done**.

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley.

The shareholders unanimously elected Gretel Murphy as President of the Company.

Shareholders:

_____
Gretel Murphy

_____
Derek Wiley

Step 4. Add Lists to the Form

The list of shareholders appears twice in the form, in two different formats. We'll begin with the narrative list of names.

Select the names in the first paragraph and click **List**, **Shareholders**, **Insert List**.

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley.

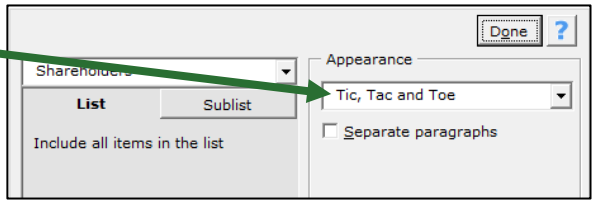
The shareholders unanimously elected {President} as President of the Company.

Shareholders:

_____
Gretel Murphy

_____
Derek Wiley

Select the **Tic, Tac and Toe** appearance and click **Done**.



A whole List structure has been inserted in the document, including several unfamiliar items: {List:, {Shareholders#X}, and |. If you want to skip ahead and learn more about List formats, see Example 7 on page 31, but for now you can just sit back and enjoy the ease with which this List was created.

The following shareholders attended the meeting: {List:{Shareholders#X}|, {Shareholders#X}| and {Shareholders#X}}.

The shareholders unanimously elected {President} as President of the Company.

Shareholders:

_____
Gretel Murphy

_____
Derek Wiley

Next we'll add the signature lines – another List, but using a different format. Select the signatures and click ⁝≡ **List**, **Shareholders**, **Insert List**.

This time select the **[signature lines]** appearance and click **Done**.

The following shareholders attended the meeting: {List:{Shareholders#X}|, {Shareholders#X}| and {Shareholders#X}}.

The shareholders unanimously elected {President} as President of the Company.

Shareholders:

_____
Gretel Murphy

_____
Derek Wiley

The finished form looks like this.

The following shareholders attended the meeting: {List:{Shareholders#X}|, {Shareholders#X}| and {Shareholders#X}}.

The shareholders unanimously elected {President} as President of the Company.

Shareholders:

{List:_____
{Shareholders#X}|

_____
{Shareholders#X}|

_____
{Shareholders#X}}

THE PAYOFF

The chart below shows a filled-in Questionnaire and the resulting finished document. Note (1) the shareholder names only had to be typed once, but were used twice in the form; and (2) the form user selected the president in a dropdown box containing shareholder names, so the president's name was used three times in the form but only typed once.

Doxserá (c) 2011-2014 Snapdone,		
Label	**Question**	**Answer**
Shareholders	List all the shareholders.	Roger Billings Esther Graves Bea Lester
President	Who is the president of the company?	Esther Graves

The following shareholders attended the meeting: Roger Billings, Esther Graves and Bea Lester.

The shareholders unanimously elected Esther Graves as President of the Company.

Shareholders:

_____
Roger Billings

_____
Esther Graves

_____
Bea Lester

After typing the shareholders in the first answer, the form user must click the **Refresh** button before those names appear as choices in the second answer box. When the cursor is in the second answer box, a flag appears above the cursor, reminding the form user to **click Refresh to update list**.

Example 5: Using a Master List

Before you begin

- Read "Master Lists" in the *Doxserá Expert Guide*

What you will learn

- Using a Master List to supply Smart Answer choices
- Fields for secondary columns in a Master List

Signature blocks like this appear in lots of forms. Rather than require the form user to type attorney names, bar numbers, and email addresses, we've created a Master List named **Attorneys** to store all that information.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

I swear that the above-stated facts are true and correct.

_____

Jackson Gray
WSBA #12345
gray@lawfirm.com

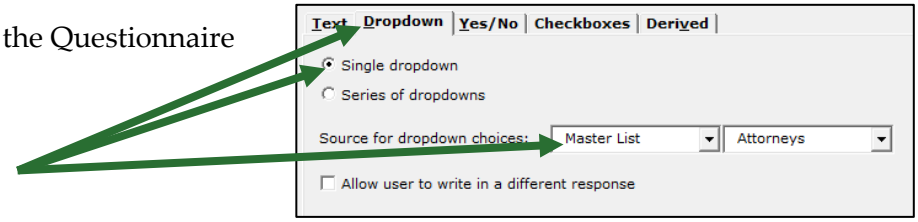
Step 1. Create the Questionnaire

		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
Signer	Which attorney is signing this document?	

Step 2. Create a Smart Answer

Place the cursor in the Answer box of the Questionnaire and click **Smart Answer**.

Select **Dropdown**, **Single dropdown**, **Master List**, make sure **Attorneys** is selected, then click **OK**.



If the **Attorneys** selection is missing, you probably haven't created that Master List yet. See "Master Lists" in the *Doxserá Expert Guide* for a walk-through.

Step 3. Add Fields

First we'll add a Field for the attorney name.

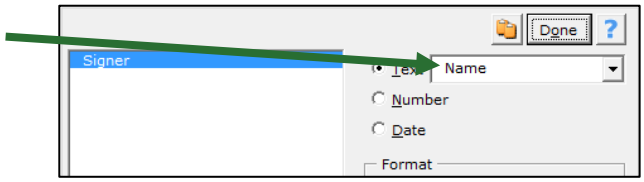
Select **Jackson Gray** and click **Field**, **Signer**, **Insert Field**.

I swear that the above-stated facts are true and correct.

_____

Jackson Gray
WSBA #12345
gray@lawfirm.com

Because the Signer question is tied to a Master List, a new box appears beside **Text**.



Make sure this box says **Name** (because we're currently inserting a Field for the attorney's name) then click **Done**.

Notice that the Field you just added doesn't say {Signer}; it says {Signer:Name}. Fields tied to Master Lists also reflect which column of the Master List they use – this will become clearer with the next two Fields.

I swear that the above-stated facts are true and correct.

{Signer:Name}
WSBA #12345
gray@lawfirm.com

Select **12345** and click **Field**, **Signer**, **Insert Field**.

This time select **Bar Number** in the box beside **Text** and click **OK**.

I swear that the above-stated facts are true and correct.

{Signer:Name}
WSBA #12345
gray@lawfirm.com

Finally, select **gray@lawfirm.com** and click **Field**, **Signer**, **Insert Field**.

This time select **Email** in the box beside **Text** and click **OK**.

I swear that the above-stated facts are true and correct.

{Signer:Name}
WSBA #{Signer:Bar Number}
gray@lawfirm.com

The finished form looks like this.

I swear that the above-stated facts are true and correct.

{Signer:Name}
WSBA #{Signer:Bar Number}
{Signer:Email}

THE PAYOFF

All that's required of the form user is to select an attorney from a dropdown box in the Questionnaire. When **Fill** is clicked, the attorney's name, bar number, and email addressed are all filled in automatically, because the Fields are tied to a Master List.

Doxserá (c) 2011-2014 Snapdone, Inc.

Label	Question	Answer
Signer	Which attorney is signing this document?	Jennifer Sykes

I swear that the above-stated facts are true and correct.

Jennifer Sykes
WSBA #293847
sykes@lawfirm.com

Example 6: Date Offsets

What you will learn

- Offset dates by a fixed amount
- Offset dates by an amount chosen by the form user
- Date functions

With Date Offsets, a single date typed in the Questionnaire can be used to fill in several related dates in the form.

Example 6a: Fixed Date Offset

The simplest sort of date offset is a fixed offset. That means that you, the form author, know exactly how much the date should be offset. In this form we'll ask for a trial date in the Questionnaire, then we'll calculate two more dates that are related to it.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

Your trial date is Wednesday, September 14, 2011. Interrogatory answers must be filed 20 business days before trial, on August 15, 2011. Please have your draft answers to me no later than the preceding Friday, August 11, 2011.

Step 1. Create the Questionnaire

		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
TrialDate	What's the trial date?	

Step 2. Add Fields

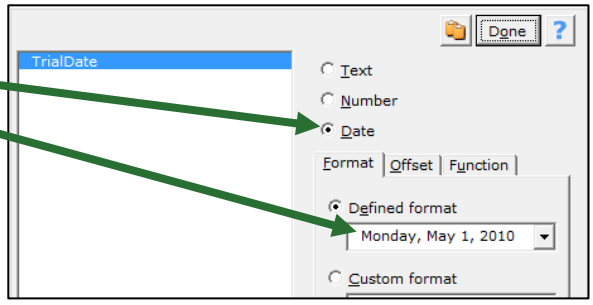
Select the first date and click **Field**, **TrialDate**, **Insert Field**.

Your trial date is Wednesday, September 14, 2011. Interrogatory answers must be filed 20 business days before trial, on August 17, 2011. Please have your draft answers to me no later than the preceding Friday, August 12, 2011.

Select **Date** for the Field type.

Select **Monday, May 1, 2010** for the date format.

This first date in the form is the actual trial date, so no offset is needed – click **Done**.



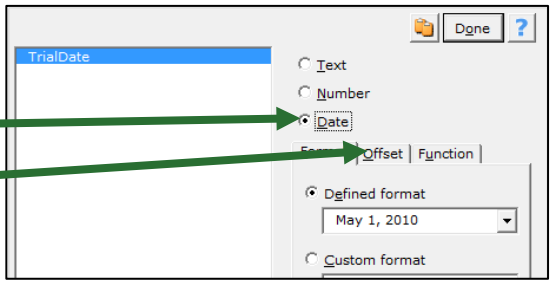
Select the next date and click **Field**, **TrialDate**, **Insert Field**.

Your trial date is {TrialDate}. Interrogatory answers must be filed 20 business days before trial, on August 17, 2011. Please have your draft answers to me no later than the preceding Friday, August 12, 2011.

This time we'll use a Date Offset to create a Date Field that precedes the trial date by 20 business days.

Select **Date**.

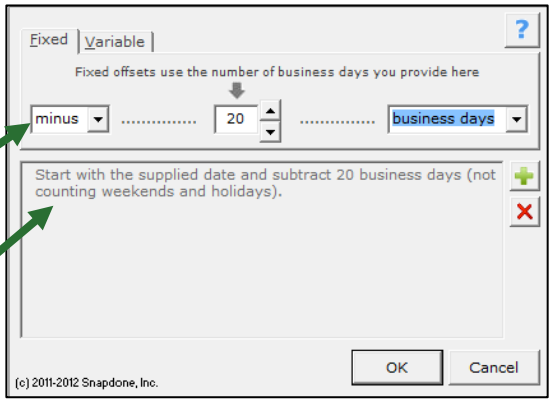
Click **Offset** to open the Date Offset screen.



Date Offsets are built one sentence at a time. Most offsets require only one sentence, but you can stack as many sentences as you need.

In this case, we need to subtract 20 business days from the trial date, so select **minus 20 business days** in the three boxes.

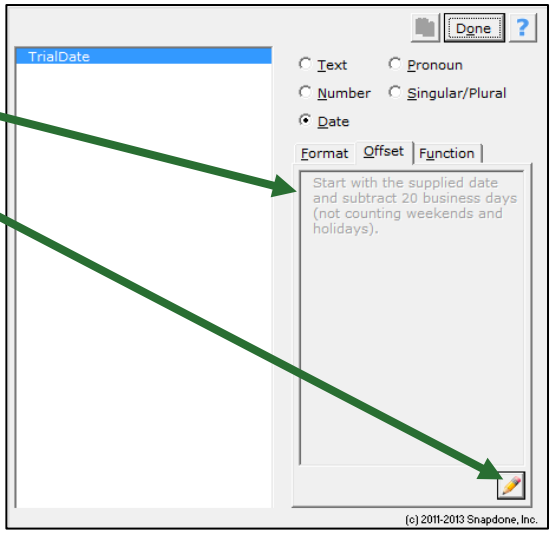
Read the Offset description to make sure it's what you intended, then click **OK** to close the Date Offset screen.



The offset you created is shown here.

If you need to revise the offset later, click the pencil to return to the Date Offset screen.

Click **Done**.



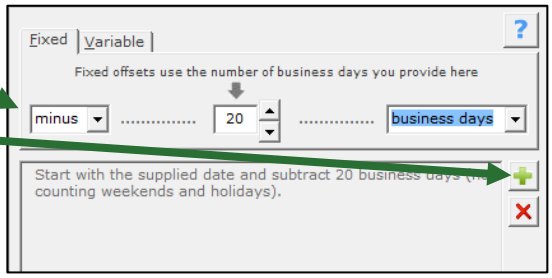
The last date is the Friday preceding the day 20 business days before trial – a mouthful, but still a doable and absolutely real-world scenario.

Select the last date and click **Field**, **TrialDate**, **Insert Field**, **Date**, **Offset**.

Your trial date is {TrialDate}. Interrogatory answers must be filed 20 business days before trial, on {TrialDate (offset)}. Please have your draft answers to me no later than the preceding Friday, August 12, 2011.

The first sentence of this offset is identical to the last one, so once again select **minus 20 business days**.

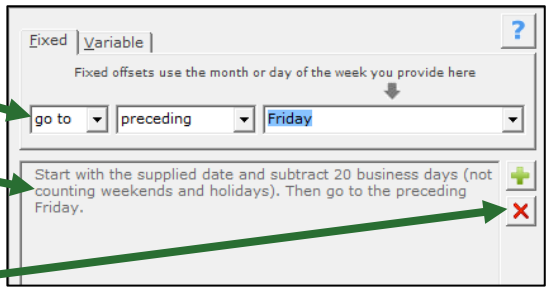
To add a second sentence to the Offset, click ✚ plus.



The next sentence needs to take us to the preceding Friday, so select **go to preceding Friday**.

Read the Offset description to make sure it's what you intended, then click **OK** to close the Date Offset screen, and **Done**.

(If you ever need to back up a step while building a Date Offset, click ✕ to remove the last sentence.)



The finished form looks like this.

Your trial date is {TrialDate}. Interrogatory answers must be filed 20 business days before trial, on {TrialDate (offset)}. Please have your draft answers to me no later than the preceding Friday, {TrialDate (offset)}.

Readability, continued

Once again, note that the two {TrialDate (offset)} Fields look identical, even though they're not. To see the full details of any Field (and modify them if you like), select the Field and click **Field**.

THE PAYOFF

In the chart below, notice how little the form user has to type into the Questionnaire, and how much information is provided in the resulting document.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
TrialDate	What's the trial date?	11/3/11

Your trial date is Thursday, November 3, 2011. Interrogatory answers must be filed 20 business days before trial, on October 5, 2011. Please have your draft answers to me no later than the preceding Friday, September 30, 2011.

Example 6b: Variable Date Offsets

Variable date offsets allow even more flexibility. In addition to asking the form user for a starting date, you can also ask for the offset amount. This form will use a variable date offset to determine the ending date of a lease term.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

Lessor leases the Premises to Lessee for a Term of 3 years, beginning on March 11, 2012, and ending on March 11, 2015.

Step 1. Create the Questionnaire

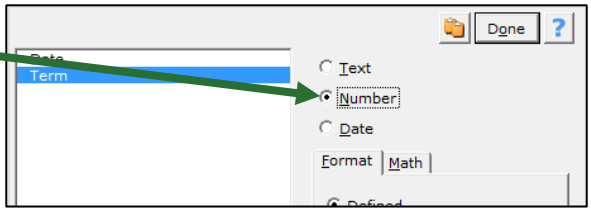
		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
Date	What is the lease commencement date?	
Term	How many years long is the term?	

Step 2. Add Fields

The first Field is an ordinary number Field. Select the number **3** and click **Field**, **Term**, **Insert Field**.

Lessor leases the Premises to Lessee for a Term of 3 years, beginning on March 11, 2012, and ending on March 11, 2015.

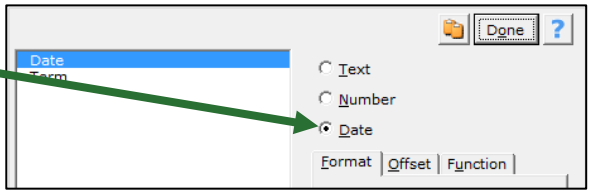
Select **Number** for the Field type and click **Done**.



The next Field is an ordinary date Field. Select the date and click **Field**, **Date**, **Insert Field**.

Lessor leases the Premises to Lessee for a Term of {Term} years, beginning on March 11, 2012, and ending on March 11, 2015.

Select **Date** for the Field type and click **Done**.

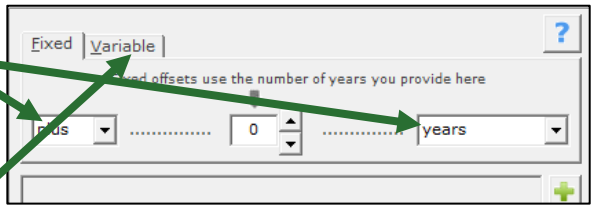


The last Field will use a variable date offset to determine the ending date of the loan term. Select the highlighted date and click **Field**, **Date**, **Insert Field**, **Date**, **Offset**.

Lessor leases the Premises to Lessee for a Term of {Term} years, beginning on {Date}, and ending on March 11, 2015.

We're going to add a number of years to the date, so select **plus** in the first box and **years** in the third box.

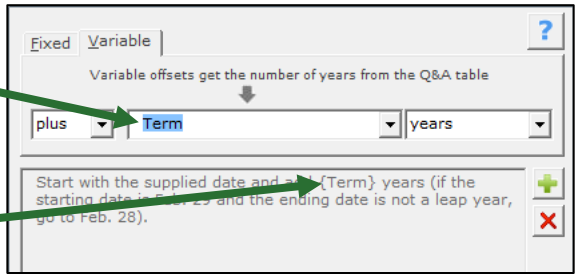
In this example, you don't know how long the lease term will be. That information will be provided later by the form user. So instead of creating a fixed offset, click **Variable** to create a variable offset.



Select **Term** in the center box. The form user's response to the Term question in the Questionnaire will be used in this date offset to add an appropriate number of years to the commencement date.

Notice that the number of years in the offset description is indicated with a **{Term}** Field.

Click **OK** to close the Date Offset screen, then **Done**.



The finished form looks like this.

> Lessor leases the Premises to Lessee for a Term of {Term} years, beginning on {Date}, and ending on {Date (offset)}.

THE PAYOFF

Two responses in the Questionnaire are used to calculate a third item in the finished document.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Date	What is the lease commencement date?	6/8/12
Term	How many years long is the term?	10

> Lessor leases the Premises to Lessee for a Term of 10 years, beginning on June 8, 2012, and ending on June 8, 2022.

Example 6c: Date Offset Combined with Date Function

This example uses a Date Function to determine the earliest in a List of dates, then applies a Date Offset to determine a date one year later.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

> All trust proceeds shall be dispersed by May 16, 2010, the date one year after the youngest beneficiary's 18th birthday.

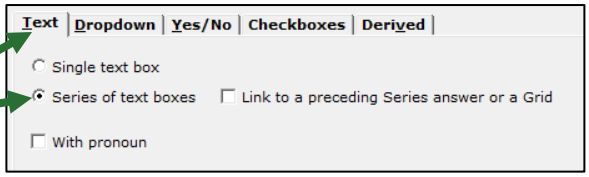
Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
DOBs	List the beneficiaries' birth dates	

Step 2. Create a Smart Answer

Place the cursor in the Answer box of the Questionnaire and click **Smart Answer**.

Select **Text**, **Series of text boxes**, and click **OK**.



Step 3. Add a Field

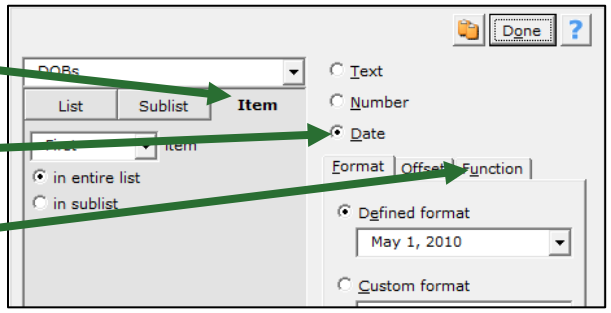
Select the date and click **Field**, **DOBs**, **Insert Field**.

All trust proceeds shall be dispersed by May 16, 2010, the date one year after the youngest beneficiary's 18th birthday.

We'll be working with a particular item in the **DOBs** Series (the latest date, which is the birthdate of the youngest beneficiary), so click **Item**.

Select **Date**.

Click **Function** to create a function that will determine which date is latest.



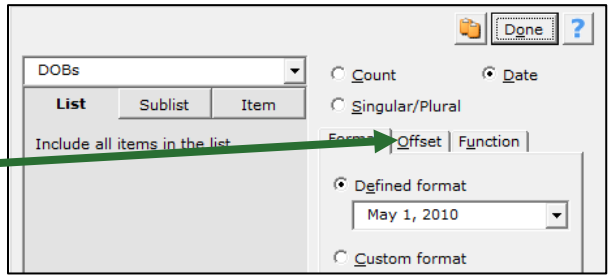
The ListLastDate function gives the latest date in a Series of dates. We'll use it to provide the birthdate of the youngest beneficiary.

Select **ListLastDate**, **DOBs**.

Click plus to add the function to the formula, and **OK** to close the Math screen.

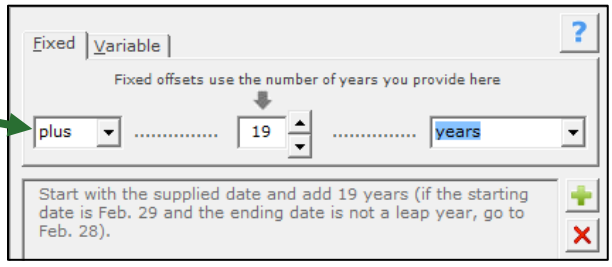
Now that we have the birthdate of the youngest beneficiary, we need to offset it by 19 years, to give the date one year after the 18th birthday.

Click **Offset** to open the Date Offset screen.



Select **plus 19 years**.

Click **OK** to close the Date Offset screen, then **Done**.



The finished form looks like this.

All trust proceeds shall be dispersed by {#/#/#} (offset), the date one year after the youngest beneficiary's 18th birthday.

THE PAYOFF

The form automatically analyzes a whole Series of dates to produce the correct result.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
DOBs	List the beneficiaries' birth dates	4/14/1998 6/6/2000 2/5/1997

All trust proceeds shall be dispersed by June 6, 2019, the date one year after the youngest beneficiary's 18th birthday.

Example 7: Linked Answers and Custom Lists

Before you begin

- Example 4: Lists ..... page 17

What you will learn

- List structure
- Linked answers
- Customizing Lists with Item Fields
- More Item Fields: first, previous, next, last

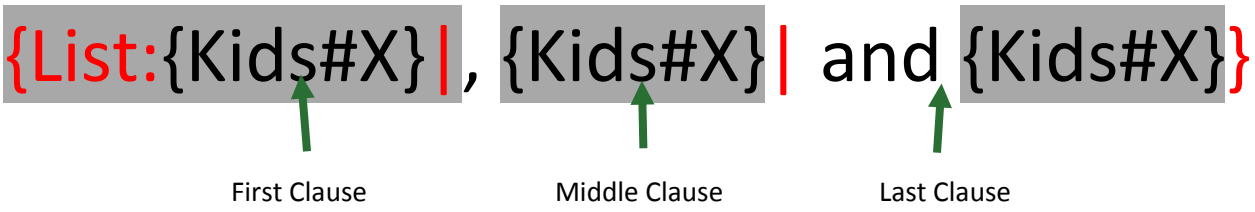
Doxserá includes several List formats that you can create with a single click. But in some cases you may want to craft your own List format. Two such examples are shown below, but first we must introduce the Three Clauses.

Three Clauses in Every List

Before creating a custom List, look closely at this standard List that was created by selecting one of the built-in formats in the **List** screen.

I leave the remainder of my estate to my children: {List:{Kids#X}|, {Kids#X}| and {Kids#X}}.

Every List contains three clauses separated by markers (the markers are colored red below):



The three clauses gives flexibility when crafting Lists. For example, in the List shown above, the middle clause includes a comma, and the last clause includes "and". With four kids, the resulting List looks like this: Andy, Betty, Carl and Debra. (There are two commas, because the middle clause appears twice, because there are two middle kids.)

Look at two more sample Lists below, and their results for four kids. Notice that the middle clause appears twice in each sample, because there are two middle kids.

This custom List …	… creates this finished product
{List:My firstborn child is {Kids#X}|, the next oldest is {Kids#X}| and the youngest is {Kids#X}}.	My firstborn child is Andy, the next oldest is Betty, the next oldest is Carl, and the youngest is Debra.

This custom List …	… creates this finished product
The remainder of my estate is divided as follows: {List:One equal share to {Kids#X}|; One equal share to {Kids#X}|; and One equal share to {Kids#X}}.	The remainder of my estate is divided as follows: One equal share to Andy; One equal share to Betty; One equal share to Carl; and One equal share to Debra.

Example 7a: Item Fields

Now that we're equipped with an understanding of the three clauses in every List, we'll craft a custom List to turn this document into an automated form.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

I leave the remainder of my estate to my children: Andy (born January 1, 1991), Betty (born February 2, 1992), Carl (born March 3, 1993) and Debra (born April 4, 1994).

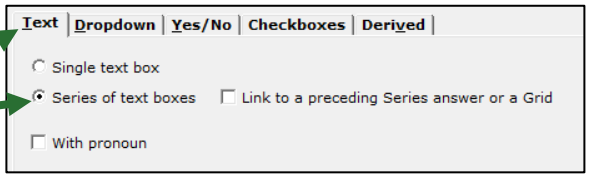
Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Kids	List the will maker's children.	
DOB	What's each child's date of birth?	

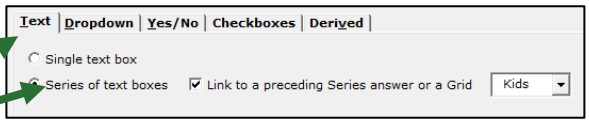
Step 2. Create Smart Answers

Place the cursor in the answer box for the Kids question and click 🧠 **Smart Answer**.

Select **Text**, **Series of text boxes**, and click **OK**.



Place the cursor in the answer box for the DOB (date of birth) question and click 🧠 **Smart Answer**.



Select **Text**, **Series of text boxes**, **Link to a preceding Series answer or a Grid**. Note that **Kids** is selected – it's the only Series answer that occurs in this Questionnaire. Click **OK**.

Step 3. Add a List

We'll add one of the built-in List formats to the form as a starting point, then customize it.

Select the text highlighted here and click ⁝≡ **List**, **Kids Insert List**, **Done**. This inserts a List structure using the default format.

I leave the remainder of my estate to my children: Andy (born January 1, 1991), Betty (born February 2, 1992), Carl (born March 3, 1993) and Debra (born April 4, 1994).

Now it's time to customize this List. In each of the three clauses, we'll add "(born ___)" after the {Kids#X} Field.

I leave the remainder of my estate to my children: {List:{Kids#X}|, {Kids#X}| and {Kids#X}}.

In the first clause: Type **(born ___)** after the {Kids#X} Field. (The large font is used here to draw your attention to the first clause, but you don't need to use a large font in your form.)

I leave the remainder of my estate to my children: {List:**{Kids#X} (born ___)**|, {Kids#X}| and {Kids#X}}.

In the middle clause: Type **(born ___)** after the {Kids#X} Field.

I leave the remainder of my estate to my children: {List:{Kids#X} (born ___)|**, {Kids#X} (born ___)**| and {Kids#X}}.

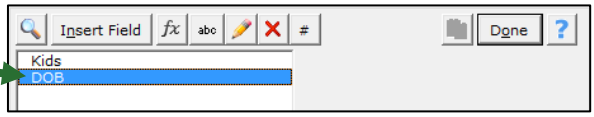
In the last clause: Type **(born ___)** after the {Kids#X} Field.

I leave the remainder of my estate to my children: {List:{Kids#X} (born ___)|, {Kids#X} (born ___)| **and {Kids#X} (born ___)**}.

Finally, we'll replace each blank with an Item Field for the date of birth. Select the first blank and click **Field**.

I leave the remainder of my estate to my children: {List:{Kids#X} (born ___)|, {Kids#X} (born ___)| and {Kids#X} (born ___)}.

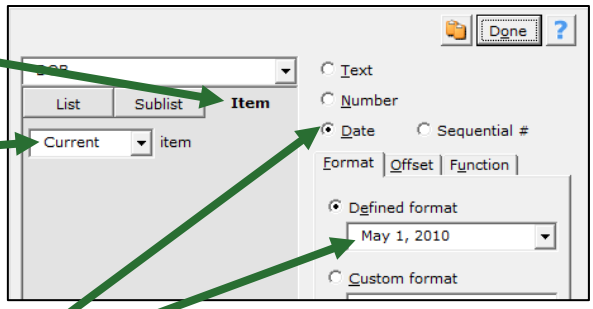
Select **DOB**, and click **Insert Field**.



Click **Item** since we're inserting a Field for an item in the Series.

Note that **Current** is selected. That means the birthdate for the *current* child in the List will be inserted when the form is filled in. In the first clause of the List, that will be the first child's birthdate. In the last clause of the List, that will be the last child's birthdate.

Select **Date**, choose the format **May 1, 2010**, and click **Done**.



Use the same steps to replace the remaining two blanks with identical {DOB#X} Fields. (Or, if you don't need the repetition for practice, you can copy-and-paste the first {DOB#X} Field to the other two locations.)

I leave the remainder of my estate to my children: {List:{Kids#X} (born {DOB#X})|, {Kids#X} (born ___)| and {Kids#X} (born ___)}.

When all three blanks have been replaced, the form looks like this. Note that each of the three List clauses contains both a {Kids#X} Field for the name and a {DOB#X} Field for the date.

I leave the remainder of my estate to my children: {List:{Kids#X} (born {DOB#X}) | , {Kids#X} (born {DOB#X}) | and {Kids#X} (born {DOB#X})}.

THE PAYOFF

No matter how many children are typed in the Questionnaire, the custom List expands to accommodate them, and includes supplemental information (a birthdate) for each.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Kids	List the will maker's children.	Helen Rufus Penelope
DOB	What's each child's date of birth?	Helen: 1/1/91 Rufus: 2/2/92 Penelope: 3/3/93

I leave the remainder of my estate to my children: Helen (born January 1, 1991), Rufus (born February 2, 1992) and Penelope (born March 3, 1993).

First, Previous, Current, Next, and Last

In the above example, you might have wondered about the **#X** in these Field codes:

{Kids#X} {DOB#X}

The **#X** indicates which item in the List should be used for that Field. **#X** refers to the ***Current*** item in the List. But once in a blue moon you might want the third clause to refer to the ***First*** item in the List, or you might want each occurrence of the middle clause to refer to the ***Next*** item in the List. The five possibilities are:

#F = *First* **#P** = *Previous* **#X** = *Current* **#N** = *Next* **#L** = *Last*

The following example shows how **#P** can be used to repeatedly refer to the previous item in a List, no matter how many items it contains.

Example 7b: Use #P for the Previous Item

Custom Lists can be created to automatically handle even the fiddliest of situations – the parts you previously had to do by hand. Consider this document.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

The first sentence refers to the first personal representative.

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

The second sentence refers to the first and second personal representatives.

I select Alan Avery as my personal representative. **If Alan Avery is unable or unwilling to serve, then I select Brenda Blake.** If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

And the third sentence refers to the second and third personal representatives.

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. **If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.**

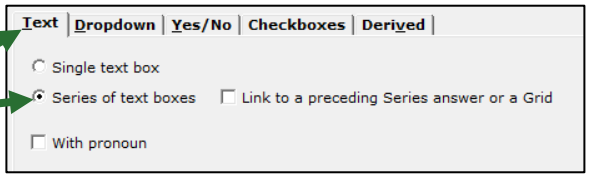
Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
PRs	List the personal representatives.	

Step 2. Create a Smart Answer

Place the cursor in the answer box for the PRs question and click **Smart Answer**.

Select **Text**, **Series of text boxes**, and click **OK**.



Step 3. Add a List

As in the last example, we'll begin by inserting a List using the default format as a starting point, then customize it.

Select this whole passage and click **List**, **PRs**, **Insert List**, **Done**.

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

This is just the bare bones of a List. Now we'll add some text to each of the three clauses.

{List:{PRs#X}|, {PRs#X}| and {PRs#X}}

Add to the first clause as shown here. (The large font is used here to draw your attention to the first clause, but you don't need to use a large font in your form.)

{List:**I select {PRs#X} as my personal representative.** |{PRs#X}| and {PRs#X}}

Change the second clause to look like this.

{List:I select {PRs#X} as my personal representative. |**If _____ is unable or unwilling to serve, then I select {PRs#X}.** | and {PRs#X}}

And finally, the third clause should look like this.

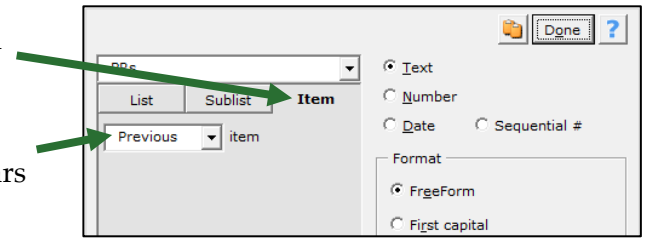
{List:I select {PRs#X} as my personal representative. |If _____ is unable or unwilling to serve, then I select {PRs#X}. |**If _____ is unable or unwilling to serve, then I select {PRs#X}.**}

Two blanks remain to be filled in before we're done. The first blank appears in clause #2. We need to fill it in with the name of the personal representative that appears in clause #1 – the *previous* clause. Select the blank and click **Field**, **PRs**, **Insert Field**.

{List:I select {PRs#X} as my personal representative. |If _____ is unable or unwilling to serve, then I select {PRs#X}. |If _____ is unable or unwilling to serve, then I select {PRs#X}.}

Click **Item** since we're inserting a Field for an item in the Series.

Select **Previous**, because we want the name of the *previous* personal representative – the one who appears in the clause preceding this clause.



Click **Done**.

Notice that the Field you just created contains a #**P**: {PRs#P}. The **P** stands for Previous. That means the personal representative in the previous clause will be inserted here.

{List:I select {PRs#X} as my personal representative. |If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}. |If _____ is unable or unwilling to serve, then I select {PRs#X}.}

Select the remaining blank and use the same steps to create another {PRs#P} Field: click **Field**, **PRs**, **Insert Field**, **Item**, **Previous**, **Done**.

{List:I select {PRs#X} as my personal representative. |If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}. |If _____ is unable or unwilling to serve, then I select {PRs#X}.}

Shave Some Clicks Off Your Time

In these examples, we've been creating each Field from scratch because it's good practice. But once you're comfortable with the process, you can often save time by simply copying and pasting things. In that last step, for example, rather than click **Field**, **PRs**, **Insert Field**, **Item**, **Previous**, **Done**, you could just copy the first {PRs#P} Field and paste it where the second one belongs.

The finished form looks like this.

{List:I select {PRs#X} as my personal representative. |If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}. |If {PRs#P} is unable or unwilling to serve, then I select {PRs#X}.}

THE PAYOFF

The List expands depending on the number of personal representatives typed into the Questionnaire.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
PRs	List the personal representatives.	Humphrey Cogg

I select Humphrey Cogg as my personal representative.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
PRs	List the personal representatives.	Humphrey Cogg Ella Grendle

I select Humphrey Cogg as my personal representative. If Humphrey Cogg is unable or unwilling to serve, then I select Ella Grendle.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
PRs	List the personal representatives.	Humphrey Cogg Ella Grendle Stanley Frock Quentin Lacrosse

I select Humphrey Cogg as my personal representative. If Humphrey Cogg is unable or unwilling to serve, then I select Ella Grendle. If Ella Grendle is unable or unwilling to serve, then I select Stanley Frock. If Stanley Frock is unable or unwilling to serve, then I select Quentin Lacrosse.

Example 8: Sublists

Before you begin

- Example 7: Linked Answers and Custom Lists..... page 31

What you will learn

- Select items from a Series to create Sublists

These minutes include two Sublists from the Series of attendees: officers in the first sentence, and nonofficers in the second.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

MEETING MINUTES

Officers who attended the meeting were Alan Diggle, Bernice Fenster, and Roy Barnes. Also present were Jerome Fuller, Cynthia Wilson, and Esther Spaulding.

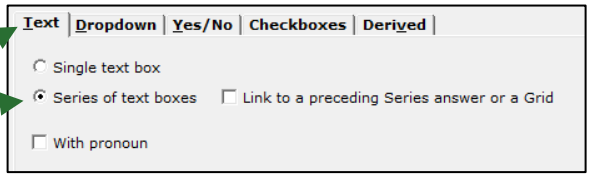
Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Attendees	List all the attendees.	
Officers	For the attendees who are officers, choose an office.	

Step 2. Create Smart Answers

Place the cursor in the **Attendees** answer box and click **Smart Answer**.

Choose **Text**, **Series of text boxes**, and click **OK**.

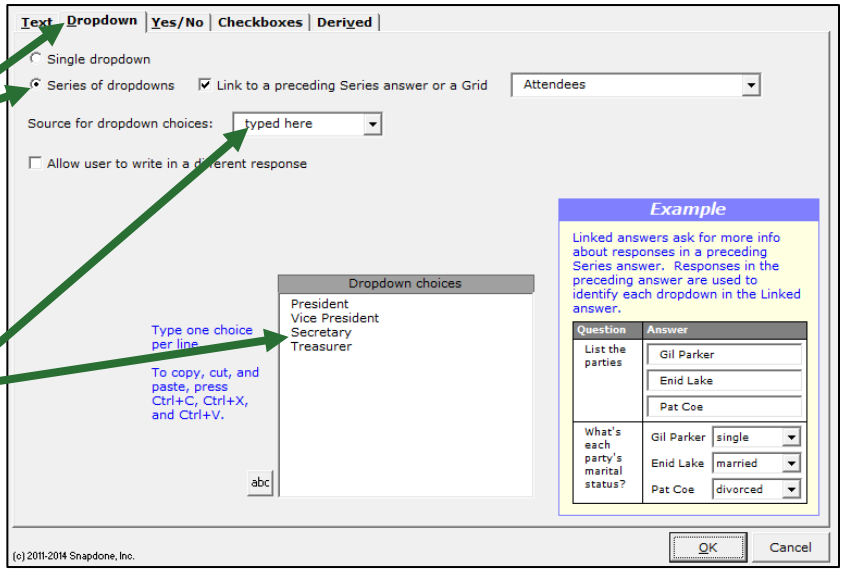


Place the cursor in the **Officers** answer box and click **Smart Answer**.

Choose **Dropdown**, **Series of dropdowns**, **Link to a preceding Series answer or a Grid**, **Attendees**. That means the Officers question will be repeated for each person listed in the Attendees question.

Choose **typed here** and type the four Dropdown choices: **President**, **Vice President**, **Secretary**, and **Treasurer**.

Click **OK**.



Step 3. Add Sublists

Select the officer names and click ⁝≡ **List**, **Attendees**, **Insert List**.

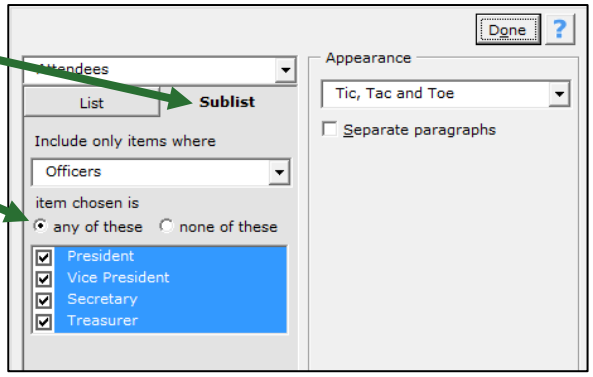
MEETING MINUTES

Officers who attended the meeting were Alan Diggle, Bernice Fenster, and Roy Barnes. Also present were Jerome Fuller, Cynthia Wilson, and Esther Spaulding.

Since we don't want to list *all* attendees, click **Sublist**.

Select only the attendees who are officers by choosing **Officers** is **any of these**: **President**, **Vice President**, **Secretary**, **Treasurer**, as shown here.

Click **Done**.



Select the other attendee names and click ⁝≡ **List**, **Attendees**, **Insert List**.

MEETING MINUTES

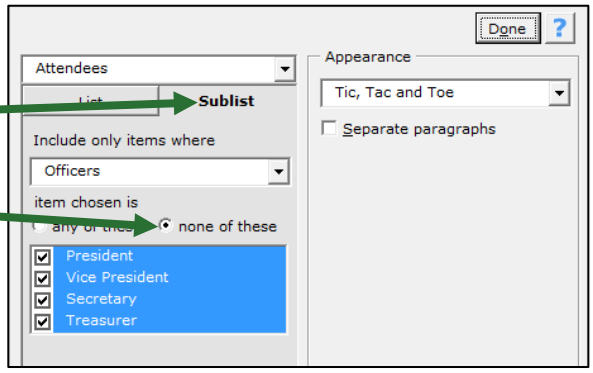
Officers who attended the meeting were {Sublist:{Attendees#X}|, {Attendees#X}| and {Attendees#X}}. Also present were Jerome Fuller, Cynthia Wilson, and Esther Spaulding.

This time we'll include only the attendees who are *not* officers.

Click **Sublist**.

Choose **Officers** is **none of these**: **President**, **Vice President**, **Secretary**, **Treasurer**, as shown here.

Click **Done**.



Here's the finished form. On the surface, the two Sublists appear to be identical. But you can see the details of each Sublist by placing the cursor in a {Sublist: code and clicking ⁝≡ **List** to return to the List creation screen.

MEETING MINUTES

Officers who attended the meeting were {Sublist:{Attendees#X}|, {Attendees#X}| and {Attendees#X}}. Also present were {Sublist:{Attendees#X}|, {Attendees#X}| and {Attendees#X}}.

THE PAYOFF

A Series and Linked answer in the Questionnaire are used to populate two distinct Sublists in the finished document.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Attendees	List all the attendees.	Judith Flambe Orson Coot Roger Beeman Hana Lorang Inez Pierce
Officers	For the attendees who are officers, choose an office.	Judith Flambe: President Orson Coot: [??] Roger Beeman: [??] Hana Lorang: Secretary Inez Pierce: Treasurer

MEETING MINUTES

Officers who attended the meeting were Judith Flambe, Hana Lorang, and Inez Pierce. Also present were Orson Coot and Roger Beeman.

Example 9: Grid Answers

Before you begin

- Example 7: Linked Answers and Custom Lists..... page 31

What you will learn

- Structure of Grid answers
- Smart Answers in Grids
- Using Grids to create Lists
- Conditions based on Grid answers
- Fetching info from a Grid with Item Fields

Grid answers are used to gather a lot of related information about a series of items – sort of a Super-Series answer. That collected information can then be parceled out throughout the finished document in Lists and Sublists. Individual bits of information can also be drawn from the middle of the Grid and inserted wherever needed in the document.

If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

Estimate for Pest Control Services
Smith Residence

Overview: Rodents were found in three rooms. Termites were found in one room.

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

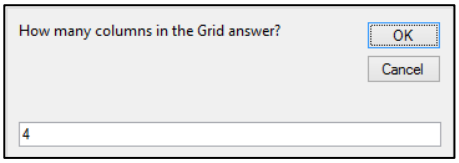
Step 1. Create the Questionnaire

		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
Client	Client's last name?	

Step 2. Add a Grid

Place the cursor *below* the Questionnaire and click 🧠 **Smart Answer** to create a Grid answer.

Type **4** and click **OK** to make it a four-column Grid.



Every Grid has four parts:

1. Type any overall **instructions** that apply to the entire Grid here.
2. Type a **label** for each column in the top row. These labels are equivalent to the labels you type in the leftmost column of the Questionnaire. They will not be seen by the form user, but are used as Field names by the form author.
3. Type a **heading** for each column in the second row. Headings tell the form user what information is expected in each column.

[instructions]

[label]	[label]	[label]	[label]
[heading]	**[heading]**	**[heading]**	**[heading]**

4. The remaining rows are where the form user types responses. The form author can create additional empty rows by clicking ✚ **Add**, or the form user can add rows later, when they are needed.

Fill in instructions, labels, and headings so your Grid looks like the one shown here:

Describe the pests and proposed action:

Pest	Rooms	Action	Cost
Type of pest found	**# of rooms infested**	**Proposed action**	**Price quote**

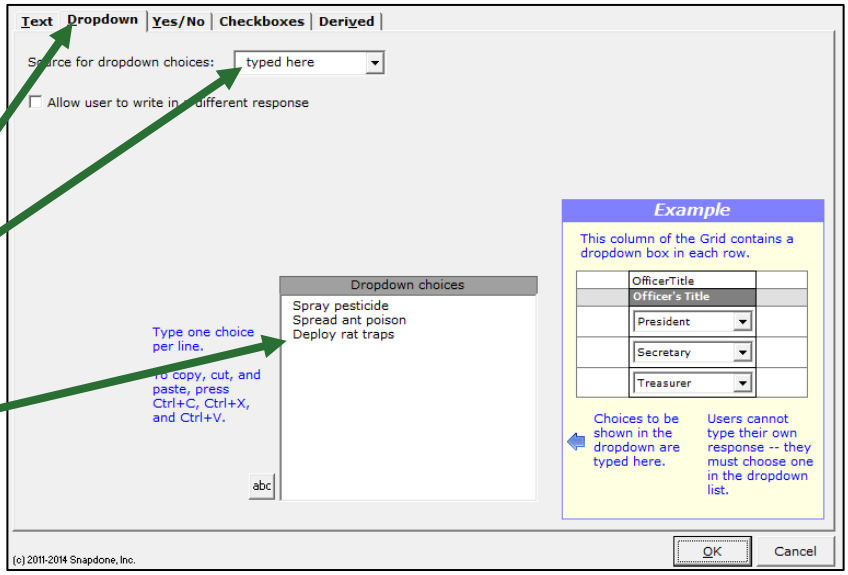
Step 3. Create Smart Answers

When Smart Answers are applied to a Grid, they apply to a whole column. We'll make the third column a Dropdown answer.

Place the cursor anywhere in the third column of the Grid and click 🧠 **Smart Answer**.

Select **Dropdown**, **typed here**.

Add three actions to appear in the Dropdown choices: **Spray pesticide**, **Spread ant poison**, **Deploy rat traps**.



Step 4. Create Two Custom Lists

The form includes two sections that will be produced with Lists: an overview that lists the types of pests found; and a plan that lists the actions to be taken. Both Lists can be drawn from the Grid answer we created in Step 2.

Select the two sentences shown here and click ⁝☰ **List**, **Pest**, **Insert List**.

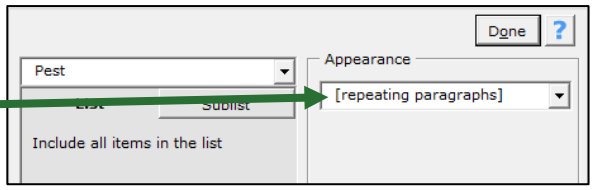
Estimate for Pest Control Services
Smith Residence

Overview: Rodents were found in three rooms. Termites were found in one room.

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

This custom List consists of repeating sentences. The closest match among the List appearance choices is **[repeating paragraphs]**, so select it and click **Done**.



A List framework has been inserted in the form. We'll modify it to create our custom List of pests.

Remove **Sample paragraph about** and add **were found in ___ rooms** after the {Pest#X} Field.

Estimate for Pest Control Services
Smith Residence

Overview: {List:Sample paragraph about {Pest#X}.

|[ditto]|[ditto]}

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Also remove the paragraph break before the **ditto**es and replace it with a space or two. That way our custom List will consist of repeating sentences instead of repeating paragraphs.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in ___ rooms.

|[ditto]|[ditto]}

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

The first custom List should now look like this.

We'll finish it by adding a Field and a Condition. The Field will provide the number of rooms, and the Condition will provide the **s** at the end of **rooms** when needed.

Select the blank line and click **Field**, **Rooms**, **Insert Field**.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in ___ rooms. |[ditto]|[ditto]}

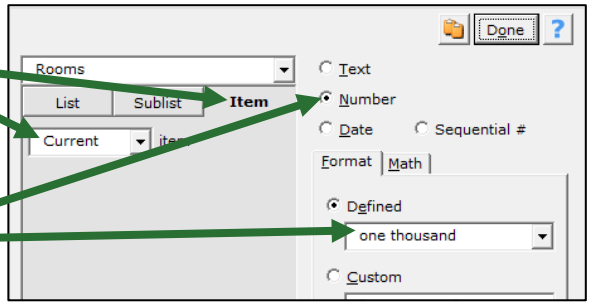
Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Click **Item** and select **Current** – this Field will insert a number for the current item in the List.

Click **Number** and choose the format **one thousand**.

Click **Done**.



Select the **s** at the end of **rooms** and make it conditional by clicking **Condition**, **Rooms**, **Add Condition**.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in {Rooms#X} rooms. |[ditto]|[ditto]}

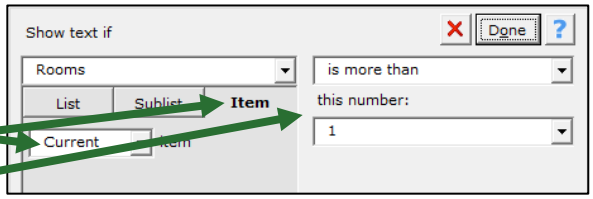
Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

We only want this **s** to appear when the number of rooms affected by the current pest is more than one.

Click **Item** and select **Current** (because we're talking about the current item in the List of pests).

Choose **is more than 1** and click **Done**.



The first custom List is complete. The second one will go a little quicker.

Select the two sentences after **Plan:** and click **List**, **Pest**, **Insert List**.

Estimate for Pest Control Services
Smith Residence

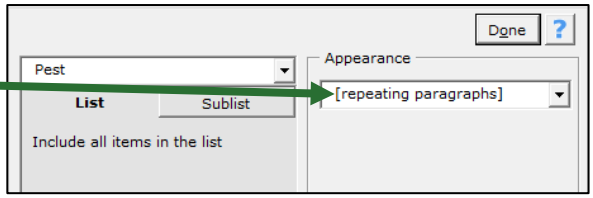
Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Note that the List we're creating only uses information from the **Action** and **Cost** columns of our Grid, but we still selected **Pest** when creating the List. That's because Lists are always based on the *primary* column (the leftmost column) in a Grid answer, even if they don't use any information from that column.

This is another custom List consisting of repeating sentences, so choose **[repeating paragraphs]** again and click **Done**.



Let's type a placeholder sentence into the form just to help us keep organized and determine where the Fields belong. Replace the whole first clause of the List with **Kill pests ($100).** and add a space or two after the period so the repeated sentences won't run into each other.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: {List:Sample paragraph about {Pest#X}. |[ditto]|[ditto]}

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Here's what the form looks like with the placeholder sentence. It represents the sentence that will be repeated for each item in the List of pests.

First we'll replace **Kill pests** with an action from the **Action** column of the Grid:

Select **Kill pests** and click **Field**, **Action**, **Insert Field**.

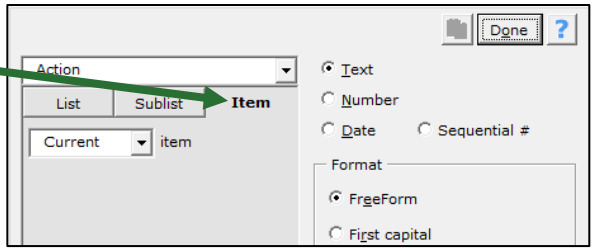
Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: {List:Kill pests ($100). |[ditto]|[ditto]}

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Click **Item** and **Done**, since the default selections **Current**, **Text**, and **FreeForm** are all correct.



Similarly, replace **100** with a Field that provides a number from the **Cost** column of the Grid:

Select **100** and click **Field**, **Cost**, **Insert Field**, **Item**, **Number**, **Done**.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: {List:{Action#X} ($100). |[ditto]|[ditto]}

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Both custom Lists are now complete.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: {List:{Action#X} (${Cost#X}). |[ditto]|[ditto]}

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Step 5. Add a Condition

The last paragraph should only appear in the finished document when the Grid includes "Deploy rat traps" in the Action column. We'll add a Condition to handle this automatically.

Select the whole paragraph and click **Condition**, **Pest**, **Add Condition**.

Estimate for Pest Control Services
Smith Residence

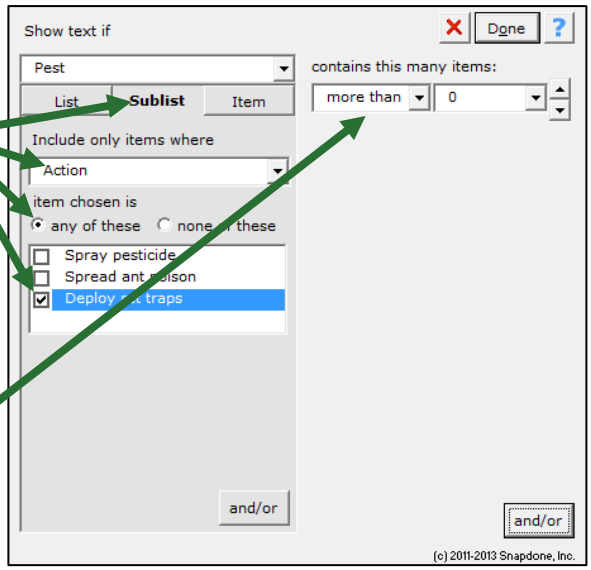
Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: {List:{Action#X} (${Cost#X}). |[ditto]|[ditto]}

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

This Condition will determine whether any items in the Pest Grid contain "Deploy rat traps" in the Action column.

Select **Sublist**, **Action**, **any of these**, and **Deploy rat traps**. That gives us a Sublist that only includes pests whose Action column contains "Deploy rat traps".



Select **more than 0**. That means the Condition is true when the Sublist contains at least one item. Summing up and saying it another way: the Condition is true when at least one Action in the Grid is "Deploy rat traps".

Click **Done**.

Step 6. Fetch a Particular Item From the Grid

Our final challenge is the **60** in the last paragraph. Here we need a Field that provides a particular number typed in the Cost column of the Grid. It has to be the number that appears in the Rodents row, but as form authors we don't know whether that will be first row, last row, or somewhere in between.

The solution is to use an Item Field that is smart enough to locate a particular item in the Grid.

Select **60** and click **Field**, **Cost**, **Insert Field**.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: {List:{Action#X} (${Cost#X}). |[ditto]|[ditto]}

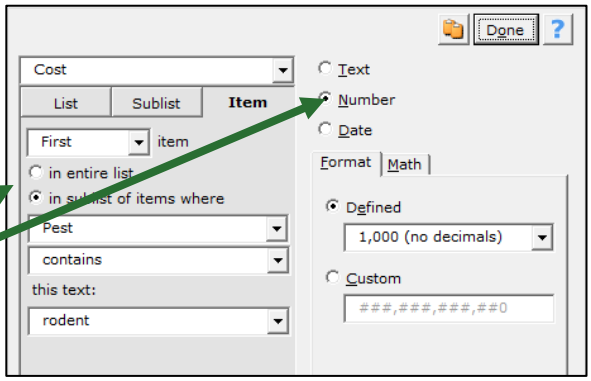
{if:**Equipment Deposit:** An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.}

Click **Item** because we want a particular item from the Cost column of the Grid.

We don't know where that item appears in the Grid, but we do know that it's the *first* item in a Sublist of rodents, so …

Choose **First** item **in a sublist of items where Pest contains rodent**, as shown here.

Choose **Number** format and click **Done**.



Thanks to the Condition we created in Step 5, if the Grid *does not* include rodents, then the last paragraph is omitted from the finished document.

When the Grid *does* include rodents, the portion of costs that applies to rodents is repeated in the final paragraph.

Add a {Client} Field to replace the word Smith in the heading, and the form is complete.

Estimate for Pest Control Services
Smith Residence

Overview: {List:{Pest#X} were found in {Rooms#X} room{if:s}. |[ditto]|[ditto]}

Plan: {List:{Action#X} (${Cost#X}). |[ditto]|[ditto]}

{if:**Equipment Deposit:** An additional deposit of ${Cost#F} is required and will be refunded when the rat traps are retrieved.}

Before saving the finished form, remember to click **Show/Hide** to hide labels, including the first row of the Grid – they're useful to the form author but distracting for the form user.

THE PAYOFF

A single Grid answer provides all the information needed to build two distinct Lists, decide whether a deposit is required, and determine a deposit amount based on particular item within the Grid.

TheFormTool (c) 2011-2013		
Label	**Question**	**Answer**
Client	Client's last name?	Barclay

Describe the pests and proposed action

Type of pest found	# of rooms infested	Proposed action	Price quote
Termites	3	Spray pesticide	150

Estimate for Pest Control Services
Barclay Residence

Overview: Termites were found in three rooms.

Plan: Spray pesticide ($150).

TheFormTool (c) 2011-2013		
Label	**Question**	**Answer**
Client	Client's last name?	Channing

Describe the pests and proposed action

Type of pest found	# of rooms infested	Proposed action	Price quote
Ants	2	Distribute ant poison	35
Rodents	1	Deploy rat traps	60

Estimate for Pest Control Services
Channing Residence

Overview: Ants were found in two rooms. Rodents were found in one room.

Plan: Distribute ant poison ($35). Deploy rat traps ($60).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the rat traps are retrieved.

Example 10: Math

What you will learn

- Building formulae with the Math screen

We'll use the math feature of **Doxserá** to automate this form. If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

The loan amount is $___, to be paid in ___ monthly payments of $___ each.

Step 1. Create the Questionnaire

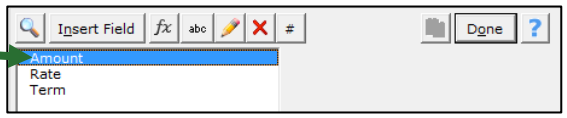
		Doxserá (c) 2011-2014 Snapdone, Inc.
Label	**Question**	**Answer**
Amount	Amount of loan?	
Rate	Annual Interest rate?	
Term	How many years long is the loan term?	

Step 2. Add Fields

The first Field requires no math. Select the highlighted blank and click **Field**.

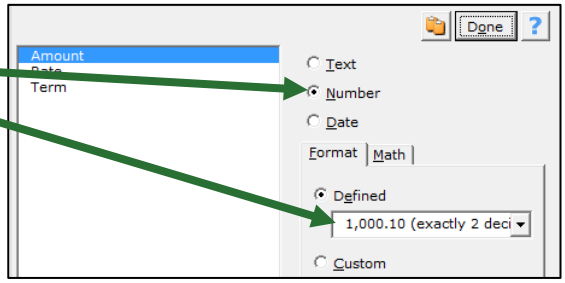
The loan amount is $___, to be paid in ___ monthly payments of $___ each.

Select **Amount** and click **Insert Field**.



Select **Number**.

Select the format **1,000.10 (exactly 2 decimals)** and click **Done**.



The next Field is the number of months in the loan term. Since the Questionnaire's Term answer provides the number of years, we'll use math to multiply that number by 12.

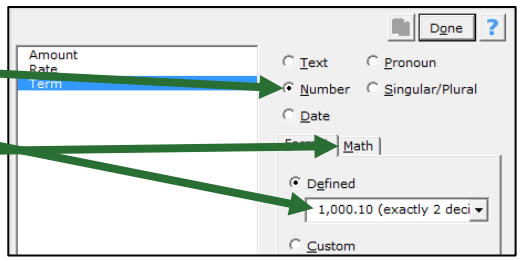
Select the highlighted blank and click **Field**, **Term**, **Insert Field**.

The loan amount is ${Amount}, to be paid in ___ monthly payments of $___ each.

Select **Number**.

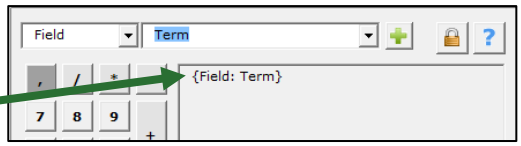
Select the format **1,000.10 (exactly 2 decimals)**.

Click **Math** to open the Math screen.



This is where the formula is built.

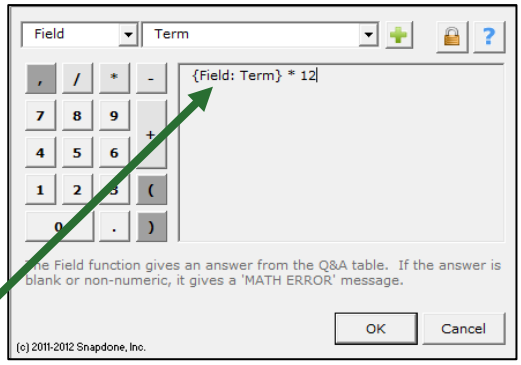
Doxserá has already inserted a function in the formula to get us started: **{Field: Term}**. When the form is filled in, this function will retrieve the number typed in response to the question **How many years long is the loan term?**



Since we want to multiply the number of years by 12, add *** 12** at the end of the formula. (The asterisk character is used for multiplication, just as plus is used for addition, hyphen for subtraction, and forward slash for division.)

You can either add *** 12** by clicking the *****, **1**, and **2** buttons in the Math screen, or you can type those three characters on your keyboard.

When finished, the formula will look like this. Click **OK** to close the Math screen.

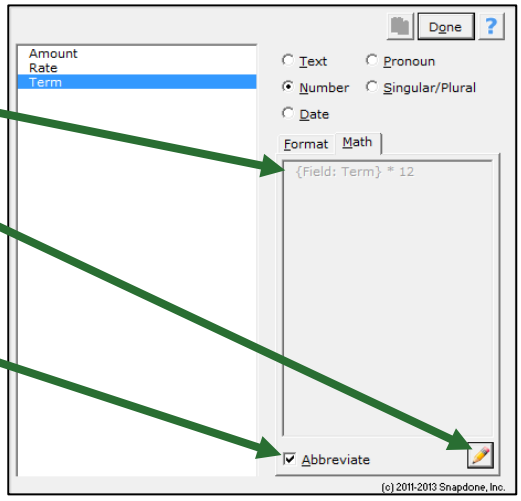


The formula you created is shown here.

If you need to edit the formula later, click the pencil to return to the Math screen.

The Abbreviate checkbox has no impact on finished documents, but controls how a formula is displayed in the form. In this example, the Field we're creating will either be abbreviated as {###} or displayed in full as {{Field: Term} * 12}.

Click **Done**.



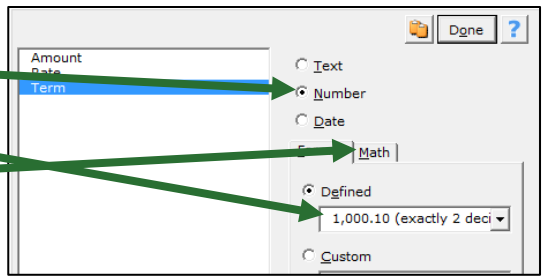
Finally, we'll use the Payment function to calculate the monthly payment. Select the highlighted blank and click **Field**, **Term**, **Insert Field**.

The loan amount is ${Amount}, to be paid in {###} monthly payments of $___ each.

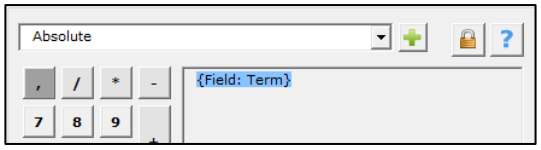
Select **Number**.

Since this is a dollar amount, choose the format **1,000.10 (exactly 2 decimals)**.

Click **Math** to open the Math screen.



This time **Doxserá** has guessed incorrectly – we don't actually want the **{Field: Term}** function that it has provided for us. Delete that whole function to start with a blank slate.

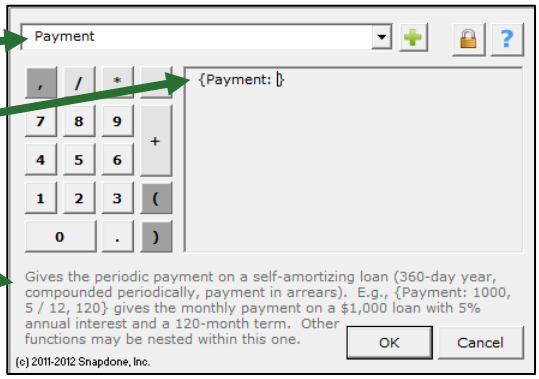


Select the **Payment** function and click ✚ plus to add it to the formula.

Note that your cursor is flashing inside the **{Payment: }** function.

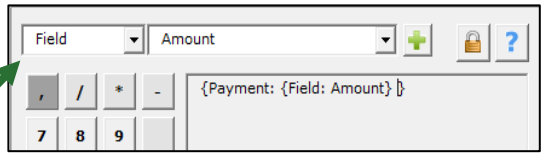
As indicated in the lower part of the screen, the Payment function requires three numbers separated by commas: loan amount, periodic interest rate, and the number of periods in the term of the loan. Those numbers can either be typed directly into the formula or they can be represented with other functions.

In this example, we'll use a Field function for each of the three numbers required in the Payment function.

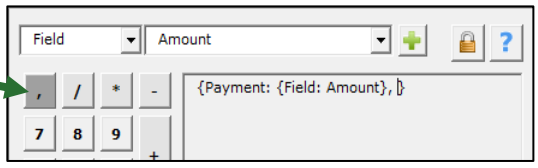


The first number required by the Payment function is the loan amount.

Make sure the cursor is still placed within the Payment function as shown here, then select **Field**, **Amount**, and click ✚ plus.



Click the **comma** button (or press the comma key on your keyboard) to add the required comma before the Payment function's second number.



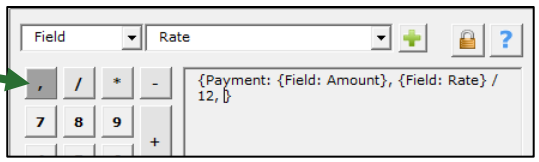
The next number required by the Payment function is the periodic interest rate.

Select **Field**, **Rate**, and click ✚ plus to add the **{Field: Rate}** function.

Since the Questionnaire asks for an annual interest rate, we'll divide it by 12 to get the periodic (monthly) interest rate.

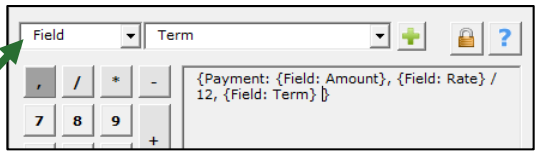
Click the **slash**, **1**, and **2** buttons or type **/12** on your keyboard.

Click the **comma** button (or press the comma key on your keyboard) to add the required comma before the Payment function's third number.



The last number required by the Payment function is the number of periods in the loan term.

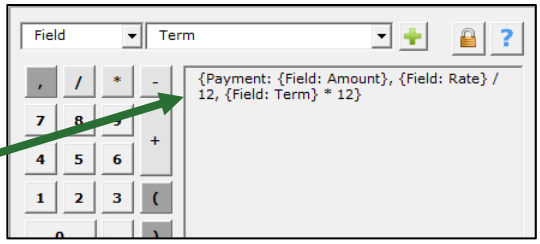
Select **Field**, **Term**, and click ✚ plus to add the **{Field: Term}** function.



Since the Questionnaire asks for the loan term in years, we'll multiply it by 12 to get the number of monthly periods in the loan.

Click the ***, **1**, and **2** buttons or type ***12** on your keyboard.

The finished formula looks like this.



Click **OK** to close the Math screen, then **Done**.

If you chose to abbreviate the two math Fields, the finished form looks like this.

> The loan amount is ${Amount}, to be paid in {###} monthly payments of ${###} each.

If you chose not to abbreviate, the finished form looks like this.

> The loan amount is ${Amount}, to be paid in {{Field: Term} * 12} monthly payments of ${{Payment: {Field:Amount}, {Field: Rate} / 12, {Field: Term} * 12}} each.

THE PAYOFF

When the form user supplies loan amount, annual interest rate, and loan term, the number of payments and monthly payment amount are calculated automatically.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Amount	Amount of loan?	150,000
Rate	Annual interest rate?	4.5
Term	How many years long is the loan term?	20

> The loan amount is $150,000, to be paid in 240 monthly payments of $948.97 each.

Example 11: Linked Answer, Repeating Paragraphs, and Math

Before you begin

- Example 7: Linked Answers and Custom Lists..... page 31
- Example 10: Math ..... page 48

What you will learn

- Repeating paragraphs with [ditto]
- Pronoun- and Number-type Item Fields
- Math in Item Fields

We'll use a Linked answer, repeating paragraphs, and math to automate this form. If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

> The shareholders are as follows:
>
> Madge Dunfey owns 50 shares (current value $350.00), giving her 55.6% ownership of the company.
>
> Herb Billings owns 25 shares (current value $175.00), giving him 27.8% ownership of the company.
>
> Grace Phinn owns 15 shares (current value $105.00), giving her 16.7% ownership of the company.

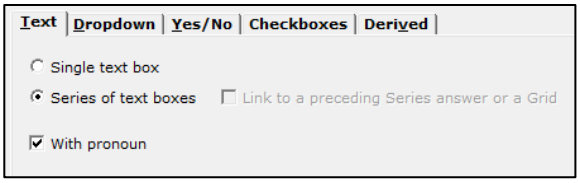
Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Shareholders	List the shareholders.	
SharesHeld	How many shares does each shareholder own?	
ShareValue	What's the current value of 1 share?	

Step 2. Create Smart Answers

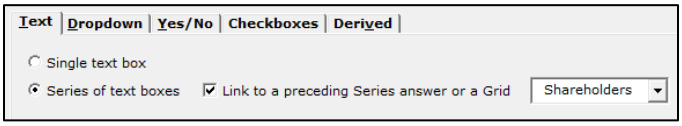
The first answer will be a Series answer with pronouns (because the form includes a "him/her" pronoun for each shareholder).

Place the cursor in the answer box for the Shareholders question and click 🧠 **Smart Answer**, **Text**, **Series of text boxes**, **with pronoun**, **OK**.



The second answer asks for additional information about each shareholder, so it will be linked to the Shareholder answer.

Place the cursor in the answer box for the SharesHeld question and click 🧠 **Smart Answer**, **Text**, **Series of text boxes**, **Link to a preceding Series answer or a Grid**, **Shareholders**, **OK**.



Step 3. Add a List

We'll start with one of the built-in List formats then customize it.

Select the three paragraphs that will be replaced by the list and click **List**, **Shareholders**, **Insert List**.

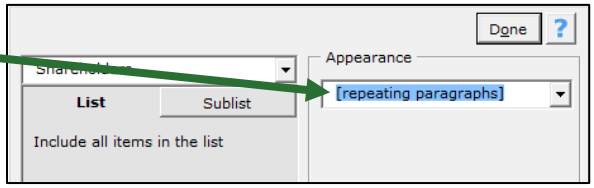
The shareholders are as follows:

Madge Dunfey owns fifty (50) shares (current value $350.00), giving her __% ownership of the company.

Herb Billings owns twenty-five (25) shares (current value $350.00), giving him __% ownership of the company.

Grace Phinn owns fifteen (15) shares (current value $350.00), giving her __% ownership of the company.

Select **[repeating paragraphs]** and click **Done**.



Now that we have a framework for the List, we'll begin customizing it.

The shareholders are as follows:

{List:Sample paragraph about {Shareholders#X}.

|[ditto]|[ditto]}

Abbreviated Repeating Lists: When each item in a List is identical, the second and third clauses can be abbreviated with **[ditto]**, as shown above.

{Shareholders#X} is the marker that shows where each shareholder's name will be inserted. Preserve that marker, but edit the surrounding text to create the paragraph shown here. (In other words, delete **Sample paragraph about** before the marker, and add **owns __ (__) shares (current value $__), giving him/her __% ownership of the company** after the marker.)

The shareholders are as follows:

{List:{Shareholders#X} owns __ (__) shares (current value $__), giving him/her __% ownership of the company.

|[ditto]|[ditto]}

Step 4. Add Fields

All that remains is to add some Fields. Start with the pronoun. Select **him/her** and click **Field**, **Shareholders**, **Insert Field**.

The shareholders are as follows:

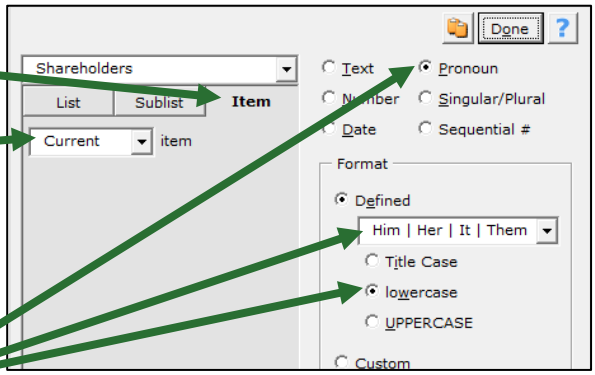
{List:{Shareholders#X} owns __ (__) shares (current value $__), giving him/her __% ownership of the company.

|[ditto]|[ditto]}

Click **Item**, because we want the pronoun for a particular person in the Series.

Note that **Current** is selected – this will give us a pronoun for the *current* person in our List of shareholders. So the first paragraph in the finished document will use the pronoun for person #1, the second paragraph will use the pronoun for person #2, etc.

Select **Pronoun**, **Him|Her|It|Them**, **lowercase**, and click **Done**.



Next we'll add Fields for the number of shares owned – first using words, then using numerals. Select the first blank and click **Field**, **SharesHeld**, **Insert Field**.

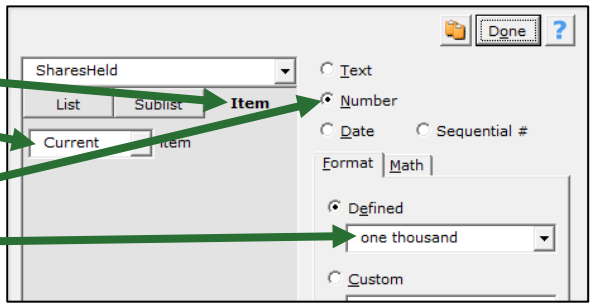
The shareholders are as follows:

{List:{Shareholders#X} owns __ (__) shares (current value $__), giving {him|her} __% ownership of the company.

{[ditto]|[ditto]}

Click **Item**, **Current**.

Click **Number**, **one thousand**, **Done**.



This next Field shows the number of shares again, but uses numerals instead of words. Rather than create the Field from scratch, let's save a little time by copying the previous Field and changing its format.

The shareholders are as follows:

{List:{Shareholders#X} owns {SharesHeld#X} (__) shares (current value $__), giving {him|her} __% ownership of the company.

{[ditto]|[ditto]}

After copying the {SharesHeld#X} Field and pasting it between the parentheses, your form should look like this.

To format the second {SharesHeld#X} Field as numerals instead of words, select it and click **Field**, **1,000 (no decimals)**, **Done**.

The shareholders are as follows:

{List:{Shareholders#X} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value $__), giving {him|her} __% ownership of the company.

{[ditto]|[ditto]}

The remaining two Fields are more exciting, since they require math.

Select the highlighted blank. We'll insert a Field here to multiply the current share value (ShareValue) by the number of shares owned by a shareholder (SharesHeld).

Click **Field**, **ShareValue**, **Insert Field**.

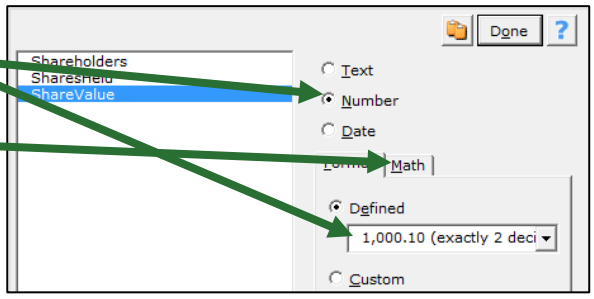
The shareholders are as follows:

{List:{Shareholders#X} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value $__), giving {him|her} __% ownership of the company.

|[ditto]|[ditto]}

Select **Number** and choose the format **1,000.10 (exactly 2 decimals)**.

Click **Math** to open the Math screen.



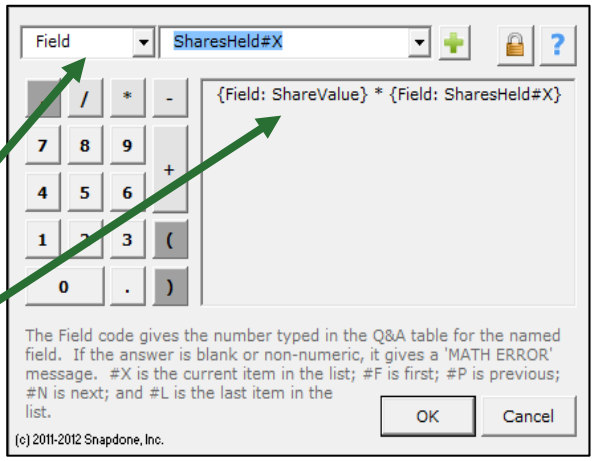
Doxserá has inserted the function **{Field: ShareValue}**, which will provide the answer to the ShareValue question in the Questionnaire.

We need to multiply the share value by the number of shares held by the current shareholder. Click the asterisk button (or press the asterisk key on your keyboard) to indicate multiplication.

Select **Field**, **SharesHeld#X**, and click plus to add **{Field: SharesHeld#X}** to the formula.

The finished formula includes two functions.

Click **OK** to close the Math screen, then **Done**.



One more Field to go! It will calculate the percentage of the company owned by each shareholder.

Select the highlighted blank and click **Field**, **SharesHeld**, **Insert Field**.

The shareholders are as follows:

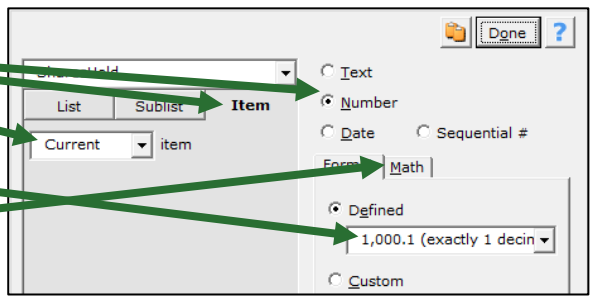
{List:{Shareholders#X} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value ${###}), giving {him|her} __% ownership of the company.

|[ditto]|[ditto]}

Select **Item**, **Current**, **Number**.

Select the format **1,000.1 (exactly 1 decimal)** so the number will be accurate to the nearest 10th of a percent.

Click **Math** to open the Math screen.

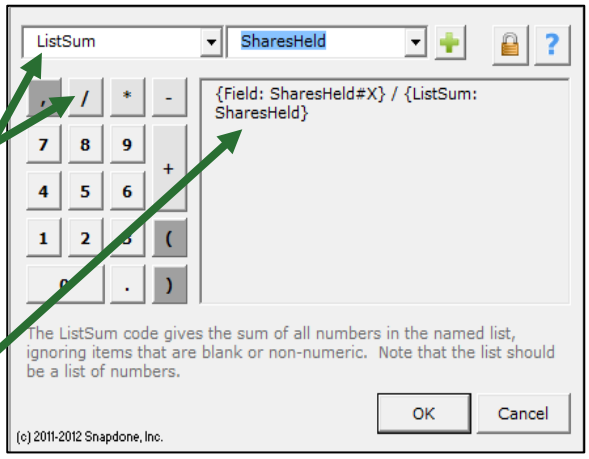


Doxserá has inserted the function **{Field: SharesHeld#X}**, which provides the number of shares held by the current shareholder.

Click the slash button (or press the forward slash key on your keyboard) to indicate division.

Then add a function that gives the total number of shares listed in the Questionnaire's SharesHeld answer: select **ListSum**, **SharesHeld**, and click plus.

Here's what the formula looks like when those steps are complete.

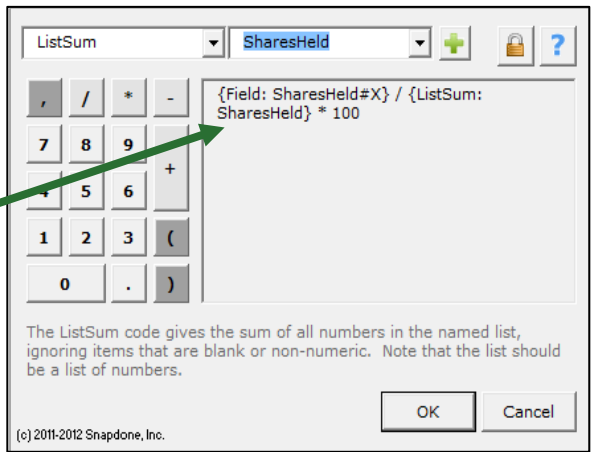


To finish, we'll multiply everything by 100 (since this number is expressed as a percentage in the finished document).

Add *** 100** at the end of the formula, either by clicking buttons in the Math screen or by typing on your keyboard.

The finished formula looks like this.

Click **OK** to close the Math screen, then **Done**.



If you chose to abbreviate the math Fields, the finished form looks like this.

The shareholders are as follows:

{List:{Shareholders#X} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value ${###}), giving {him|her} {###}% ownership of the company.

|[ditto]|[ditto]}

If you chose not to abbreviate, the finished form looks like this.

The shareholders are as follows:

{List:{Shareholders#X} owns {SharesHeld#X} ({SharesHeld#X}) shares (current value ${{Field: ShareValue} * {Field: SharesHeld#X}}), giving {him|her} {{Field: SharesHeld#X} / {ListSum: SharesHeld} * 100}% ownership of the company.

|[ditto]|[ditto]}

THE PAYOFF

The form user supplies a few names and numbers in the Questionnaire, and the form takes care of the rest.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Shareholders	List the shareholders.	Burt Wilmer [he] Frieda Knowles [she] Hugh Soder [he]
SharesHeld	How many shares does each shareholder own?	Burt Wilmer: 180 Frieda Knowles: 235 Hugh Soder: 165
ShareValue	What's the current value of 1 share?	105.35

The shareholders are as follows:

Burt Wilmer owns one hundred eighty (180) shares (current value $18,963.00), giving him 31.0% ownership of the company.

Frieda Knowles owns two hundred thirty-five (235) shares (current value $24,757.25), giving her 40.5% ownership of the company.

Hugh Soder owns one hundred sixty-five (165) shares (current value $17,382.75), giving him 28.4% ownership of the company.

Example 12: List in Table Format, Master List, and Math

Before you begin

- Example 5: Using a Master List ..... page 20
- Example 7: Linked Answers and Custom Lists..... page 31

What you will learn

- Lists formatted as tables

To automate this form we'll use a List formatted as a table, a Master List of information about classes, and math. If you'd like to work along with this example, begin by typing or copying the first and last paragraphs into a blank document. (Don't worry about the table in the middle – we'll be creating it with **Doxserá**.)

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
Basic Personhood	3/3/2012	125	11.00	136.00
Advanced Humanity	3/17/2012	200	17.60	217.60
TOTAL:				$353.60

Payment is due one week before the class date.

Step 1. Create the Master List

Rather than make the form user type a lot of dates and tuition fees, we'll create a Master List of classes that can be maintained and updated in one place, and used by this form and other forms too.

Click **Master List** then plus to create a new Master List. Name it **ClassInfo** and give it **3** columns.

Add the column headings **Class Name**, **Date**, and **Cost**, and fill in information for three classes as shown here.

Class Name	Date	Cost
Basic Personhood	3/3/2012	125
Intermediate Being	3/12/2012	175
Advanced Humanity	3/17/2012	200

Click **Master List**, **Save and Close** to save your work.

Step 2. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Classes	List the classes registered.	

Step 3. Create Smart Answer

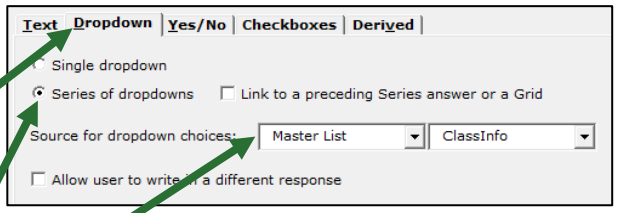
Place the cursor in the answer box and click **Smart Answer**.

Select **Dropdown** (because the user will choose each registered class from a dropdown box that shows all classes).

Select **Series of dropdowns** (because we want the form user to be able to choose more than one registered class).

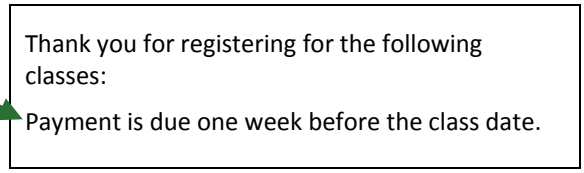
Select **Master List**, **ClassInfo** (because the classes are contained in a Master List named ClassInfo).

Click **OK**.



Step 4. Add a List

Place the cursor between the two paragraphs where the List is needed (just before the word **Payment**) and click **List**, **Classes**, **Insert List**.

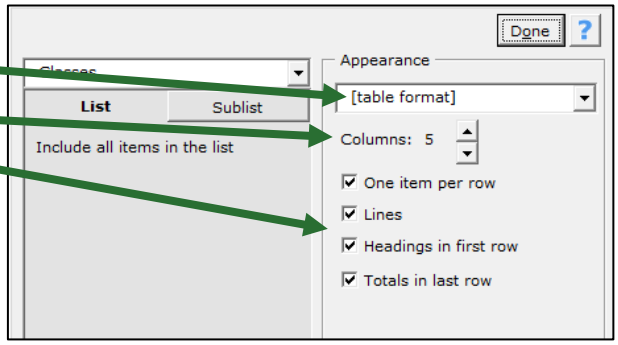


Select **[table format]**.

Select **5** columns.

Select all of the checkboxes: **One item per row**, **Lines**, **Headings in first row**, and **Totals in last row**.

Click **Done**.



This gives the bare bones of our List, formatted as a table. We'll add some Fields and clean it up a bit.

Thank you for registering for the following classes:

Heading1	Heading2	Heading3	Heading4	Heading5
{List:{Classes:Class Name#X}				
|{Classes:Class Name#X}				
|{Classes:Class Name#X}				
TOTAL:	0	0	0	0

}Payment is due one week before the class date.

Step 5. Add Fields

Doxserá provided placeholders for column headings. Begin by replacing them with the actual headings: **Class**, **Date**, etc. You may want to center the headings too.

Also delete the **0**'s at the bottom of each column but the last one, since that's the only place we want a total.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}				
|{Classes:Class Name#X}				
|{Classes:Class Name#X}				
TOTAL:				0

}Payment is due one week before the class date.

We'll fill in the Date column next.

Place the cursor in the first cell under the Date heading and click **Field**, **Classes**, **Insert Field**.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}				
|{Classes:Class Name#X}				
|{Classes:Class Name#X}				
TOTAL:				0

}Payment is due one week before the class date.

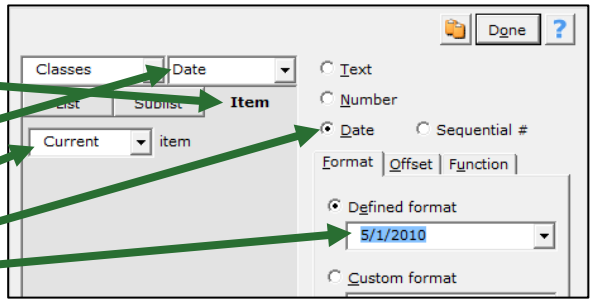
Click **Item**.

Select **Date** to use the Date column of the Master List.

Note that **Current** is selected. This will give the date of the current class in the List of classes.

Select **Date** and choose the format **5/1/2010**.

Click **Done**.



That's enough to make the date appear for the *first* item in the List, but it needs to appear for *every* item in the List. Rather than create the Field from scratch twice more, we'll copy and paste.

Copy the {Classes:Date#X} Field.

Paste the copied Field into these two cells.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes: Date#X}			
|{Classes:Class Name#X}				
|{Classes:Class Name#X}				
TOTAL:				0

}Payment is due one week before the class date.

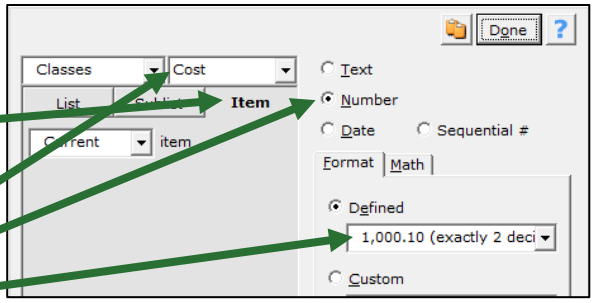
Use the same method for the Tuition column. Place the cursor in the first cell under the Tuition heading and click **Field**, **Classes**, **Insert Field**.

Select **Item**.

This time select **Cost** to use the Cost column of the Master List.

Select **Number, 1,000.10 (exactly 2 decimals)**.

Click **Done**.



Copy the {Classes:Cost#X} Field you just created from the first Tuition cell and paste it into the other two Tuition cells. Here's the form with the Tuition column completed.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
TOTAL:				0

}Payment is due one week before the class date.

Now we'll add math to a Field to calculate tax. To figure the tax for a particular class, we'll multiply its cost by a tax rate.

Put the cursor in this cell and click **Field**, **Classes**, **Insert Field**.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}		
TOTAL:				0

}Payment is due one week before the class date.

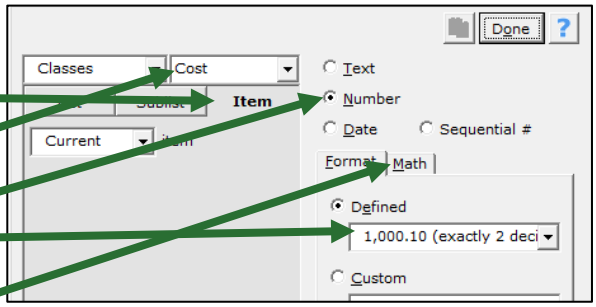
First we'll fetch the cost of the current class in the List.

Click **Item**.

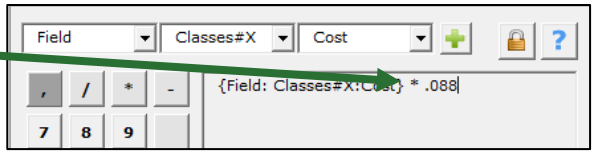
Choose **Cost** to look at the Cost column of the ClassInfo Master List.

Choose **Number, 1,000.10 (exactly 2 decimals)**.

And now we'll perform some math on that number. Click **Math** to open the Math screen.



To multiply the class cost by .088, add ***.088** to the end of the formula, either by clicking buttons in the Math screen or by typing on your keyboard.



Click **OK** to close the Math screen, then **Done**.

We'll use the same Field to calculate tax for other items in the List too.

Copy this Field.

And paste it in these two cells.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}	{###}	
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}		
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}		
TOTAL:				0

}Payment is due one week before the class date.

The last column will calculate tuition plus tax. We can copy one of the existing Tax Fields as a starting point, then use math to add Tuition.

Copy this Field.

And paste it here.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}	{###}	
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}	{###}	
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}	{###}	
TOTAL:				0

}Payment is due one week before the class date.

Select the Field you pasted in the Total column and click **Field** to modify it.

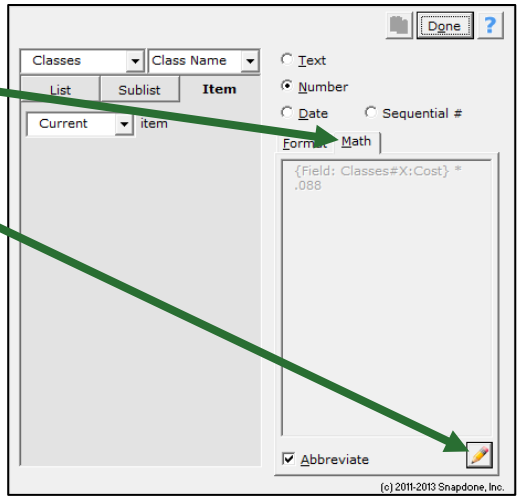
Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}	{###}	{###}
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}	{###}	
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes: Cost#X}	{###}	
TOTAL:				0

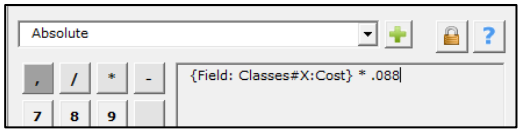
}Payment is due one week before the class date.

Click **Math** to see the existing formula.

Click the pencil to edit the formula in the Math screen.

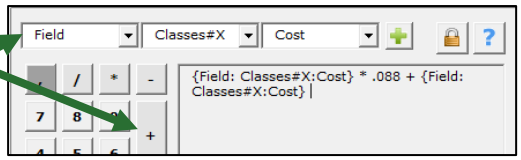


The formula already calculates tax. We'll add the tuition amount to get a total.



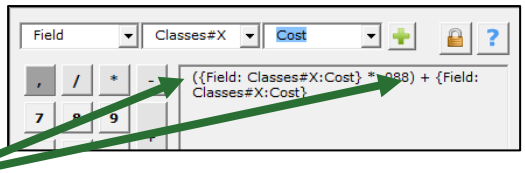
Click the **+** button for addition (or type it on your keyboard).

Select **Field**, **Classes#X**, **Cost**, and click plus. This function gives the cost of the current class in the List.



Whenever there is a chance that a formula may be calculated in the wrong order, use parentheses to indicate priority.

In this example, the result would be incorrect if addition were performed before multiplication. So add parentheses as shown here to make sure the multiplication is performed first.



Click **OK** to close the Math screen, then **Done**.

As before, copy and paste the Field you created to fill out the Total column.

Copy this Field.

And paste it in these two cells.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	
TOTAL:				0

}Payment is due one week before the class date.

One more item requires attention. The **0** in the last cell is a "sum" Field. It's a standard Word Field, so it needs to be formatted with the standard Word menu.

You can either replace it with a **Doxserá** Field that calculates total tax plus total tuition, or use the standard Word method: right-click on the Field, choose **Edit Field**, click **Formula**, and choose the number format **$#,##0.00**.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
TOTAL:				0

}Payment is due one week before the class date.

Finish up with any additional formatting you prefer. In the example shown here, the dates and dollar amounts are all centered.

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List:{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
|{Classes:Class Name#X}	{Classes:Date#X}	{Classes:Cost#X}	{###}	{###}
TOTAL:				$ 0.00

}Payment is due one week before the class date.

THE PAYOFF

The form user makes a couple quick choices from dropdown boxes, and additional information is drawn from the ClassInfo Master List and included in the resulting document, along with several math calculations.

Doxserá (c) 2011-2014 Snapdone.		
Label	**Question**	**Answer**
Classes	List the classes registered.	Basic Personhood Advanced Humanity

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
Basic Personhood	3/3/2012	125	11.00	136.00
Advanced Humanity	3/17/2012	200	17.60	217.60
TOTAL:				$353.60

Payment is due one week before the class date.

Example 13: Derived Answers

Example 13a: Basic Derived Answer

Before you begin

- Example 2: Conditions ..... page 7
- Example 10: Math ..... page 48

What you will learn

- Creating and using Derived Answers
- Hiding Derived Answers

Derived Answers can be used to leverage information that's been provided in another answer. Here we'll use a birthdate to automatically determine a person's age without asking an additional question.

If you'd like to work along with this example, begin by typing or copying this text into a blank document. We'll be adding a Condition to include the "minor" language only when appropriate.

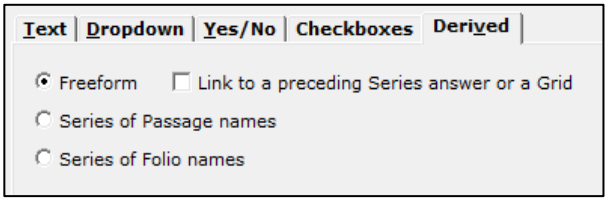
> The beneficiary is Larry Reno, a minor (born May 13, 2001).

Step 1. Create the Questionnaire

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Name	What's the beneficiary's name?	
DOB	What's the beneficiary's birthdate?	
Age	How old is the beneficiary?	

Step 2. Create a Derived Answer

Rather than make the form user answer the Age question, we'll create a Derived Answer to answer it automatically.



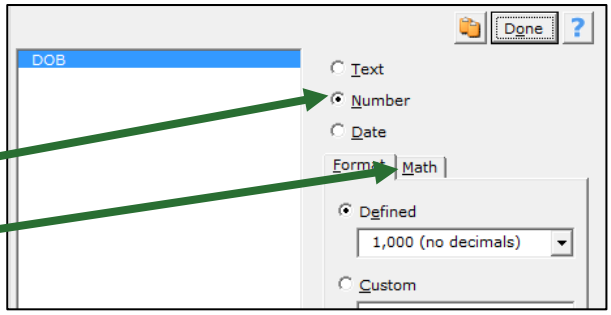
Place the cursor in the answer box for the Age question and click **Smart Answer**, then select **Derived**, **Freeform**, and click **OK**.

Now that this is a Derived Answer, you can fill the answer box with any combination of text, Fields, Lists, and Conditions. In this example, all we need is a single math Field, but other Derived Answers may be far more complex.

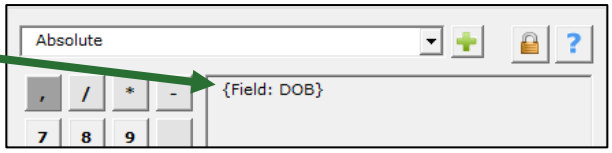
Make sure the cursor is still in the answer box for the Age question and click **Field**, **DOB**, **Insert Field**.

Select **Number**, since we're calculating the beneficiary's age, which is a number.

Click **Math** to open the Math screen.

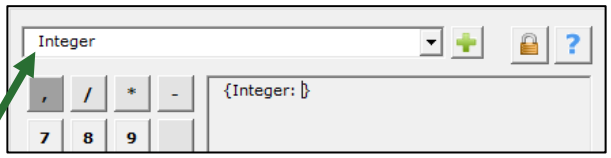


Begin by deleting the **{Field: DOB}** function to start with a clean slate.



The formula we're about to create will use four functions and math operator to determine a person's age, which is (1) the integer portion of (2) the number of days between (3) the birthdate and (4) now, divided by 365.25.

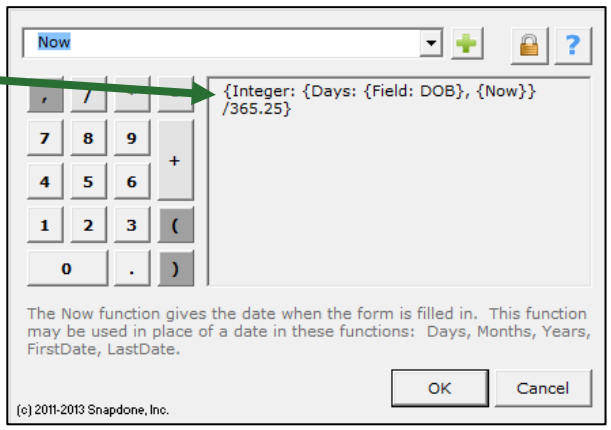
To begin, select **Integer** and click plus to add the Integer function. This function lops off the fractional part of a number without rounding, so that the age of someone who is **17.83** years old will be shown as **17**.



Fill in the rest of the math formula shown here. (If this is your first math formula, see Example 10 on page 48 for help.)

This formula determines the number of days between the birthdate and today, then divides that number by 365.25, then gives the integer portion of that number. The birthdate and "today" are obtained with two functions: **{Field: DOB}** and **{Now}**.

Click **OK** to close the Math screen, then **Done**.



Step 3. Add Fields

Select **Larry Reno** and replace it with a Field: click **Field**, **Name**, **Insert Field**, **Done**. The result looks like this.

The beneficiary is {Name}, a minor (born May 13, 2001).

Select **May 13, 2001** and replace it with a Field: click **Field**, **DOB**, **Insert Field**, **Date**, **Done**. The result looks like this.

The beneficiary is {Name}, a minor (born {DOB}).

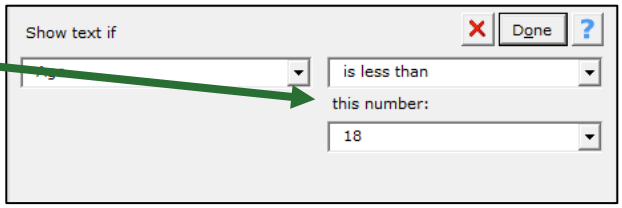
Step 4. Add a Condition

The "minor" language should appear only when the age is less than 18, so we'll add a Condition.

Select the highlighted text and click **Condition**, **Age**, **Add Condition**.

The beneficiary is {Name}, a minor (born {DOB}).

Select **is less than**, **18**, and click **Done**.



The finished form looks like this.

The beneficiary is {Name}{Age<18:, a minor (born {DOB})}.

One step remains. Click **Row/Column**, **Show/Hide** to hide the Derived Answer – since it is answered automatically, it would only be a confusing distraction to the form user. If you need to edit it later, click **Row/Column**, **Show/Hide** again to make it visible.

Note that the Age answer is not visible in the Questionnaire below. The form user just enters a birthdate – the age is calculated automatically in the background, and the sentence is altered accordingly.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Name	What's the beneficiary's name?	Mercedes Winthrop
DOB	What's the beneficiary's birthdate?	8/25/62

The beneficiary is Mercedes Winthrop.

Doxserá (c) 2011-2014 Snapdone, Inc.		
Label	**Question**	**Answer**
Name	What's the beneficiary's name?	Grant Baker
DOB	What's the beneficiary's birthdate?	10/3/2002

The beneficiary is Grant Baker, a minor (born October 3, 2002).

Example 13b: Grid with Derived Answer, Field Comparison

Before you begin

- Example 7: Linked Answers and Custom Lists..... page 31
- Example 9: Grid Answers..... page 41
- Example 13a: Basic Derived Answer ..... page 65

What you will learn

- Derived Answers in Grids
- Comparing two Fields in a Condition

But what if you have a whole list of people, and you need to derive the age of each one of them? And what if the age of majority is flexible, provided by the form user? And what if you want to use a Grid instead of a Series and Linked answer?

This example is similar to Example 13a above, with a couple adjustments to handle a whole list of people and a flexible cut-off date to determine adulthood.

The beneficiaries are listed below:

Larry Reno

Annette Garland, a minor (born May 13, 2001)

Phil Bertrand

Step 1. Create the Questionnaire

This time, create a Questionnaire with only one question:

TheFormTool (c) 2011-2013 Snapdone, Inc.		
Label	**Question**	**Answer**
AdultAge	What's the age of majority?	

Step 2. Add a Grid

Place the cursor below the Questionnaire and click **Smart Answer** to add a Grid answer. When asked for the number of columns in the Grid, type **3**.

		TheFormTool (c) 2011-2013 Snapdone, Inc.
Label	**Question**	**Answer**
AdultAge	What's the age of majority?	

[instructions]

[label]	[label]	[label]
[heading]	**[heading]**	**[heading]**

Fill in the Grid's instructions, labels, and headings so it looks like this:

		TheFormTool (c) 2011-2013 Snapdone, Inc.
Label	**Question**	**Answer**
AdultAge	What's the age of majority?	

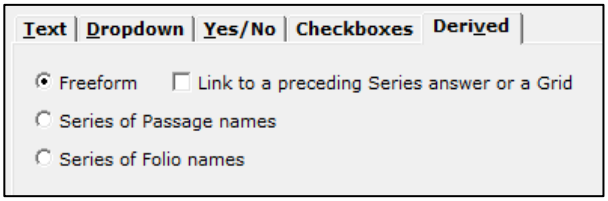
List the beneficiaries:

BeneName	BeneDOB	BeneAge
Name	**Date of Birth**	**Age**

Step 3. Create a Derived Answer Column in the Grid

The first two columns will contain simple Text answers, but the third column will contain Derived Answers that calculate the age of each beneficiary.

Place the cursor anywhere in the third column and click **Smart Answer**, then select **Derived**, **Freeform**, and click **OK**.



		TheFormTool (c) 2011-2013 Snapdone, Inc.
Label	**Question**	**Answer**
AdultAge	What's the age of majority?	

List the beneficiaries:

BeneName	BeneDOB	BeneAge
Name	**Date of Birth**	**Age**
		[create derived answer here]
		[ditto]

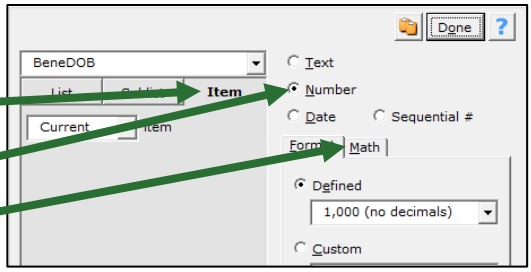
The third column is now Derived. That means we can add any Fields, Lists, and Conditions that are needed to manufacture an answer – in this case, the beneficiary's age.

With **[create derived answer here]** selected, click **Field**, **BeneDOB**, **Insert Field**.

Click **Item**.

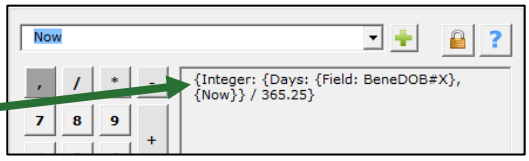
Select **Number** since we're creating a Field for the beneficiary's age.

Click **Math** to open the Math screen.



Create the same age formula we used in the previous example (page 66), with one change: instead of using **{Field: DOB}**, use **{Field: BeneDOB#X}**. This Field provides the birthdate of the current beneficiary in the Grid.

Click **OK** to close the Math screen, then **Done**.



Step 4. Add a Custom List

We'll create the List of names with a custom List.

Select the highlighted text and click **List**, **Names**, **Insert List**, **[repeating paragraphs]**, **Done**.

> The beneficiaries are listed below:
>
> Larry Reno
>
> Annette Garland, a minor (born May 13, 2001)
>
> Phil Bertrand

This provides the framework of our List – a paragraph that will be repeated for each item in the List of names.

> The beneficiaries are listed below:
>
> {List:Sample paragraph about {Names#X}.
>
> |[ditto]|[ditto]}

Modify the sample paragraph so that it looks like this, including the "minor" language – in a moment we'll make it conditional depending on each person's age.

> The beneficiaries are listed below:
>
> {List:{BeneName#X}, a minor (born _____)
>
> |[ditto]|[ditto]}

Now replace the blank with a Field to show the birthdate of the current person in the List:

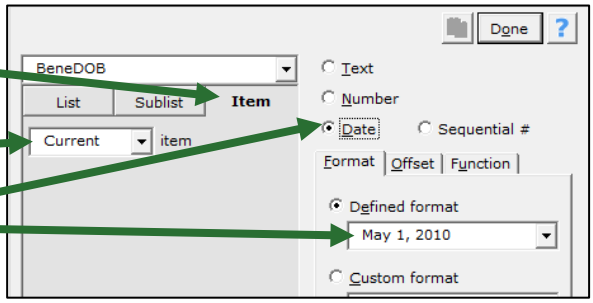
Click **Field**, **BeneDOB**, **Insert Field**.

> {List:{BeneName#X}, a minor (born _____)
>
> |[ditto]|[ditto]}

Click **Item** since we're creating a Field for a particular person's birthday.

Note that **Current** is selected, to provide the birthdate of the current person in the List.

Select **Date**, **May 1, 2010**, and click **Done**.



Finally, we'll make the "minor" language conditional for each person in the List (similar to what we did on page 67 in the previous example).

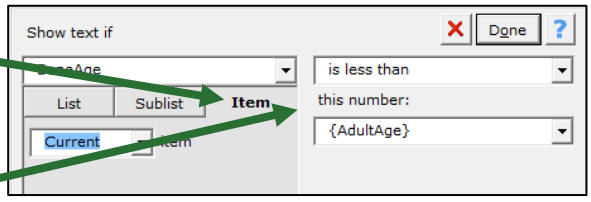
Select the highlighted text and click **Condition**, **BeneAge**, **Add Condition**.

```
{List:{BeneName#X}, a minor (born
{BeneDOB#X})
|[ditto]|[ditto]}
```

Click **Item** and note that **Current** is selected.

Select **is less than**, **{AdultAge}**. Rather than type a fixed number 18, we're using the age of majority provided by the form user in response to the **AdultAge** question in the Questionnaire.

Click **Done**.



The finished form looks like this.

```
The beneficiaries are:
{List:{BeneName#X}{if:, a minor (born
{BeneDOB#X})}
|[ditto]|[ditto]}
```

Don't forget the final step. Click **Row/Column**, **Show/Hide** to hide the **BeneAge** column from the form user. Since it's a Derived Answer processed automatically in the background, the form user doesn't need to see it.

BA-DA-BING

The age of each person is calculated automatically, and that age is compared with an age of majority provided by the form user.

TheFormTool (c) 2011-2013 Snapdone, Inc.		
Label	**Question**	**Answer**
AdultAge	What's the age of majority?	21

List the beneficiaries:

Name	Date of Birth
Mercedes Winthrop	3/17/62
Gavin Lloyd	4/9/99
Paula Stimpson	2/5/70

The beneficiaries are:

Mercedes Winthrop

Gavin Lloyd, a minor (born April 9, 1999)

Paula Stimpson

Index

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK

THIS PAGE INTENTIONALLY LEFT BLANK