

Program Information Topic List



Welcome to the Program Information feature in the **It's Legal** for Windows online help system. Here you can find general information on operating the program and instructions on all of **It's Legal's** menu options and screen elements.

To make getting around in the help system as easy as possible, it has been divided into different areas, each represented by one of the buttons below. You can move to an area by clicking its button. The areas and topics are interconnected and linked so that you can move quickly from one area directly to another by clicking icons or underlined words.



Introduction



Welcome to **It's Legal 5.0** for Windows--the software that places the power of the law right on your computer screen. The point-and-click Windows environment makes **It's Legal** versatile and easy to use. With very little setup required, you'll be producing custom legal documents in no time.

With **It's Legal**, you will create professional, legally-binding documents with the look and feel of a lawyer's touch all at the click of a mouse. You can create wills, powers of attorney, premarital agreements, leases, financial documents, memorial service documents, and corporate and employment documents (each complying with current legislation in your state as of April 1, 1994). The documents are presented in manageable sections, so you can focus on one issue at a time. **It's Legal** makes the process even easier by automatically entering basic personal information whenever it is appropriate.

It's Legal's intuitive pull-down menu format guides you through the document creation process--every command you need is listed right on screen. Shortcut keys and tool bar icons provide additional options for operating the program. You can create legal documents using an interview, answering questions about the information you want to include, or use the document templates, filling in the blanks to supply the necessary data. When you've finished entering data, the program even checks to make sure no required information has been missed!

In addition to this program operation, **It's Legal** has an online help system, and an online Legal Guide providing descriptions and information on all the legal documents available, and on screen hints to assist with data entry.

The purpose of **It's Legal** is not to replace lawyers when they are required for special situations, but to remove some of the confusion that arises in creating legal documents. You can organize your information and familiarize yourself with legal documents before seeking a lawyer's advice; therefore, minimizing otherwise expensive legal fees.

For more information, click:



Documents

Throughout the **It's Legal** program and *User's Guide*, the word "document" is often used to refer to every type of certificate, declaration, revocation, worksheet, and letter in **It's Legal**.

Getting Started



Setting up the program so you can create and print legal documents is simple and requires minimal effort. The following paragraphs outline the items you may wish to review and set up before producing any legal documents. If you start with these items, you can tailor the program options to suit your individual needs and save having to enter frequently requested data more than once.

Personal Information

Use the Personal Information window to record the names and addresses of people you wish to insert into your legal documents. This streamlines the data entry process so you don't have to spend a lot of time rekeying data. For more information, click



Printer Setup

Choosing Print Setup from the File menu opens the Print Setup dialog where you can select the printer you plan to use for printing your legal documents. By default, **It's Legal** uses the default printer you have set up in Windows. But you can select another printer from the list of printers you currently have installed in Windows if you wish. To install additional printers, see your Windows manual. For more information, click



Options

Items on the Options menu allow you to tailor the program environment. You can turn on and off the tool bar and the status bar, and you can move or hide the Hint pane. You can also turn on and off various system preferences. For more information, click



For more information, see:

[Introduction](#)

[Menus](#)

[Creating Documents](#)

Operations & Techniques

The icons below outline some of the more mechanical aspects of working with **It's Legal**. Click on any icon to move to the topic.



Entering Personal Information




The Personal Information feature simplifies document creation by storing personal details about you and other people you want to include in your legal documents (like your spouse, children, or friends). You can record the name, address, and other applicable information about each person. Then while creating a legal document, you can call up the Personal Information feature and paste a selected record into your document. This saves you time and reduces errors since you won't be retyping information over and over.

Accessing the Personal Information Feature

You can access Personal Information by:



- * Clicking the  button on the tool bar.
- * Choosing Personal Information from the Document menu.
- * Pressing **F2** from most program locations.

The Personal Information window opens where you can add new records and work with existing ones. To help you use the Personal Information feature, Quick Tips appear above the Personal Information dialogs providing information on what to enter in each field.

Automatically Inserting Your Name into Your Documents

You can specify a default Personal Information record, usually for yourself, so that whenever you open a new document, information from the default record is automatically pasted into the document (where applicable). You can create both individual and business personal information records to suit your needs.

For further details on Personal Information, see:

Quick Tips

Adding a Record

Saving a Record

Specifying a Default Record

Modifying a Record

Copying a Record

Deleting a Record

Attaching Notes to Records

Pasting Personal Information into a Document

Quick Tips



Throughout the Personal Information feature, Quick Tips (shown below) appear above the current window in a balloon. These Quick Tips provide information on what you should do to proceed as well as general instructions on how to complete the requested information. Quick Tips will help you become oriented to the program, especially if you are a first time user or only use the program occasionally.

**Choose add to create a personal information record.
Information from a record can be automatically or
selectively pasted into documents.**

For further details on Personal Information, see:

Entering Personal Information

Adding a Record

Saving a Record

Specifying a Default Record

Modifying a Record

Copying a Record

Deleting a Record



Attaching Notes to Records

Pasting Personal Information into a Document

Adding a Personal Information Record



To add a personal information record, open the Personal Information feature (via the Document menu, the tool bar, or by pressing **F2**), then follow these steps:

1. On the Personal Information window that appears, click the  button to enter a new record.
2. On the Add Personal Information dialog that appears, choose Individual or Business.
3. Depending on the type of record you selected, an Individual Information or Business Information dialog opens where you can enter the appropriate details for the personal information record. Type the information for each field, using your mouse or the **Tab** key to move from field to field. (Do not use the **Enter** key to move to the next field as this saves and exits the current record.) Use the scroll buttons, where available, to choose from a list of options.
If you need help completing a particular field, check the Quick Tips shown above the dialog. These tips explain what information is requested for the field and provide examples for you to follow.
4. If you have specific information you want to add to a particular record, but find there is no appropriate field for that data, click the  button to open another window where you can record the information. Any notes you enter are not pasted into documents and may be viewed only from this record. After typing your note, click OK to save your entry and return to the Individual or Business Information dialog.
5. When you finish entering the information, click OK (or **Tab** to highlight the OK button and press **Enter**) to save the record, close the Information dialog, and return to the Personal Information window.

For further details on Personal Information, see:

[Individual Personal Information Record](#)

[Business Personal Information Record](#)

[Saving a Record](#)

[Specifying a Default Record](#)

[Modifying a Record](#)

[Copying a Record](#)

[Deleting a Record](#)

[Attaching Notes to Records](#)



[Pasting Personal Information into a Document](#)

Individual Personal Information Record



When you are creating a new personal information record, you are given the option to select the type of record you want: Individual or Business. Individual records are ideal for your spouse, children, or friends. Business records are meant to describe people and their relationship to a company. The option you choose depends on the types of documents you intend to create. In some cases, you may want to enter both an individual and a business record for yourself (and others, if needed).

To create an individual personal information record, open the personal information feature (via the Document menu, the tool bar, or by pressing **F2**), then do the following:

1. Click the  button on the Personal Information window.
2. On the Add Personal Information dialog that opens, choose Individual.
3. The Individual Information dialog opens containing fields for basic personal data relating to a single person. Type the information for each field, using your mouse or the **Tab** key to move from field to field. (Do not use the **Enter** key to move to the next field as this saves and exits the current record.)
If you need help completing a particular field on the Individual Information dialog, check the Quick Tips shown above the dialog. These tips explain what information is requested for the field and provide examples for you to follow.
4. If you have specific information you want to add to a particular record, but find there is no appropriate field for that data, click the  button to open another window where you can record the information. You can use personal information notes to add any additional information or jot reminders to yourself about this person (just as you might write brief facts in the margin of a page). After typing your note, click OK to save your entry and return to the Individual Information dialog.
5. When you've finished entering data about this person, click OK to add the record to the Personal Information window.

For further details on Personal Information, see:

Attaching Notes to Records



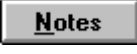
Business Personal Information Record

Business Personal Information Record



When you are creating a new personal information record, you are given the option to select the type of record you want: Individual or Business. Individual records are ideal for your spouse, children, or friends. Business records are meant to describe people and their relationship to a company. The option you choose depends on the types of documents you intend to create. In some cases, you may want to enter both an individual and a business record for yourself (and others, if needed).

To create a business personal information record, open the personal information feature (via the Document menu, the tool bar, or by pressing **F2**), then do the following:

1. Click the  button on the Personal Information window.
2. On the Add Personal Information dialog that opens, choose Business.
3. The Business Information dialog opens containing fields for data regarding an individual and his relationship to a business. Type the information for each field, using your mouse or the **Tab** key to move from field to field. (Do not use the **Enter** key to move to the next field as this saves and exits the current record.)
If you need help completing a particular field on the Business Information dialog, check the Quick Tips shown above the dialog. These tips explain what information is requested for the field and provide examples for you to follow.
4. Click the  button to define the relationship between the individual named on the personal information record and the company with which he/she is associated. Enter the appropriate information and click OK to return to the Business Information dialog.
5. If you have specific information you want to add to a particular record, but find there is no appropriate field for that data, click the  button to open another window where you can record the information. You can use personal information notes to add any additional information or jot reminders to yourself about this person (just as you might write brief facts in the margin of a page). After typing your note, click OK to save your entry and return to the Business Information dialog.
6. When you've finished entering data about this person, click OK to add the record to the Personal Information window.

For further details on Personal Information, see:

Using the Details Button

Attaching Notes to Records

Individual Personal Information Record

Details...Defining the Relationship Between Individual and Business



Defining the relationship between an individual and a company is important because the individual's relationship to the company affects how some personal information is transferred to various fields in business related documents.

On the Details dialog (accessed by clicking the  button on the Business Information dialog), indicate the individual's relationship to the company by placing an X in the appropriate check box:

- * **Employee**
- * **Officer**
- * **Director**
- * **Shareholder**

To place an X, click the check box with your mouse or press **Tab** until the desired option is highlighted and press the spacebar. Check as many boxes as needed.

For example, Jane Doe works for First State Bank. She is an employee and an officer at the bank whose title is Vice President. Jane also holds 15 shares as a bank shareholder. To complete the details for Jane Doe's relationship to First State Bank, do the following:

1. Check the box for Employee and type **Vice President** in the Title field.
2. Check the Officer box and enter the same title.
3. Mark the Shareholder check box and enter **15** in the No. of shares field.

For further details on Personal Information, see:

[Attaching Notes to Records](#)
[Adding a Record](#)

Saving a Personal Information Record



Once you have completed the fields on the Individual or Business Information dialog, click OK or press **Enter** to save the record. The new record will appear in the Personal Information window in alphabetical order by the name of the person for whom it was created.

For further details on Personal Information, see:

Adding a Record

Specifying a Default Record

Modifying a Record

Copying a Record

Deleting a Record

Attaching Notes to Records

Pasting Personal Information into a Document


Specifying a Default Personal Information Record



It's Legal designates the first Personal Information record you enter as the "default" record. When you create any new document, the program inserts information from this record into the appropriate fields in the document. The first record you enter in the **Personal Information window** is automatically assigned as the default record and identified in the **Default Personal Information box** that appears at the top of the **Personal Information window**. You can change the default record at any time.


Changing the Default

To change the default personal information record,

1. Highlight the record to be used as the default from those listed on the **Personal Information window** (click on it with your mouse or use the arrow keys to highlight it and press **Enter**).
2. Click on the  button.

Removing the Default

You can also choose NOT to specify a default record. In this case, the program will not insert the personal data automatically in new documents. To remove the default designation, highlight the current default

record and click on the  button (or press **Tab** to highlight the button and press **Enter**). Later, you can mark a new default record or choose the original again.

For further details on Personal Information, see:

[Adding a Record](#)

[Saving a Record](#)

[Modifying a Record](#)

[Copying a Record](#)

[Deleting a Record](#)

[Attaching Notes to Records](#)

[Pasting Personal Information into a Document](#)

Personal Information Window

This window opens when you access the Personal Information feature and lists all the personal and business records you have created. From the window, you can add records, specify a default record, modify existing records, and paste, copy, and delete records.

For more information, click [Personal Information](#).

Modifying a Personal Information Record



Personal Information records contain basic data used by **It's Legal** to complete certain fields in a document. These records are easily modified.

To modify a Personal Information record,

1. On the Personal Information window, double-click the record to be modified or highlight it and click



2. The Information dialog box opens displaying the record's current information. Enter any changes.
3. Click OK (or **Tab** to highlight the button and press **Enter**). Your changes are saved and you are returned to the Personal Information window.

For further details on Personal Information, see:

[Adding a Record](#)

[Saving a Record](#)

[Specifying a Default Record](#)

[Copying a Record](#)

[Deleting a Record](#)

[Attaching Notes to Records](#)

[Pasting Personal Information into a Document](#)

Copying a Personal Information Record



If you want to create a new Personal Information record similar to an existing one, you can duplicate the existing record's data and create a new record with the same entries. This feature is handy for entering individuals residing at the same address or employees of the same company, for example.

To copy a record,

1. On the Personal Information window, highlight the record you wish to duplicate.
2. Click on Save As (or **Tab** to it and press **Enter**).
3. When the Add Personal Information dialog opens, choose Individual or Business. The relevant data is copied into the new record. (**Note:** You can copy data from a business record into a new individual record and vice versa.)
4. Modify the data as needed, then click OK to save the record.

After the copy process is complete, **It's Legal** returns you to the Personal Information window. The copied record appears in alphabetical order by name on the list.

For further details on Personal Information, see:

Adding a Record

Saving a Record

Specifying a Default Record

Modifying a Record

Deleting a Record

Attaching Notes to Records

Pasting Personal Information into a Document

Deleting a Personal Information Record



To delete a record listed on the Personal Information window,

1. Highlight the record you want to delete. (Click on it with your mouse or use the arrow keys.)
2. Click on Delete. A warning box appears asking you if you're sure you want to delete the record. Click Yes.

If you delete the default Personal Information record, the default will be left unassigned until you designate another default record. **Note:** Even if you delete a record, that information still remains in any documents you created previously.

For further details on Personal Information, see:

Adding a Record

Saving a Record

Specifying a Default Record

Modifying a Record

Copying a Record

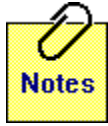
Attaching Notes to Records

Pasting Personal Information into a Document

Record


In **It's Legal**, a record is one set of data for one person.

Attaching Notes to Personal Information Records





You can attach notes to any personal information record to outline additional details about that person. You can add personal information notes when adding or editing a personal information record.

To attach a note to a personal information record,

1. On the Individual or Business Information dialog, click the  button.
2. On the Notes dialog that opens, enter your text. (Note that the information you enter here is not pasted into documents and may be viewed only from this record.)
3. When you've finished entering your note, click OK to save your entries and return to the Individual or Business Information dialog.
4. Click OK to save the personal information record and return to the Personal Information window.

Viewing/Modifying Personal Information Notes

To view or change the notes for a particular personal information record,

1. Double-click on the desired record on the Personal Information window (or highlight it and click .
2. On the Information dialog that opens, click the  button to view your notes.
3. When you're finished viewing or editing the note, click OK to save your modifications and return to the Information dialog. Click OK again to save the personal information record.

For further details on Personal Information, see:

[Adding a Record](#)

[Saving a Record](#)

[Specifying a Default Record](#)

[Modifying a Record](#)

[Copying a Record](#)

[Deleting a Record](#)

[Pasting Personal Information into a Document](#)

Pasting Personal Information into a Document




You can paste data from your Personal Information records directly into your documents. For example, you can paste the names and addresses of your witnesses into your Simple Will. You can also use the Paste feature if you want to create legal documents for someone else by pasting details from another Personal Information record over your default data.

You may want to perform a paste when:

- * You do not have a designated default record or the default record that transfers is not appropriate for the creator of the document. To perform this paste, you must access Personal Information from the first field designated for the document creator's name and address so that the new record will replace appropriate fields throughout the document. Generally, this field accepts a first name, personal title, or company name.
- * You want to insert data for a person other than the creator of the document. For example, you can paste relatives' records into your Simple Will in the special bequests section. You can perform this paste by accessing Personal Information from any field designated for the person's name and address.

To paste a Personal Information record,

1. Access Personal Information from the appropriate field on a document window.
2. When the Personal Information window opens, highlight the desired record from which information will be pasted.
3. Click on the  button to transfer the data. Click Paste for more information on using this button.

Special Considerations

When pasting personal information into a document, there are a few things you need to consider. Click the button below for details about these special considerations.



For further details on Personal Information, see:

[Adding a Record](#)

[Saving a Record](#)

[Specifying a Default Record](#)

[Modifying a Record](#)

[Copying a Record](#)

[Deleting a Record](#)

[Attaching Notes to Records](#)

Paste Button

The Paste button allows you to transfer personal information into a data field within a document. If the Paste button is not active, then you accessed the Personal Information feature from a field that does not accept pasted information. Return to the document and try initializing the paste from an appropriate field.

NOTE: The onscreen hints or interview question description will tell you if a paste is available for a certain field.

Special Considerations for Pasting Personal Information



When pasting personal information into a document, consider the following:

- Personal Information transfers data from a record 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 automatically transfers to subsequent fields.
- Name and address fields for a document's creator will accept:
 - * an automatic paste of the designated default record, or
 - * any other pasted record as long as the highlight appears in the first field requesting name and address information.
- For name and address information for someone other than the creator of a document, you can paste over previously entered data.

For more information on personal information, see:

[Adding a Record](#)

[Saving a Record](#)

[Specifying a Default Record](#)

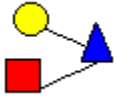
[Modifying a Record](#)

[Copying a Record](#)

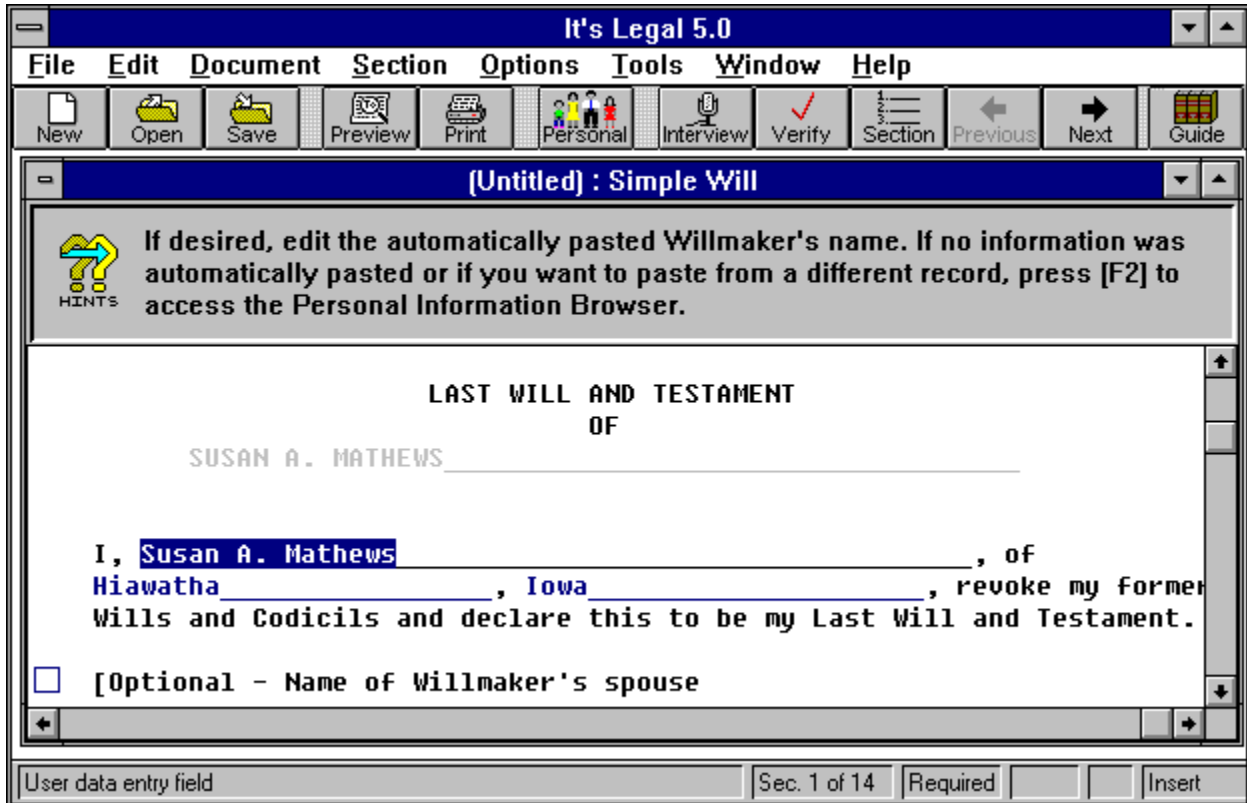
[Deleting a Record](#)

[Attaching Notes to Records](#)

Desktop Elements



Features in the **It's Legal** desktop and document windows help you to navigate the program quickly and smoothly. The basic components of **It's Legal** desktop are depicted in the following illustration. Click on any portion of the illustration to pop-up quick information about the area selected. The topics following the illustration provide more information on each of the desktop elements.



For more information, see:

- [Desktop Control-menu Box](#)
- [Document Control-menu Box](#)
- [Menu Bar](#)
- [Tool Bar](#)
- [Document Windows](#)
- [Hint Pane](#)
- [Status Bar](#)
- [Scroll Bar](#)
- [Minimize Button](#)
- [Maximize Button](#)
- [Desktop Window](#)

Title Bar

The horizontal bar located at the top of a window, containing the title of the application or window.

Menu Bar

The horizontal bar containing the names of all **It's Legal's** menus. The menu bar appears just beneath the title bar. For more information, click [Menu Bar](#).

Document Window

A window containing an open **It's Legal** document. Each document you open appears in a separate document window. A document window may display a document's [template](#) or [interview](#). For more information, click [Working with Document Windows](#).

Scroll Bars

Horizontal and vertical bars displayed on the right and bottom edges of a window whose contents cannot be entirely viewed on screen. The box and arrow buttons on the scroll bar allow you to move up and down (and left and right) to view the various areas of the screen.

For more information, click [Scroll Bars](#).

Control-menu Box

The box (or button) located in the upper-most corner of the application window. When you click on this box, a menu drops down listing available choices. From this menu you can:

- * Arrange windows on the screen
- * Move the window
- * Change the size of the window
- * Close the current window

Double-clicking on this box closes the current application. For more information, click [Desktop Control-menu Box](#).

Document Control-menu Box

If you click once on this box with your mouse, a menu appears where you can move, size, maximize, minimize, restore, and close the current document window as well as move to the next document window.

For more information, click [Document Control-menu Box](#).

Minimize Button

This button displays a small down arrow and is located second from the right in the upper right corner of the **It's Legal** desktop and also within any document window. Clicking on the desktop Minimize button reduces **It's Legal** to an icon on the Windows Program Manager. Clicking on a document window Minimize button reduces the current document to an icon on the **It's Legal** desktop.

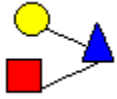
For more information, click [Minimize Button](#).

Maximize Button

This button allows you to increase the size of the window so that it spans the entire screen. Whenever a window is maximized, the Maximize button changes to an up and down arrow symbol. You can click on this icon to return the window to its previous size.

For more information, click [Maximize Button](#).

Desktop Control-menu Box



When you open **It's Legal**, the main window appears with the same components as most other Windows applications. In the upper-most left corner of the **It's Legal** desktop, is a Control-menu box. If you click once on this box with your mouse, a menu appears where you can move, size, maximize, minimize, restore, and close the current application window as well as move to another application window. If you double-click on this box, you will exit **It's Legal**. Consult your Windows manual for further details on using the Control-menu box.

For more information, see:

Document Control-menu Box

Menu Bar

Tool Bar

Document Windows

Hint Pane

Status Bar

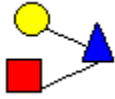
Scroll Bar

Minimize Button

Maximize Button

Desktop Window

Document Control-menu Box



Each time you open a document, it initially appears inside a document window. This window functions like any other document or file window in any Windows application. If you click once on this box with your mouse, a menu appears where you can move, size, maximize, minimize, restore, and close the current document window as well as move to the next document window.

When you first open a document window, the Control-menu box appears in the upper, left corner of the window on the document title bar, just below the tool bar. If you maximize the document window, the box moves above the tool bar and appears just below the desktop Control-menu box.

You can easily differentiate the desktop Control-menu box from the document Control-menu box because the desktop box is larger and it never moves. Double-clicking on the document Control-menu box closes the document window. (Any other document windows you may have open are not affected and the **It's Legal** application remains active.) Consult your Windows manual for further details on using the Control-menu box.

For more information, see:

Desktop Control-menu Box

Menu Bar

Tool Bar

Document Windows

Hint Pane

Status Bar

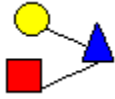
Scroll Bar

Minimize Button

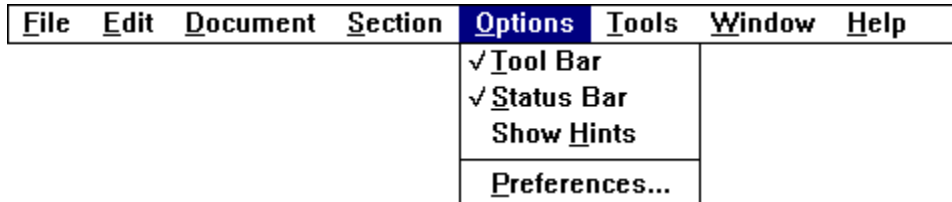
Maximize Button

Desktop Window

Menu Bar



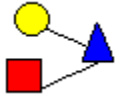
Across the top of the **It's Legal** desktop, just under the program title, is a horizontal list of menu options. Each item on this "menu bar" has a pull-down menu from which you can select various options to access program features (see the illustration below). This menu bar is also referred to as **It's Legal's** Main Menu.



For more information, see:

[Tool Bar](#)
[Document Windows](#)
[Hint Pane](#)
[Status Bar](#)
[Scroll Bar](#)
[Minimize Button](#)
[Maximize Button](#)
[Desktop Window](#)

Tool Bar



Below the pull-down menus, **It's Legal** has a tool bar you can use to access the most-used functions of the program by clicking on special buttons, rather than selecting the options from the menu. The tool bar displays by automatically by default, but you can hide it if you like. (Click [Hiding the Tool Bar](#) for details.) Each of the buttons on the tool bar is described below.



New Open a new document.



Open Open an existing document.



Save Save the current document.



Preview Show a preview of the layout of your document before printing.



Print Prints the current document.



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



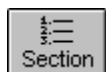
Interview Open the Interview for the current document. This button only appears when you're using a document template.



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



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



Section

Access the Section List dialog where you can view a list of the sections in the document, move to another section, and include or excluded sections.



Previous

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



Next

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



Guide

Open the online Legal Guide.

For more information, see:

Menu Bar

Document Windows

Hint Pane

Status Bar

Scroll Bar

Minimize Button

Maximize Button

Desktop Window

Operating Buttons

To operate a button, position the pointer over it and click the left mouse button.

Hiding the Tool Bar

To hide the tool bar, select the Tool Bar option from the Options menu. To redisplay the tool bar, select this option again. A check mark appears next to the option if the tool bar is currently being displayed.

Document Windows



When you access a new or existing document, a document window opens on screen. You can have many documents, and thus many windows, open at the same time. The first window you open is automatically active (meaning it includes a blinking cursor and is available for use) until you close it or activate another window. On the window title bar, **It's Legal** displays the name you gave the document (or "Untitled" if it is a new document) and the type of document.

Template vs. Interview Document Window

When you open a new or existing document, it appears in a template or interview document window. The template window appears if you're opening a new document using its template (where you fill in the blanks to complete the document). The interview window 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).

For more information, see:

Menu Bar

Tool Bar

Hint Pane

Status Bar

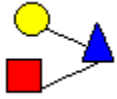
Scroll Bar

Minimize Button

Maximize Button

Desktop Window

Hint Pane



The **It's Legal** Hint Pane provides information and instructions on how to complete the various fields within a document. The illustration below shows a typical Hint Pane. You can use these hints to guide you through the document production process. The Hint Pane can be displayed at the top or bottom of the document window; you can even hide the Hint Pane if you do not want it displayed. (Click [Moving and Hiding the Hint Pane](#) for details.)



For more information, see:

[Menu Bar](#)

[Tool Bar](#)

[Document Windows](#)

[Status Bar](#)

[Scroll Bar](#)

[Minimize Button](#)

[Maximize Button](#)

[Desktop Window](#)

Moving and Hiding the Hint Pane

The Show Hints option on the Options menu allows you to modify the placement of the Hint Pane and to turn it on and off. You can display the hints above the document, below the document, or not at all. Click any option to enable your choice.

Status Bar



The status bar at the bottom of the screen displays important information as you use **It's Legal**. For example, if you highlight any menu option, the status bar displays a brief description of that item. The status bar displays by automatically by default, but you can hide it if you like. (Click [Hiding the Status Bar](#) for details.)

The status bar also indicates the section number for the active document, whether the section is [required](#) or [optional](#), or if any [notes](#) are attached to the current input field. When you highlight any field to which a note has been attached, the word "NOTE" appears in the middle of the status bar.

For more information, see:

[Menu Bar](#)

[Tool Bar](#)

[Document Windows](#)

[Hint Pane](#)

[Scroll Bar](#)

[Minimize Button](#)

[Maximize Button](#)

[Desktop Window](#)

Hiding the Status Bar

To hide the status bar, select Status Bar from the Options menu. To redisplay the status bar, select this option again. A check mark appears next to the option if the status bar is currently being displayed.

Scroll Bar



The vertical and horizontal scroll bar along the right and bottom edge of an open window let you quickly move through the open document. Click the arrow buttons on the vertical bar to scroll one line at a time; click and hold one of the arrows to scroll continuously.

The box within the scroll bar is an elevator. Moving the elevator lets you browse through the text in larger sections. Click above/below or to the left/right of the elevator to jump shorter distances.

For more information, see:

Menu Bar

Tool Bar

Document Windows

Hint Pane

Status Bar


Minimize Button

Maximize Button

Desktop Window

Minimize Button



The Minimize button  is located second from the right in the upper right corner of the **It's Legal** desktop and also within any document window.

Clicking this button from the **It's Legal** application, reduces **It's Legal** to an icon on the Windows Program Manager. Clicking this button on a document window reduces the current document to an icon on the **It's Legal** desktop. In either case, the application or document remains open.

To return to the application or document, you must select the icon and maximize or restore it. (You can use the desktop Control-menu box to restore an application or the document Control-menu box to restore a document window.)

For more information, see:

Menu Bar

Tool Bar

Document Windows

Hint Pane

Status Bar


Scroll Bar

Maximize Button


Desktop Window


Maximize Button



The Maximize button  is located in the far, upper right corner of the **It's Legal** desktop and also within any document window.

Clicking on this button on the **It's Legal** desktop increases the size of the **It's Legal** application so that it spans the entire screen. Clicking on this button from a document window increases the size of the current document so that it covers the whole **It's Legal** desktop area.

Whenever an application or document is maximized, the Maximize button changes to a  symbol. You can click on the

 icon to return the application or document to its previous size.

For more information, see:

[Menu Bar](#)

[Tool Bar](#)

[Document Windows](#)

[Hint Pane](#)

[Status Bar](#)

[Scroll Bar](#)

[Minimize Button](#)

[Desktop Window](#)

Desktop Window



The **It's Legal** desktop may contain one or more windows. These can be legal documents, tools, or other information (such as online help). The number of windows you can have open at one time varies depending on the memory capacity of your computer.

For more information, see:

Menu Bar

Tool Bar

Document Windows

Hint Pane

Status Bar

Scroll Bar

Minimize Button

Maximize Button

Menus



To perform most operations in the **It's Legal** program, you select options from lists called menus. The program's Main Menu--or menu bar--is displayed along the top of the screen when you first open the program and remains there throughout most program operations.

Submenus

In addition to the Main Menu, other **It's Legal** options are available through submenus (or pull-down menus). Selecting any Main Menu item causes a submenu to "drop down" or open. Options on each submenu are related to the corresponding Main Menu item. Sometimes submenus or pull-down menus are referred to simply as "menus," so don't be confused if you find the terms used somewhat interchangeably.

If a submenu is followed by an ellipsis (...), a data entry or information screen opens prior to the actual function. Complete the information in this screen as requested.

All menu and submenu options can be selected using either the keyboard or a mouse.

For more information, see:

[It's Legal's Main Menu](#)

[Keyboard Commands](#)

[Mouse Operations](#)

It's Legal's Main Menu



It's Legal is a menu-driven program. That is, you select options from lists called menus to perform most program operations. The program's Main Menu (also called the menu bar) is displayed along with the top of the screen when you first open the program and remains there throughout most program operations. All menu and submenu options can be selected using either a keyboard or a mouse.

The options described below are available from the **It's Legal** Main Menu. Each option opens to display a "pull-down" menu with additional choices.

File

This menu provides functions that allow you to create and manipulate document files. You can create new documents, open existing documents, close a document window, save the current document, copy a document, preview the layout of a document, print a document, modify printer setup, and exit the program.

Edit

The options on this menu allow you to manipulate text within a document. You can undo the last action, cut text from a field in a document, copy from a document field, and paste cut or copied text into another document field.

Document

This menu provides several document-related functions, such as entering personal information, switching to the document interview or template, finding text in a document, moving around the different sections available for a document, and writing/viewing field notes.

Section

This menu allows you to view and switch to the various sections in an open document. Note that this menu only appears on the Main Menu if you have a document currently open on screen. This menu is "hidden" from view whenever the desktop is blank; it will reappear when you open a new or existing document.

Options

The options on this menu can be used to tailor the **It's Legal** program environment to suit your needs. You can turn on and off the tool bar and the status bar, move or hide the Hint pane, and set other program preferences.

Tools

This menu provides a variety of tools you will find handy when preparing your legal documents. There's a math calculator, a Notepad, and a financial calculator (**Interest Vision**). The last menu option, Tools Menu Setup, allows you to customize the Tools menu to access other applications from **It's Legal**.

Window

The options on this menu allow you to arrange your open document windows, arrange the icons for your minimized document windows, close all open document windows, and jump to another open document.

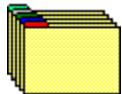
Help

You can use the options on this menu to get information on program operation, **It's Legal's** documents, product support information on contacting Parsons Technology, and additional information on the **It's Legal** product.

For more information, see:

Menus

File Menu



This menu provides functions that allow you to create and manipulate document files. The following options are available from this menu:

New

Opens a new legal document. When you select this option, a New dialog appears where you can select the category and type of document you need. After you have selected the document you need, you are given the option to choose the method you prefer for creating your document: the interview or the template. After you've made your choice, the document interview or template opens on screen, ready for you to enter your legal information.

Open

Opens an existing document that you've already created in **It's Legal**.

Close

Closes the current document window. The program will ask you if you want to save the document if you have made changes or are closing a new document window. You can also close documents using the document control-menu box.

Save

Saves any changes made to the current document. If you are saving a document for the first time, the Save As dialog appears (see below).

Save As

Allows you to save the current document and give it a name. You can use this option to save a document for the first time or to make a copy of an existing document. Copying documents is a quick way to create a document for another person. For example, you can copy a Simple Will you made for yourself and make changes to it for your spouse.

Preview

Shows you how the current document would look if printed. From document preview, you can change the font of your document, modify the display attributes, zoom in or out of the document, or jump to other pages in the document. You can even print from within the preview feature if you want.

Print

Prints out the current document. From the Print dialog, you can modify any of the following before printing: printer setup, the document's font, and other print options.

Print Setup

Defines the printer to which you will print your legal documents. You can change printers, install a new printer, set the page orientation, or modify the printer settings.

Exit

Exits the program and returns to the Windows Program Manager.

For more information, see:

Menus

It's Legal's Main Menu

Edit Menu



The options on the Edit menu allow you to manipulate text within a document. These options are only available when you are working with an open document. To use the Cut and Copy features, you need to select (highlight) text in order to activate these menu options. The available options are listed below. For more information about a particular option, click on it.

Undo

Cut

Copy

Paste

For more information, see:

Menus

It's Legal's Main Menu

Undo

Reverses the last action performed, such as reversing a deletion or paste.

Cut

Cuts (removes) the highlighted text from the current field within a document and copies it to the Windows Clipboard.

Copy

Copies the highlighted text in the current document to the Windows Clipboard (the original text remains unchanged).

Paste

Inserts information from the Windows Clipboard to the current location within a document. You can paste information that you cut or copied from **It's Legal** or any information you have copied to the Clipboard from another Windows application. Pasting information into a field will override any previous data that may have existed in that field.

Clipboard

A temporary storage location used to transfer data from one location in a document or application to another or to transfer data between documents and applications.

Document Menu



This menu several document-related functions, such as entering personal information, switching to the document interview or template, finding text in a document, moving around the different sections available for a document, and writing/viewing field notes. The following outlines each of the options available from this menu:

Personal Information

Use this option to record the names and addresses of people (including yourself) that you will use when creating your legal documents. You can specify a default record (typically for yourself) so that each time you open a new document, your name and address are automatically pasted into the document. You can also select other personal information records you have created to paste into documents where appropriate.

Go to Interview

Switches to the interview method where you can complete the document by answering a series of questions. This option is only active when you have a document template open on screen.

Go to Template

Switches to the template method where you can work directly with the document's text. This option is only active when you are using the document interview.

Find Text

Opens the **It's Legal** search feature you can use to locate text you've typed into your document. You enter the text you wish to search for and select other search options.

Repeat Find

Repeats the last search you performed, based your previous search criteria.

Section List

Use this option to review the sections included in a document. Both the required and optional sections are listed. You can go to a specific section or you can include and/or exclude optional sections as needed.

Next Section

Use this option to jump to the next section of a document.

Previous Section

Use this option to return to the previous section of a document.

Finalizing Document

Opens a submenu where you can:

- * Access the Make It Legal screen.
- * Verify the current document.
- * View the signing instructions for the current document.
- * Open the document safekeeping section.

Write/View Note

Use this option to write or view a field note to clarify or explain information in a field without having that information print on the actual document.

For more information, see:

Menus

It's Legal's Main Menu


Section Menu

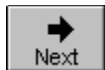


All **It's Legal** documents are divided into sections to identify the various components of the legal document. The Section menu provides easy access to the various sections contained in an open document. Because each document contains different sections, the sections listed on the Sections menu will vary.

The Section menu only appears on the Main Menu if you have a document currently open on screen. This menu is "hidden" from view whenever the desktop is blank; it will reappear when you open a new or existing document.

When you click on the Section menu on the Main Menu, a list of the sections for the current document appears on a pull-down menu. You can click on any section shown on this pull-down menu to jump to the beginning of the section selected.

NOTE: You can also use the section list feature or the  and



buttons on the tool bar to go to other sections of a document.

For more information see:

Managing Document Sections
Section List

Options Menu



Use the Options menu to modify certain features in **It's Legal** for Windows to suit your needs. You can turn the tool bar, the status bar, and the Hint pane on and off. In addition, you can set several other program preferences. The following options are available from this menu:

Tool Bar

This option allows you to turn the tool bar display on and off.

Status Bar

This option allows you to turn the status bar display on and off.

Show Hints

This option opens a submenu where you can choose to:

- * Display the hints above the document window.
- * Display the hints below the document window.
- * Turn the Hint pane off and on.

Preferences

This option allows you to enable or disable certain helps and prompts.

For more information, see:

Getting Started

It's Legal's Main Menu

Menus

Color Selection

Tool Bar

The tool bar, located just below the [menu bar](#), contains icons you can use to access program features quickly. To view the specific icons available on the Tool Bar, click here: [Tool Bar Icons](#)

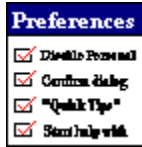
Status Bar

The status bar appears at the very bottom of the **It's Legal** desktop and provides important information as you operate the program. For example, it briefly describes the function of each menu item as you highlight it. Click [status bar](#) for more information.

Hint Pane

The Hint pane can appear at the top or bottom of a document window. Hint panes tell you what a particular section or field in a document is for and what you should do to proceed. For example, when you highlight an input field, the Hint pane will tell you what kind of information you should enter. Click [Hint pane](#) for more information.

Preferences



You can customize **It's Legal** for your system and for each work session by choosing to enable or disable certain program helps and prompts. If you're cautious, you'll want to be reminded of each action taken by the program, but if you find the reminders annoying, you may choose to turn them off.

From Preferences, you can also choose the document creation method you want to use when creating new documents. You can use the document templates, the interview, or have **It's Legal** prompt you to select a method each time you create a new document.

It's Legal's preferences are divided into two categories: Settings and New Document Creation Options. You can choose as many "settings" as you like; however, you can only choose one document creation option. The items shown below outline the preference options. Click on any item for more information.

Settings you can change include (to select an option, click its preceding check box):

- Disable "Personal Information Browser" prompt at startup**
- Confirm dialog for "Default Personal Information" pastes**
- "Quick tips" helper windows in Personal Information**
- Start Help with right mouse button**

New Document Creation Options include (to select an option, click its preceding radio button):

- Prompt for entry method when creating new documents**
- Create documents using Template method**
- Create documents using Interview method**

See also:

[Color Selection](#)

Disable "Personal Information Browser" prompt at Startup

This option disables the reminder that appears each time you start the program, prompting your to create a personal information record if you haven't yet done so.

Confirm Dialog for "Default Personal Information" Pastes

This option enables a confirmation message that appears whenever you attempt to paste a Personal Information record to a field containing information from a default Personal Information record. You are asked to confirm whether or not you want to replace the default information with the paste.

"Quick Tips" Helper Windows in Personal Information

This option enables the balloon captions that appear above various dialogs in the Personal Information feature providing tips on what to enter in each data field.

Start Help with Right Mouse Button

Enabling this option allows you to use the right mouse button to access context-sensitive Program Information Help.

If you choose this option, **It's Legal** will prompt you to select a document entry method (Interview or Template) each time you open a new document.

This option enables the Template document entry method. This method allows you to enter text directly into the document, supplying your own information where necessary. Each time you open a new document, the document will display in the Template format automatically.

This option enables the Interview document entry method. The Interview asks you a series of questions about the document you're creating and creates the document for you based on your responses. Each time you open a new document, the document will display in the Interview format automatically.

Tools Menu



This menu provides a variety of tools you'll find handy when preparing your legal documents. Available tools include: a Notepad, a financial calculator (**Interest Vision SE**), and a math calculator. You can also customize the Tools menu to include any applications you like (click [Customizing the Tools Menu](#) for details). The following outlines the standard (default) tools available from the Tools menu.

Calculator

This option accesses the Windows Calculator. Use this option to compute simple calculations without leaving the program. See your Windows manual for more information.

Notepad

This option accesses the Windows Notepad. You can use this option to modify the fixed text of an **It's Legal** document or to record notes and information for future reference. The Notepad operates like a word processor, so you can manipulate text in a number of ways.

Once a Notepad file is saved, you can retrieve its contents later, or you can open another Notepad file to record new notes. You can open the Notepad--and any Notepad files you've saved--from most program locations (unlike [Field Notes](#) which can only be accessed from the field within the document where they were entered). See your Windows manual for details on using the Notepad.

Interest Vision SE

Use this option to assist with calculations involving time and money that are not easily handled by a standard four-function calculator. **Interest Vision** can 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 this program instead of the **Interest Vision SE** program you received with **It's Legal** for Windows (click [Customizing the Tools Menu](#) for details).

Tools Menu Setup

This option allows you to customize the Tools menu to access other applications directly from the **It's Legal** program.

For more information, see:

[Menus](#)

[It's Legal's Main Menu](#)

[Customizing the Tools Menu](#)

Customizing the Tools Menu




As you work with **It's Legal**, you'll probably find that you want to access other applications now and then (such as your word processor). If you like, you can set up **It's Legal** to access these applications directly. To do this, you simply add options to the Tools menu from within the **It's Legal** program.

Initially, the Tools menu contains two standard Windows applications--Calculator and Notepad--along with the Parsons Technology **Interest Vision SE** application. **Interest Vision** is included with **It's Legal** and is ordinarily installed along with it. (If you have **Interest Vision Professional**, you can set up **It's Legal** to access this application instead of **Interest Vision SE**.)

To add an application the Tools menu:

1. Select Tools Menu Setup from the Tools menu.



2. On the Tools Menu Setup dialog that appears, click the  button.

3. On the Browse dialog that appears, select the directory and application you want to add using the File Name, Directories, and Drive selector boxes. When you've located the correct application, click OK on the Browse dialog.

4. The Tools Menu Setup dialog returns where the new application now appears on the Tools Menu

Contents list. If you want to move the option's location, use the  and

 buttons to reposition the option on the list.

5. Repeat Steps 2-4 for each additional application you want to add to the Tools menu.

Note: You can start up to eight applications from the Tools menu.

6. When you are finished adding options for the Tools menu, click OK on the Tools Menu Setup dialog. The new options will appear on the **It's Legal** Tools menu.

For more information see:

[Tools menu](#)

Window Menu



The options on this menu allow you to arrange your open document windows, arrange the icons for your minimized document windows, and jump to another open document. The following explains the available options:

Cascade

Tile

Arrange Icons

Close All

For more information, see:

Menus

It's Legal's Main Menu

Cascade

When you first open a second window, it appears in front of and overlapping the already-opened document. This arrangement is called a "cascade." You can use this option at any time by selecting Cascade from the Window menu.

Tile

If you don't want to flip back and forth between two (or more) open windows, you can use this option to "tile" the windows. Tiling fills your entire desktop, positioning the windows side by side for easy comparison. You can tile windows at any time by selecting Tile from the Window menu.

Arrange Icons

You can use this option to organize the icons of several minimized documents.

Close All

You can use this option to close all open document windows.

Help Menu



It's Legal provides several online help options to ensure that you take full advantage of the program. All of these help options are available from the program's Help menu. Available options include:

Contents--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--Provides information on the legal ramifications and terms used in **It's Legal's** documents.

Product Support--Contains details on 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**.

For more information, see:



Menus

It's Legal's Main Menu

Program Information Help



It's Legal Program Information Help offers specific information to help you with the mechanics of operating the program's features. You can access Program Information by choosing Contents from the Help menu or by pressing **F1** at many program locations. A window opens either to the main topic list or to a topic related to your current program location.

Whenever you see a topic list, use your arrow keys, letter keys, or mouse to make a selection, then press **Enter**. The selection opens to detailed program information and other available topics. To return to the previous help topic, click the  button. To return to the main topic list, click the  button.

For more information, see:

[Using the Online Help System](#)

Using the Online Help System



It's Legal makes extensive use of the Microsoft Windows online help system. All online help options are available from **It's Legal's** Help menu. Online help is versatile. In addition to choosing and reviewing topics, you can print them, attach annotations, and perform several other operations. Details for using these special features are available by choosing How to Use Help from the Help menu at the top of this window or How to Use Help from the Help menu on **It's Legal's** Main Menu.

Legal Guide



The Legal Guide was written by a team of lawyers to provide expert legal guidance on how to use each document included in **It's Legal**. It also contains definitions of legal terms and tips on where to find more information on a topic. Before you produce any legal documents, check the Legal Guide for legal information and issues about the specific documents you want to create. You can access the Legal Guide from the Help menu, the tool bar, or by pressing **Ctrl+F1** from most program locations.

For more information see:

Understanding Document Variations

Product Support



Choose Product Support from the Help menu to find out how to reach Parsons Technology for Customer Service and Technical Support, how to register your **It's Legal** product, and how to order other products from Parsons Technology, Inc.

About It's Legal



The last Help menu option, About **It's Legal**, provides copyright and trademark information, and the names of the people who have worked together to bring you this product.

Color Selection



It's Legal makes extensive use of the color set you can select through the Windows Control Panel. If you are having problems reading **It's Legal's** menus, dialogs or data entry screens, you may wish to review your Windows colors by selecting Color from the Control Panel in the Windows Program Manager.

Data Entry Procedures



Many **It's Legal** windows and dialog boxes display blank spaces, called fields, ready for you to enter information. You'll enter the information much like you would using any word processor. When creating a document, read and follow the on screen hints (or interview question description) for more information about what to enter into each field.

When you first access a window or dialog box, a highlight bar usually appears in the first field. This highlight indicates your current location on the screen. To move the highlight from field to field, use **Tab**, **Enter**, the arrow keys, or your mouse.

Fields are designed to accept the keyboard characters that you enter. As you start to type characters, a blinking cursor indicates your location within the field. Characters include letters, numbers, punctuation marks, spaces, and other keyboard symbols. Some fields accept any characters, but other fields accept only certain ones. For example, fields where you would enter a dollar amount accept numbers only.

For more information, see:

[Selecting Program Options](#)

[Data Entry Keys](#)

[Shortcut Keys](#)

[Deleting Data](#)

[Entering New Field Information](#)

[Transferred Data](#)

[Marking Fields](#)

[Pick List Key](#)

[Using Command Buttons](#)

[Keyboard Commands](#)

[Mouse Operations](#)

See also:

[Pasting Personal Information into a Document](#)

Selecting Program Options



You can "select" program options (either from a menu or pick list) using one of the following methods:

- * Position the mouse pointer on the option and click.
- * Use the "cursor" keys (the arrow keys, **PgUp**, **PgDn**, **Home**, or **End**) to move the highlight to the option or item of your choice and press **Enter**.
- * Press **Alt** plus the highlighted "pick letter" of the option of interest.
- * Press **ONLY** the option's highlighted pick letter. This applies to Main Menu options when the Main Menu is active or to submenu options when the submenu is pulled down.

For more information, see:

Data Entry Keys

Shortcut Keys

Deleting Data

Entering New Field Information

Transferred Data

Marking Fields

Pick List Key

Using Command Buttons

Keyboard Commands

Mouse Operations

Data Entry Keys



Some common cursor-movement and editing keys are listed here. These keys operate as indicated in most data entry fields:

Key	Function
Left Arrow	Moves the cursor one position to the left (or to the previous field when positioned on the first character).
Right Arrow	Moves the cursor one position to the right (or the next field when positioned at the end of a field).
Up Arrow	Moves the cursor up one field.
Down Arrow	Moves the cursor down one field.
Ctrl+Home	Moves the cursor to the first field in the current document section.
Ctrl+End	Moves the cursor to the last field in the current document section.
PgUp	Moves the cursor up about one screen.
PgDn	Moves the cursor down about one screen.
Home	Moves the cursor to the beginning of a field.
End	Moves the cursor to the end of a field.
Del	Deletes the character in the current cursor position.
Ins	Toggles between the insert and overwrite modes when the cursor is positioned on a data entry field. For example, if you are currently in overwrite mode, an "Overwrite" notation appears on the far, right end of the <u>status bar</u> .

For more information, see:

Selecting Program Options

Deleting Data

Entering New Field Information

Transferred Data

Marking Fields

Pick List Key

Using Command Buttons

Keyboard Commands

Mouse Operations

Shortcut Keys



Shortcut keys are keystroke combinations you can use to access features of **It's Legal** quickly from many different program locations. Shortcut keys are frequently referred to as accelerator keys. For your convenience, a list of many of the shortcut keys available in the **It's Legal** program is listed below:

Key	Function
Ctrl+N	Create New Document
Ctrl+O	Open a Document
Ctrl+S	Save Document
F4	Preview Document
Ctrl+P	Print Document
F2	Personal Information
Alt+V	Interview
Alt+L	Template
F3	Find Text
Ctrl+F3	Repeat Find
F7	Section List
Alt+X	Next Section
Alt+R	Previous Section
Alt+M	Make It Legal Screen
F5	Verify Document
Alt+I	View Signatures, etc.
Alt+A	Document Safekeeping
Ctrl+W	Write/View Field Note
F1	Program Information Help
Ctrl+F1	Legal Guide
Alt+F4	Exit It's Legal

For more information, see:

[Data Entry Keys](#)

[Keyboard Commands](#)

[Pick List Key](#)

[Deleting Data](#)

[Entering New Field Information](#)

[Transferred Data](#)

[Marking Fields](#)

[Selecting Program Options](#)

[Using Command Buttons](#)

[Mouse Operations](#)

Deleting Data in a Document



To erase data from a data entry field:

1. Position the cursor at the beginning of the field you want to erase.
2. Press the spacebar to delete the entire entry (if the field is one line or less), or press the **Del** key repeatedly to erase entries character by character.

For more information, see:

Selecting Program Options

Data Entry Keys

Shortcut Keys

Entering New Field Information

Transferred Data

Marking Fields

Pick List Key

Using Command Buttons

Keyboard Commands

Mouse Operations

See also:

Pasting Personal Information into a Document

Entering New Field Information



Initially, a data entry field can be empty or it may contain preset or default characters. In either case, to enter data into it:

1. Position the highlight on the desired field. (Use **Tab** or the arrow keys to move the highlight.)
2. Press **Enter** to accept the default characters; or use the keyboard to type the appropriate information, then press **Tab** or an arrow key to move to the next field.

When entering information into an additional description box (where you may have to check the check box outside of the description box in order to enter information), note the following special considerations:

Tab
Enter
Arrow Keys
Home
End

For more information, see:

Selecting Program Options

Data Entry Keys

Shortcut Keys

Deleting Data

Transferred Data

Marking Fields

Pick List Key

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Mouse Operations

See also:

Pasting Personal Information into a Document

Tab

This key takes you out of the description box altogether. **Note:** The **Tab** key does NOT indent the paragraph. If you need to indent, use the spacebar to enter the appropriate number of spaces.

Enter

This key ends the current line and advances to the next line. **Note:** The **Enter** key will not take you out of a description box nor will it advance you to the next field. To exit the description box and advance to the next field in the document, use the **Tab** key.

Arrow Keys

Like the **Enter** key, the arrow keys will move you around within the confines of the description box, but they will not take you out of the box.

Home

This key takes you to the beginning of the current line within the description box.

End

This key moves you to the end of the current line within a description box.

Transferred Data



When creating documents, you may find that some data entry fields already contain entries. These fields contain "transferred" data that **It's Legal** automatically entered. This data appears in a different color than your other entries. Examples of transferred data include the default record from Personal Information, calculations, and name/address information entered in a previous section.

Transferred data is dimmed in color (and thus, uneditable) 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.

For more information, see:

[Selecting Program Options](#)

[Data Entry Keys](#)

[Shortcut Keys](#)

[Deleting Data](#)

[Entering New Field Information](#)

[Marking Fields](#)

[Pick List Key](#)

[Using Command Buttons](#)

[Keyboard Commands](#)

[Mouse Operations](#)

See also:

[Pasting Personal Information into a Document](#)

Marking Fields



On many screens, you need to choose from a list of features or indicate whether optional information should be included. You will encounter three slightly different version of this type of field:

Check Boxes

Radio Buttons

Colored Highlight Bar

For more information, see:

Selecting Program Options

Data Entry Keys

Shortcut Keys

Deleting Data

Entering New Field Information

Transferred Data

Pick List Key

Using Command Buttons

Keyboard Commands

Mouse Operations

See also:

Pasting Personal Information into a Document

Check Boxes



When you are creating documents, you will notice check boxes () that allow you to select or deselect an item or paragraph to include. When you click on a check box with your mouse, an X appears in the box. When you open a document, one or more items may already be checked by default.

To change the selection, move the cursor to the box in front of the option of interest and press the spacebar (or click on it with your mouse). If the item was previously selected, the "X" is removed from the box. If the item was not selected, an "X" appears in the box.

When you are creating a new document, you will find this type of selection box used extensively. Check boxes are also used to select and deselect optional sections within a document.

See also:

[Radio Buttons](#)

[Colored Highlight Bar](#)

Radio Buttons



When you are creating documents, you will encounter radio buttons (☉) that allow you to select items to include. Radio buttons are used for options where you can make only ONE choice. Sometimes, radio buttons are selected by default, but you can change this selection by clicking on another radio button. The selection will move from the default (if there was one) to your new choice. You cannot deselect a radio button by clicking on it; you must select another option.

NOTE: Some radio buttons are not available for use until you select the check box (☑) that precedes the radio button (or buttons) for that section or area of the document. If a radio button is not available for use, it will be dimmed in color.

See also:

[Check Boxes](#)

[Colored Highlight Bar](#)

Colored Highlight Bar



Throughout **It's Legal**, some program features allow you to select one, several, or all of the options listed using the highlight bar. To select an option, move the highlight to the item of interest and press the spacebar.

For example, when you access the section list feature, you can select and deselect the optional sections to be included in a document using the spacebar. To include a section, move the highlight to the desired item and press the spacebar; a check mark will appear next to that section. To exclude an optional section, repeat this procedure and the check mark disappears.

See also:

Check Boxes

Radio Buttons

Pick List Key



At many data entry fields, you can click on a down arrow at the right end of the field to pop open a box showing suggested (or allowable) entries. Frequently, these lists operate with a "smart" feature. That is, typing the first letter or few letters of your choice moves the highlight to it. Press **Enter** or click to select the highlighted item. The list will close, and your selection will appear in the appropriate field.

For example, in most State fields within a document, you can click the down arrow at the right end of the field to access a list of U.S. states and territories. You can scroll through the list and highlight your choice or begin typing the name and the first match found is highlighted for you. With your choice highlighted, click OK to return to the document; your choice is forwarded to the State field.

For more information, see:

[Shortcut Keys](#)

[Selecting Program Options](#)

[Data Entry Keys](#)

[Deleting Data](#)

[Entering New Field Information](#)

[Transferred Data](#)

[Marking Fields](#)

[Using Command Buttons](#)

[Keyboard Commands](#)

[Mouse Operations](#)

See also:

[Pasting Personal Information into a Document](#)

Using Command Buttons



Command buttons can perform actions, complete actions, and open windows to additional program features. They look much like buttons on any electronic device, but rather than "pressing" the button, you click on it with your mouse or press one or two associated keys on your keyboard. This is called "executing" the button.

To execute a button, do one of the following:

- * Position the mouse cursor on it and click.
- * Press and hold the **Alt** key and press a button's highlighted pick letter (if any).
- * Press the arrow keys or **Tab** until the cursor or highlight has moved to the desired button, then press **Enter**.

For more information, see:

[Keyboard Commands](#)

[Mouse Operations](#)

Keyboard Commands



Most **It's Legal** options can be selected using either the keyboard or a Microsoft (or compatible) mouse. The keyboard movements used in the program are typical of those found in many software programs.

For example, next to some menu options on a pull-down menu, there are shortcut keys listed. You can use these shortcut keys to quickly access program features by pressing the appropriate key(s) on your keyboard.

For more information, see:

Data Entry Procedures

Selecting Program Options

Data Entry Keys

Shortcut Keys

Deleting Data

Entering New Field Information

Transferred Data

Marking Fields

Pick List Key

Using Command Buttons

Mouse Operations

Mouse Operations



Most **It's Legal** options can be selected using either the keyboard or a Microsoft (or compatible) mouse. Before you can run **It's Legal**, make sure the "mouse driver" software provided with the mouse has been properly installed. If you have questions about mouse installation, consult the installation instructions included with your mouse package.

Because most Windows users tend to use a mouse, we emphasize mouse operation in our program documentation and in the online help. If you are new to mouse operations, please refer to your Windows manual for assistance.

For more information, see:

[Data Entry Procedures](#)

[Selecting Program Options](#)

[Data Entry Keys](#)

[Shortcut Keys](#)

[Deleting Data](#)

[Entering New Field Information](#)

[Transferred Data](#)

[Marking Fields](#)

[Pick List Key](#)

[Using Command Buttons](#)

[Keyboard Commands](#)

Working With Documents



It's Legal contains a variety of legally-binding documents for personal and business use.



Click this button for general information about the purpose and use of It's Legal's documents.



Click this button for details on creating a document or on any of **It's Legal's** document creation features (like searching for text).



Click this button for instructions on finalizing your documents once you've entered all the pertinent information (like verifying, previewing, etc.).

Document Fundamentals



Before beginning a document, you should review the topics outlined below to understand what **It's Legal's** documents are for and how you can use them.



Click this button for a brief overview of each type of document you can create in **It's Legal**.



Click this button to learn more about **It's Legal's** documents.



Click this button for details on converting documents from previous versions of **It's Legal** for use in **It's Legal 5.0**.

For more information see:

[Creating Documents](#)

[Finalizing Your Documents](#)

[Understanding Document Variations](#)

About It's Legal Documents



It's Legal provides over 50 documents you can customize for your own personal use. Although **It's Legal** is not a substitute for a lawyer, the program can remove some of the confusion involved in creating legal documents. 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.

For your convenience, **It's Legal's** documents have been organized into the following categories. Click on any button for a brief overview of the documents included in that category. For detailed information on all the documents you can create with **It's Legal**, consult the online Legal Guide (accessible from the Help menu or by pressing **Ctrl+F1** from most program locations).



For more information, see:

[Understanding Document Variations](#)

[Creating Documents](#)

Estate/Personal

For documents pertaining to your personal affairs, such as wills, estate planning, living trusts, memorial arrangements, premarital agreements, and a fact sheet with details for an executor or loved one regarding your material goods, finances, and more.

Powers of Attorney

To arrange for another person to act on your behalf in a variety of situations.

Health and Medical

Regarding advance directives concerning your own health care, such as living wills, health care power of attorney, and health care directive.

Consumer/Credit

For letters related to consumer and credit matters and complaints.

Real Estate

With documents expressly used to document transactions or serve as a formal record for all parties involved with a legal action. Included here are three home worksheets, real estates leases, and rental documents.

Financial

For bills of sale, general receipt, promissory note, equipment lease, and a license agreement.

Corporate

With forms and worksheets for the corporate business user.

Employment

For letters and agreements relating to employment issues.

Other

Contains child care documents and an Exhibit document used to supplement other documents requiring lengthy descriptions or other information (which is better handled as separate from the original document).

Understanding Document Variations



Be aware that some documents vary from state to state due to differences in state laws. For example, a Living Will created for a Wisconsin resident may not resemble one for someone in Florida. Since laws can change as new statutes are written and cases are decided, you may wish to review your documents periodically as well as the applicable state rulings. However, documents executed previously are generally still valid even if laws change. You can consult a lawyer to ensure that your documents comply with your state's laws.

NOTE: Some of **It's Legal's** documents may not be valid in Louisiana. Also, **It's Legal** cannot generate documents for persons living in U.S. possessions (such as Puerto Rico and the Virgin Islands).

Creating Documents



Creating a Simple Will or any other document in **It's Legal** is easy and straightforward. Additional tools and program features will help you complete your document so it contains all the necessary information.

Researching Legal Documents

Before you create any documents, read the corresponding information on the document you want to create in the online [Legal Guide](#). The Legal Guide contains important general information that is designed to clarify and explain legal subjects you may encounter as you prepare your legal documents. You need to be aware of this information before you proceed.

Document Creation Features

Select from the following topics for more information on opening a new document, entering data, and a number of features and options available to help you customize your documents to suit your individual needs:

[Opening a New Document](#)

[Entering Data in a Document](#)

[Attaching Field Notes](#)

[Searching for Text in a Document](#)

[Managing Document Sections](#)

[Pasting Personal Information into a Document](#)

See also:

[Finalizing Your Documents](#)

[Previewing Documents](#)

[Printing Documents](#)

[Saving a Document](#)

[Saving Documents as Text Files](#)

[Opening Existing Documents](#)

[Copying Documents](#)


[Deleting Documents](#)

Opening a New Document



To open a new document:



1. Select New from the File menu or click the  button on the tool bar.
2. On the New dialog that appears, select the category of document you want to create from the Category box on the left side of the window.
3. Then select the document you want from the Document list on the right. (Note that when you select a document, a description of that document appears in the Description box below the Document list.) Click OK (or press **Enter**).
You may be asked to select a state for the document before proceeding. If so, select the correct state and click OK. Be sure to select your state or residence or the document may not be valid.
4. On the Information Entry Methods dialog that opens, select the method you prefer for creating your document.



Clicking this button opens the selected document in the Interview mode. **It's Legal** will ask you a series of questions and create the document for you.



Clicking this button opens the selected document in the Template mode. This method lets you review the document's text directly as you create your document.

5. The document window opens where you can begin entering your data. Click Entering Data in a Document for further details.

NOTE: The interview is not available for all **It's Legal's** document. 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, **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.

For more information, see:

[Using the Interview](#)
[Using Document Templates](#)
[Data Entry Procedures](#)

See also:

[Attaching Field Notes](#)

Searching for Text in a Document

Managing Document Sections

Pasting Personal Information into a Document

Finalizing Your Documents

Entering Data in 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 more information, click the appropriate button below:



Using the Interview




The Interview feature allows you to create a legal document by answering questions about the type of information you want to include. Based on your answers, **It's Legal** will create the document according to your specifications and display it for your review. Using the Interview feature to create a document provides a fast and easy way to generate legal documents.

You can access the interview:

- * When opening a new document.



- * By pressing the  button on the tool bar when you have a document template open on screen.


Interview Format

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. Note that some fields (like names and addresses) may already contain information from your default personal information record.

Answering the Interview Questions

Data entry fields are provided on each interview screen where you can enter the appropriate information. The interview question's description (shown just below the question itself) will provide additional details on what to enter. These descriptions also indicate where you can use the Personal Information field to paste data from one of your personal information records.

After you've answered a question, click the  button to go to the next question. You can return to previous questions by clicking the

 button.

If you have a legal question about the document, click the  or



 button to open the online Legal Guide and read more about the document.

Finalizing Your Documents

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. For further details on finalizing your documents, click:



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.

For more information see:

[Transferred Data](#)

[Attaching Field Notes](#)

[Searching for Text in a Document](#)

[Managing Document Sections](#)

[Pasting Personal Information into a Document](#)

[Saving a Document](#)

[Previewing Documents](#)

[Printing Documents](#)

[Opening Existing Documents](#)

See also:

[Data Entry Procedures](#)

[Understanding Document Variations](#)

[Document Fundamentals](#)


Using Document Templates



It's Legal's templates allow you to enter data directly into a legal document--much like filling out a form. The program guides you through the various sections of the legal document using information you provide. You can access a document's template:


- * When opening a new document.



- * By pressing the  button on the tool bar when you have a document interview open on screen.

Documents are divided into many sections, based on the logical organization of the document. In a



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 in your document. 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. 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 accept only 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).

Adding Optional Information to a Document




Some sections contain check boxes  and 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 information you want to edit since the data may transfer forward to other document locations.

Accessing Other Document Sections

After you've entered all the necessary information in a particular section, you can use any of the following to go to the next section:

* Click the  button at the bottom of a document screen.

* Click the  button on the tool bar

* Press **Alt+X**.

Depending on your entries and choice of optional sections, the program takes you to additional screens.

Finalizing Your Documents

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. For further details on finalizing your documents, click:



For more information see:

[Transferred Data](#)

[Attaching Field Notes](#)

[Searching for Text in a Document](#)

[Managing Document Sections](#)

[Pasting Personal Information into a Document](#)

[Saving a Document](#)

[Previewing Documents](#)

[Printing Documents](#)

[Opening Existing Documents](#)

See also:

[Data Entry Procedures](#)

[Understanding Document Variations](#)

[Document Fundamentals](#)

Required vs. Optional Document Data



When using a document template, required sections are indicated by an "X" in the first check box. To ensure that your document is valid, enter data into every field within a required section (unless you are creating a "form" document where you will add information later). You cannot uncheck required sections--the "X" is permanent.

On optional sections, you must mark the check box before you can enter data. If you uncheck an optional section after entering data, that data remains (shown as dimmed in color) in case you should change your mind later, but is not included when you preview or print the document.

Note that you can also select optional sections to include in your document using the Section List feature. Click Using the Section List for further details.

Document Fields



Enter data into a document's fields as you would in any other window, noticing that some fields accept only a certain type of character (for example, dollar amount fields accept only numbers). The hints (or interview question description) will suggest what to enter in each field. See Data Entry Procedures for more details on completing the fields in a document.

You may notice that some fields may already contain entries. Data in these fields has been transferred automatically by **It's Legal** and appears in a different color from your other entries. Examples of these automatic entries include default personal information, calculations, and name/address information copied from a previous section of the document. Other transferred data may appear dimmed in the document. These entries must not be modified or the document becomes invalid. 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 change it.

For more information see:

[Signature Fields in a Document](#)

[Data Entry Procedures](#)

[Transferred Data](#)

[Searching for Text in a Document](#)

Signature Fields in a Document



On some documents, you cannot 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 witnesses).

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



2. Select Write/View Note from the Document menu (or press **Ctrl+W**).
3. When the Write Note dialog box opens, enter your note. To erase the note, click on the  button.

4. When you finish entering the note, click OK to save your entries and return to the document window. To exit without saving, click Cancel.

Once you attach a note to a field, 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 from the Document menu again.

For more information see:

[Opening a New Document](#)

[Entering Data in a Document](#)

[Searching for Text in a Document](#)

[Managing Document Sections](#)

[Pasting Personal Information into a Document](#)

See also:

[Finalizing Your Documents](#)

[Saving a Document](#)

[Saving Documents as Text Files](#)

[Opening Existing Documents](#)

[Copying Documents](#)


[Deleting Documents](#)

Searching for Text in a Document





It's Legal has a Search feature you can use to quickly locate information you've typed into a document. The Search feature even takes you directly to the screen in the document where the specified text is located.

To use the Search feature,

1. Choose Search Text from the Document menu (or press **F3**).
2. On the Find Text dialog that appears, enter the word or phrase you wish to search for (up to 25 characters). You can insert spaces or other punctuation marks as appropriate. **Note:** 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 appropriate Search Options:
 - Match Upper/Lower Case**--Searches for the text EXACTLY as entered.
 - Search Attached Notes**--Searches all notes you've attached to any document fields.
 - Ignore Protected Text**--Skips any text in the document you are not able to enter or change.
4. Select the Search Direction. Choose Up to search from your current location back to the beginning of the document. Choose Down to search from your current location to the end of the document.
5. Click the  button to begin searching for the selected information.

The program will take you to the first screen containing the specified text. If you're using the Interview, the program will switch to the Template method before display the text.

To repeat the search, reselect the Search Text option from the Document menu. (The search criteria defaults to the last entries made, so you can click the  button again to repeat the Search.)

NOTE: If the selected word or phrase could not be found, a dialog will appear where you can cancel the search or click the  button to change your search criteria.

For more information see:

- [Opening a New Document](#)
- [Entering Data in a Document](#)
- [Attaching Field Notes](#)
- [Managing Document Sections](#)
- [Pasting Personal Information into a Document](#)

See also:

- [Finalizing Your Documents](#)
- [Saving a Document](#)
- [Saving Documents as Text Files](#)
- [Opening Existing Documents](#)
- [Copying Documents](#)

Deleting Documents

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 provides two ways for you to manage the various sections in a document: the Section menu and the Section List. The Section menu provides access to the various sections in a document; this menu only appears on the Main Menu when you have a document open on screen. The Section List feature allows you to review the sections in a document, move to another section, or perform other functions--much like a table of contents. For further details on using either of these features, click the appropriate item below:

[Using the Section Menu](#)
[Using the Section List](#)

For more information see:

[Opening a New Document](#)
[Entering Data in a Document](#)
[Attaching Field Notes](#)
[Searching for Text in a Document](#)
[Pasting Personal Information into a Document](#)
[Working with Document Windows](#)

See also:

[Finalizing Your Documents](#)
[Saving a Document](#)
[Saving Documents as Text Files](#)
[Opening Existing Documents](#)
[Copying Documents](#)
[Deleting Documents](#)
[Data Entry Procedures](#)
[Working with Document Windows](#)

Using the Section List




The Section List feature allows you to review the required and optional sections in a document, and to include and exclude the optional sections of your choice. To access the Section List for a document you currently have open, select Section List from the Document menu (or press **F7**). The Section List dialog opens listing all of the document's sections by descriptive title in the order they appear in the document.

Scanning a Document's Sections

Sections are listed in the Section box on the left side of the dialog; a description of the highlighted section appears in the Section Overview box at the right side of the dialog. Required sections are automatically preceded by a check mark and are dimmed in color in the Section List. Because required sections are necessary for your document to be legally valid, you cannot exclude a required section from your document.

Viewing a Specific Document Section

To view a particular section, highlight the section on the Section List, then click on the  button. That section will appear on the screen. To return to the Section List feature, reselect Section List from the Document menu (or press **F7** again).

Including and Excluding Sections

You can also use the Section List feature to add and remove optional sections from a document. For details on using these options, click Including and Excluding Sections.

For more information see:

[Opening a New Document](#)

[Entering Data in a Document](#)

[Attaching Field Notes](#)

[Searching for Text in a Document](#)

[Pasting Personal Information into a Document](#)

[Working with Document Windows](#)

See also:

[Finalizing Your Documents](#)

[Saving a Document](#)

[Saving Documents as Text Files](#)

[Opening Existing Documents](#)

[Copying Documents](#)


[Deleting Documents](#)


Including and Excluding Sections





Most documents contain optional information you can include in your legal documents if you wish. Such information is NOT required for your document to be legally valid. However, it is important you carefully review the optional sections in a document as they may contain data that is vital to your particular situation (like whether or not you have children).

The optional sections for a document can easily be identified from the [Section List](#) feature. Those sections that are NOT dimmed in color are optional and can be included or excluded from your document as you like. On the Section List dialog, optional sections are marked with a check mark only if you have selected them.

To include an optional section, highlight it on the Section List browser and click the  button. A check mark will appear beside that section.

To exclude an optional section, highlight it on the Section List browser and click the  button. The check mark will be removed.

You can click on  to place a check mark beside every section of the document. Or, click  to remove all optional sections from the document.

You can also choose to include and exclude sections from within a document by clicking on the check box beside the section title.

NOTE: It's Legal uses the check marks during the Verify process to determine if all the necessary information has been included. The verification procedure only checks those sections that contain a check mark beside them.

For more information see:

[Opening a New Document](#)

[Entering Data in a Document](#)

[Attaching Field Notes](#)

[Searching for Text in a Document](#)

[Pasting Personal Information into a Document](#)

[Working with Document Windows](#)

See also:

[Finalizing Your Documents](#)

[Saving a Document](#)

[Saving Documents as Text Files](#)

[Opening Existing Documents](#)

[Copying Documents](#)

[Deleting Documents](#)

Required Section


Required sections must be included for the document to be considered legally valid. These cannot be excluded from a document.

Saving a Document



To save a new document that is open on screen,



1. Choose Save from the File menu or click the  button on the tool bar.
2. When the Save As dialog opens, enter a valid DOS filename (of up to 8 characters). Note that the Document box in the Save As dialog lists all **It's Legal** documents previously saved in the current directory. Each **It's Legal** document is automatically given an .LGL extension, for example, the file MYLEASE becomes MYLEASE.LGL.
3. If necessary, select an alternative drive and directory where you want to save the document file.
4. Click OK (or press **Enter**) to save the document file.

Updating and Copying Previously Saved Documents

If you continue to enter or modify data in a saved document, reselect Save to overwrite the existing version with the edited one. To save the edited version as a new file and keep the existing one intact, select Save As from the File menu instead and assign a new name for the edited version using the same steps as above.

Saving Documents to a Text File

You can also save a file as a text file for use or editing outside of **It's Legal** (using the Notepad or your word processor). See [Saving a Document as a Text File](#) for further details.

NOTE: If you open a document window and then try to close it without saving, **It's Legal** prompts you to save the file if one of the following occurred: 1) you entered or pasted data, 2) the program transferred the default Personal Record to the document, or 3) you selected an optional section.

For more information, see:

[Saving Documents as Text Files](#)

[Opening a New Document](#)

[Entering Data in a Document](#)

[Attaching Field Notes](#)

[Searching for Text in a Document](#)

[Managing Document Sections](#)

[Pasting Personal Information into a Document](#)

See also:

[Finalizing Your Documents](#)

[Opening Existing Documents](#)

[Copying Documents](#)

[Deleting Documents](#)

Saving a Document as a Text File



If you want to make minor changes to the fixed text of an **It's Legal** document, you can save it as a text file for use or editing outside of **It's Legal** (using the Notepad of your word processor).

To save a document as a text file,

1. Open the document to be saved.
2. Select Save As from the File menu.
3. Enter a name for the file on the Save As dialog.
4. Click the down arrow on the File Type field and select " Text w/o CR (*.TXT)." Click OK to save the file.

Open the file in the Windows Notepad or your word processor to edit it. When you have made the necessary changes, you can print the modified document directly from the Notepad or your word processor. (Use the application you used to edit the text file.)

<p>NOTE: Altering the fixed text of a document may affect it's validity. You may wish to consult a lawyer if you intend to make significant changes.</p>

For more information, see:

[Opening a New Document](#)

[Entering Data in a Document](#)

[Attaching Field Notes](#)

[Searching for Text in a Document](#)

[Managing Document Sections](#)

[Pasting Personal Information into a Document](#)

See also:

[Finalizing Your Documents](#)

[Opening Existing Documents](#)

[Copying Documents](#)

[Deleting Documents](#)

Fixed Text


Fixed text is the portion of the **It's Legal** documents you cannot alter in **It's Legal**.

Opening Existing Documents



To open an existing document:



1. Select Open from the File menu or click the  button on the tool bar.
 2. When the Open dialog box appears, highlight any document. (Note the description of the document that appears in the File description box in the lower portion of the Open dialog.)
 3. Click OK to open the document. The document will appear in the format used when the document was last saved (the template or the interview).
- You can have more than one document open at a time. The number of documents that can be open at one time depends on the memory capacity of your computer.

NOTE: It's Legal automatically adds an .LGL extension to all the document files you create.

For more information, see:

[About It's Legal Documents](#)

[Personal Information](#)

[Opening New Documents](#)

[Working with Document Windows](#)

Copying a Document



It's Legal allows you to copy any existing document. For example, you might copy a Living Will you created for yourself and edit it for your spouse.

To copy a document,

1. Open the document you wish to copy.
2. Select Save As from the File menu.
3. Enter a new file name for the document and click OK.
4. The new document opens on screen and you can tailor it as needed. You can save this new file using Save on the File menu.

For more information, see:

[Opening New Documents](#)

[Opening Existing Documents](#)

[Saving a Document](#)

Deleting a Document



To delete a document you created with **It's Legal** (one of your .LGL files), use the Windows File Manager or the DOS **DEL** command. See your Windows or DOS manual for more information on deleting files.

If you would like to *PERMANENTLY* remove a document that you installed with the program (to free hard disk space, for example), see the README file for details on deleting documents you no longer need.

Finalizing Your Documents



When you reach the end of a document, the Make It Legal screen appears presenting options available for finalizing your document. To finish your document you should,

1. Verify it to ensure it contains all the necessary data. For details on verifying a document, click the Verify button below.



2. Read the signing instructions so you know who should sign the document and if it should be notarized. For details on signing your document, click the Signatures, etc. button below.



3. Use the Safekeeping option to record where you plan to store the document and any other pertinent details. For details on safekeeping your document, click the Safekeeping button below.



4. Preview and proofread the document's text. For details on previewing a document, click the Preview button below.



Completing the Steps

As you complete each step listed on the Make It Legal screen, **It's Legal** inserts a check mark before that option so you know what's left to do. After completing all the steps, you are ready to print your document. If you need further assistance before printing, click the Help button on the Make It Legal screen to access online Program Information Help.

Changing the Document's Fixed Text

If you would like to make minor changes in the fixed text of the document (that portion you cannot alter in **It's Legal**), you can save the document as a text file. You can then edit the file using your word processor or the Windows Notepad (accessed from **It's Legal** by choosing Notepad from the Tools menu). When you are finished making changes, print the document using your word processor or the Notepad (use the application you used to make the changes.) For further details, click [Saving a Document as a Text File](#).

Printing the Document

When you are ready to generate a hard copy of your document, click the Print button. For further information about printing documents, click the Print button below.



For more information see:
Working with Documents

Verifying a Document




The verify process searches a document for missing data entries in any required or checked optional sections. Verification is a good way to ensure your document contains all the data necessary to make it legally valid. You will most likely perform this process when you reach the end of the document.


NOTE: You do not have to verify a document before previewing or printing it. In some cases, you may choose not to verify. For example, if you are creating a form document, that document *should* contain incomplete data entries.

To verify a document you have open on screen, do one of the following:



- * Click the  button on the Make It Legal Screen.



- * Click the  button on the tool bar.
- * Choose Finalizing Document from the Document menu, then Verify from the submenu that appears. (Or, simply press **F5**.)

A Verify message box appears as **It's Legal** checks the document. If incomplete data is found, a Verify dialog appears notifying you of the omission. The cursor appears on the field in question where you can enter the appropriate information. (Note that the Verify dialog remains open, and you can move it to view more of the document, if needed.) To resume verification, click the Continue button on the Verify dialog (or press **F5**). The program notifies you when all sections have been checked.

NOTE: You can verify a document at any time, but if you're using the Interview, the program will switch to the Template method before beginning the verification.

For more information, see:

Finalizing Your Document
Working with Documents


Signing Your Document



In order for your document to be legally valid, it must be properly signed and notarized (if necessary). Not all documents must be notarized, but in some cases you may want to do so. Because signing a legal document is so important, you'll want to carefully review the signing instructions found in the online [Legal Guide](#) for *EVERY* document you create.

To access the signing instructions for a document you currently have open on screen, do one of the following:



- * Click the  button on the [Make It Legal Screen](#).
- * Choosing Finalizing Document from the Document menu, then View Signatures, etc. from the submenu that appears.
- * Press **Alt+I**.

When you've finished reading the information, close the Legal Guide to return to your document.

For more information see:

[Signature Fields](#)

[Finalizing Your Documents](#)

[Working with Documents](#)

Safekeeping Your Document



Because many people store their important legal documents in a special place (like a safety deposit box), **It's Legal** provides an additional section in each document for safekeeping information. In this optional safekeeping section, you can indicate where you plan to store the document and record other pertinent information. When you print the document, the safekeeping information will print on a separate page so others can be notified of the document's location.

To access the safekeeping section for a document you currently have open on screen, do one of the following:



* Click the **Safekeeping** button on the Make It Legal Screen.

* Choose Finalizing Document from the Document menu, then Document Safekeeping from the submenu that appears. (Or, simply press **Alt+A**.)

When the Safekeeping section opens, click the first check box and complete the appropriate fields. When you are finished, use the document Control-menu box to close the section and return to your document (or the Make It Legal screen).

NOTE: If you're using the Interview, the program will switch to the document's Template before opening the Safekeeping section.

For more information see:

Finalizing Your Documents
Working with Documents

Previewing a Document




The Preview feature lets you see your document as it would look printed at any point during your work session. Preview saves time by enabling you to view your work in its printed form without actually printing. You can use the preview feature at any time while creating or editing a document; however, you cannot enter or edit data while previewing a document.

To preview a document you currently have open, do one of the following:



- * Click the **Preview** button on the Make It Legal Screen.



- * Click the  button on the tool bar.
- * Choose Preview from the File menu. (Or, simply press **F4**.)

A Building document data message appears as **It's Legal** prepares the document, and then the preview screen opens. The Preview dialog displays the document with all required sections and any selected optional sections. Preview text appears in two colors so you can distinguish your data entries from the actual document text. View the entire document using the scroll bars at the side and bottom of the screen.

Preview Options

At the top of the Preview dialog are buttons you can use to perform other functions. The following options are available:



Print the document.



Change the font for the entire document.



Select print options.



Choose the view for the document--One Page, Two Pages, 3/4 Size (75%), Full Size (100%), or Zoom (200%).



Turn to the previous page in the document.



Turn to the next page in the document.

For more information, see:

[Choosing Fonts](#)

[Choosing Printing Options](#)

[Printing a Document](#)

[Finalizing Your Documents](#)

[Working with Documents](#)

Selection Fields


Any field containing a down arrow beside it is a selection field. Selection fields allow you to view a list of possible choices for the current option by clicking the down arrow. From the list of choices, click on any option to select it.

Printing a Document



To print a document from **It's Legal**, open the desired document, then follow the steps below to print it.



1. Choose Print from the File menu (or click  on the tool bar) to open the Print dialog box.
2. Designate the Print Range, the number of Copies, the Quality of the printout, and whether or not to Collate Copies.

NOTE: The Print dialog box shows the printer that is currently selected. To choose another printer, use the Print Setup option on the File menu.

For more information, see:

Choosing Fonts

Choosing Printing Options

Setting Up Your Printer

Previewing a Document

Finalizing Your Documents

Working with Documents

Print Range

Choose one of three print ranges:

All Prints the entire document

Pages Lets you specify which pages to print. Type the number for the first page of your chosen range in the From box and the number of the last page in the To box.

Copies Box

Type the number of copies you want to print.

Printout Quality

Choose High, Medium, Low, or Draft quality printouts.


Collate Copies


Click on this check box to collate multiple copies of a document.


Setting Up Your Printer



The Print Setup option on the File menu allows you to identify and change the printer you plan to use to print your legal documents. By default, **It's Legal** uses the default printer you have set up in Windows. But you can select another printer from the list of printers you currently have installed in Windows.

Choose Print Setup from the File menu or click on the  button on the Print dialog. In the Print Setup dialog box that appears, you can change the selected printer, print orientation, paper size and source, or Windows print options.

1. If the default printer listed is not the one you want, click Specific Printer to activate the text box. Click the down arrow and select a printer from the current list. (To install additional printers, see your Windows manual.)
2. In the Orientation box, choose Portrait to print to a vertical or upright page. Click on Landscape to print to paper in a horizontal or sideways position.
3. Choose the paper size and source in the following manner: first, click on the scroll button to display a list of options and then click on the item you want.
4. Click the  button to specify other Windows printing options. The choices available will vary based on the printer you have selected. For more detail on these options, open the Windows help for this dialog by clicking the

 button on the Options dialog.

For more information, see:

[Printing a Document](#)

[Choosing Printing Options](#)

[Getting Started](#)

[File Menu](#)


Choosing Fonts



You can print documents from **It's Legal** using any font that you have installed in your Windows system.

To change font settings for the current document,

1. Choose Print from the File menu to open the Print dialog box. (You can also change the font for a document while previewing it.)

2. Click on the  button to open the Font dialog where you can specify the font characteristics for your document. Use the scroll buttons to the left of each box in the dialog to view the entire list of options available.

3. Choose a font from the Font list. The Font Style and Size boxes change to present the available characteristics for the chosen font. (For example, your system may only contain Bold and Bold Italic for the Font Styles of your System font. Your only point size option might be 10). The styles and sizes for each font depend on your system.

A Sample display is shown at the bottom of the Font dialog. This box shows examples of the currently selected font, style, and size. Note how the sample changes with each selection. The font you select will apply only to the document currently open on your screen.

NOTE: Font settings are saved each time you save a document. If you change the font and want to save the new setting, you must resave the document.


For more information see:

Setting Up Your Printer
Choosing Options
Previewing a Document

Choosing Printing Options



You can set several printing options specific to the document currently open on your screen. To select printing options for the current document,

1. Choose Print from the File menu to open the Print dialog box. (You can also change the print options for a document while previewing it.)
2. Click on the  buttons to open the Options dialog.
3. Click on the options presented in the dialog to mark or unmark them. Available options include:
 - Double Space**--Prints the document with a blank line after each line in the text.
 - Letterhead**--Prints the document with space to allow the use of preprinted letterhead paper.
 - Print Draft on Document**--Prints "Draft" on the document.
 - Print _____, not 0.00**--Automatically replace dollar amounts in the document with blank spaces.

NOTE: Options settings are saved each time you save a document. If you change an option and want to save the new change, you must resave the document.

For more information, see:

Setting Up Your Printer
Choosing Fonts
Previewing a Document

Converting Data from Previous Versions of It's Legal



It's Legal 5.0 for Windows can convert data created using earlier versions of the **It's Legal** program, including **It's Legal** for Windows and **It's Legal 3.0-4.0** (for DOS). However, you should be aware of the following before converting:

Many It's Legal documents have been updated

One of the most important reasons for upgrading to **It's Legal 5.0** for Windows is for the updated documents, revised by lawyers to reflect current legislation. Since many of the documents have been changed, data from documents created in previous versions of **It's Legal** may not transfer in some situations. Therefore, we highly recommend you review and reverify the contents of your documents carefully in **It's Legal 5.0** using the Verify option once they're fully converted.

Similarly, **It's Legal 5.0** cannot print documents from previous versions of **It's Legal** in their original form, since the text of most of the documents has changed. However, if you previously created and printed documents using your earlier version of **It's Legal**, these are still valid if they were properly executed (and signed and notarized, if necessary).

The purpose of the **It's Legal 5.0** conversion feature is to create NEW **It's Legal 5.0** documents that contain much of the same data you used in your earlier version of **It's Legal**, only the documents will be more current.

You Cannot Convert Documents from It's Legal 2.0 or Earlier

Conversion is not available for any documents created with **It's Legal 2.0** (for DOS) or earlier. Attempting to convert these documents to Version 5.0 format 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.

To convert your data files, see:

[Converting It's Legal for Windows/It's Legal 4.0 Documents](#)

[Converting It's Legal 3.0 Documents](#)

See also:

[Creating New Documents](#)

[Opening a New Document](#)

[Entering Data](#)

[Opening an Existing Document](#)

[Copying a Document](#)

Converting It's Legal for Windows/It's Legal 4.0 Documents



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** for Windows. Simply open the document in Version 5.0 and it will be converted for you automatically. Note, however, that the format and appearance of your documents may be different in Version 5.0. Also, you should review and verify the contents of your documents before printing them.

For more information, see:

Opening an Existing Document

Verifying a Document

Converting It's Legal 3.0 Documents



If you have **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**. However, because of the many changes in state formats, conversion is not available for Living Will and Health Care Power of Attorney documents created with **It's Legal 3.0**. Also, after you've converted your documents, make sure you review and verify the information in **It's Legal 5.0**.

To convert It's Legal 3.0 documents for use in It's Legal 5.0 for Windows,

1. Insert the It's Legal compact disk into your CD-ROM drive.
2. Go to the DOS prompt and switch to your D:\OVLS drive and directory (where "D" represents your CD-ROM drive).
3. Start the conversion utility by typing **CONVERT** and pressing **Enter**.
4. On the Select Option box that opens, press **Enter** to begin the conversion.
5. In the Source Directory box that appears next, enter the path where your **It's Legal 3.0** data files are located (the default is **C:\LEGAL3**). Press **Enter** to continue.
6. In the Destination Directory box that appears, enter the desired location for the converted files. For convenience, we suggest entering the location where you installed **It's Legal 5.0** for Windows. After entering the desired location, press **Enter**.

Note: The program will not allow you to specify the same directory for both the source and destination sets of files.

7. A Confirm box appears asking you to verify your source and destination paths. If the paths displayed are correct, press **Enter**. (Press **Esc** instead if you need to go back and make changes before proceeding.)
8. Progress meters will appear briefly as each data file is converted followed by a summary screen listing the files converted and the new file name with an .LGL extension.

Remember that one data file from **It's Legal 3.0** may produce more than one .LGL document of the same type. For example, if you created two Simple Wills in **It's Legal 3.0** you have only one S_WILL.DAT file, but you'll have two converted .LGL files, one for each unique will.

On the summary screen, you can press **P** to print a copy of the summary list or make a note of the old and new file names for future reference.

9. Press **Esc** to close the Summary. Then press **Enter** to confirm the end of the conversion process. The Select Option box returns where you can choose another conversion option or press **Esc** to exit the conversion program.

To open the converted files in It's Legal 5.0 for Windows,

1. Start **It's Legal 5.0** for Windows.
2. Choose Open from the File menu. On the Open dialog that appears, select the destination directory (and subdirectory, if applicable) that you entered in Step 5 above to view a list of your converted files.
3. Highlight one of the converted files. Notice that the type of document currently highlighted is described at the bottom of the screen.

4. Click OK to open the selected file. The converted document opens on screen in the template mode. At this point, you should carefully review and verify the document's contents before using it.

For more information, see:

Verifying a Document

Using Document Templates

Exiting the Program

When you finish using **It's Legal**, you can exit the program in any of three ways:

- * Select Exit from the File menu.
- * Select Close from (or double-click on) the Control-menu Box.
- * Press **Alt+F4**.

If you don't want to exit **It's Legal**, you can minimize the program temporarily and return to it later. Click



the button to reduce **It's Legal** to an icon on the desktop. You can return to where you left off by double-clicking on the **It's Legal** icon.

For more information see:

Desktop Control-menu Box

Minimize Button

