3 Creating a Document

This chapter provides information on creating and working with legal documents. The instructions in this chapter assume you are creating a document with complete data. However, you can create other types of documents, like "forms" with no data entered. Keep in mind the purpose of your document as you use the procedures outlined here.

Creating a New Document

To start a new document,

1. Select New from the File menu. The New dialog opens.

2. Select the category of document you want to create from the Category list on the left. Then, select the type of document you need from the Document list on the right. (Note that when you select a document, a description of it appears in the Description box.) Click OK to proceed.

   You may be asked to select a state for the document. If so, select the correct state and click OK. Be sure to select your state of residence or the document may not be valid.

3. By default, **It's Legal** asks you to select the method you prefer for creating your legal document. You can select from the following options:

   ***Interview*--It's Legal** creates the document for you based on your answers to a series of questions. The Interview is ideal for anyone who has never produced a legal document. If you choose this option, you are taken to the first interview question for the selected document (see page 3-2).

   ***Template*--It's Legal** guides you through the various sections of the legal document using information you provide. If you prefer to work directly with the document's text, choose this option to open the document's template. For details on using the template, see page 3-3.

NOTE: The interview is not available for all **It's Legal**'s documents. For example, some letters and worksheets only allow you to use the template method.

If you've changed the program's default preference settings and selected either the template or interview method (see page 1-5), **It's Legal** will display that method automatically. Note that any document you create in **It's Legal 5.0 for Windows** is fully compatible with **It's Legal 5.0** (for DOS) and vice versa.

Entering Data into a Document

It's Legal provides two ways to enter data in a document: an interview and document templates.

You can create legally binding documents with either one, you'll just complete the information in a different format. For details on accessing a document's interview or template, see *Creating a New Document* on page 3-1.

Using the Interview

The Interview provides a quick and easy way to create a legal document. All you do is answer questions about the information you want to include, and **It's Legal** does the rest. Figure 3-1 illustrates a typical document interview screen.

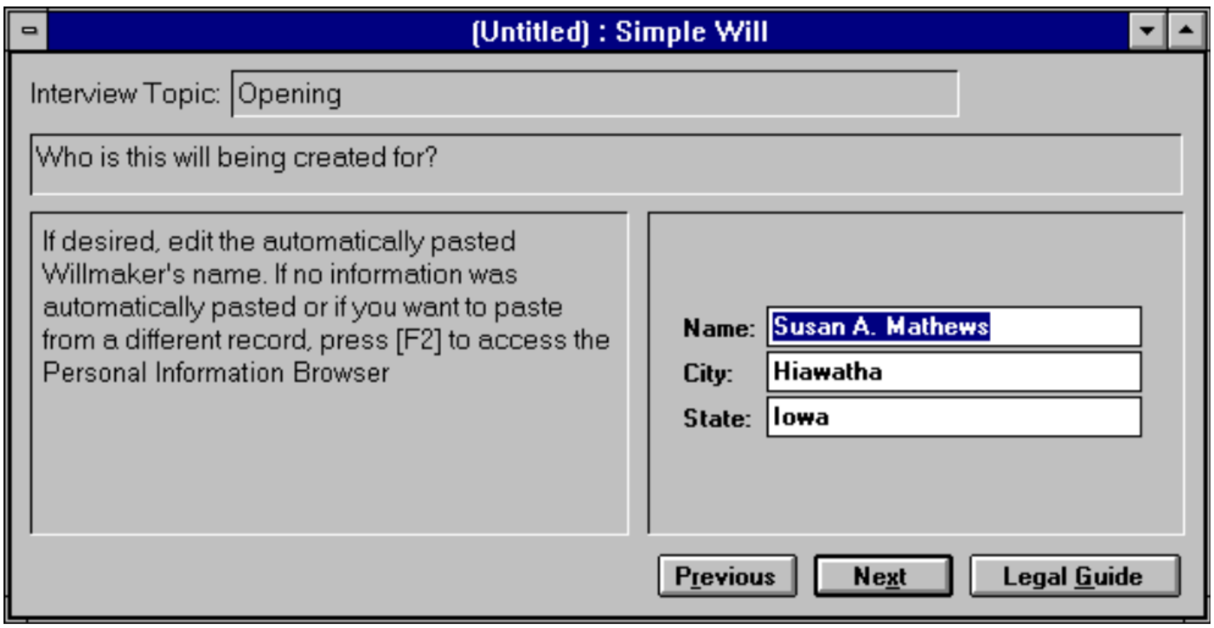

Figure 3-1. Typical Document Interview

Each interview question is displayed on a separate screen. Each screen contains:

* An interview topic identifying the current document section.
* An interview question.
* An explanation of the information requested.
* A place to enter or choose your response.

After you've answered a question, click the Next button to go to the next question. You can return to previous questions by clicking the Previous button. If you have a legal question about the document, click the Legal Guide button for further details.

Once you've answered all the questions, the Make It Legal screen appears presenting options available for finalizing your document. Follow the instructions on this screen to ensure your document is complete and legally valid. See Chapter 4 for details on the Make It Legal screen and its options.

Using Document Templates

It's Legal's templates allow you to enter data directly into a legal document--much like filling out a form. Figure 3-2 illustrates a typical document template.

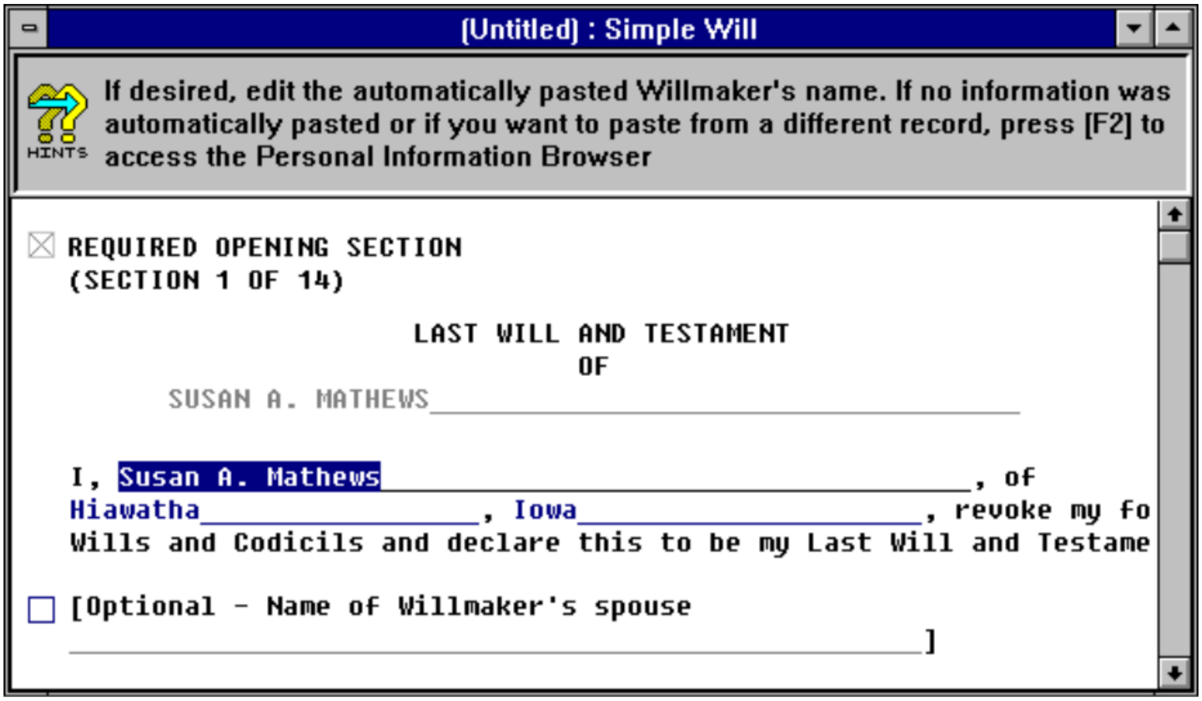

Figure 3-2. Typical Document Template

A check box appears at the top of each section (or screen). You'll use these check boxes to mark the sections you want to include. If a section is required for legal reasons, it will already be marked for you and you won't be able to unmark it.

Filling in the Blanks

The "blanks" (or fields) in a document are where you'll enter your own information. Some fields (like names and addresses) may already contain information from your default personal information record (see page 2-2). Enter data into a document's fields as you would in any other window, noticing that some fields accept only certain characters (for example, dollar amount fields only accept numbers). The Hint Pane tells you what data to enter in each field.

Some fields also have instructional text within brackets. This information is for reference only and will not be printed with the document. In some templates, you cannot highlight and enter data into certain date and signature fields. These must be completed by hand on the day the document is signed (frequently before a notary public or witness).

Accessing Other Document Sections

Documents are divided into many sections, based on the logical organization of the document. You can use the right arrow button at the bottom of a screen or the Next button on the tool bar to go to the next section. Depending on your entries and choice of optional sections, the program takes you to additional screens.

Some sections contain check boxes and circular radio buttons you can use to select optional information to include in your document. Use the spacebar or your mouse to select a check box or radio button. Occasionally, you must select a check box before you are able to enter other information. After you enter data, you can return to a previous section and make changes. Be sure to return to the first field containing the information you want to edit since the data may transfer forward to other document locations.

When you reach the end of a document and there are no more sections to complete, the Make It Legal screen appears presenting options available for finalizing your document. Follow the instructions on this screen to ensure your document is complete and legally valid. See Chapter 4 for detailed information on the Make It Legal screen and its options.

Transferred Data

Some fields may already contain entries when you open a document. These fields contain "transferred" data that **It's Legal** automatically entered. Examples of transferred data include the default Personal Information data, calculations, and name/address information entered in a previous section. Other transferred data is dimmed in color if you cannot modify it without creating an invalid document. For example, your name may be transferred from the opening of a Simple Will to the signature block. Since you must use the same name in all places, the transferred information is dimmed and you cannot modify it at that location.

Pasting Personal Information into a Document

Some fields in a document (like names and addresses) will accept "pasted" data from your personal information records. For example, you can paste the names and addresses of your witnesses into your Simple Will. The Hint pane (or the interview question description) will tell you where you can use the Paste feature.

To paste data from a personal information record into a document field,

1. From the appropriate field in a document window, press **F2** or click the Personal button on the tool bar to open the Personal Information feature.

2. On the Personal Information window, highlight the record containing the data you want to use, then click the Paste button. (If the button is not active, you accessed the feature from a field that does not accept pasted data.)

The appropriate information is transferred to the correct field(s) in your document. Note that Personal Information transfers data *forward* through a document's fields, so it is important to highlight the *first* occurrence of a name or address field for the record being pasted, especially since the data may automatically be transferred to subsequent fields.

Attaching Field Notes

As you enter data into fields in a document, you may want to save additional information regarding your entries. **It's Legal** allows you to attach notes to a field in a document window much like you would jot notes in the margin of a paper document. To attach notes to a document field,

1. Highlight any field (except check boxes or radio buttons) and select Write/View Note from the Document menu.

2. On the dialog that opens, enter your note.

3. When you finish entering the note, click OK to save your entries. You are returned to the document window.

When you attach a field note, the word "NOTE" appears in the middle of the Status Bar when that field is highlighted. To retrieve the note later, highlight the field and select Write/View Note again.

Searching for Text in a Document

It's Legal's search feature allows you to quickly locate information you've typed into a document. To use the search feature,

1. From an open document, choose Find Text from the Document menu (or press **F3**).

2. On the Find Text dialog that opens, enter the word or phrase you wish to search for. If you've used the search feature previously, you can click the down arrow beside the Search For field to view a list of your previous search descriptions.

3. Select the desired search options and direction. (Press **F1** or click the Help button for details on the available search options.)

4. Click the Search button to initiate the search. If the program finds the specified text, you will be taken to the first screen containing the designated word or phrase. (If you're using the Interview, the program will switch to the Template method before displaying the text.)

To repeat the search, reselect Find Text from the Document menu and click the Search button again (or simply press **Ctrl+F3**). If the word or phrase could not be found, a dialog will appear where you can cancel the search or click Options to change your search criteria.

Managing Document Sections

Most documents contain a number of sections, depending on the length and number of *required* and *optional* clauses, and a section may require more than one screen. **It's Legal**'s Section List feature allows you to review the sections in a document, move to another section, or perform other functions. To access this feature, choose Section List from the Document menu.

The left area of the Section List outlines the sections in the document. When you highlight a section, the right side of the box explains the purpose of that section. Required sections are marked with a checkmark and are dimmed in color, indicating you cannot exclude them from your document. Optional sections are marked with a checkmark only if you have selected them. To include an optional section in the document, highlight it and click the Include button. To exclude a marked optional section, highlight it and click Exclude. To review a particular section, highlight the section and click the Goto button.

To exit the Section List and return to your previous location, press **Esc**. Your changes to the Section List are saved and the document is updated accordingly.

Saving/Copying Documents

To save a document that is active on screen, select Save from the File menu. (To make a copy of the document, choose Save As instead.) On the Save As box that opens, enter a valid DOS filename of up to 8 characters. Click OK to save the document. **Note:** Each document you create is stored in a separate file and given an .LGL extension. If you have already saved the document, it will be saved under the name you previously gave it.

Opening an Existing Document

Once you save and close a document window, you can reopen it later and modify the data. To open an existing document, choose Open from the File menu. When the Open dialog box appears, highlight any document. (A description of each document is shown at the bottom of the Open dialog.) Click OK to open the selected document.

You can have more than one document open at the same time if you like. The number of documents you can have open at one time depends on the memory capacity and configuration of your computer.