

1 Getting Started

Introduction

Welcome to **It's Legal for Windows**--Parsons Technology's popular and multifaceted program for creating custom legal documents. **It's Legal** allows you to create professional, legally-binding documents with the look and feel of a lawyer's touch at a fraction of the cost. The program offers wills, powers of attorney, leases, employment documents, letters, and much more--each complying with current legislation in your state (as of April 1, 1994).

It's Legal's intuitive pull-down menus guide you through the document creation process. Plus **It's Legal's** extensive online help system and hints provide expert assistance any time, so you can complete your documents without needing a background in law.

It's Legal is not designed to replace lawyers when they are required for special situations. However, the program can remove some of the confusion from the document production process. You can use **It's Legal** to organize information and familiarize yourself with legal documents before seeking a lawyer's advice, therefore, minimizing otherwise expensive legal fees.

About the *User's Guide*

In this *User's Guide*, some symbols and conventions have a special meaning:

| <i>This</i> | <i>Indicates</i> |
|--------------------------|--|
| A or Enter | Keyboard character. |
| Ctrl+A | Keyboard characters typed in combination. |
| A:SETUP | Keystrokes to be entered exactly as shown. |

In this guide, the word document is used to refer to every type of certificate, declaration, revocation, worksheet, agreement, and letter in **It's Legal**.

Starting and Exiting Applications

To use any of the applications included with **It's Legal**,

1. Start your computer and Microsoft Windows.
2. Insert the **It's Legal** compact disk into your CD-ROM drive.
3. Open the It's Legal program group.
4. Double-click on the appropriate icon. (To start **It's Legal**, for example, double-click on the **It's Legal 5.0** icon.)

Later, when you're finished using the application, exit it by selecting Exit from the File menu. Do *NOT* use **Ctrl+Alt+Del** to exit an application. Doing so may cause you to lose information. It may also cause any other applications you may be running under Windows to lose data. Also, make sure you exit the application and Windows before turning off your computer.

Navigating the Program

Depending on the program options and features you're currently using, various items may appear on the **It's Legal** screen. Figure 1-1 illustrates the basic components of the **It's Legal** screen.

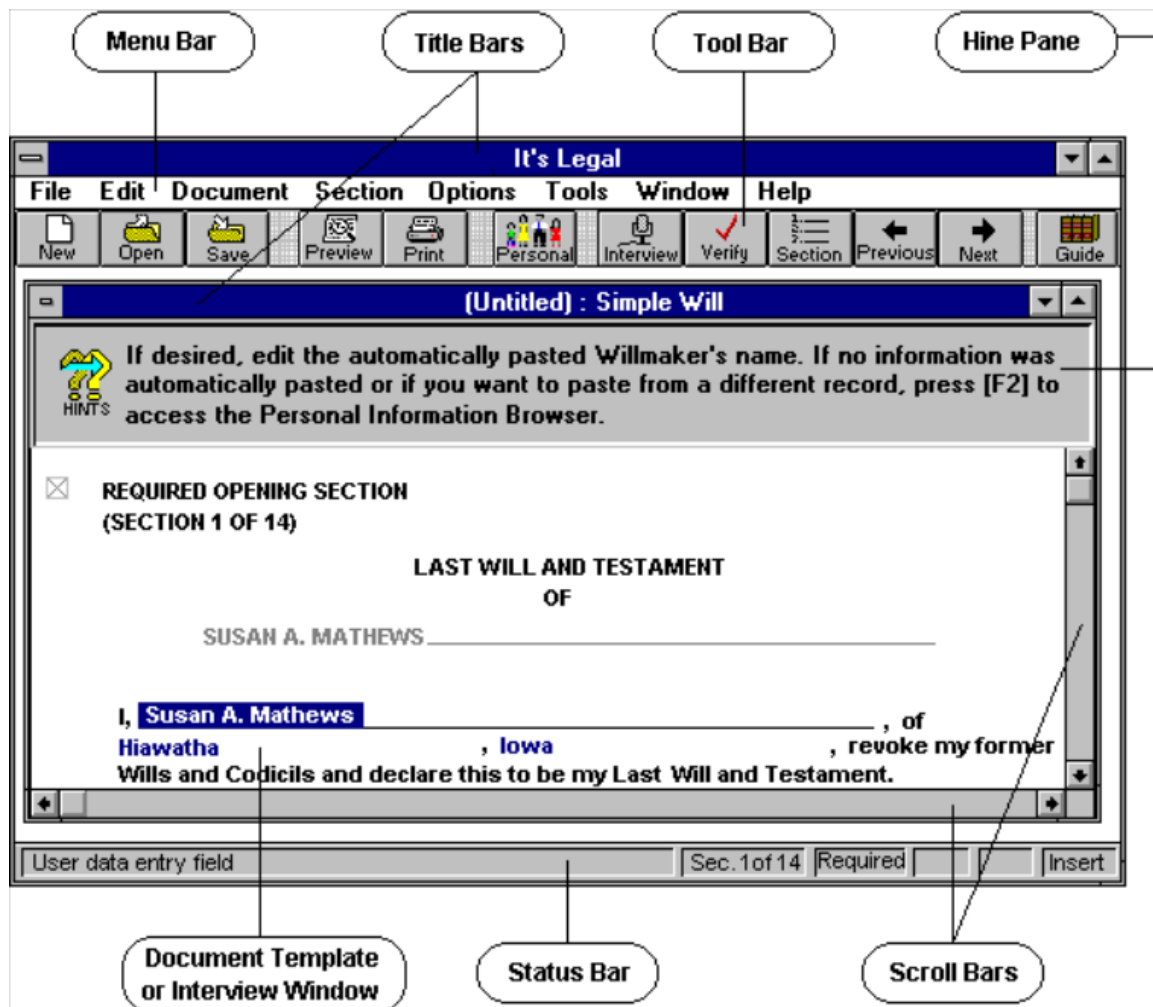


Figure 1-1. Typical *It's Legal* Screen

Document Template or Interview Window--When you open a new or existing document, it appears in a template or an interview window. The Template window shown in Figure 1-1 appears if you're creating a document using its template (where you fill in the blanks to complete the document). The Interview window (shown on page 3-2) appears if you elected to create the document by answering a series of questions. When you open an existing document, it displays in the format used when the document was last saved (the template or the interview).

Each document you open appears in a separate window. The window's title bar displays the document's name and type. Under the title, you'll see the document's opening section or question. The scroll bars allow you to view text that does not fit in the window. See Chapter 3 for further details on working with documents.

Hint Pane--When using a document template, the Hint pane automatically appears above the template window by default. Hint panes suggest what to enter in each field to complete the legal document. Use these hints to guide you through the document creation process. You can turn the hints off or move the Hint pane if you like by choosing Show Hints from the Options menu.

Locating Menu Options

Below is a summary of the functions available from **It's Legal's** menu bar.

File--Create, open, close, save, preview, or print a document or exit **It's Legal**.

Edit--Undo the last action, cut selected text from a document, copy selected text to the Windows Clipboard, and paste text from the Clipboard into a document.

Document--Work with personal information, switch to the document interview or template, search for text in a document, access a list of document sections, move to another section, finalize a document, or write/view a field note.

Section--View or move to another section in the current document. (This menu only appears when you have a document open on screen. The menu options shown will vary, depending on the document you have open.)

Options--Turn on/off the Tool Bar and Status Bar, move or hide the Hint pane, or set program preferences. See *Options and Tools* on page 1-5.

Tools--Record notes, perform arithmetic and financial calculations, or modify Tools Menu setup. See *Options and Tools* on page 1-5.

Window--Arrange open windows, arrange the icons of minimized applications, close all open windows, or view a list of open windows to switch to another document.

Help--Access program or legal help; instructions on using online Help; or information on your system, the **It's Legal** product, and product support available from Parsons Technology. See *Locating Help* on page 1-7.

Using the Tool Bar

Below the menu bar is a tool bar. You can access the most-used functions of the program by clicking on the tool bar's special buttons instead of selecting the options from the menu. Each Tool Bar button is described below.



Open a new document.



Open an existing document.



Save the current document.



Show a preview of the content and layout of your document before printing.



Print the current document.



Access Personal Information where you can enter, edit, and delete records to paste into the documents you create.



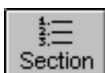
Open the Interview for the current document. (This button only appears when you're using a document template.)



Open the Template for the current document. (This button only appears when you're using the document interview.)



Verify the current document to ensure all necessary information has been completed.



Access the Section List dialog where you can view and manipulate the sections in the document.



Access the previous screen (or question) in the document.



Access the next screen (or question) in the document.



Access the online Legal Guide for details on all **It's Legal's** documents.

Options and Tools

It's Legal provides many "accessories" to make working with the program more convenient. The paragraphs below introduce these accessories and explain how you can benefit from using them.

Setting Preferences

It's Legal provides options you can use to tailor the program to your liking. To access these preference options, choose Preferences from the Options menu. The Preferences dialog appears where you can mark your choices (see Figure 1-2).

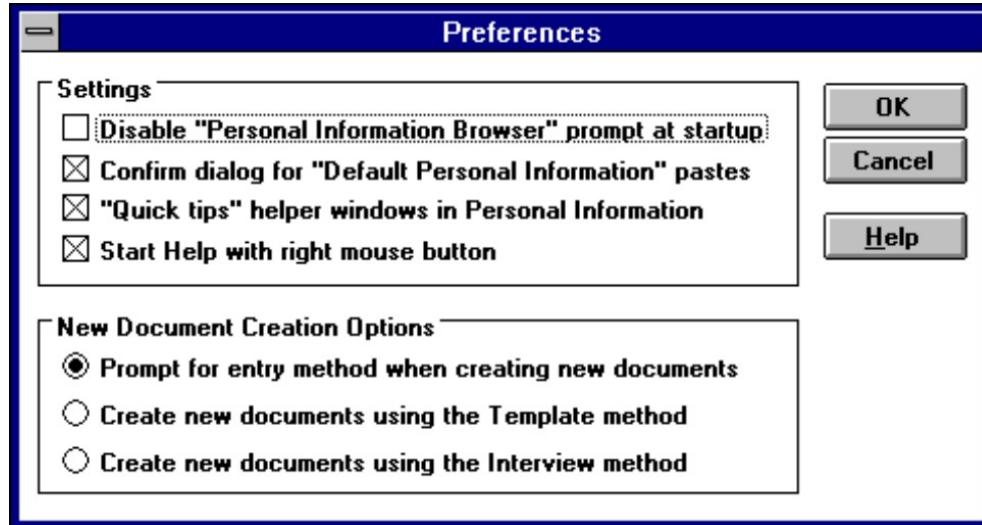


Figure 1-2. Preferences Dialog Box

To change any of the Settings options, simply click on the box preceding the desired option. For the New Document Creation Options, you can make only one choice. To choose an option, click on the radio button preceding it. Press **F1** or click the Help button for details on the options available.

Using It's Legal's Tools

It's Legal includes a set of tools you can use to assist you with document creation. These tools are accessible from the Tools menu.

Calculator--Performs both simple and scientific calculations while creating financial documents. See your Windows manual for complete instructions on using this Calculator.

Notepad--Allows you to record personal notes, ideas, or figures without leaving the program or interrupting your work in progress. It operates like a word processor, so you can manipulate text in a number of ways. See your Windows manual for more details on using the Notepad.

Interest Vision SE--Assists you with complex calculations involving time and money that are not easily handled by a standard four-function calculator. It can also be used to generate amortization and accumulation schedules showing monthly payments and interest.

Interest Vision Professional, with several advanced features, is also available from Parsons Technology as a stand-alone application. If you have this advanced program installed, you can set up **It's Legal** to access it instead if you like. See *Accessing Other Applications from It's Legal* below for details.

Accessing Other Applications from It's Legal

It's Legal allows you to add options to the Tools menu so you can access other applications directly from the program. For example, you can add options for your word processor or Parsons Technology's advanced financial calculator **Interest Vision Professional**. To begin, choose Tools Menu Setup from the Tools menu to access the Tools Menu Setup dialog.

To add a menu option, click the Add button and select the correct drive, directory, and application. To remove an option from the Tools menu, highlight the option in the Tools Menu Contents list, then click the Remove button. To rearrange the options on the Tools menu, you'll use the Move Up and Move Down buttons. Simply highlight the menu option you want to move and click the appropriate button until the option is in the desired location. When you're satisfied with the Tools Menu setup, click OK to close the dialog. For further details on customizing this menu, click the Help button or press **F1**.

Backing Up Your Data

It is very important to make frequent backup copies of all your data files (those with an .LGL extension) and program configuration files (those with a .DAT extension). You can make backup copies using the Windows File Manager or any number of utility programs.

Locating Help

It's Legal is a user-friendly program that includes extensive online Help, accessible from the Help menu and from most program locations. The following online options are available from the

Help menu:

Contents (F1)--Provides assistance with operating the **It's Legal** program.

How to Use Help--Includes instructions for using the Program Information and Legal Guide online Help systems.

Legal Guide (Ctrl+F1)--Provides information on the legal ramifications and terms used in **It's Legal's** documents.

Product Support--Contains information about product registration and on contacting Parsons Technology for Customer Service, Technical Support, or to purchase products.

About It's Legal--Lists the program version and presents the team who worked to bring you **It's Legal**.

A Help button is also available on many dialogs. Simply click on a Help button to get information about the specific dialog. If your problem is associated with a legal issue or a specific document, first check the Legal Guide for a related topic or term. If you still need assistance, you may want to contact a licensed lawyer, especially if your problem is uncommon or complex.

Converting Data from Previous Versions

If you have a previous version of **It's Legal for Windows** or **It's Legal 4.0** (for DOS), you can use any documents you've created with these programs in **It's Legal 5.0**. Simply open the document in Version 5.0 and the document will be converted for you automatically. Note, however, that the format and appearance of your documents may be different in Version 5.0.

To convert documents created with **It's Legal 3.0** (for DOS), you'll need to convert your documents before you can open them in **It's Legal 5.0**. For detailed instructions on converting your data, see online Program Information Help (F1).

You *cannot* convert documents you created from **It's Legal 2.0** (for DOS) or earlier into **It's Legal 5.0**. Attempting a conversion could corrupt these existing documents and their data. If you previously created documents using Version 2.0, these are still valid if they were properly executed.