

Course Outline for *Certified Creator: Intelligent Documents™*

Why a Certification?

The **Certified Creator: Intelligent Documents™** designation recognizes the best of the best. Use of the CC:ID title identifies experienced users from around the world who have successfully completed the grueling certification course and who are expert at creating intelligent documents™ with TheFormTool PRO and Doxserá.

While the vast majority of our users prefer to build their own forms and take pride in both the effort and result, some haven't the time or the interest to create a needed form or library. Certification is our tool to bring these interests together. Those who need an expert can look with confidence on those who bear the title.

TheFormTool, LLC will host an online meeting place to bring these communities together.

Course Information

Sponsoring Firm	TheFormTool, LLC
Title:	Certified Creator: Intelligent Documents™

Course Detail

Offering Media:	Online only			
Course Fee:	\$150 with application, non-refundable upon registration and acceptance			
Grade Code:	Pass/No Pass			
Time to Complete:	Ninety (90) days, maximum			
Number of Hours: 20+	Lecture: 11+	Practicum: 5+	Evaluation, written: 3+	Evaluation, oral: 1

Prerequisites and Recommended Preparation

Prerequisites	Read and be conversant with: <i>Doxserá Expert User Guide, Doxserá Detailed Examples, Doxserá Folios, Wrappers</i>
Requirements	Candidates should be highly knowledgeable about, experienced with, and skilled users of Word for Windows 2007 or later as well as experienced and enthusiastic users of TheFormTool PRO, Doxserá, or Doxserá DB. Candidates will need to own Word for Windows and Doxserá, Doxserá DB, or Aurora.

Course Description

The primary goal of the Certified Creator: Intelligent Documents™ certification course is to assure that candidates for certification are knowledgeable of and skilled at applying the features and functions of TheFormTool PRO and Doxserá and that each is fully capable of following and creating best practices in their use.

A secondary goal is to create a community of experts to foster the development of expanded uses of and best practices with the programs.

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CANDIDATE LEARNING OUTCOMES

Upon completion of the course the candidate should be able to:

- discuss, analyze, and understand others' needs for intelligent forms.
- estimate, design, construct, test, improve upon, and deliver a finished form that satisfies the users' needs and represents an elegant answer using all of the program features and functions that apply and represent best practices.
- synthesize new approaches and solutions, while answering at least 85% of the opportunities the document presents for the creation of intelligent variables and assuring that each of the solutions created operates as planned 100% of the time.

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CONTENT

These are the areas covered in the course and upon which candidates will be evaluated.

TheFormTool PRO and Doxserá	
Installation	
Questionnaires and Fields Smart Answers	Text, Dropdown, Yes/No, Checkbox, Derived, Series, and Pronoun
Fields	Text, Number, Date, Pronouns, Singular/Plural, Count, Custom
Conditions	Simple, Complex, Compound, within Lists The five built-ins
Lists and Sublists	Formatted as tables Identifying Fields: Current, First, Next, Last, Previous,
Item# Math, Date Offsets	
Attention Markers	
Saving Answers, Questionnaires, and Forms	
Networks	
Sharing	
Questionnaires	
GRIDs	
Wrappers	
Troubleshooting	
Doxserá only	
Sets	Creation, grouping, maintenance of Sets
Folios	Fetch and Fetcher Tags and Facts

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INSTRUCTION METHODS - OVERVIEW

User Manuals	Be completely familiar with the <i>Doxserá Expert User Guide</i> , <i>Doxserá Folios</i> , and <i>Wrappers</i>
Video Lectures	Learn processes demonstrated in the required Core and Elective Videos from the Knowledge Base
Practicum	Complete each of the Examples from <i>Doxserá Detailed Examples</i>
Demonstrate Skill	Complete up to five practical forms, satisfying at least 85% of the best practices grading points established for each with 100% functionality under all circumstances
Oral Evaluation	One-hour interview to determine candidate's familiarity with the totality of customers' needs for intelligent documents and how to best address those needs.

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COURSE ASSIGNMENTS

Candidates will register at the Knowledge Base (<https://service.theformtool.com/hc/en-us>) so that attendance and progress can be confirmed. In addition, candidates will maintain a log of the lectures attended and time spent.

Required Core Lessons

Required Core video lectures from The Lesson Plan — 10.2 hours

<https://service.theformtool.com/hc/en-us/sections/115000643723-The-Lesson-Plan>

- Lesson #1 Fixed Date Offsets (10:38)
- Lesson #2 Variable Date Offsets (12:42)
- Lesson #3 Pronouns and Plurals (28:03)
- Lesson #4 Conditions (9:14)
- Lesson #5 Compound Conditions: This AND That (7:03)
- Lesson #6 Conditions: This OR That AND The Other Thing (30:39)
- Lesson #7 Lists (11:51)
- Lesson #8 List Layers (24:58)
- Lesson #9 Lists with Linked Answers (11:09)
- Lesson #10 Lists with Previous Items (11:51)
- Lesson #11 Sublists (10:18)
- Lesson #12 Lists with GRIDs (29:42)
- Lesson #13 Derived Series Answers (21:14)
- Lesson #14 Sorting Lists (6:51)
- Lesson #15 Math (13:01)
- Lesson #16 Dates, Math and Derived Answers (14:23)
- Lesson #17 Lists in Table Formats with Master Lists and Math (24:50)
- Lesson #18 Creating Master Lists (6:41)
- Lesson #19 Using Master Lists (22:00)
- Lesson #20 Creating Folios (7:30)
- Lesson #21 Tagging Passages (4:32)
- Lesson #22 Folio Facts (6:34)
- Lesson #23 Advanced Folio Editing (9:42)
- Lesson #24 Asking for Passage Names from a Folio (6:43)
- Lesson #25 Folio Fetchers (5:06)
- Lesson #26 Asking for a Passage Tag from a Folio (5:51)
- Lesson #27 Questionnaires in Folios (26:49)
- Lesson #28 Folio Passages in Lists (9:32)
- Lesson #29 Folio Facts in Lists (3:49)
- Lesson #30 Fetching Folio Passages (3:41)
- Lesson #31 Adding a Data Source (9:01)
- Lesson #32 Adding a Data Source to a Form (21:52)
- Lesson #33 Using Dividers in the Questionnaire (4:32)

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Required additional Core video lectures from the Knowledge Base — 2.1 hours

The Power and Economics of an Intelligent Document
<http://service.theformtool.com/entries/41382696-The-Power-and-Economics-of-an-Intelligent-Document>

How to Create a Perfect Pleading
<http://service.theformtool.com/entries/56458245-How-to-Create-a-Perfect-Pleading>

Form Sets from Soup to Nuts
<http://service.theformtool.com/entries/61700605-Form-Sets-from-Soup-to-Nuts>

Pronouns, Plurals, and Possessives
<http://service.theformtool.com/entries/61458035-Pronouns-Plurals-and-Possessives>

Doxserá 2.0 Overview
<http://service.theformtool.com/entries/64805463-Everything-you-d-like-to-know-all-in-one-place>

Doxserá Only: Features and Functions
<http://service.theformtool.com/forums/23062576-Video-Course-for-Doxser%C3%A1-2-0-Folios-Fetch-and-Passages-> (16 videos)

Date Offsets
<http://service.theformtool.com/entries/41382236-Date-Offsets>

Required Core Booklets - available in current Doxserá download packages

Doxserá Expert

Guide Doxserá

Folios Wrappers

Elective Lessons

Elective video lectures from the KNOWLEDGE BASE — 4.5 hours

<https://service.theformtool.com/hc/en-us>

The candidate should select lectures that appeal to his or her individual interests.

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EVALUATION

Create and donate two approved forms to the Community Treasure Chest

Note: Acceptable donations will be required prior to the test forms

Complete up to five forms with a “Satisfactory” score on each

Upon completing all the course learning requirements, the student will convert up to five relatively short documents to elegantly, automatically, and intelligently assemble themselves into documents. The forms will be expected to demonstrate optimal efficiency, deriving maximum useful information from the fewest practical number of questions.

The documents have been “pre-created” by TheFormTool’s technical department to identify the number of potential improvements that can reasonably be created using current best practices. To receive the “Satisfactory” rating required for certification, the candidate will need to identify and provide solutions for at least 85% of those opportunities. Each provided solution must provide for, and function properly under, all reasonable assumptions 100% of the time.

Notice of Trustee Sale	Complex Date Offsets, Conditions, Dates, Fields within Lists, Lists, Lists in Tables, List Sums, extensive Math
Evaluation Forms 2-5	Autonumbering, complex Conditions, Derived Answers, Folios, Folio Facts, Grids, Lists formatted as tables, Master Lists, Passages, Roles, Styles, Tags, and Wrappers

Oral evaluation

One hour	The interviewer(s) will explore areas based upon evaluations of the candidate’s written evaluation materials and forms submitted for donation to the Community Treasure Chest. This evaluation will be on a Pass/Fail basis.
Submit two forms for approval as contributions to the Community Treasure Chest	Create and provide two intelligent forms covering any worthwhile subject for use of the common good of TheFormTool’s world-wide, 200+ industry community. Each form should display TFT virtues of elegant construction and simple, foolproof operation. The author will be credited on published submissions. World-wide copyrights or residual rights must be released.

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Written Study Materials

The required items are included in current Doxserá download packages. The recommended items are available at the bottom of the Support page <http://www.theformtool.com/resources/>

Required

*Doxserá Expert User
Guide Doxserá Detailed
Examples Doxserá Folios
Wrappers*

Recommended

*Word Warrior® 101: Everything You Need to Know About... Organizing Documents, Templates, Files,
Folders & Shortcuts*
Word Warrior® 102: Eleven Intrusive Microsoft Word Features, and How You Can Avoid Them
Improving Word & Reducing Errors; No More Cut & Paste

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Prerequisites

We **strongly** recommend that only candidates **highly** skilled with Word for Windows apply for and take the course.

Experience with Word for Windows

Only candidates **highly** skilled with Word for Windows are encouraged to apply for admission. At a minimum, candidate should be completely comfortable with styles, autonumbers and outlines, tables, sections, headers and footers, cross-references and hyperlinks, and tables of contents.

Experience with TheFormTool PRO or Doxserá

Candidates comfortable with TheFormTool PRO and Doxserá and most motivated to excel will have an advantage for successful completion of the course. We expect the vast majority of graduates to come from the top 2% of skilled Doxserá users.

Candidates will have read and be conversant with:

*Doxserá Expert User
Guide, Doxserá Detailed
Examples, Doxserá Folios,
and Wrappers*