Getting Started User's Guide

If you need assistance ...
Technical Support:
Monday through Friday
9:00 a.m. to 5:00 p.m. Eastern Time
E-mail: support@lawgic.com
Phone: toll free 877-2-LAWGIC (252-9442) or 904-223-2223
Fax: 904-223-2224
www.lawgic.com

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Chapter 1: About This Guide and Getting Started

This user's manual will guide you through the creation of a document using the Lawgic software. It is a summary of the more extensive System Help within the Lawgic software available by selecting Help on the Lawgic menu and then Help again.

If after reading this guide and creating a document you have further questions, we provide a number of additional resources as described in the 'Getting Help in Using the Software' section below.

Conventions Used in This Guide

- Menu or button commands will be given in **Bold** Face (Example: "Click the **Start** button.")

- Important information on how to use the program is indicated by a symbol.

- A note will be indicated by a symbol.

Getting Help in Using the Software

To help you get the most out of your Lawgic subscription, we provide the following tools in addition to this manual:

Private Product Training: We highly recommend you schedule a free one-on-one web based training to get you started with the program. Simply click HERE and choose 'Private training'.

Webinar Training: We offer multiple training topics via Webinar. Simply click HERE and sign up for any of these free training webinars.

Product Training Videos: We highly recommend you review the Product Training videos available on our web site at www.lawgic.com. Click the **Support** link and then the **Training** link where you can DOWNLOAD the file to your computer. The videos are also available on CD by request.

General System Help is available from within the Lawgic product by clicking **Help** on the Lawgic menu and then **Help** again. This displays a table of contents on the left side of the screen that enables you to quickly access the help topics you need. Scroll to and click the appropriate category or topic. This action will display either the text of an explanation or a list of subordinate help topics, one or more of which may provide the information you need.

Important!   In order to ensure proper document formatting and before creating your first document, we highly recommend you review the Editing Your Documents topics for Word or WordPerfect available in System Help by clicking Help on the Lawgic menu inside the program and then Help again.

Title-specific Help Resources is available by clicking **Resources** on the **Help** menu bar. This displays a list of various primary source and supporting materials that relate to your specific product(s). These **Resource** materials include:

- Getting Started Guide
- Update Letters
- Product Outline
- Key court decisions
- Relevant statutes and regulations

The program allows you to quickly view the text of these **Resources** and, if you wish, to print them. All of these **Resources** can be searched electronically.

Estate planning products only: 'How To' Help is available by selecting 'How To' from Question 1 (Select An Activity). It includes numerous topics, such as how to create various trusts on death, how to customize documents and how to create templates.

In addition to general system Help and title-specific Help Resources, you can also click **About Our Authors** on the **Help** menu to display biographies of the authors of the program Titles. Also, click **License Agreement** on the **Help** menu to display the **License Agreement** of the program.

You can also access a list of **Frequently Asked Questions (FAQs)** by selecting **Support** and then **Frequently Asked Questions** from our web site at www.lawgic.com.

Contacting Technical Support

- **Telephone:** You can call our Technical Support staff toll free at **877-2-LAWGIC (252-9442) or 1-904-223-2223** Monday through Friday 9:00 a.m. – 5:00 p.m. Eastern Time. (You may leave voice mail if you call at other hours.)

- **Fax:** 1-904-223-2224 Address your fax to "Technical Support."

- **Mailing Address:**

  Lawgic LLC
  Technical Support Department
  4475 Sutton Park Ct.
  Suite 404
  Jacksonville, Florida 32224

- **Email:** Our email address is support@lawgic.com. We encourage the use of email especially if you have a more substantive legal, estate planning or program question as this will help expedite your answer.

- **Lawgic's Web Site:** Visit our home page at http://www.lawgic.com/.

Whether you fax, e-mail, or write to us, please include your name, day or evening phone numbers, the best time to return your call, and your e-mail address, if available.

Chapter 2: Getting Started

Please refer to the installation document provided as part of your subscription. Installation instructions were emailed to you with your order confirmation.

1. To begin, click **Start**, click **All apps**, select the **Lawgic** program group, and then click **Lawgic**. (on Older systems click All Programs)

   The **Select Title/File** dialog box is displayed (see *Figure 2-1*).

Figure 2-1:
Select Title/File
dialog box
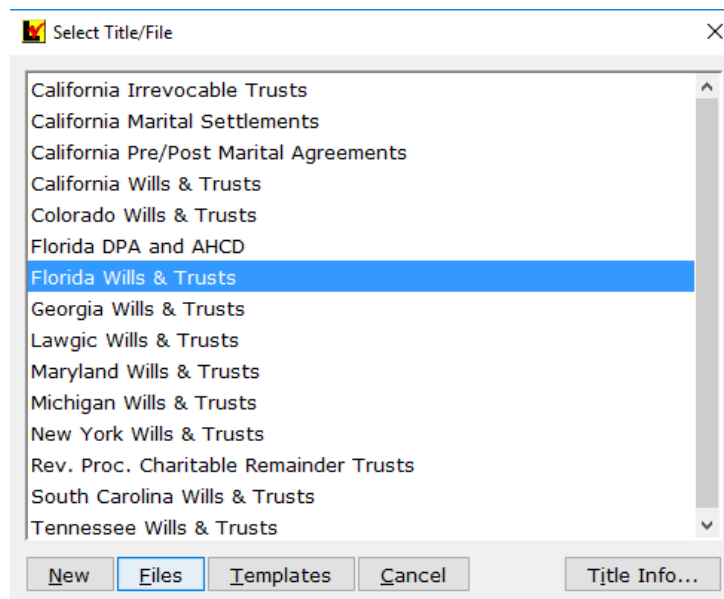
- **New** begins a new answer file in the Title you select.
- **Files** lets you open one of your previously saved answer files.
- **Templates** loads a "template," which is an answer file you can create for reusable scenarios. The advantages of templates are explained in *Chapter 9: Creating Templates.*

  Important!   Answers are saved in an answer file. Typically you create one answer file per client. The program creates multiple documents from one answer file. Your answers are shared across all documents, which decreases errors and ensures consistency.

2. To begin answering questions, click **New** at the Select Title/File box, which begins a new *answer file,* not a document.

Important! If you are using the Colorado, Michigan, South Carolina or Tennessee titles, the following box will appear:

Figure 2-2: *Open Template dialog box*
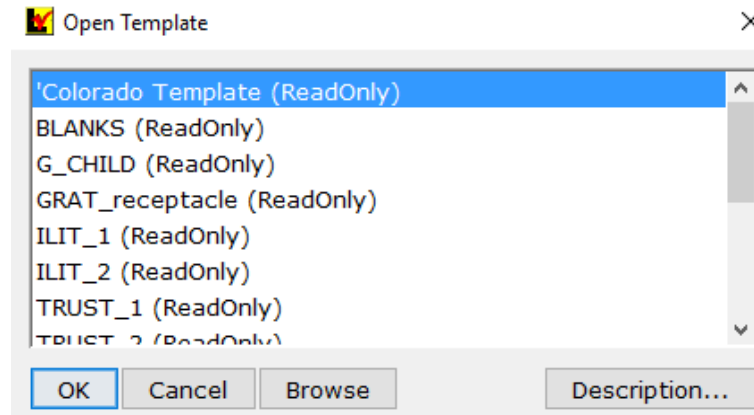
Choose your state template and click 'ok'.

3. This will take you to the Title page for that Title (*see Figure 2-3*). The Title Page displays the name of the product's author.

Figure 2-3: *Title Page*
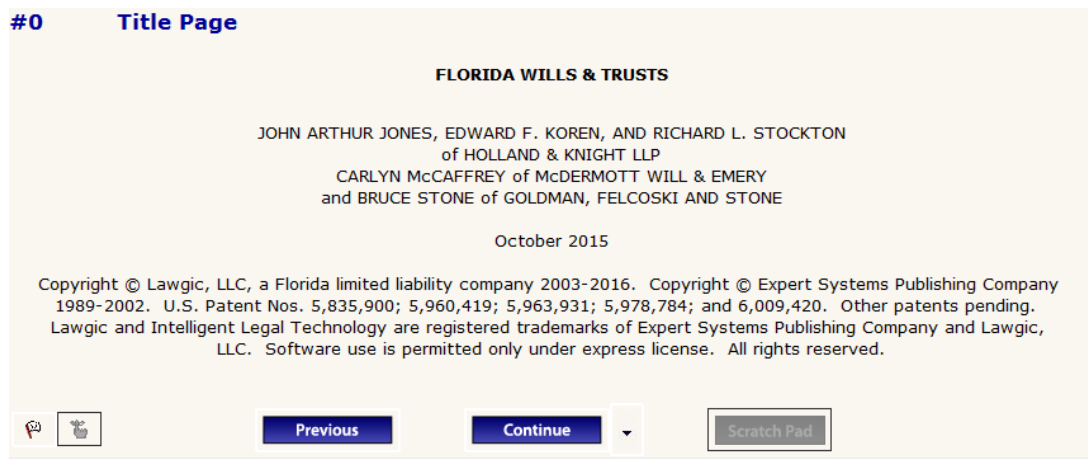
4. Click the **Start** button to go to Question 1 (*see Figure 2-4*). This screen displays a list of the activities available in the Title. Select the activity you want to perform. Each document option is created separately.

Figure 2-4:
Question 1 –
Select An Activity

5. Click the **Continue** button. (You can also press **Ctrl+Down Arrow** on your keyboard.)

> *Important!   The Continue button takes you to the next unanswered, relevant question based on your prior answers. It is the only way to proceed through the questions in order to create a document.*

6. This takes you to a sub-menu relating to your answer choice at Question 1. *(See Figure 2-5).* Make your selection and click the **Continue** button.

Figure 2-5:
Trusts Menu

> *Important!   The program will always re-present the Title Page, Question 1 and any sub-menu relating to your choice at Question 1 whenever you open the answer file or when you return to it from the word processor. Simply click the Continue button to proceed.*

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7. Before you go any further be sure to save your answers by selecting **Save** or **Save As** from the **File** menu. The **Save As** function allows you to also enter a Description. See *Chapter 5: Saving Your Answer Files* for more detailed information.

8. To finish creating your first document, simply click the **Continue** button and answer all of the questions presented until you see the '**All Questions Answered'** screen (*Figure 2-6 below)* at the end of the Q & A process. (See the following Chapters 3-8 for details on how to navigate, review and save your answers).

Figure 2-6: All Questions Answered dialog box

All Questions Answered   ✕

Send Document to Word Processor

Return to Title

Close the Current Answer File
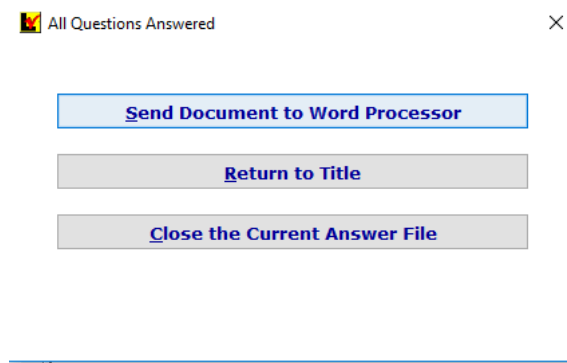
9. At the 'All Questions Answered' screen, select '**Send to Word Processor.'** The program will create and name the document and then send it to your word processor where you can make edits. You must then name and save the document in your word processor. *(See Chapter 7, Creating Your Document).*

Chapter 3: Understanding the Program Window Layout

The program window is divided into 3 sub-windows (see *Figure 3-1*):

- **The Navigator Window** appears along the left side of the screen. This window displays an outline of the Title, indicating which questions will be or have been asked. A red checkmark indicates that you have already provided an answer for that question.

- **The Question Window** is located at the top right section of the screen. This window displays the full text of the current question and your answer.

- **The Folders Window (with tabs that display different views)**, located at the bottom right hand side of the screen. Clicking on the various tabs allows you to view either **Progress** (dynamic text based on your answers), **Law & Strategy** relating to the current question, **Notes** that you may record about the current question, **Question Help** on how to answer the current question, or **Scratch Pad** to enter the various names that will be used throughout the file.

Figure 3-1: The Program Window Showing the Separate Sub-windows
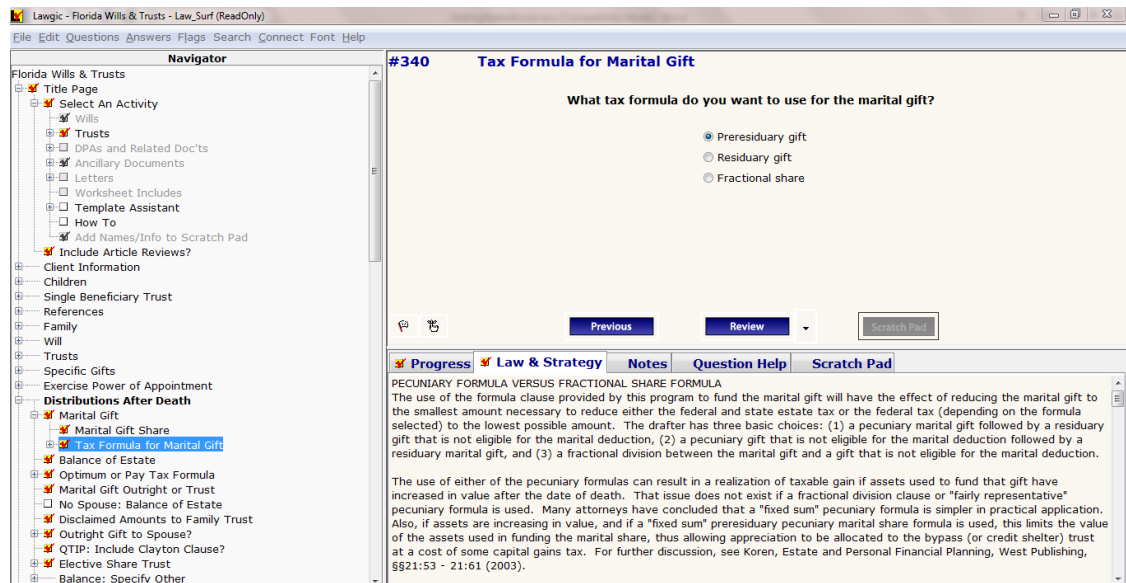
Each window can be resized by dragging the border. Move your mouse over the border until a double-headed arrow appears, then hold down the left mouse button and drag the border to the desired position.

The Navigator Window

The **Navigator Window** (*Figure 3-2*) is located on the left side of the screen. This window displays an outline of the Title. When expanded it will show which questions have been asked and answered. A red checkmark indicates that you have already provided an answer for that question. A gray checkmark means the question has been suppressed based on previous answers not allowing the question to be included. See *Chapter 8*, *Navigating and Reviewing Your Answers* for additional information on the Navigator.

Figure 3-2: The Navigator window
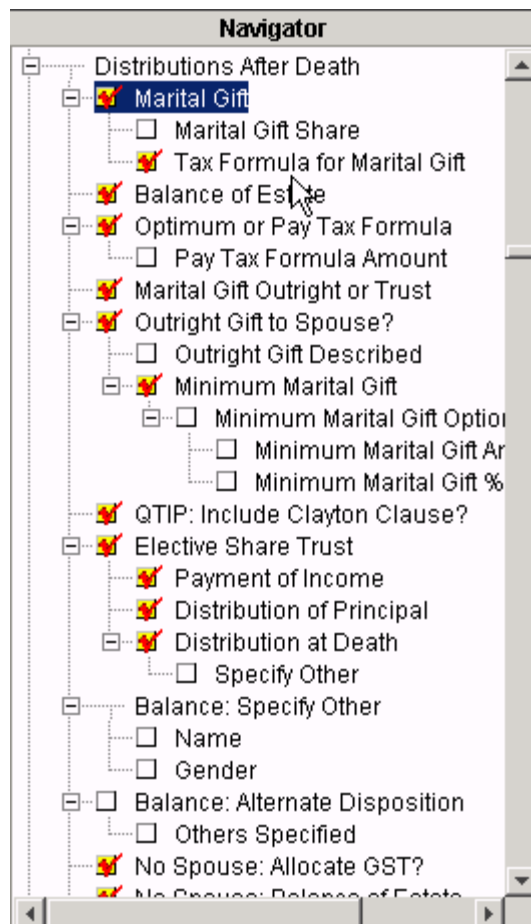
Elements in the **Navigator** can be used to help determine your progress through the Title:
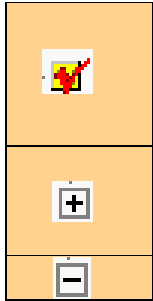
☑	A checkmark indicates that you have already answered the question. If there is no checkmark, you have not yet answered the question or the question is not applicable to what you are working on.
➕	Click the Plus Sign to expand a section of the **Navigator** and view an outline of questions contained in that section.
➖	Click the Minus Sign to collapse a section of the **Navigator's** outline.

Bold   If a question appears in blue bold, you have previously flagged this question for later use.

Highlighted   The current question appears highlighted in the **Navigator**.

Italics   If a question appears in italics, you have marked it tentative.

Red   If a question appears in red, its answer is required before the intended question can be presented.

Green   If a question appears in green text, it contains notes in the **Notes** folder.

Gray   If a question appears grayed out, it is suppressed and not relevant based on answers you've provided.

Important!   Some questions require that certain threshold questions first be answered. For example, to answer questions about minor children, you must specify that the couple has such children. This is called a threshold question. If you try to bypass a threshold question using the Navigator, the program will automatically jump to the threshold question. When this happens, the threshold question appears in red on the Navigator.

The Question Window

The **Question Window** (*Figure 3-3*) is located in the top right section of the screen. This window displays the full text of the current question, relevant choices (if any), and your answer.

Figure 3-3: The Question window
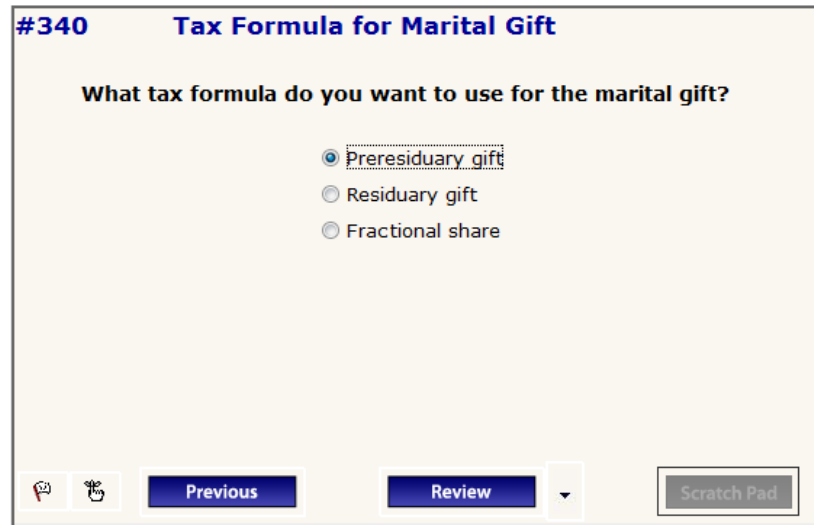
Here's a quick overview of the elements in the **Question Window**:

	Flag this question to bold it in the Navigator by clicking the **Flag** icon in the bottom left of the **Question Window**. When clicked, the **Flag** icon changes color to red. Flags are not saved when you exit the file. To save the flagged questions for future reference select **Save Flags** from the **Flag** menu. Then, name and save the flags. Flags are used extensively with Templates.
	Mark this question tentative by clicking the **Tentative** icon in the bottom left of the **Question Window**. At the end of the Q&A process, a 'Tentative Answers' box will pop up to remind you that you have tentative answers.
	Takes you back to the last question you viewed.
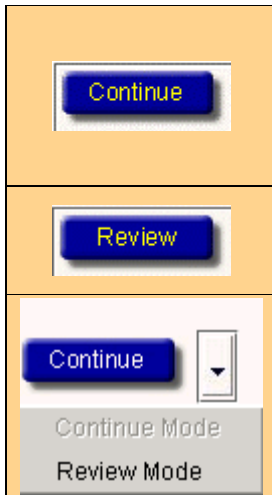
Continue	Takes you to the next relevant *unanswered* question. If you are creating a new document use this mode to go forward through the questions. To go back through questions you have already answered use the 'Review' mode (see below).
Review	Takes you to the next relevant question, whether or not it has already been answered. This is very useful in changing answers in completed files.
Continue ▾ Continue Mode Review Mode	To toggle between **Continue** and **Review**, click the arrow to the right of the **Continue/Review** button and select the desired mode.

The Folders Window

The **Folders Window** contains five folders that display different types of information to help you as you proceed through the questions and answer session. If a folder's tab does not have a red check mark, the current question does not contain that type of information.

Progress Folder
Clicking the **Progress** tab in the **Folders Window** opens the **Progress Folder**, which shows dynamic text based on your answers (see *Figure 3-4*).

Figure 3-4: Progress Folder
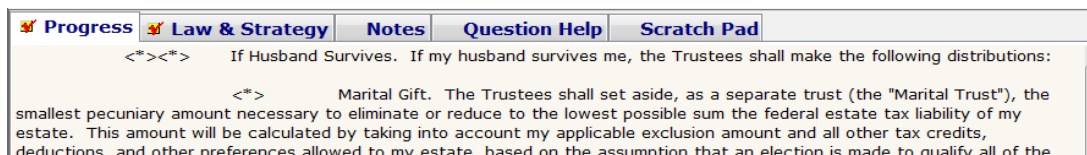
As you proceed through the questions, the program will build a document based on your answers. The **Progress Folder** allows you to read the text of the section, clause, or document that is affected by your answer to the current question.

Law & Strategy Folder
Clicking the **Law & Strategy** tab in the **Folders Window** opens the **Law & Strategy Folder**, which displays the *federal and state* legal analysis of a question written by the Title's authors. (See *Figure 3-5*).
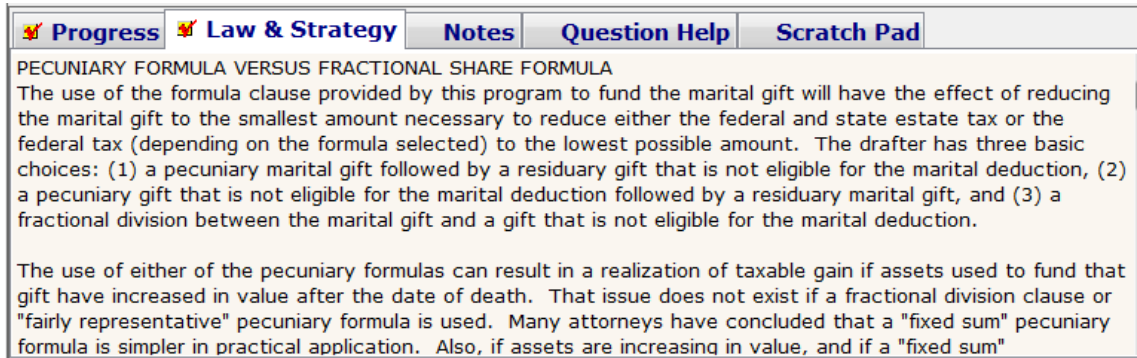
This analysis, which may vary depending on your facts, addresses issues such as:

- Statutes, regulations, or court decisions that could affect your answer
- Legal ramifications of alternative approaches
- Relevant practice considerations

Notes Folder

Clicking the **Notes** tab in the **Folders Window** will open the **Notes Folder** (*Figure 3-6)*. Here, you can record any observations you think relevant to a particular question. If you have already written notes for the current question, clicking the **Notes** tab will display them. These comments can be edited or deleted at any time. Notes **are not** reflected in the document generated by the program.
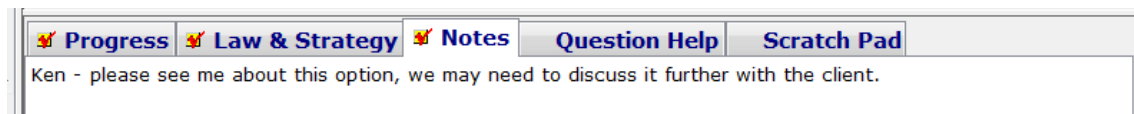
When Notes Are Helpful...

- When you are uncertain about a particular question and need to record your concerns.
- When you are handing off your work to a colleague and want to bring his or her attention to particular issues.
- When you are creating a template and want to record your insights on why you drafted the template the way you did.

To print Notes, click the **File** menu, select **Send** and click **Notes**; the Notes will now be displayed in your word processor. From here you can print as you would normally. See *Chapter 6: Recording and Sharing Your Thoughts* for more information on Notes.

Question Help Folder

Click the **Question Help** tab in the **Folders Window** to display context-sensitive help relating to that question (*Figure 3-7*).

Figure 3-7: Question Help folder
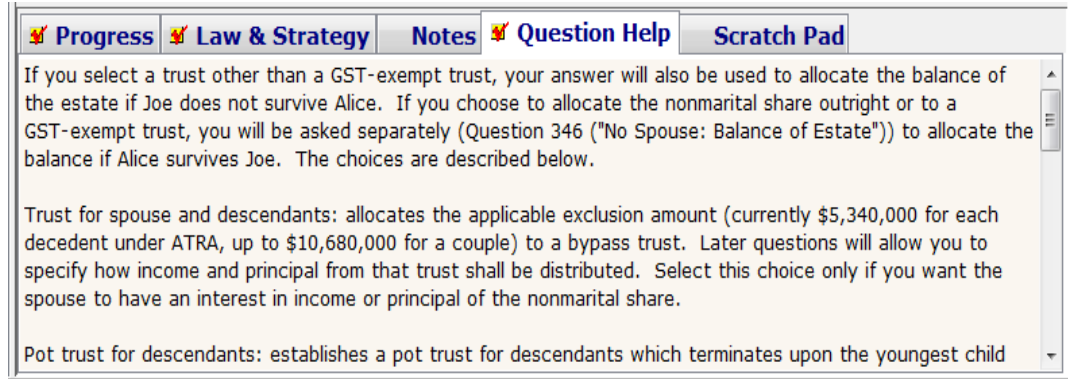
Question Help answers the following types of questions:

- Why is this question being asked? What are the ramifications of alternate answers?
- What background information or factual context is relevant to answering the question?
- How does the question relate to other questions?
- What decision making, drafting issues, or definitions are relevant?

Important! We highly recommend you read Question Help the first few times through the software as it contains important information not found elsewhere. We receive many tech support calls with questions whose answers are explained in the Question Help folder.

Scratch Pad Folder

Clicking the **Scratch Pad** tab in the **Folders Window** opens the **Scratch Pad Folder**. This folder allows you enter all relevant names for a client file in a single location and then simply right click on the appropriate name and insert it from the scratch pad as needed. (See *Figure 3-8*). Please refer to Help in the Lawgic software for further explanation.

Figure 3-8: Scratch Pad folder
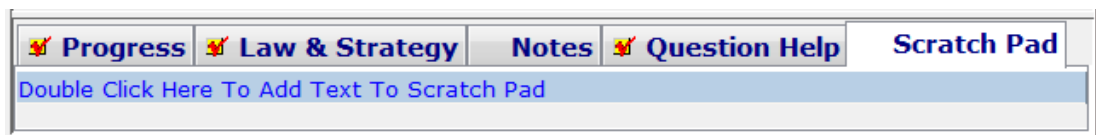
Chapter 4: Answering Questions: The Intelligent Dialogue

During a question-and-answer session, the expert author of your Title is always present. Think of this as a dialogue with an expert attorney. Following are some of the benefits of this electronic dialogue.

Instead of making you wade through a morass of potentially irrelevant questions, this program makes an ongoing evaluation of each answer you provide. With each answer, the software is assessing the next question's relevance, and modifying its phrasing, its available choices, and its related legal commentary. If you go back and change any answers, all answers are reevaluated and the question and answer stream may be dynamically modified.

For example, in the estate planning products if you answer 'no' to the question: Is Your Client Married?, the program will ignore questions relating to creating a marital trust and only ask relevant ones. If you subsequently change your answer to "yes," you will be returned to the questions relating to the marital trust.

With a click of the mouse, the expert will provide you several types of important information, including legal analysis and practical advice relating to the current question. In addition, as you answer questions, the software simultaneously builds your document. Clicking the **Progress** tab in the **Folders** Window will display the section of the document currently being built.

Question Types

Single-select or multi-select questions allow either a single selection or multiple selections, depending on the specific question. In a selection question where you may make only a single choice, use the mouse to click a new choice. A new selection automatically clears the old. In a selection question where multiple choices are possible, use the mouse to click an existing choice to clear it, or click a new choice to select it. Alternatively, for both question types, you may use the up and down arrow keys on your keyboard to move the focus to the desired choice, and then press the space bar to select it.

Fill-in Questions are questions that require you to type in a response. These questions provide a text field, and the cursor is automatically placed in this field. Type the appropriate information. Alternately, you can copy and paste text from another source into the screen.

Providing Dates: Whenever you are prompted to provide a specific date, enter the information using any standard date format, but be sure to specify the year using four digits; for example: **8/9/1999**, **04-17-1957**, etc.

Answering with a Blank: There may be occasions where you lack certain information (e.g., a birth date). To insert a blank, click **Set to Blank** on the **Answers** menu. You can also insert a blank by leaving the answer empty on screen and clicking the **Continue** button.

Review Questions: At the end of each major section in the program you will have the opportunity to preview the text that has been created *for that entire section (see Figure 4-1).* To activate this feature you need to answer 'Yes' to the "Include Article Reviews?" question that is presented at the beginning of the program.

***Figure 4-1:
Review
Question***

The <*> symbols in the Progress window are placeholders for numbering that will be created once you send your document to the word processor.

> *Note: If you want to print the text in the any Progress window before you have answered all of the questions, you need to copy the text and paste it into a document in your word processor where you can print. To do so, place your cursor in the Progress window, choose Select All from the Edit menu. The text will be highlighted. Then, select copy from the Edit menu. Open your word processor and select paste.*

Repeat Questions: Certain sets of questions will be asked repeatedly to gather information about sets of people or situations. For example, you may need information for a client's children; thus the questions soliciting this information need to be repeated for each child.

The program addresses these situations with a unique type of question called a **Repeat Question**, which consists of a **Repeat Control Question** *(See Figure 4-2 below)* and a series of substantive questions (e.g., name, birth date, gender) appropriate to the situation. *(See Figures 4-2 and 4-3 below).*   Repeat Control Questions are identified on the **Navigator** by **(Q REPEATS)** to the right of the question and provide the following choices: **Add, Modify, Delete, Clear All Answers and Done.**

Figure 4-2:
Repeat Control
Question

```
#50     Current Marriage (Q REPEATS)

CHILDREN OF CURRENT MARRIAGE
Select ADD to add another child.
Select MODIFY to view or change a previously added child.
Select DELETE to delete a child.
Select CLEAR ALL ANSWERS to delete all children.
Select DONE when finished.

                          ○ Add
                          ○ Modify
                          ○ Delete
                          ○ Clear All Answers
                          ⊙ Done

                    [ Previous ]        [ Review ]    ▾
```

The substantive questions follow the Repeat Control Question and are identified on the **Navigator** by a counter such as **1/2**, where the right number indicates the total number of iterations and the left number indicates which iteration is currently on screen. For example, **1/2** *(see Figure 4-3 below)* would indicate that there are two children and information about the first child is currently on screen.

Figure 4-3:
Repeat Question

```
#52     Child Info (1/2)

Provide information for the first child of the marriage of Joe and Alice.

        Name   Andrew
Date of Birth  1/1/1980
      Gender   ⊙ Male
               ○ Female




                    [ Previous ]        [ Review ]    ▾
```

Here's how the options mentioned above work:

- If you were entering one of the couple's children, you would select **Add** at the Repeat Control Question *(See Figure 4-2 above)* and click **Continue**. You would then be asked the substantive questions about that child *(see Figure 4-3 above)*. When the sequence of questions is finished, you are returned to the Repeat Control Question. Select **Add** once again to provide information on an additional child.

- To review and/or modify previously provided information or answers, select **Modify** at the Repeat Control Question and click Continue. Select the repeat element you would like to review and click OK. This action takes you to the first question in the repeat sequence. You can then use the **Navigator** or the **Review** button (not the **Continue** button) to go directly to the answer at issue.

After you have provided information for all of the children, select **Done** and click **Continue** to move on to the next series of questions. At any time you may return to a Repeat Control Question (look for "Q REPEATS" on the **Navigator**) to **Add**, **Modify**, or **Delete** an iteration (e.g., child). Deleting an iteration deletes all information for that person or situation.

Changing Answers

Once you have answered a question you can change your answer at any time. There are two ways to do this:

1. Click the PREVIOUS button: This retraces your steps back through the exact sequence of questions you just answered, regardless of their numerical order. (You can also click **Previous** on the **Questions** menu or press **Ctrl+Up Arrow**.) It is best used the first time through the questions for a particular document. The **Previous** button performs essentially the same function as the Back button on your Internet browser.

2. Use the Navigator: Scroll through the Navigator and click on the question whose answer you want to change. The program will then take you to that question. Change your answer. Then, click the **CONTINUE** button and the program will take you to the next unanswered question. See the section titled **Using the Navigator** in *Chapter 8: Navigating and Reviewing Your Answers* for detailed information.

> *Important!   Do NOT use the Navigator to answer questions for the first time. You must use the Continue button to move through the Q&A in order to create your document. The Navigator should be used to change and/or review questions that have already been answered.*

Changing Answers in a Repeat Question

Once you have answered a Repeat question, you might want to go back at a later time to add, modify or delete information. To do this, you first need to locate the Repeat Control Question in the Navigator identified as **(Q REPEATS)** to the right of the question *(See Figure 4-4 below)*. Then, click on it and the program will take you to that question.

Figure 4-4: Locating Repeat Control Questions on the Navigator
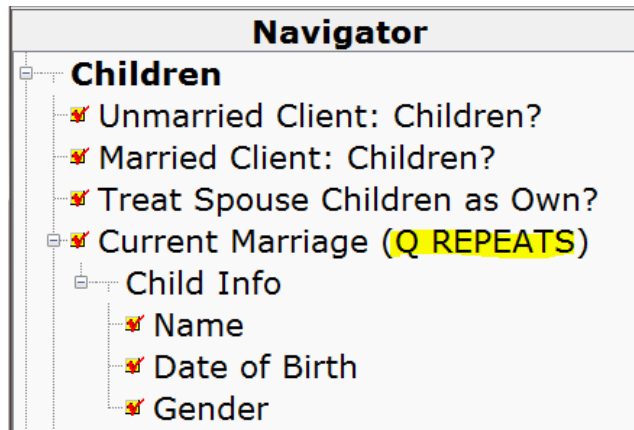
Once at the Repeat Control Question, click **Add, Modify, Delete or Clear All Answers,** depending on what you want to do. Once you are done, simply click **Continue** to move to the next unanswered, relevant question.

Note: You may review or edit the answers you have provided for an iteration of the Repeat Question by clicking Prev Repetition or Next Repetition on the Answers menu when in the Repeat Question. This will move you sequentially through the answers. (See Figure 4-5 below),

Figure 4-5: Repetitions

File Edit Questions **Answers** Flags Search Connect Font H|

Naviga	
Current Mar	Load Answers/Notes...
Child Info	Load Template...
Name	
Date	Clear Multiple...
Gende	Revert to Previous Answer... Ctrl+R
Male or Spo	Reinstate Default Answer
Female or S	Refresh Display
Disinheriting	
Single Benefici	Set To Blank
References	
Family	Switch Tentative
Will	Clear All Tentatives
POW: Trust	
POW: Trust	Prev Repetition
Recipient if	Next Repetition Go to the previous member
Cremation o	
Gift of Home	Show Answers
Trusts	Hide Answers
Specific Gifts	Expand All
	Collapse All

Printing the Navigator With or Without Your Answers

You can send the Navigator's questions with or without your answers by selecting **Send** on the File menu and then select **Navigator Outline** (See figure 4-6). Then choose either with or without your answers in the subsequent pop-up (see figure 4-7). A document named "Outline" is prepared and your word processor is opened (see figure 4-8).

Figure 4-6: Navigator Outline

File Edit Questions Answers Flags Search Connect

		#72
Select Title/File... Ctrl+T		
Recent Files		CHILDF
Save Ctrl+S		Select /
Save As...		Select I
Save As Template...		Select I
Close Ctrl+W		
Send	Document	
Exit...	Navigator Outline...	
Married Client: Childre	Notes	
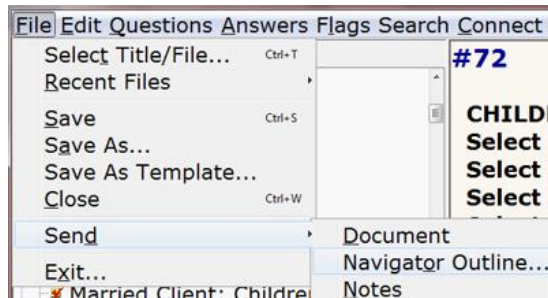
Figure 4-7: Answers
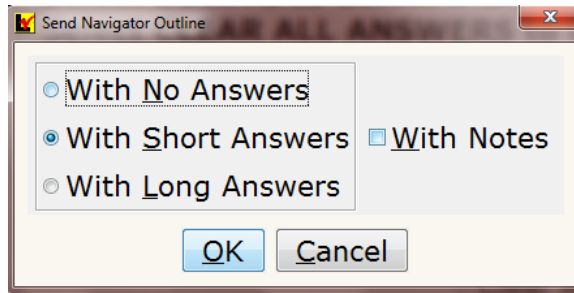
Figure 4-8: Navigator Document

```
Title: Florida Wills & Trusts      Answer File: New File
Feb 29 13:49:33 2016

 Copyright (c) Lawgic LLC 2003 - 2015.

NOTE:
This file will appear best when viewed in a fixed font, like Courier.
Set the margins to 80 characters or more.
----------------- O U T L I N E ----------------

000 Title Page                           = << OK >>
001   Select An Activity                 = Trusts
002     Wills                            = Simple Will
003     Trusts                           = Revocable Trusts-Single
004       Type of Revocable Trusts       = Revocable Trust
005       Type of Joint Trusts           =
006       Type of Irrevocable Trusts     =
007       Drafting for Same-sex couple?  = No
008     DPAs and Related Doc'ts          = Durable Power of
Attorney|Designati
009       DPA Format                     = Full version
010         DPA Provisions Included      = Real property|Tangible
personal pro
011       Revoke All Prior DPAs?         = No
012       Include Explanation Page?      = Yes
013       Authorization Forms for Minors = Designation of Health Care
Surrogat
014       Ancillary Documents            = Assignment
015         Assignment Specified         = Stock
016         Crummey Notices Specified    = Complex single notice (ILIT
only)
017         Delegation of Powers         =
018     Letters                          = Sending documents
019       Type of Word Processor         =
020         Type of Questionnaire        =
021       Worksheet Includes             = Will|Codicil to Will|GRAT
Codicil|R
022       Template Assistant             =
023         User Profile Includes        =
024     How To                           =
025     Add Names/Info to Scratch Pad    = << OK >>
026   Include Article Reviews?           = Yes
027                                      =
028 Client Information                   =
029   Client Married?                    = Yes, opposite-sex couple
030   Client Identity/Gender             = Wife
031     Same-sex: Gender of Couple       = Male
032     Same-sex: Refer to Spouse As     = spouse
```

There are two types of files that are created as part of your work: an *answer file* and a *document file.*

The *answer file* consists of your answers (and notes) to the questions and is saved within the Lawgic program. Typically you create one answer file per client. All documents are then created from that one client answer file because answers are shared between documents, where appropriate.

To save your answers select either:

- **Save** (on the **File** menu), which saves your answers and notes under the existing file name (if a file name has already been created); or

- **Save As** (on the **File** menu), which saves your answers and notes under a new file name. It differs from **Save** in that it includes a Description dialog box where you can type in information on the file as well as a list of your client files. You should chose this the first time you save an answer file.

> ***Important! You should save your answers immediately when you start a new answer file as well as periodically during the question and answer session.***

Should you forget to save your answers the AutoSave feature can help you recover some of your work. This feature automatically saves a separate copy of your answers to a file named "LGCTMP00.ANS" roughly every fifteen questions. For more information, select **Help** from the Lawgic menu and then **Help** again. Then, select **Advanced Features** and **Recovering Your Work** for detailed instructions on using this file. However, we recommend you do not rely on this feature. It is best to get in the habit of saving your answers as soon as you start a new answer file and periodically through the Q&A session.

The *document file* is created at the *end* of the question and answer session by selecting **Send Document to Word Processor** when the 'All Questions Answered' dialog pops up*. This will then open the document file in your word processor to be re-saved and edited as you would any fully formatted document.*

Transferring Answer Files Between Computers

If you use the program both in your office and at home you can copy your answer files onto a flash drive, CD, attach to an email or other medium to transfer them to your home or laptop computer.

All answer files have an ".ans" extension and are stored in a sub-folder in the Lawgic folder on your computer. For instance, the *Florida Wills & Trusts* sub-folder is named 'fl_wt' and is stored in the following path: C:\Program Files (x86)\Lawgic\fl_wt.

Using Answer Files as a Template

Once you have completed an answer file and want to use it as a model set of answers or "template" for subsequent clients, you can create a **Template**. This important, time-saving feature is explained in Chapter 9, *Creating Templates.*

> ***Important!   Once you have closed the program and want to return to your answer file at a later time, select File from the Select Title/File dialog box that appears when you first open Lawgic. You can also get to the same Select Title/File box from within the Lawgic program by selecting File from the Lawgic menu and then Select Title/File, i.e. you do NOT need to close the Lawgic program to open another answer file.***
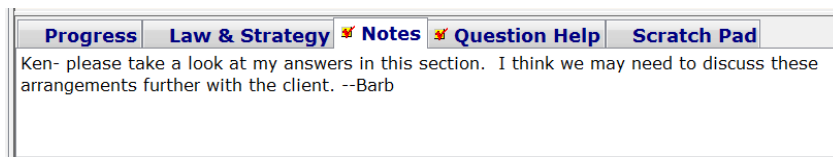
Chapter 6: Using the Notes and Tentative Features

The program lets you record any thoughts or concerns you might have about certain questions. You can also mark questions for subsequent action or review. The information or marks you record are directly attached to the question(s) at issue, so that you don't have to rely on either memory or paper trails. Moreover, this information is easily shared with colleagues.

Recording Your Thoughts with Notes

Whenever you are on a question, you can click the **Notes** tab in the **Folders Window** and record observations you have about that question *(see Figure 6-1)*. Your comments can be edited or deleted at any time. (**Notes** are part of your internal work product and do not form part of the document generated by the software.) Questions containing **Notes** appear in **green text** on the Navigator

Figure 6-1: Example of Notes

Progress	Law & Strategy	🔥 Notes	🔥 Question Help	Scratch Pad

Ken- please take a look at my answers in this section. I think we may need to discuss these arrangements further with the client. --Barb

Here are situations where you might like to create some **Notes**:

- You are uncertain about a particular question and wish to record your concerns.
- You are handing off your work to a colleague and want to bring his or her attention to particular issues.
- You are creating or editing a template (model session) and want to record your insights on why you drafted the template the way you did. (Templates are discussed in Chapter 9.)

Note: Notes are saved as part of your answer file. You can print your Notes by selecting the File from the menu, then Send and then click Notes. The program prepares a document named 'Notes' and sends it to your word processor.

Marking Questions as Tentative

You can mark any question about which you are uncertain as "tentative." To do this, click the **Tentative** icon to the left of the PREVIOUS button while the question is on screen.

Tentative questions appear in *italics* on the **Navigator**, and the **Tentative** icon changes appearance while such questions are on screen. After answering all of the questions, the program presents a 'Tentative Answers' dialog box that reminds you if any questions are marked "tentative." You have three choices:

- Review Tentative Answers Individually
- Remove Tentative Status For All Answers
- Ignore Tentative Status and Continue

If you select 'Review Tentative Answers Individually,' the program automatically takes you to each of them in order.

You can use the Tentative feature either separately or together with the Notes feature.

Chapter 7: Creating Your Document

In Chapter 3 we discussed the **Progress** folder, which allows you to preview the individual provisions of your document as it is being built. To finalize the document, you must answer all relevant questions until you get to the 'All Questions Answered' screen *(see Figure 7-1)*. Click **Send Document to Word Processor.**

Figure 7-1: All Questions Answered dialog box
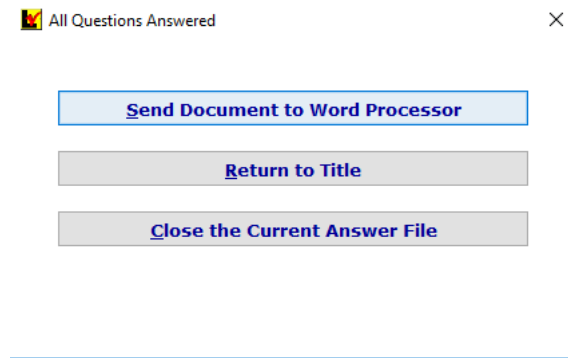
The program will check your answers, create and name the document and open your word processor.

Depending on your word processor you will either need to run the *lawgic.wcm* macro if using WordPerfect by selecting **Tools/Macro/Play** or you will need to generate the Table of Contents by selecting **Control+A, then press Alt+Shift+U (or the F9 key)** if using Word. These instructions are typically found at the beginning of the document.

Note: Once a document has been sent to Microsoft® Word, depending on your product, you will either get a "**Lawgic will now format your document**" message OR you will see the following message at the top of the document:

Press Ctrl+A, to Select All, then press Alt+Shift+U (or the F9 key) to complete the formatting of this document

As an alternate to Alt+Shift+U or the F9 key, you can **Right-click** and select **Update Field**.

With the document loaded in your word processor, you can review and edit the document.

Important! Before editing your first document we highly recommend you review the Editing Your Documents topic for Word or WordPerfect available by selecting Help from the Lawgic menu and then Help again. These topics provide step-by-step instructions on how to add, move and delete provisions, and update the table of contents and cross-references.

Use the **Save As...** command on the word processor's **File** menu, save the document under a new file name **to a location where you typically store your client files.** (You will notice that the document has been given a generic name, such as 'WTRIT00.doc' for Revocable Intervivos Trust.)   Lawgic works with most document management systems

Important!   If you just rename your document but do not move it to another location, the document will be saved in the default Docs subdirectory under the Lawgic directory. If you forget to save the document under a new file name, the program will save it temporarily under a generic name with '00' at the end of the name, such as WTRIT00.doc; however, this file will be overwritten as you continue to generate additional documents.

To create your next document: Remember, one answer file creates multiple documents for your client, so to create your next document simply return to Lawgic and **go to Question 1 (Select An Activity), select the next document (or activity)**, and answer the questions until you see the 'All Questions Answered' screen. Then, select **Send Document to Word Processor** to create the document.

Changing Your Word Processor

During installation, the program is usually able to identify your word processor automatically. However, if you have more than one word processor, change your word processors, or have installed to a non-standard word processor file path, you may need to specify the file path of the desired word processor either during installation or by clicking **Set Preferences** on the **Edit** menu and entering the file path in the **Set Preferences** dialog box (see *Figure 7-2*.)

Figure 7-2: The word processor file path in the Set Preferences dialog box
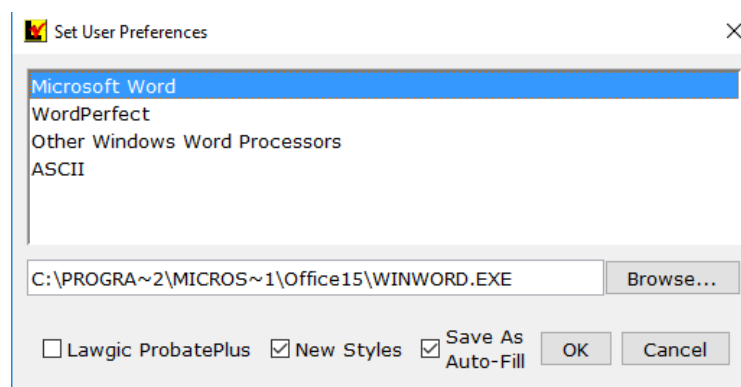
If an incorrect path was identified during installation, there are two primary ways to determine the correct path: the **Browse** utility on the **Set Preferences** dialog box (see *Figure 7-2*), or the **Search/Find** feature of your computer system. Once you have identified the file path, type it into the "Word Processor File Path" field on the **Set Preferences** dialog box.

The path consists of the name of the executable file (.exe) for your word processor and the directory in which that file is located. The name of the executable file will depend on your word processor.

The file path and executable files for several common word processors are:

32-bit Word Processor paths

Microsoft Word 2016	C:\Program Files (x86)\Microsoft Office\root\Office16\winword.exe
Microsoft Word 2013	C:\Program Files (x86)\Microsoft Office\Office15\winword.exe
Microsoft Word 2010	C:\Program Files (x86)\Microsoft Office\Office14\winword.exe
Microsoft Word 2007	C:\Program Files (x86)\Microsoft Office\Office12\winword.exe
Corel WordPerfect x7	C:\Program Files (x86)\Corel\WordPerfect Office X7\Programs\wpwin17.exe
Corel WordPerfect x6	C:\Program Files (x86)\WordPerfect Office X6\Programs\wpwin16.exe
Corel WordPerfect x5	C:\Program Files (x86)\WordPerfect Office X5\Programs \wpwin15.exe
Corel WordPerfect x4	C:\Program Files (x86)\WordPerfect Office X4\Programs \wpwin14.exe
Corel WordPerfect x3	C:\Program Files (x86)\WordPerfect Office X3\Programs\wpwin13.exe

64-bit Word processor paths

|	
Microsoft Word 2016	C:\Program Files\Microsoft Office\root\Office16\winword.exe
Microsoft Word 2013	C:\Program Files\Microsoft Office\Office15\winword.exe or C:\Program Files\Microsoft Office 15\Root\Office 15\Winword.exe

Example: C:\Program Files (x86)\Microsoft Office\Office15\winword.exe is a common file path for Word 2013.

Chapter 8: Navigating and Reviewing Your Answers

Now that you have created your first document you might want to go back to the answer file to review or change your answers. The program has several features that simplify the review process to help you to navigate through the program.

The Review Mode – Difference between Continue and Review

While the **Continue** button takes you to the next *relevant **unanswered*** question, the **Review** button takes you to the next *relevant* question in sequence *whether answered or not.*
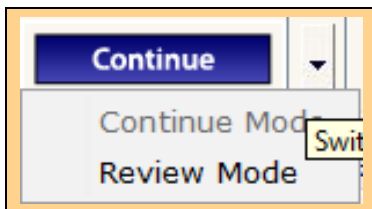
To toggle between **Continue** and **Review**, click the arrow to the right of the **Continue/Review** button and select the desired mode.

Here are simple rules on when to use **Continue** and when to use **Review**:

- The **Continue** mode is the program default and it is the only correct way to move through the Q&A in order to create a document **for the first time**. It takes you to *unanswered relevant questions based on your prior answers.* (You can also press **Ctrl+Down Arrow** on your keyboard to execute the **Continue/Review** function.)

The **Review** mode is generally used once you have answered all of the questions and want to go back to the answer file at a later time to either review or change your answers. You can click on any question in the Navigator and then switch to **Review** mode but remember to switch back to **Continue** mode if you want to send the document to the word processor. You will need to click Continue until you reach the 'All Questions Answered' box to do so. Keep in mind that using the **Review** mode is optional, i.e. you do NOT have to use **Review** to change your answers. Rather, you can click any question in the Navigator to change your answer.

Important! If you are in Review mode and land on a Repeat Control Question, and want to Add an answer at that question, you need to temporarily switch back to the Continue mode first, add your answer and then switch back to Review mode to continue reviewing your answers.

Note: You can use the 'sample' or 'law_surf' answer files provided by Lawgic in conjunction with the Review button to change answers in order to view the text associated with different client fact patterns. These sample answer files are files where all questions have been answered.

The ability to reuse previous work can be a great time-saver and ensure consistency and accuracy in your work output. The program has several features that let you reuse your work in helpful ways.

Whenever you finish an answer file that you believe would make a good model for subsequent clients with a similar legal scenario, you should consider saving the file as a *template*. Basically, a template is a partial set of answers that you can reuse for subsequent clients. You might consider creating a template to:

- Ensure consistency in standard provisions
- Create "masters" for recurring situations
- Establish provisions favoring one side versus another
- Customize answers for a client or an industry

> *Note: Before saving an answer file as a template, consider adding Notes to certain questions to remind yourself and others of the template's use and of the decision-making reflected in it.*

Templates are created somewhat differently depending on the product.

Creating Templates for Estate-Planning Products

All estate-planning products have an *automated* template creation feature called the Template Assistant available by selecting **Template Assistant** from **Question 1** (Select Current Activity).

The Template Assistant allows you to create a template from your current answer file by automatically clearing only client-specific answers, such as names, addresses, specific dispositions, etc. It saves all other 'fact-pattern' answers, such as whether or not you create a bypass or QTIP trust, etc.

When you go to use the Template, the program will only present the cleared 'client-specific' answers and will skip over the pre-answered 'fact-pattern' ones. This saves a tremendous amount of time. Of course, you can change any answer that has been pre-answered or skipped.

The Template Assistant feature also allows you to create a *User Profile Template* where you pre-answer questions relating to attorney information, drafting style, formatting and witnesses. These are questions that you will want to answer the same way in every answer file you create.

For instructions on how to use the Template Assistant, refer to the **Question Help** at the Template Assistant question as well as the **Create Your Own Templates** topic available by selecting **How To** at Question 1 (Select An Activity).

Creating Templates for California Family Law Products

These products do not have an automated Template Assistant feature. To create a template from a current answer file, do the following:

- Open the answer file that you want to save as a template.

- Select **Save as Template** on the **File** menu. This action displays the **Save Template** dialog box where you need to name your template. You should also enter a description in the Description box.

- Typically, you will only want to save some of the answers in your template, you can accomplish this by using flags. After you have created and saved the template, you should flag those answers that you want to keep (or flag those you no longer want – whichever action requires the least amount of "flagging"). Locate the questions you want to flag by using the **Navigator** and click the **Flag icon**.

- It's a good idea to save the flagged questions for future reference by selecting **Save Flags** from the **Flag** menu. Then, name and save the flags. You have now created a *flag file.*

- Then, with the appropriate questions flagged, click **Clear Multiple Answers/Notes** on the **Answers** menu. The dialog box that appears will ask you to indicate which answers you want to clear (i.e., "flagged" or "unflagged"). To leave any notes, you might want to **uncheck** the 'Flagged (or Unflagged) Notes' box. After you have cleared the answers you do NOT want to save, click **OK.**

- Save the template again by clicking **Save as Template** on the **File** menu

Important! For complex templates we suggest you schedule a free one on one training to guide you through the process the first time.

Using an Existing Template

Note: When you use a template as the basis for a new answer file, the new answer file is automatically given all information contained in the template, including answers and notes.

There are several ways to load a Template, the simplest is to load a single template:

- At the **Select Title/File** dialog box, select the desired Title and click **Templates**. This action displays a dialog box in which you select and load the template you wish to use into a New answer file which can then be saved.

- Alternatively, from within an answer file, select **Load Template** on the **Answers** menu. At the **Select Title to Load a Template** dialog box, select the Title whose template you would like to use (the default is your current Title) and click **OK**. At the **Load Template** dialog box, select the template you would like to load and click **OK**.

We also recommend you review the **Using Templates** topic in the general Help system by clicking **Help** on the Lawgic menu and then **Help** again.

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