

# Quick Start

for

# WinDraft

These instructions will help you to quickly learn the WinDraft basics and start producing client documents with WinDraft.

*(If you have not already installed WinDraft, see the Addendum at the end of this chapter. Also, please note that this document does not walk you through creating your own system. For that, see the Author's Guide.)*



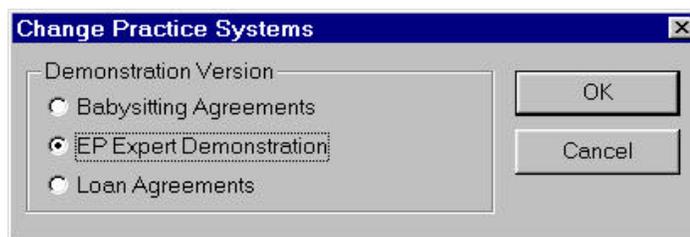
1. Load Microsoft Word.



Click on the LoadWinDraft button or simultaneously press **Control-Alt-W** to “load” the Windraft global add-ins. You will see the WinDraft toolbars appear. (If you don’t see the Load WinDraft button, you can load it by clicking the right mouse button while the cursor is on any toolbar.)



2. If you have access to more than one practice system in your office, select the system you want to use by clicking on the “change systems” button. The selection screen will look like this:



Your systems will vary, depending on what you or your staff have set up on your network or PC. Select the system you want to use. If you are new to WinDraft, choose EPEXpert. (If you only use one system, you can skip this step. The last system you used will “stick.”) If you

have just installed WinDraft and are exploring WinDraft for the first time, we recommend going through these steps with each of the demo systems. These steps will be the same as those outlined here, but the screens will look a little different for each practice system.



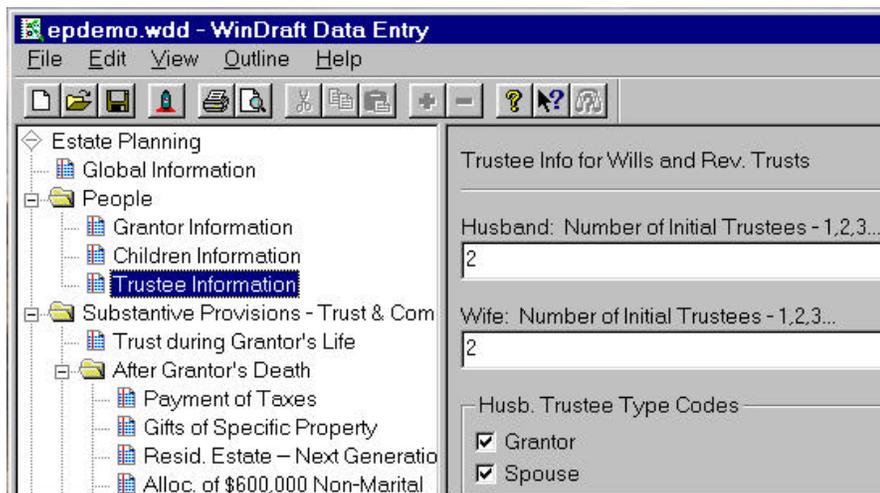
3. Click on the “Checklist” Button on the toolbar.

(If it is not visible, see the Addendum at the end of this chapter or try pressing Control+Alt+W again.)

4. Use the WinDraft checklist program to enter, edit, save and print client information by following these steps:



- a. Use File Open or click on the toolbar button to open a data file. Files with a “.WDD” extension are WinDraft data files, and files with a “.WDM” extension are WinDraft model data files. (If you are using DOCS OPEN, the interface will be the usual DOCS profiles, with special document types for different practice systems.) You may use either. By loading a previous client’s data, you can save time by not having to reenter data that is the same for more than one client.



- b. Edit the data to suit your needs, making sure to answer all the relevant questions. There is an outline-based interface. Simply click on the folders and pages on the left side of the screen to open up data entry screens on the right side of the page. Use the tab keys or the mouse to move around the data entry screen.

You will note that questions that don't apply may be "grayed out." That is, if you select "None" for Marital Deduction Formula type, all further questions relating to the Marital Deduction and marital trusts will be displayed in gray on the screen. You cannot move the insertion point to a "grayed out" field.

Unanswered questions are indicated as follows:

Text boxes	Contain the word, "UNANSWERED"
Radio buttons	None selected
Check boxes	Shaded gray check

Be sure to answer all the relevant questions in each section of the outline. If you leave a needed question unanswered you will receive a warning message when you merge the documents, and you will have to go back and answer it then. There are three ways to move between data entry questions. Simply clicking the mouse on the outline headings on the left side of the screen will navigate you around the various sections. The Tab key, also, can be used to move you to the next question on the screen, and Shift Tab will move you back. Outline Find Next Unanswered (Ctrl+F) is also very helpful, as pressing it takes you to the next relevant unanswered question on the data entry screen. And you can alternate between the outline and data entry side by selecting Jump to other side or (Ctrl+J).

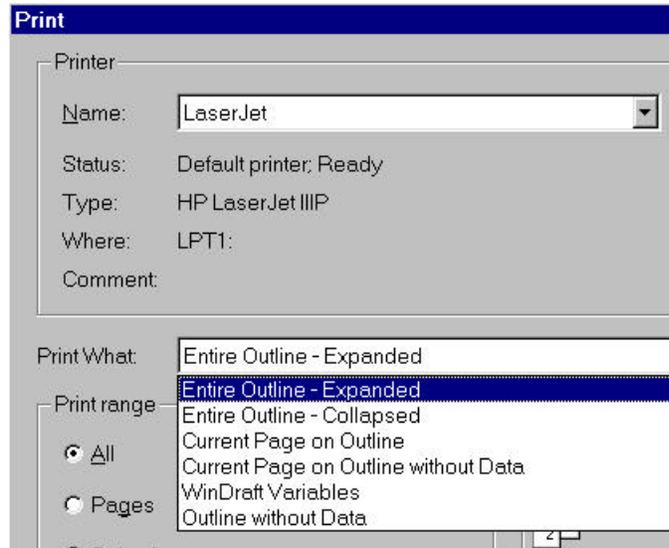


- c. Save your data. File Save As will save your modified data file, using any name you choose, with up to eight characters, followed by .WDD for client data or .WDM for model data. We suggest using the client's last name as the file name so that the appropriate file can easily be recognized. If you want to save under the same name, use File Save or click on the Save button.



- d. You can print your data either by clicking on the Print button

or by selecting File Print from the menu.. If you want to review the print output on the screen, you can select File Print Preview. Note that there are six printing selections to choose from:



Normally, print the expanded outline to see your data presented in a “lawyer-friendly” way. **We recommend putting a copy of the data outline printout in the file** so that, as the documents are proofread, a lawyer can verify the selected options. Standard prompts and data will appear in black, indented to the right outline level. Formatting of the font indicates special information as follows:

Type of Information	Font
Headings	<b><u>Bold and Underlined</u></b>
Inapplicable/Irrelevant	Light gray
Unanswered	<i>Italic</i>

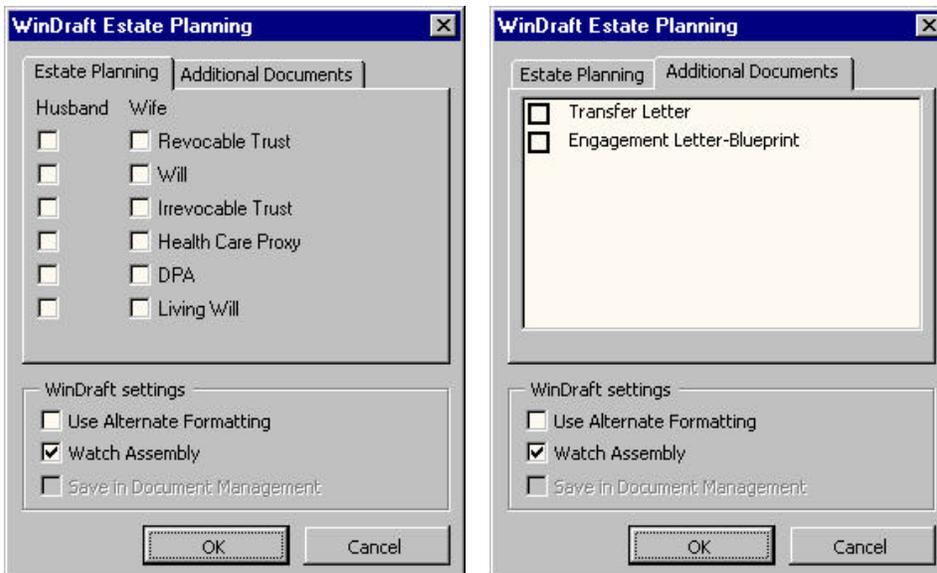
A typical printout with data included looks like this:



To print out a blank outline for use by lawyers who are not on the system, print Outline without Data, or better yet, a partially completed outline with typical data selected. This feature lets computer-phobic attorneys use the system in a paper format. For debugging systems, you can set “Print What” to “variables” on the print dialog box (See above) in order to print the names of all the variables and their values.

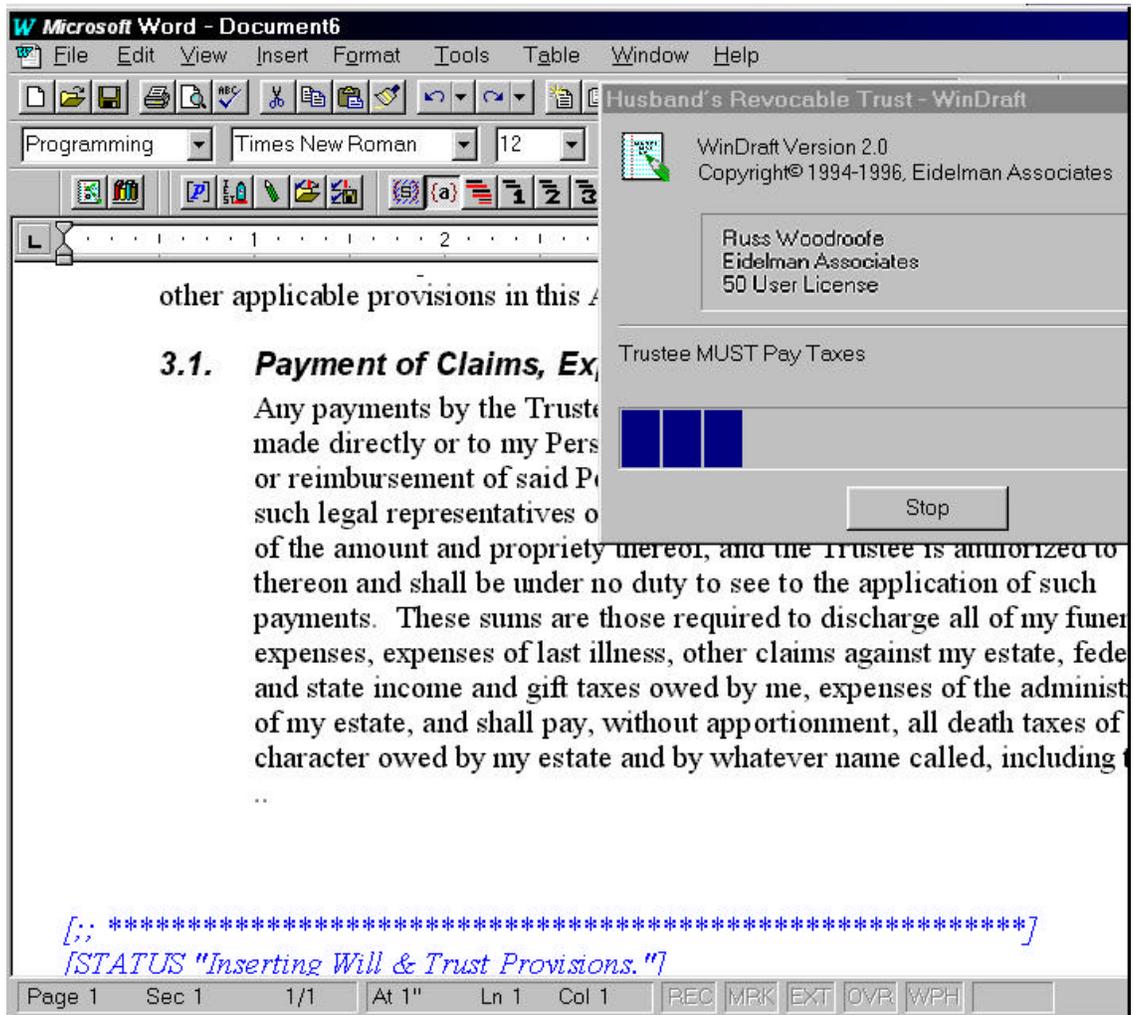


6. **BLAST OFF!** Click on the Rocket Icon to switch to Microsoft Word and access the “Blast Off” Dialog Box. The estate planning system looks like this:



Select the documents you want WinDraft to create, and click OK. Although it will take slightly longer, we recommend that you “Watch Assembly” so that you can observe the document as it is assembled on the screen.

The system will then merge the model documents and the client data you entered to create, on the screen, the selected documents. During the merging process it displays a progress dialog box that shows the percent (%) completed and status information, like this:



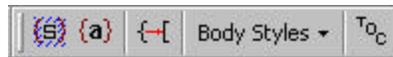
When it is all done, you will see a “Document Assembly Completed!” message, and you can save the documents just like any other Word document. You have now created your personalized document in a fraction of the time it used to take and with fewer errors. (If you are running DOCS OPEN and have DOCS OPEN profile creation turned on and set up properly, the system will create a profile for each

document and display a pick list of the documents that WinDraft just created. See Appendix 4, Integration With DOCS OPEN Document Management.)

## 7. Editing and saving your documents

WinDraft integrates with Word very well and supports the use of MS Word bookmarks and fields, automatic paragraph numbering, table of contents, cross referencing, and outline headings. In fact, many of our model documents use these features extensively.

WinDraft Edit Toolbar (an additional editing toolbar) has special styles, macros, and buttons to make it easier to work with these features.



For example, clicking on the show field shading (S) button will turn on and off the shading of Word fields that change terminology in a document (he/she, trust/will, etc.), and the table of contents button (Toc) will automatically insert a table of contents at the end of the document. The numbers on the toolbar automatically indent text in an outline format. See the WinDraft User Guide for more information. Select View | WinDraft Options from the WinDraft Checklist program and change the appropriate checkbox to load or unload the toolbar.

## Addendum



### 1. Installing WinDraft

Insert the WinDraft diskette in drive a:. Exit from WinWord. From Windows Program Manager or File Manager, select File, Run, "A:SETUP," and click on OK. For a standard single-user setup, we suggest going with the default. That is, put WinDraft on C:\WINDRAFT directory. For network setups, make sure you are logged in with a supervisor's ID, and read Appendix 2, Network Setup Notes, and Appendix 3, WinDraft.INI Settings.

For further information about the WinDraft Setup program, see Appendix 2, Installing WinDraft.

### 2. Performance Issues

An optimized computer operates 20 times faster than a slow, non-optimized one. Processor speed, video speed, video drivers, settings in WinWord6.ini, and other factors can each double the speed of WinDraft. See Appendix 1, Optimizing WinDraft Performance.

### 3. Troubleshooting

If you have any problems, please call Eidelman Associates at 734-769-1500.

?? Different versions of WinDraft are available for Word 6.0, Word 7.0 (Office 95), Word 8.0 (Office 97), and Word 9.0 (Office 2000).

?? If you are running the system for the first time, don't forget to open the "Load WinDraft" icon or press Control-Alt-W to load and unload WinDraft. If you don't see the toolbar, you may need to open the WinDraft tool bar using the dialog under the Tools|WinDraft Options menu.

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