TheFormTool

Hey, hey. Ho, ho. Cut & paste has got to go!™

Word Warrior™ 101

Everything You Need to Know About Organizing
Documents, Templates, Files, Folders & Shortcuts

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Word Warrior™ 101:
Organizing Your New Forms

Now that you've created a pile of super-smart forms with The**Form**Tool, how should they be organized? You're welcome to keep right on saving the new forms in the same place you saved the old forms and using them the same way. (Sometimes it's smart not to make too many changes all at once.) But when you're ready, consider the ideas below to organize and further leverage your new forms.

Your Forms Library

Word users have two basic methods to access forms: (1) the File-New menu; and (2) Windows Explorer. Both work well, but the second method has a couple advantages.

First Method (pretty good): Word's File-New Menu

1. Set the location of your form folder so Word knows where to look.

Word 2007	Word 2010
Click the Office button, **Word Options**, **Advanced**, **File Locations**, **User Templates**, **Modify**, and select the location where your forms are saved.	Click **File**, **Options**, **Advanced**, **File Locations**, **User Templates**, **Modify**, and select the location where your forms are saved.

2. If you have lots of forms, subdivide the Forms folder into categories that will appear as tabs in the File-New screen.
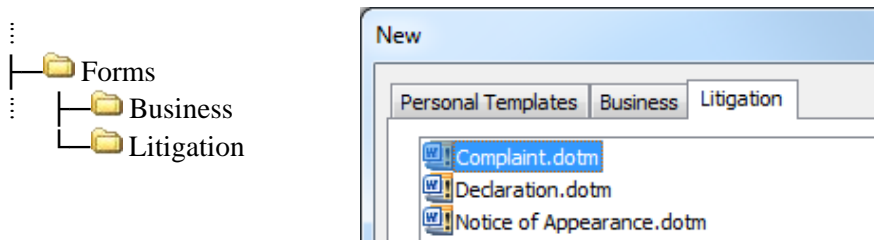
3. Save forms as template files to the desired location. (See the box on page 3 for a discussion of the difference between documents and templates.)

Word 2007	Word 2010
Click the Office button, **Save As**, and choose **Word Template (*.dotx)** in the **Save as type** box.	Click **File**, **Save As**, and choose **Word Template (*.dotx)** in the **Save as type** box.

4. Use forms with Word's **File, New** command.

Word 2007	Word 2010
Click the Office button, **New**, **My Templates**.	Click **File**, **New**, **My Templates**.

The Difference Between Documents and Templates

A template file is a form that's used repeatedly to create many documents. You might use a single Contract *template* to create a Contract *document* for John Doe, another Contract *document* for Jane Smith, and so on.

Double-clicking a <u>document file</u> opens that document for editing. Make some changes and click Save, and your revisions are saved over the top of the previous draft of the document.

But double-clicking a <u>template file</u> *creates a new document without altering the template.* If you edit the new document and click Save, you are prompted to save the new document in a new location with a new filename -- there is no danger of overwriting the template form.

When you *do* want to make changes to a template, rather than double-clicking it you must right-click and choose **Open**.

If the display of file extensions is enabled on your computer (see Step 1 in the box on page 3), document files end with **.doc**, **.docx**, or **.docm**. Template files end with **.dot**, **.dotx**, or **.dotm**.

Second Method (better): Windows Explorer

Using Windows Explorer to browse to your form folder has a few advantages: (a) categories can be subdivided; (b) Windows' search function can be used to locate forms; and (c) shortcuts can be used to further organize forms and form packets.

1. Create a folder for forms -- if you have a network, create it in a shared location on the server. Unlike the first method above, you may subdivide it into categories, subcategories, sub-subcategories, and so on.
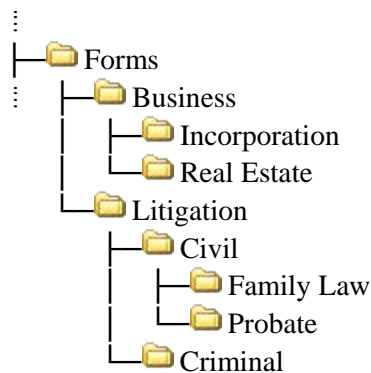
2. Save forms as template files to the appropriate category within the Forms folder.

🧩 **Word 2007**	🧩 **Word 2010**
Click the 🧩 Office button, **Save As**, and choose **Word Template (*.dotx)** in the **Save as type** box.	Click **File**, **Save As**, and choose **Word Template (*.dotx)** in the **Save as type** box.

3. Make the Forms folder easily accessible by doing at least one of the following:

   a. Add it to your Favorites list.

   b. Create a shortcut on your desktop.

   c. Pin it to your Taskbar. (See the box below if you use Windows Vista or Windows 7.)

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4. To use a form: (a) use your Favorites link, desktop shortcut or Taskbar icon to open the Forms folder; (b) browse to the desired subcategory or use Windows' search function to locate the form; and (c) double-click the form to create a new document.

Pinning Folders to the Taskbar in Windows Vista and Windows 7
(an obscure tip for the hardy tweaker)

When you pin a folder to the Taskbar in Windows Vista or Windows 7, the folder is added to a collection of items within the Explorer icon, where it is not readily accessible. To create a dedicated icon in the Taskbar that opens a particular folder with a single click, you need to trick the operating system:

1. Make sure file extensions are enabled by clicking **Start**, **Computer**, **Organize**, **Folder and search options**, **View**, and unchecking **Hide extensions for known file types**.

2. Temporarily create a text file on the desktop by right-clicking the desktop then clicking **New**, **Text Document**.

3. Right-click the text file you created, click **Rename**, and type a new name with ".exe" at the end instead of ".txt" (e.g., **My Forms.exe**).

4. Drag the file you created onto the Taskbar to create a pinned icon there.

5. Right-click the pinned icon, right-click its name (e.g. **My Forms**), and click **Properties**.

6. In the **Target** box (on the **Shortcut** tab), type the path to your folder (e.g., **F:\Firm\Forms**).

7. Click **Change Icon** and choose an appropriate icon, then click **OK**, **OK**. (The new icon will appear next time the computer is rebooted.)

8. You can delete the temporary file from your desktop.

Form Packets

To simplify the job of keeping forms current, it's important that you don't create multiple copies of a form. But you can still organize forms into various tailored "packets" by using shortcuts.

What's a Shortcut?

Shortcuts are analogous to links that you click to open a web page. There is only one web page, but links are scattered far and wide, so people can get to the web page from many different locations. When the web page needs to be updated, it only has to be updated in one place, and all of the links point to the new information. Shortcuts have a similar purpose, but link you to files instead of web pages.

There are many ways to create a shortcut to a file. Here's a simple one: First browse to the file in Windows Explorer and copy it as you normally would (for example, right-click on the file and choose **Copy**). Then right-click in the folder where you want to create a shortcut and choose **Paste shortcut**.

For example, suppose that every time you sign on a new client you generate the following packet of documents:

- Background of the Firm
- New Client Letter A (if it's a business client)
- New Client Letter B (if it's a litigation client)
- Fee Schedule
- Notice to Preserve Electronic Documents (if it's a litigation client)
- Questionnaire A (if it's a business client)
- Questionnaire B (if it's a litigation client)

Further suppose that those seven templates are scattered among your forms like so:

```
├── Forms
│   ├── New Clients
│   │   ├── Letters
│   │   │   ├── New Client Letter A.dotx
│   │   │   ├── New Client Letter B.dotx
│   │   │
│   │   ├── Questionnaires
│   │   │   ├── Questionnaire A.dotx
│   │   │   ├── Questionnaire B.dotx
│   │   │
│   │   └── Info Sheets
│   │       ├── Fee Schedule.dotx
│   │
│   ├── Litigation
│   │   ├── Client Notices
│   │       ├── Notice to Preserve Electronic Documents.dotx
│   │
│   ├── Marketing
│       ├── Background of the Firm.dotx
```
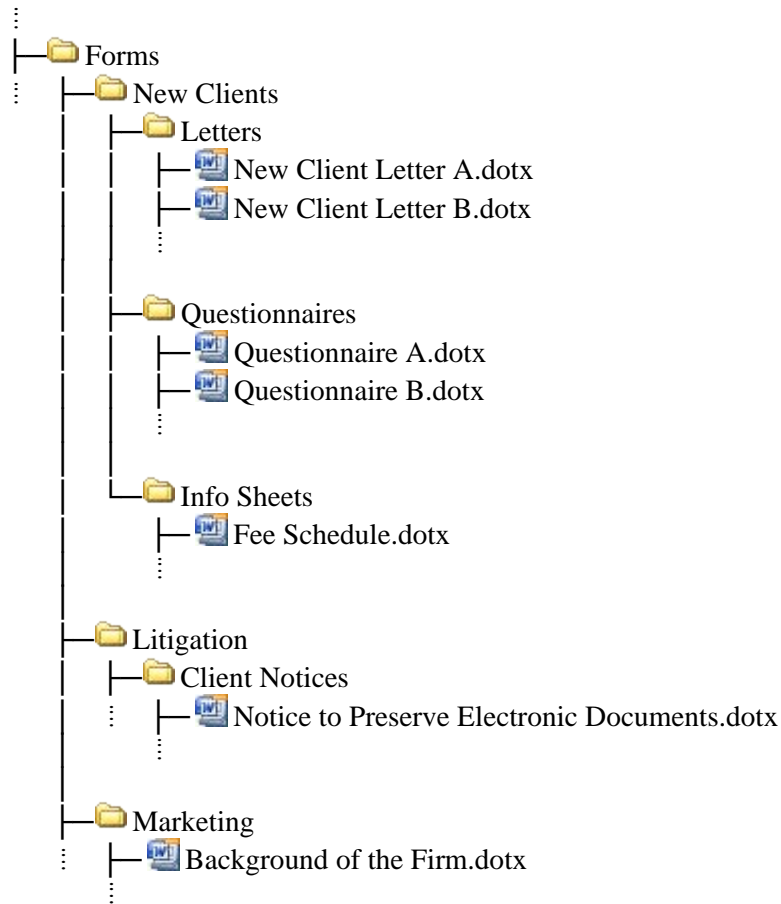
Rather than embark on a hunt for the required forms each time a new client signs on, you can create a "packet" of form shortcuts for each type of client:

```
┊
├─📁 Forms
  ┊   ├─📁 Packets
      ┊   ├─📁 New Clients
          ┊   ├─📁 Business Client
              │   ├─🔗 Background of the Firm
              │   ├─🔗 New Client Letter A
              │   ├─🔗 Fee Schedule
              │   └─🔗 Questionnaire A
              └─📁 Litigation Client
                  ├─🔗 Background of the Firm
                  ├─🔗 New Client Letter B
                  ├─🔗 Fee Schedule
                  ├─🔗 Notice to Preserve Electronic Documents
                  └─🔗 Questionnaire B
```
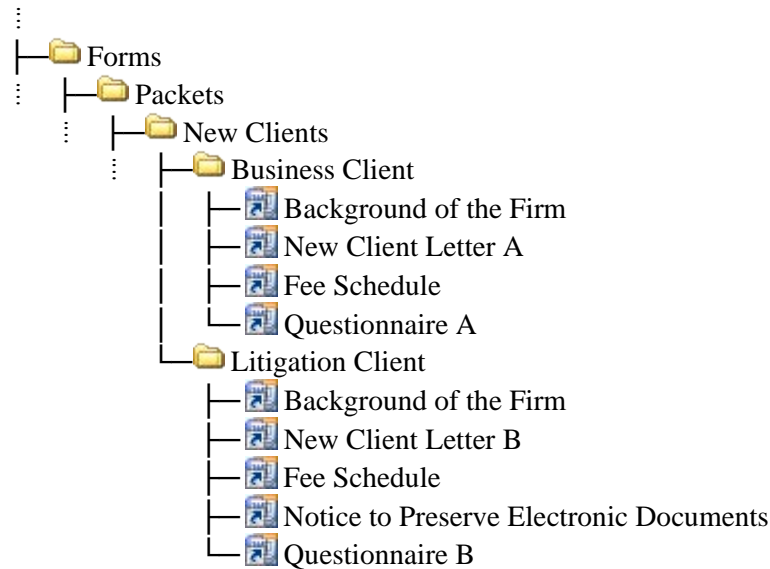
Now you can find all the forms you need in one location, and you've reduced the chance that you might forget one or mistakenly use Form A instead of Form B.

Note that these are *shortcuts* to your form files; they are not *copies* of the forms.

The same approach can be used with any set of forms that tend to be used in packets rather than singly. For example:

```
┊
├─📁 Forms
  ┊   ├─📁 Packets
      ┊   ├─📁 Estate Planning
          ┊   ├─📁 QTIP
              │   ├─🔗 Durable Power of Attorney
              │   ├─🔗 Health Care Directive
              │   ├─🔗 Letter to Client Forwarding EP Docs
              │   ├─🔗 Trust - QTIP
              │   └─🔗 Will - QTIP
              └─📁 Simple
                  ├─🔗 Durable Power of Attorney
                  ├─🔗 Health Care Directive
                  ├─🔗 Letter to Client Forwarding EP Docs
                  └─🔗 Will - Simple
```