



Quick-Start Guide

Version 3.0

Forms don't need to be dumb as bricks.

You can teach them, they'll learn.



In less than 5 minutes you can teach your forms to recognize people and the roles they play; pronouns; the rules for singular and plural agreement between nouns and verbs; when to use articles such as "a" and "an;" and basic punctuation.

In 30 minutes you can teach your forms nearly everything they need to know to help you earn a living: how to count days between court appearances and filings; conditional statements; how to build lists that can relate to each other; even some pretty cool Boolean logic.

*Best of all, it takes no extra time
to teach your forms to not make mistakes.*

Imagine that.

Forms without mistakes.

We call them brilliant.

You will, too.

One-Page Cheat Sheet

For those who are driven to get started *right now*, without filler or fluff

1. Install Doxserá®

Right-click the **Doxsera.zip** file you downloaded and choose **Properties**. If you see an **Unblock** button, click it to unblock the file, then click **Apply, OK**.

Double-click the same **Doxsera.zip** file to see the files it contains.

Double-click the **Doxsera.docm** file to install the program.

- ## 2. Activate it.
- Go to the new **Doxserá** tab in Microsoft Word, click  **Options, License code**, and enter the registered name and license code we emailed to you. Or retrieve your license code by logging into your account at www.theformtool.com.

- If you prefer, skip the remaining steps and watch these short [videos](#) instead.

3. Create a form

Open a document or form you've used in the past, and save a copy wherever you like to store forms.

Add a Questionnaire at the bottom of the form by clicking  **Questionnaire, + Create** on the **Doxserá** tab. Type questions in the Question column and a short label for each question in the Label column.

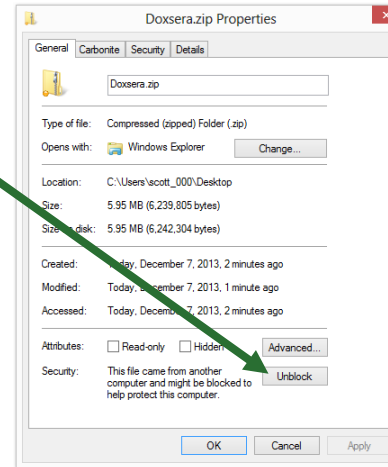
Add Fields to the form by placing the cursor wherever a Field is needed and clicking  **Field** on the **Doxserá** tab. Then save and close the finished form.

4. Use your new smart form to create a document

Open the form you created in Step 3. Type answers in the Questionnaire and click  **Fill** on the **Doxserá** tab. Done!

5. For later

This manual and the **Expert User Guide** are available at www.theformtool.com, along with videos and a full-service support center where you can ask questions, report problems, make suggestions, and exchange tips with the authors of **Doxserá®**.



Doxserá® is compatible with **Word for Windows** versions 2007 and later

Turn off all computer security systems before opening the installation .docm file!

If you're uncertain how to do that, here is an article our Knowledge Base discussing some of the major players.

[https://kb.theformtool.com/
search term: Security](https://kb.theformtool.com/search term: Security)

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

My name is {Signer}. I was born on {DOB}.

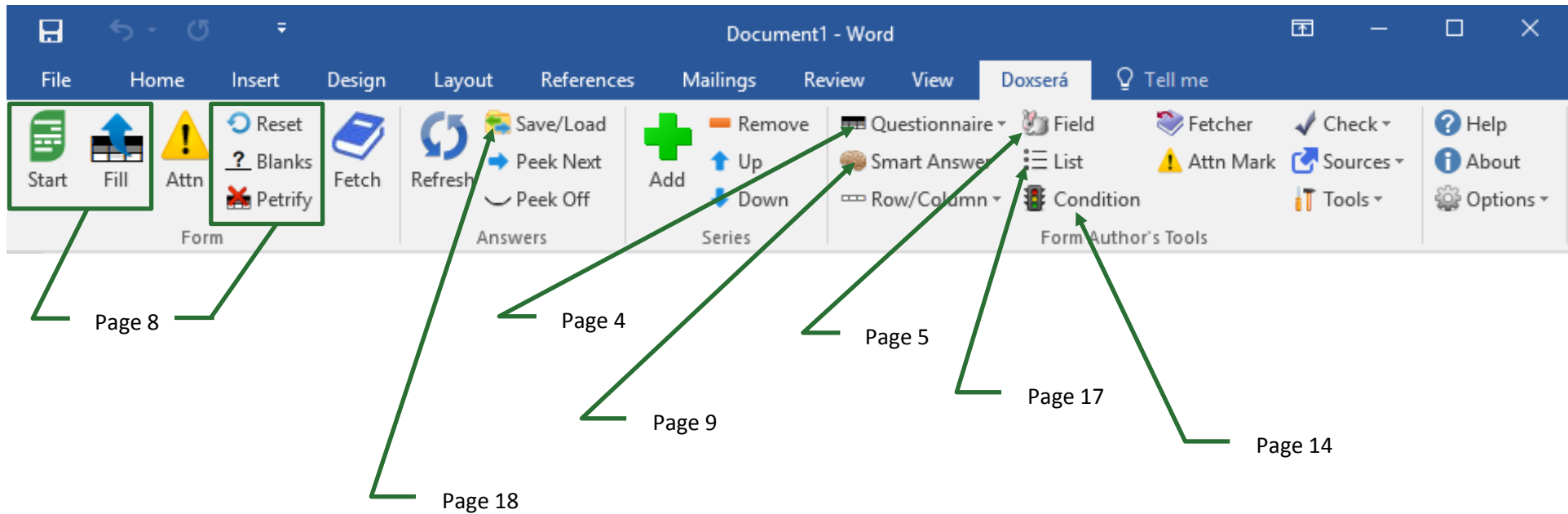
Signed:

{SIGNER}

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Meet the Buttons



Installing Doxserá®

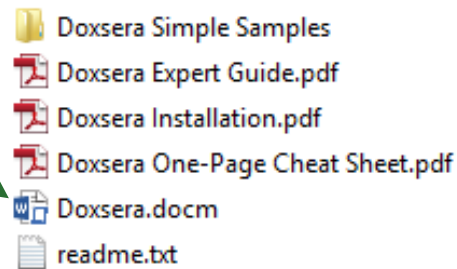
Step 1: Is the File Blocked?

Windows sometimes blocks downloaded files to protect you from viruses.

Right-click the **Doxsera.zip** file you downloaded and choose **Properties**. If you see an **Unblock** button, click it to unblock the file, then click **Apply**, **OK**.

Step 2: Open the Installation File

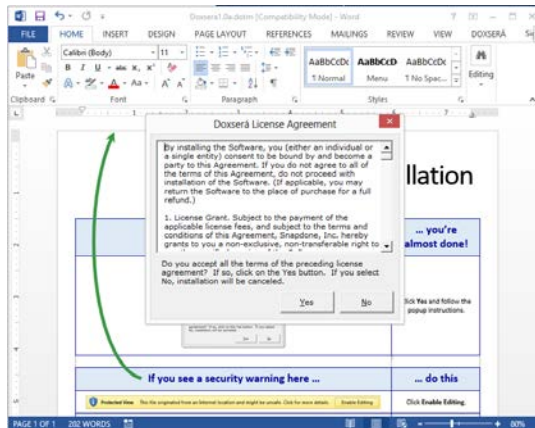
Open the file you downloaded to see its contents. Double-click the **Doxsera.docm** file.



Depending on whether file extensions are visible on your computer, you may or may not see the **.docm** at the end of the filename: **Doxsera** or **Doxsera.docm**.

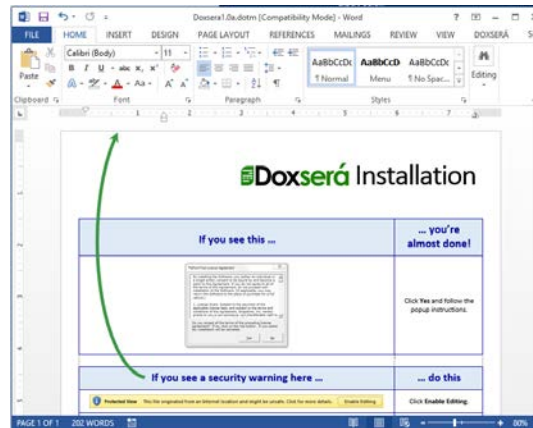
Step 3: Security Warnings?

If you see this ...



You're almost done. Click **Yes** to the license agreement, then **OK** to install.

If you see this ...

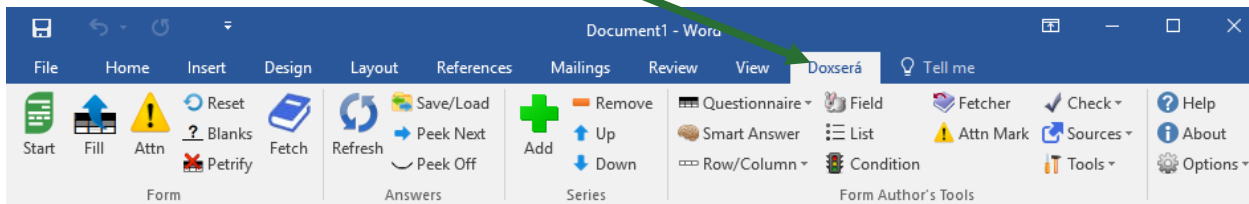


Follow the on-screen instructions to respond to your computer's security warnings.

Depending on Windows and Microsoft Word settings, you may need to respond to one or more security warnings before installation can proceed.

Step 4: Close and Reopen Word

Close Microsoft Word completely, including all open documents. When you reopen Microsoft Word, you'll find a new tab on the ribbon menu labeled **Doxserá**. Click that tab to reveal **Doxserá®** commands.



If the **Doxserá** tab does not appear, try restarting your computer. If that doesn't work, please contact us at www.theformtool.com/resources so we can help you get started.

Step 5: Enter License Code

To activate **Doxserá**®, click  **Options, License code** and enter the registered name and license code we emailed to you.

Step 6: Sharing Information on a Network

Doxserá® initially saves program information on your local computer. But if your firm owns more than one license, you will likely want to share program information with other people in your office. To do so, click  **Options, Path** and enter the path to a shared folder on your network.

Step 7: Updates

Check for [updates](#) periodically at the **Doxserá**® website. To be notified when updates are available, subscribe to our newsletter at www.theformtool.com/newsletter.

If you need to buy a license, visit www.theformtool.com. If you've lost your license code, check your emailed receipt or log into your account at www.theformtool.com (click **Log In** in top right corner).

Creating a Form

We'll turn this document into a form. If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Step 1: The Questionnaire

Click  **Questionnaire, + Create** on the **Doxserá** tab to add a Questionnaire to the end of the form.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer

In this example, we need to ask the form user for the signer's name and birthdate.

Type the two questions in the Questionnaire, including a short label for each.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

As with any table in Word, add rows by pressing **Tab** when your cursor is in the table's last cell.

Later on, **Doxserá** "locks" the Questionnaire so form users can't accidentally alter it. But you can still add rows by clicking

 **Row/Column**,  **Add**.



Step 2: Add Fields

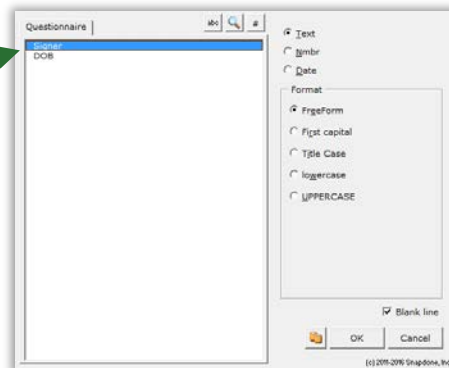
Select **Abigail Bentley** and click  **Field** to open the screen shown below.

My name is Abigail Bentley. I was born on April 17, 1960.

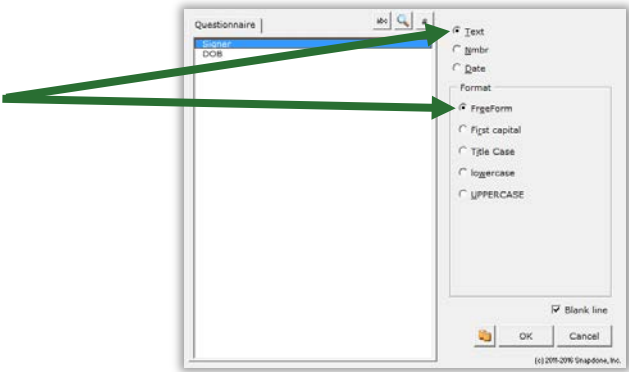
Signed: _____
ABIGAIL BENTLEY

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

The questions in the Questionnaire are listed here. In this example, there are only two: **Signer** and **DOB**. Select **Signer**.



Several Field formats appear. For our first Field, the default is correct (**Text**, **FreeForm**), so click **OK**.



Notice that the Field you added shows up as a gray bracketed item: {Signer}. We'll add two more Fields.

My name is {Signer}. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Select **April 17, 1960** and click **Field** to add the second Field.

Use the same steps as above, but this time choose the **DOB** label and **Date** format.

My name is {Signer}. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Now select **ABIGAIL BENTLEY** and click  **Field** to add the last Field.

For this Field choose the **Signer** label and **UPPERCASE** format.

My name is {Signer}. I was born on {DOB}.

Signed: _____
ABIGAIL BENTLEY

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

The finished form looks like this. Save it wherever you like to keep your forms.

My name is {Signer}. I was born on {DOB}.

Signed: _____
{SIGNER}

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Consider saving your forms as *templates* instead of *documents*. See “Document Versus Templates” on page 9.

Using a Form

Step 1: Type Answers

Open the form and type answers in the Questionnaire, like so:

My name is {Signer}. I was born on {DOB}.

Signed: _____
{SIGNER}

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	Horace Blixt
DOB	What's the birthdate of the signer?	4/17/60

After opening the form, you can click  **Start** to quickly move your cursor to the Questionnaire, poised to answer the first question.

Step 2: Fill in the Form

Click  **Fill** to fill in the form. Done!

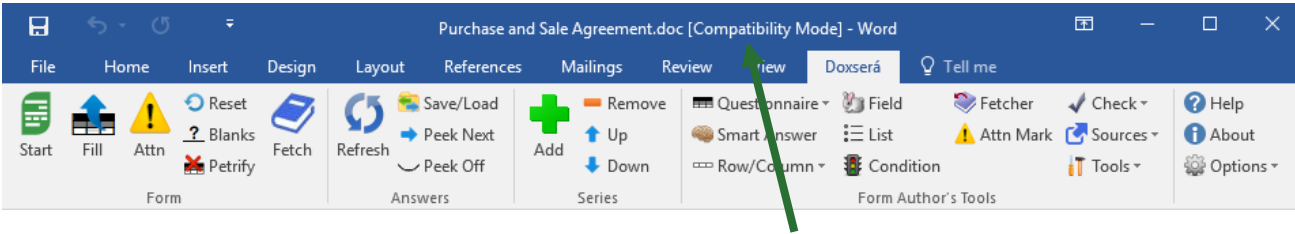
My name is **Horace Blixt**. I was born on **April 17, 1960**.

Signed: **HORACE BLIXT**

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the name of the signer?	Horace Blixt
DOB	What's the birthdate of the signer?	4/17/60

You can also click  **Reset** to return the form to its original state,  **Blanks** to replace Fields with blank lines, or  **Petrify** to convert all Fields to plain text and remove the Questionnaire.

Old File Formats – Pre-2007 Files Need to Be Converted



Look at the top of the Word screen. If you see **Compatibility Mode** beside the document name, it needs to be converted by following these steps:

You're using a recent version of Word now, but some of your old documents and forms might have been created with earlier versions. It's important to convert those old files to the new format so all **Doxserá** features are available.

 Word 2007	 Word 2010 and  Word 2013/2016
Click the  Office button (the round button in the top left corner), then click Save As . In the Save as type box, choose Word Document (.docx) or Word Template (.dotx) . Near the bottom of the screen, make sure the Maintain compatibility with Word 97-2003 checkbox is UNCHECKED . Click Save .	Click File, Save As . In the Save as type box, choose Word Document (.docx) or Word Template (.dotx) . Near the bottom of the screen, make sure the Maintain compatibility with previous versions of Word checkbox is UNCHECKED . Click Save . If you <i>still</i> see Compatibility Mode at the top of the screen, click File, Info, Convert .

Documents Versus Templates: As you create forms, you can save them as documents (files that end with **.docx**) or templates (files that end with **.dotx**). **Doxserá®** works fine with both types of files, but saving forms as templates does have one important advantage: When form users double-click a template file to open it, Word creates a *new unsaved document* based on that template. This makes it impossible for the form user to accidentally overwrite the original form -- when they click **Save**, they are prompted to save their brand new document elsewhere.

As the form author, you sometimes need to revise the original form. Instead of double-clicking the template file to open it, right-click the file and choose **Open**. This opens the form itself, rather than creating a new document, so you can make changes and save the revised form.

Creating Smarter Forms

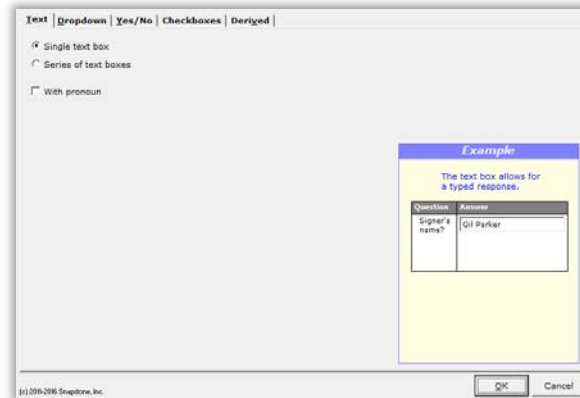
Smart Answers

We used Text answers in the example above, but several other types of answers are available. To change an answer's type, select it in the Questionnaire and click  **Smart Answer**. Tabs across the top of the Smart Answer screen let you choose one of five types:

Text Answers

Select **Single text box** when you are asking for a single piece of information ("Who are you?"), or **Series of text boxes** to ask for several pieces of information ("What are the names of the shareholders?").

To include a pronoun box alongside a Text answer, select **With pronoun**. This allows the form user to select a pronoun to go along with their answer: he, she, it, or they.



Question	Answer
Signer's name?	Gil Parker

Dropdown Answers

Dropdown answers present the form user with several choices in a dropdown list.

Select **Single dropdown** when you are asking for a single piece of information (“On what continent do you live?”), or **Series of dropdowns** to ask for several pieces of information (“On what continents have you lived?”).

The list of choices in the dropdown box is drawn from one of four sources: **typed here**, **another answer**, **Master List**, or **Folios**.

Text | **Dropdown** | Yes/No | Checkboxes | Derived

☒ Single dropdown
☐ Series of dropdowns

Source for dropdown choices: typed here

☐ Allow user to write in a different response

Type one choice per line.
To copy, cut, and paste, press Ctrl+C, Ctrl+X, and Ctrl+V.

abc

Example

The dropdown box allows users to select one of several choices.

Question	Answer
Choose a region	North

Users cannot type their own response -- they must choose one in the dropdown list.

Choices to be shown in the dropdown are typed here.

© 1996-2005 Soapstone, Inc. OK Cancel

Yes/No Answers

Yes/No answers allow the form user to respond **yes** or **no** (and sometimes **n/a**).

Text | Dropdown | **Yes/No** | Checkboxes | Derived

☒ Single Yes/No
☐ Series of Yes/No's linked to a preceding Series answer or a Grid

☐ Include 'N/A' choice

Example

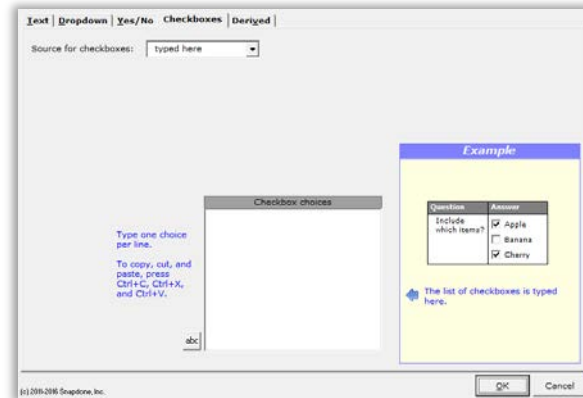
A dropdown box allows the user to respond Yes or No.

Question	Answer
Is the signer married?	yes

© 1996-2005 Soapstone, Inc. OK Cancel

Checkbox Answers

Checkbox answers allow the form user to check or uncheck a list of labeled checkboxes. Like Dropdown answers, the list of choices is drawn from one of four sources: **typed here**, **another answer**, **Master List**, or **Folios**.



Derived Answers

Derived Answers are automatically derived from other answers, requiring no additional input. For example, if another answer provides the signer's birthdate, then a Derived Answer could perform a calculation to determine the signer's age.

Since Derived Answers work automatically in the background, they are hidden from form users before saving the form by clicking  **Row/Column**,  **Show/Hide**.



Derived answers are extremely flexible and range from very simple to very complex, since they can contain any combination of text, Fields, Lists, and Conditions. See the *Expert User Guide* for suggestions and examples.

Grid Answers

Grids are a special type of answer that appear under the main Questionnaire and supplement it.

Grid {

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
DateSign	Date of signing?	12/29/2012

List all the parties:

Name	Street	City	State	Zip
Terry Porter	555 Main Street	Seattle	Washington	98101
Garth Blinth	123 Sycamore Lane	Chicago	Illinois	60290
Eva Roette	868 Meridian Drive	Houston	Texas	77001

To add a Grid, click  Questionnaire,  Grid, .

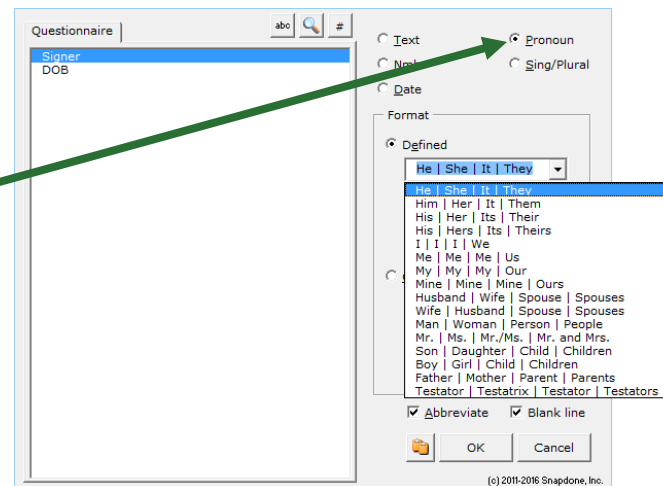
Grids can contain Smart Answers. When you apply a Smart Answer in a Grid, you are choosing a Smart Answer for an *entire column*. To add a Smart Answer, place the cursor anywhere in the desired column and click  **Smart Answer**.

Field Types

We already glimpsed Text, Date, and Number Fields in the first example on page 4. The following Field types add even more intelligence to your forms.

Pronoun Fields

Pronoun Fields automatically choose words like “he/she” and “him/her” depending on which pronoun is selected in a Pronoun answer. They also automate gender words like “husband/wife”, “son/daughter”, and “testator/testatrix”.



Questionnaire | abc #

Signer
DOB

☐ Text
☐ Number
☐ Date
☒ Pronoun
☐ Sing/Plural

Format
☒ Defined
He | She | It | They
Him | Her | It | Them
His | Her | Its | Their
His | Hers | Its | Theirs
I | I | I | We
Me | Me | Me | Us
My | My | My | Our
Mine | Mine | Mine | Ours
Husband | Wife | Spouse | Spouses
Wife | Husband | Spouse | Spouses
Man | Woman | Person | People
Mr. | Ms. | Mr./Ms. | Mr. and Mrs.
Son | Daughter | Child | Children
Father | Mother | Parent | Parents
Testator | Testatrix | Testator | Testators

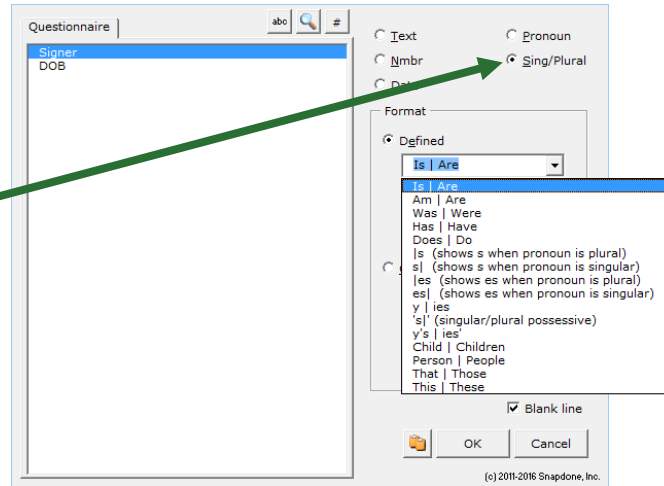
☒ Abbreviate ☒ Blank line

OK Cancel

(c) 2011-2016 Snapdone, Inc.

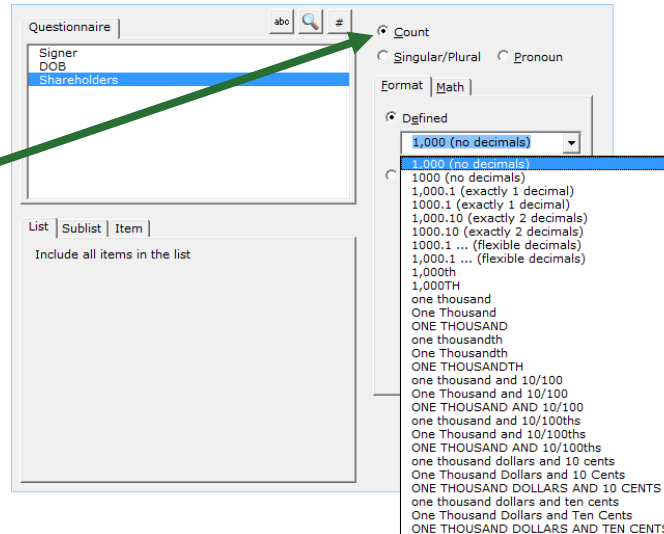
Singular/Plural Fields

Singular/Plural Fields automatically choose words like “is/are” and “child/children” depending on (1) which pronoun is selected in a Pronoun answer; or (2) how many items appear in a Series or Grid answer.



Count Fields

Count Fields refer to the number of items in a series answer. They can be formatted as numbers or words.



Conditions

To demonstrate Conditions, we'll turn this snippet into a form, adding Conditions to make it work even when the signer is not married. To follow along, open a fresh document and type these two sentences.

Click  **Questionnaire**,  **Create** to add a Questionnaire, and type the two questions shown here, along with their labels.

Replace the names in the document with Fields, using the  **Field** button.

My name is Terry Vance. My spouse's name is Gena Vance.

My name is Terry Vance. My spouse's name is Gena Vance.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

My name is {Signer}. My spouse's name is {Spouse}.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Conditions include or exclude text, depending on responses in the Questionnaire.

See page 5 if you need a refresher course on inserting Fields.

Type an alternate second sentence to be used when the signer is unmarried.

My name is {Signer}. My spouse's name is {Spouse}.
I am not married.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Finally, we'll add two conditions so that the proper second sentence appears when the form is used.

Select the highlighted text (including the two spaces at the end of the sentence) and click  **Condition**.

My name is {Signer}. My spouse's name is {Spouse}.
I am not married.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Select the **Spouse** answer.

Show the selected text if:

Questionnaire

Signer	is not
Spouse	empty

and/or

OK Cancel

(c) 2011-2016 Snapdone, Inc.

We only want this sentence to appear when there is a spouse, so select **is not empty** and click **OK**.

We'll treat the last sentence similarly, but with an opposite Condition.

Select the highlighted text, click

 **Condition**, select **Spouse**, and (since this sentence should appear when the Spouse answer is left blank) select **is empty**. Click **OK** to finish.

Here's the finished form. The first conditional sentence will be used when the Spouse answer **is not empty**; and the second conditional sentence will be used with the Spouse answer **is empty**.

Now watch how the form responds to different circumstances when it is used.

When a Spouse is typed, the result looks like this.

My name is {Signer}. {if:My spouse's name is {Spouse}. }I am not married.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

My name is {Signer}. {if:My spouse's name is {Spouse}. }{if:I am not married.}

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

My name is Betty Miller. My spouse's name is Jerome Miller.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	Jerome Miller

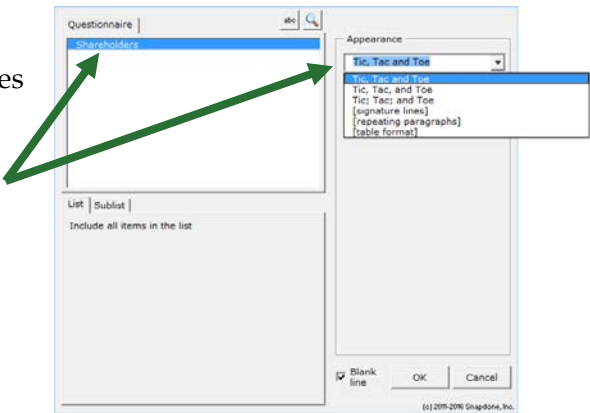
And when the Spouse answer is left empty, the result looks like this.

My name is Betty Miller. I am not married.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

Lists

Lists are like Fields, except they are used with series answers to add a whole series of items to a form. To insert a List (shareholders, signers, children, executors, etc.), click **List**, select one of the series answers shown, select a format, then click **OK**.



Lists are another extremely flexible feature. See the *Expert User Guide* for examples of all sorts of built-in List formats, and learn how to create your own custom Lists.

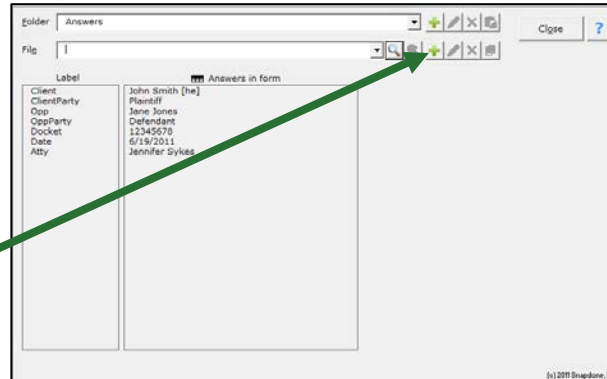
Capturing and Reusing Data

Answers can be saved from one form and reused in a different form (for the same client, matter, or project on another day, for example).

Saving Answers

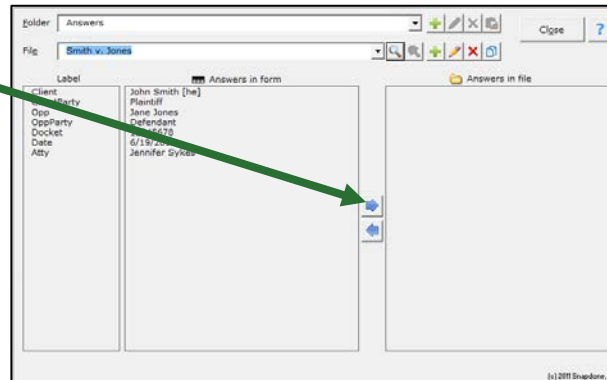
After typing answers in a Questionnaire, click  **Save/Load** to open this screen.

Click  plus to create a file for this client, matter, project, etc., and give the file a name like (e.g., “Acme, Inc.” or “Smith v. Jones”).



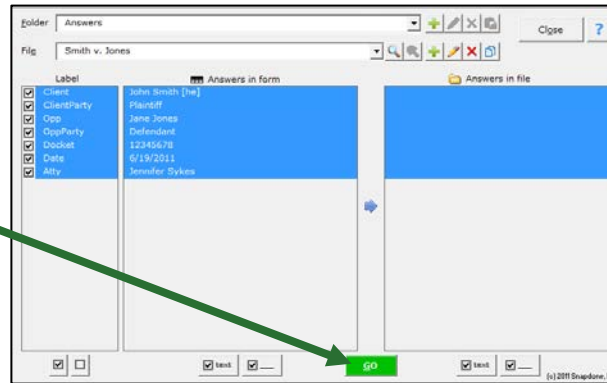
The screenshot shows a window titled 'Answers' with a 'File' dropdown set to 'Answers'. The main area is divided into two panes. The left pane, labeled 'Label', contains a list of fields: Client, ClientParty, Opp, OppParty, Docket, Date, and Atty. The right pane, labeled 'Answers in form', contains the corresponding values: John Smith (he), Plaintiff, Jane Jones, Defendant, 12345678, 6/19/2011, and Jennifer Dykes. A green arrow points from the text 'Click + plus' to the plus icon in the top toolbar of the 'Answers in form' pane.

Click the  right arrow to indicate answers should be copied *from the form to the file*.



The screenshot shows the same 'Answers' window, but now the 'File' dropdown is set to 'Smith v. Jones'. The right pane is now labeled 'Answers in file' and is empty. A green arrow points from the text 'Click the right arrow' to the right arrow icon in the bottom toolbar of the 'Answers in file' pane.

Click **GO** to finish.

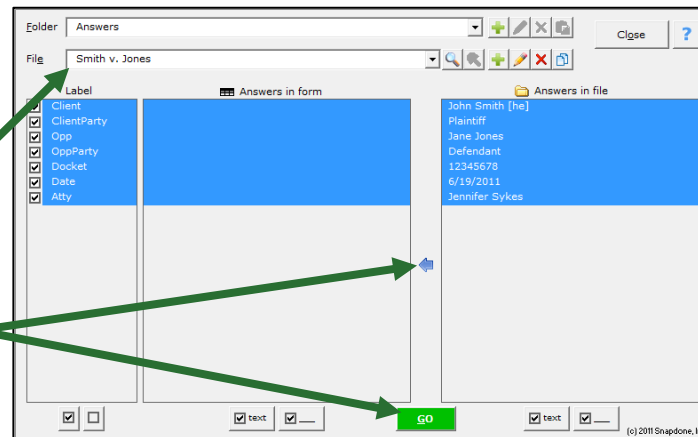


Loading Answers

When you're working on another form for the same client/matter/project, simply load the answers you saved previously.

Click  **Save/Load** and select the **Smith v. Jones** answer file.

Click the  left arrow to indicate answers should be copied *from the file to the form* and click **Go**.



Advanced Features

Even entry-level users of **Doxserá®** will boost productivity in their office enormously, creating everyday working forms within minutes of installation. A little time spent with this *Quick-Start Guide* will lead to even more astonishing results. And for the rocket scientists who want to harness all the power available, the *Expert User Guide* has much more to explore:

Master Lists are great repositories for information that is used in multiple forms. For example, many firms maintain a Master List of employees, along with their direct dial numbers, email addresses, and other information. That information is then available in all forms to create signature blocks, personalized letterhead, etc. Master Lists allow form users to make a simple menu selections rather than remembering or looking up and typing or copy/pasting frequently-used information.

Folios store multiple texts, called Passages, that can be brought into documents manually with  **Fetch** or into forms automatically with  **Fetcher**. A Folio could contain boilerplate paragraphs or pages, employee biographies, parts lists, jury instructions, interrogatories, letterheads, captions, or any set of text passages, even if they include graphics, formatting, footnotes, hyperlinks, special characters, and other non-text features.

Form Sets organize forms into groups that fit your needs, and allow you to create batches of related documents all at once. When a Form Set is used, **Doxserá®** builds a *compiled* Questionnaire that includes all relevant questions for the selected forms and no duplicates, so the form user can work with a single Questionnaire for the whole set instead of a separate Questionnaire for each finished document.

Wrappers change the overall *appearance* of a finished document without changing the *content*. Use Wrappers to produce the same content with a variety of “looks”. Wrappers turn a single form into a chameleon that can instantly rebrand itself to serve multiple affiliates, subsidiaries, jurisdictions, or marketing channels. And Wrappers can automatically apply your own corporate identity to generic forms supplied by form publishers and other external sources.

Math Formulae and **Date Offsets** perform calculations -- from simple to extremely complex -- to automatically generate information and make document-altering decisions using mathematical and boolean operators and functions. Calculations are self-contained within the form, so there's no need to go back and forth with an external spreadsheet.

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Some helpful resources at www.theformtool.com:

Doxserá Quick-Start Guide	You're reading it now!
Doxserá Expert User Guide	For the true form aficionado who needs to <i>know it all</i> . A copy is included in each program download. Or click here for an interactive online version.
Online training course	Click here to browse a collection of short, graduated videos that will take you from the basics to rocket science. We strongly encourage all users to review the Beginning and The Basics levels of The Learning Curve. Doing so will provide a strong foundation for productivity with the software and save an enormous amount of time.
Timely updates	If you haven't already done so, click here to sign up for our newsletter to stay informed of updates and improvements.
The Learning Curve weekly webinar	Every Wednesday morning (8am PT, 1500GMT), our very best, most experienced technical experts and service professionals are available to answer your questions, address your issues, and listen to your suggestions. Click here to join us.
And the kitchen sink	Our general help page is here . Everything else you need is here at the Service Center, where you may search or browse hundreds of questions, answers, tips and suggestions, and contribute your own.

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