

A DOCUMENT ASSEMBLY PRIMER



Section of Real Property, Probate, and Trust Law

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DOCUMENT ASSEMBLY

Document assembly programs enable a lawyer to quickly and easily produce repetitive documents without the tedium of marking up a form with a pencil, having it typed and going through multiple rounds of drafting, proofreading and re-typing. Paralegals and younger lawyers can use automated templates to draft high quality first drafts with little input. The use of these programs by lawyers in transactional and estate planning practice who use forms such as loan agreements, notes, mortgages, wills and trusts repetitively can greatly increase document production speed and improve fee yield.

There are numerous document assembly programs now available including HotDocs, CAPS, Ghostfill, Pathagoras, ProDoc, thinkDOCS, Ixio, Scrivener and Shortwork. Some have more sophisticated capabilities than others, and a lawyer considering implementing a document assembly program should investigate as many programs as possible to evaluate the capabilities necessary for his or her practice. This program focuses on HotDocs only.

I. WHAT IS A DOCUMENT ASSEMBLY PROGRAM?

HotDocs works inside the word processor to create and assemble a template programmed with HotDocs code to “interview” the user and request the data necessary for the form, then insert it the data into the form and “assemble” the document.

When a template is created using HotDocs, the user first opens HotDocs to instruct it to create a template, and HotDocs then opens the word processor (HotDocs works with both Word and WordPerfect, but not all document assembly programs support WordPerfect) creating a template into which the user will insert HotDocs commands using a HotDocs toolbar which automatically appears on the word processor toolbar when HotDocs opens the word processor to create the template. During the process of programming the form in HotDocs, the document is open in the word processor, and any command or function available in the word processor is available in creating the template being programmed in HotDocs.

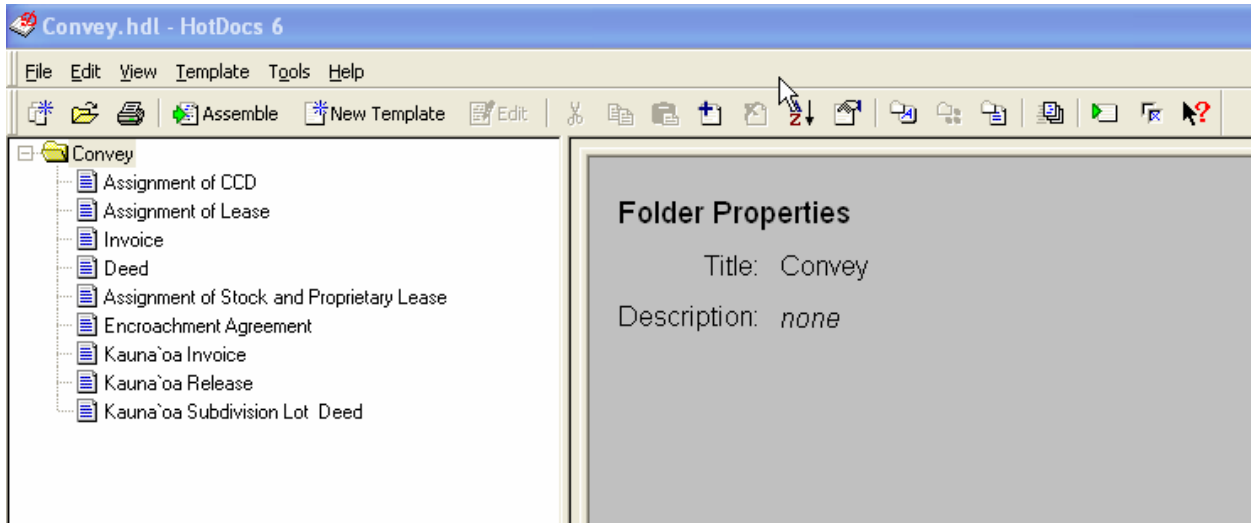
In the same fashion, when a template created in HotDocs and the word processor is assembled, the user opens HotDocs, selects the template to be assembled, and HotDocs opens the word processor and executes the HotDocs commands inside the word processor. When the document is assembled, a Word or WordPerfect document results, which can be edited in the word processor like any other document created in it.

II. HOW DOES HOTDOCS WORK?

A. Creating Libraries and Templates

1. Libraries

HotDocs allows the user to create “libraries” of HotDocs templates. The libraries are not folders but are groupings of pointers to particular templates. This facilitates logical groupings of templates created in HotDocs. The templates themselves can be stored on a network drive to make them available to multiple users in the firm, so long as each user creates a library at his or her local HotDocs program referencing the templates. The HotDocs screen from which templates are selected for editing and assembly looks like this:



2. Creating New Templates

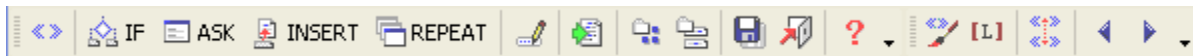
A user creates a new template by clicking on “New Template” on the Hotdocs toolbar, and HotDocs will ask whether the template is to be created from an existing document or in a blank screen. When that selection is made, the word processor opens with either the existing document or a blank screen.

3. Assembling and Editing Templates

In screen shown above, “Convey” is a library and each of the titles appearing in it are templates. A user who wanted to use the “Deed” template would scroll to it, select it, click on “Assemble” and the template would open in the word processor in which it was created, and the interview screens would appear.

4. The HotDocs Toolbar

If a user instructs HotDocs to create a new template or to edit an existing template, the HotDocs toolbar appears on the user’s word processor toolbar when the word processor opens and it looks like this:



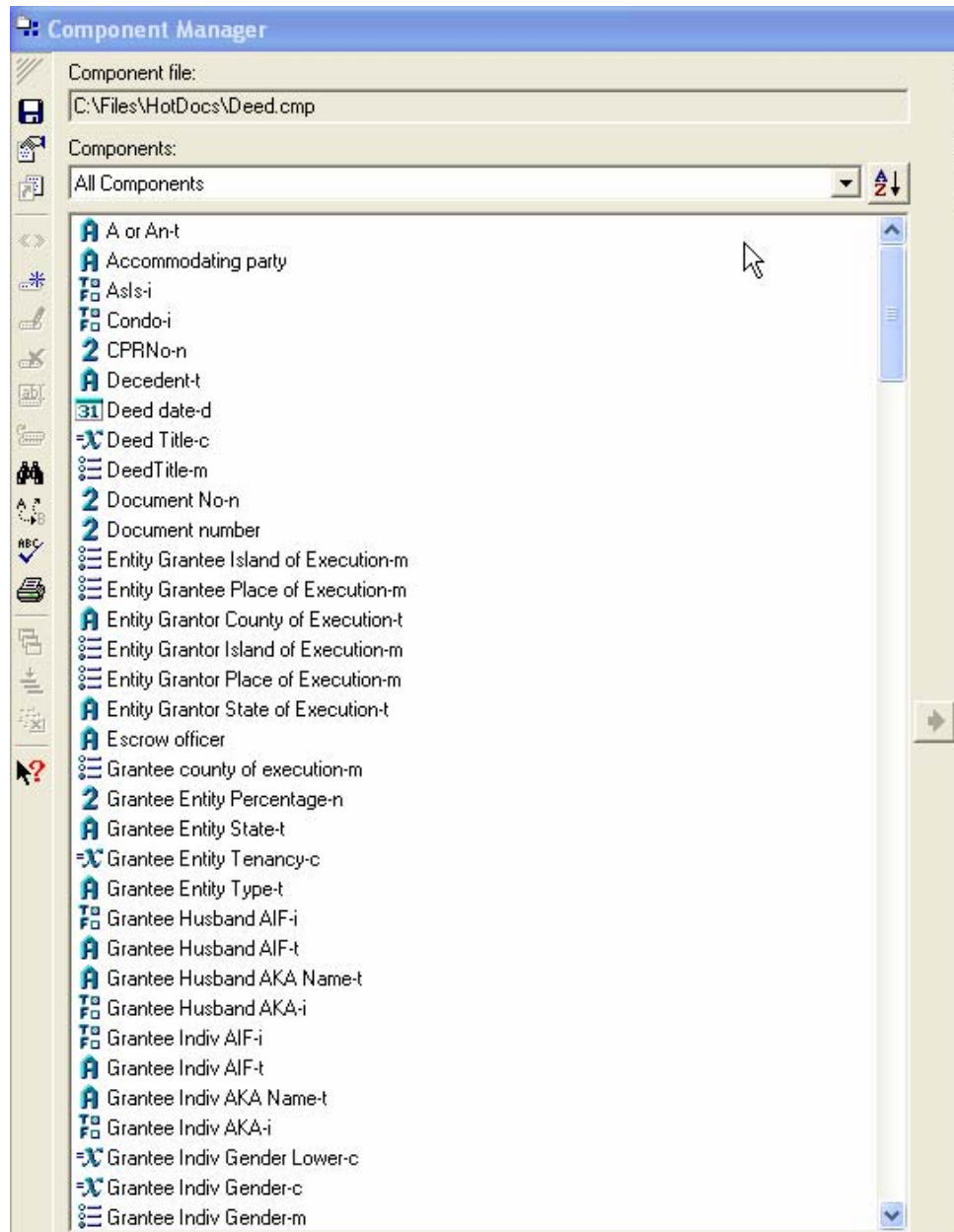
Each of the buttons allows the user to insert HotDocs code into the template being created and edited, and to manage the components of the template.

B. Structure of a HotDocs Template

When a HotDocs template is created, two files are necessary to run it: the HotDocs template which is a template in Word and WordPerfect (“.dot” file in Word and “.wpt” file in WordPerfect) and the component file. HotDocs functions by interviewing the user and asking for the information required by each of the HotDocs “components,” that is the variables, in the file. The

components are stored in a file by the same name as the template but with a “.cmp” extension. HotDocs cannot run a template unless it finds a component file with the same name as the template in the same folder.

Once components are created, they can be modified, deleted, duplicated or moved to other templates by using the “Component Manager” available in the main HotDocs screen and from the HotDocs toolbar when a template is open in the word processor. The Component Manager screen looks like this:




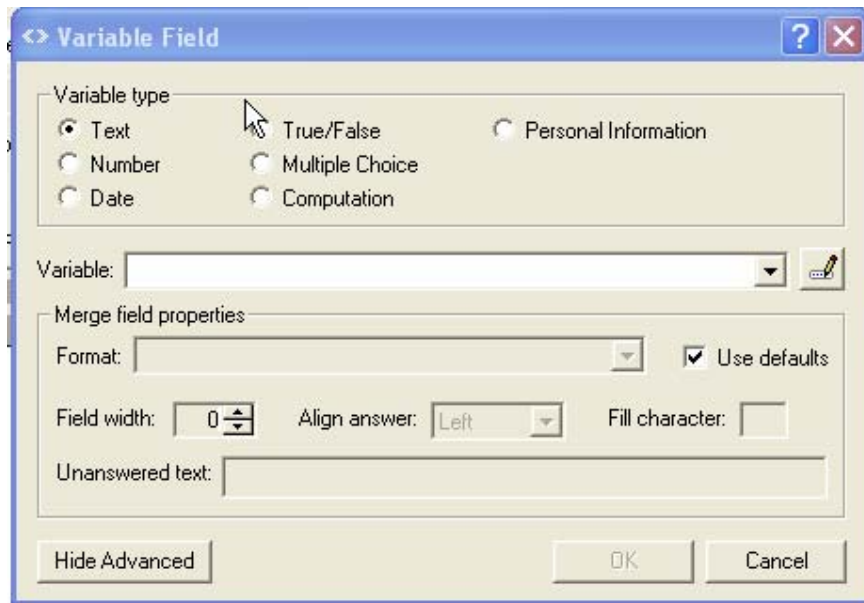
III. HOTDOCS VARIABLES

The power of HotDocs lies in the many variables which can be programmed into a template and the logic which can be incorporated in a template to use the variables and incorporate text based upon the variables in a particular document.

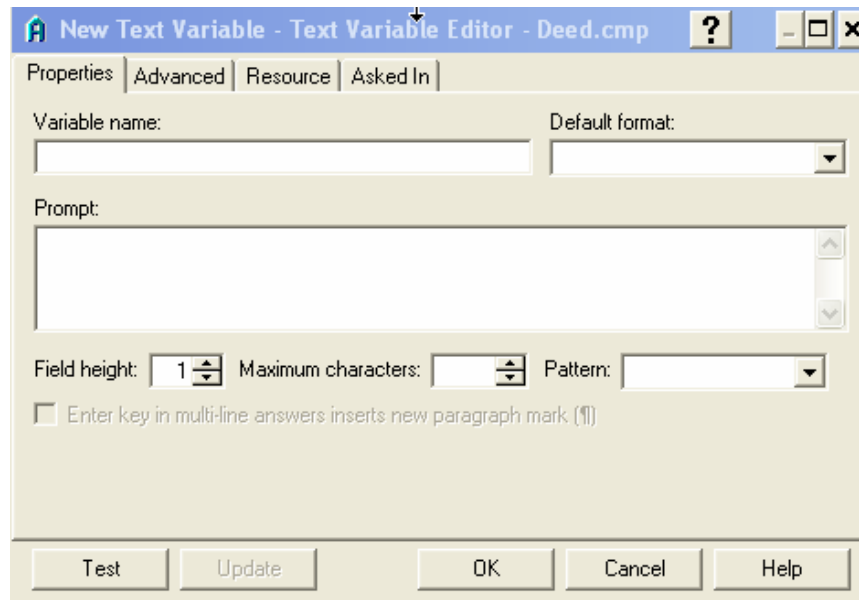
A. Text Variables

The text variable is a basic HotDocs variable. In programming a text variable you can specify how the text variable is to be formatted (all caps, initial caps or lower case) and how the user is to be prompted for the information. To insert a text variable click on the variable button on the HotDocs

toolbar  and select “Text” from the choices



The text variable window will appear:



Type the name of variable, select a default format if the variable is to be formatted the same way throughout the document, the prompt to tell HotDocs what to ask when requesting the variable and OK.

B. Date and Number Variables

Follow the same procedure to create number and date variables. Both have multiple formatting possibilities. Dates can be formatted in any manner regardless of how typed in the interview. Numbers can be formatted as numbers or words, or both at different places in the template.

C. True False Variables

True false variables can be used to test for a condition such as “is a party married,” and the answers can then be used to determine whether variable text is inserted in the documents. True false variables can be programmed as simple variables: “Is the settlor married” or as an IF expression which can test for an answer to another variable and then insert conditional text. For example, suppose that if the settlor is married, conditional text must be inserted in a will. The template can ask the true/false variable regarding marital status, then surround the conditional text in the template with an “IF” expression providing that if the variable is TRUE, then the text is inserted.

D. Multiple Choice Variables

Multiple choice variables can be used to control conditional text or to require that specified text be inserted depending upon the answer. To insert a multiple choice variable, click the variable button, and select “Multiple Choice” from the variable dialog window. The multiple choice variable window will appear:

	Option	Prompt	Default Merge Text
1	Blue		Sky
2	Green		Grass
3	Red		Fire engine
4	Black		Night
5	White		Ghost
6			
7			
8			
9			
10			

The screen above specifies “default text” to be inserted if a particular choice is selected, but that need not be done and if it is not included, the choice itself will appear if the multiple choice variable is inserted. A multiple choice variable can also be used to test for a condition by using an “IF” expression testing for a particular choice, and requiring that if a particular choice is made, that other variables will be requested, or other text will appear in the document.

E. Advanced Variables

1. Dialogs and Interviews

As a default, HotDocs asks variables as it encounters them in the template. This rarely results in a logical sequence of the interview so HotDocs allows the user to group variables in “dialogs” which when invoked will ask the variables in the order they appear in the dialog. The dialog can even include a “script” which allows programming whether or not a variable is asked at all in the dialog based upon the answers to other dialogs.

Because HotDocs processes variables in the order it encounters them, even using dialogs may not result in a logical sequence of the interview, so the latest version of HotDocs allows the user to create an “INTERVIEW” computation which lists the dialogs, computations and variables to be asked in the order the user prefers, thus completely controlling the interview process in assembling the document.

2. Repeats

Templates may be required to gather information such as the names of the parties where the number of parties is different every time the template is assembled. HotDocs allows the user to require that a dialog be repeated thus gathering the information as many times as necessary.

3. Clause Libraries

Clause libraries are lists of clauses which can be chosen for insertion in the same manner as multiple choices.

4. Computations

One of the most powerful features of HotDocs is the computation. A computation is a variable created from the variable button which is the functional equivalent of a macro. It contains a series of HotDocs instructions and can include any variable available in HotDocs. A computation speeds the processing of HotDocs templates and can incorporate sophisticated logic to determine what is inserted in an assembled document. It can also be used as a mathematical computation, adding the results of number variables or performing other mathematical computations (it could for example calculate a tenant’s pro rata share of operating expenses by dividing the area of the tenant’s premises (determined by the answer to a variable) by the gross area of the building, and expressing the result as a percentage. It can be used to determine what text is inserted in the assembled document based upon a particular multiple choice. Here is a computation which determines what text is inserted in a document based upon the choice of the type of party in a multiple choice variable. This computation illustrates the use and formatting of text variables and repeating dialogs where the user is first prompted to choose the type of party in a multiple choice variable:

```
IF Encroacher Type-m = "Married Couple"
"REPEAT Encroacher Married-di
FORMAT "A, B and C"
RESULT + "«Encroacher Husband Name-t:LIKE THIS» and «Encroacher Wife Name-t:LIKE THIS»,
husband and wife, whose address is «Encroacher Married Couple Street Address-t:Like This»,
«Encroacher Married Couple City State-t:Like This»"
END REPEAT
END IF
```

```
IF Encroacher Type-m = "Individual"
REPEAT Encroacher Individual-r
FORMAT "A, B and C"
RESULT + "«Encroacher Individual Name-t:LIKE THIS», «Encroacher Marital Status-m»"
IF Encroacher Marital Status-m = "husband of" OR Encroacher Marital Status-m = "wife of"
RESULT + " «Encroacher Spouse-t:Like This»"
END IF
RESULT + ", whose address is «Encroacher Individual Street Address-t:Like This», «Encroacher
Individual City State-t:Like This»"
END REPEAT
END IF
```

```
IF Encroacher Type-m = "Trust"
REPEAT Encroacher Trust-r
FORMAT "A, B and C"
RESULT + "«Encroacher Trustee Name-t:LIKE THIS», Trustee under «Encroacher Trust ID-t» dated
«Encroacher Trust Date-t:January 1, 2002», whose address is «Encroacher Trustee Street Address-t:Like
This», «Encroacher Trustee City State-t:Like This»"
END REPEAT
END IF
```

```
IF Encroacher Type-m = "Entity"
ASK Encroacher Entity-di
IF "AEIO" CONTAINS FIRST ( Encroacher Entity State-t , 1)
SET A or An Encroacher-t TO "an"
ELSE
SET A or An Encroacher-t TO "a"
END IF
REPEAT Encroacher Entity-di
FORMAT "A, B and C"
RESULT + "«Encroacher Entity Name-t:LIKE THIS», «A or An Encroacher-t» «Encroacher Entity State-
t:Like This» «Encroacher Entity Type-t:like this», with its address at «Encroacher Entity Street Address-
t:Like This» «Encroacher Entity City State-t:Like This»"
END REPEAT
END IF
```

IV. ANATOMY AND ASSEMBLY OF HOTDOCS

A. The HotDocs Template

A HotDocs template is a Word document template, but with HotDocs code which appears only if the template is opened for editing in HotDocs. The code appears in blue inside chevrons appearing like this: «Lender-c». When the template has been opened by HotDocs in Word, the user can view the contents of the code and edit it simply by clicking in the code and then the variable field button the HotDocs toolbar.

B. Assembly of the HotDocs Template

The code inserted in the HotDocs template will be executed when the user clicks on the template in the HotDocs library and clicks “Assemble.” Assembly will result in the interview screens appearing if the user has used dialogs and the INTERVIEW computation. If not, the individual variables will be asked as they encountered by HotDocs. HotDocs allows the user to control the appearance of the screen by using background colors and by specifying the layout of the variables. A HotDocs interview screen where dialogs have been used looks like this:

The screenshot shows a software interface for an interview. On the left is a sidebar with a tree view of variables: Place of Execution-di, Borrower-m, Lender-m, Security-di, Payment Default-di, Payment Terms-di (highlighted), and End of Interview. The main area is titled "Payment Terms-di" and contains the following fields and controls:

- Amount of note: text input field
- Interest rate: text input field
- Payment-m: radio buttons for "P and I", "Interest only", and "At end"
- Amount of principal and interest payment: text input field
- Prepayment OK?: radio buttons for "Yes" and "No"
- Day of payment: text input field with a calendar icon
- Month of first payment: text input field with a calendar icon
- Year of first payment-d: text input field with a calendar icon
- Month of last payment: text input field with a calendar icon
- Year of last payment: text input field with a calendar icon
- Street address where payments are made: text input field
- City state zip where payments are made: text input field
- Are there future advances?: radio buttons for "Yes" and "No"
- Canadian borrower?: radio buttons for "Yes" and "No"
- Is there a collection agent?: radio buttons for "Yes" and "No"
- Name of collection agent: text input field

At the bottom, there is a navigation bar with buttons: First, Previous, Next, Last, and Finish.

The screen at the left is the list of variables in the INTERVIEW computation and a user can click on any one and have it appear on the screen. The buttons at the bottom allow moving from one dialog to the next.

DOCUMENT ASSEMBLY IN THE WORD PROCESSORS

Do you have a word processor? If so, then you have a variety of powerful document assembly tools available to you and you need not buy another program, implement it, nor train your staff to use it. Chances are that your clerical staff is either not aware of these features or if they are, they are unwilling to spend the time necessary to learn to use them. It's up to you to train your staff and require that they use power features to improve the speed and quality of their word processing and to automate document production.

V. USING THE DOCUMENT ASSEMBLY TOOLS OF THE WORD PROCESSORS

A. MICROSOFT WORD

1. Toolbars

Did you know that you can create custom toolbars including icons for the power features you regularly use, including styles? To create a custom toolbar simply right click on any active toolbar, then click customize. Now click on the left tab "Toolbars" and "New" to create a new toolbar. The toolbar will appear on your screen. Now click on "Commands" and drag the icons for the commands you want to the toolbar.

TIPS AND TRICKS: Word will not allow you to create a multiple-level toolbar as WordPerfect does, so if you need more than one row, start another custom toolbar or you'll have to click an icon at the right of the toolbar for more buttons.

2. Auto Correct

You probably see this in operation constantly. It politely corrects "teh" to "the." But did you know that it can be used to insert text of virtually any length in a document by typing only a few characters? Suppose you are preparing a group of documents for the same client and the client's name will have to be inserted multiple times. Simply type the client's name, select the text, then click on Tools/Autocorrect, insert an abbreviation such as the client's initials in the window and click add. Now when you type the abbreviation, you'll get the client's name. You can insert text of any length in a document such as notaries, standard paragraphs, your signature line in a letter or repetitively typed phrases.

TIPS AND TRICKS: Don't make the abbreviation a real word because the full text is inserted as soon as you hit the space bar. Try inserting a slash or other character before the abbreviation if you want to use a real word.

3. Auto Text

Auto text is a variation on the auto correct feature which allows you to decide if you want to accept the entry represented by the abbreviation. Type the first few letters of an auto text entry and a suggested completion appears on your screen. Hit enter and the auto text entry is inserted. If you don't hit enter Word will move on and not insert the auto text entry. To create entries simply type the words you want the entry to generate, select the words, then Tools/Autocorrect. Select the auto text tab, then type the abbreviation in the top window and click on add.

4. Merge

The merge feature of Microsoft Word, ineptly named “mail merge,” is a powerful feature which can do much more than a mail merge (merging names and addresses into a form letter). It can be used to prepare multiple documents in the same form while inserting different information in each. Suppose you have to prepare a dozen promissory notes between a parent and its subsidiary, each on a different date for a different amount. You could collect all of the information and ask your secretary to type 12 notes or you can use “mail merge” to do the job for you by entering the data in a spreadsheet or table, and creating a form with merge fields corresponding to the headings on the columns in the table or spreadsheet.

To use mail merge, create the spreadsheet or table with the data to be inserted in the form, giving each column a heading name. Then create the mail merge form by clicking on Tools/Merge (your IT department has probably integrated the mail merge function with your document management system if you have one, enabling you to save forms and data files in the DMS). Then insert merge fields in your document which match the names of the columns in your data source. Need to make a change in the form or the data? If you change the form you can re-merge and get your dozen documents corrected in seconds. Or you can change an entry in your data source, remerge and have the same quick results. Either way you can create all of the documents in seconds.

5. Templates and Styles

Templates and styles are probably the most powerful and least understood, hence the most underutilized features of Word. A template is a document into which formatting styles have been inserted and which can be used repeatedly to generate new documents without inserting formatting styles or codes. When used with Word’s form feature which allows you to insert prompts for insertion of text into pre-defined fields it enables creation of powerful and consistently formatted documents with little effort.

To create a template click on File/New then click in the Template radio button. Styles are created by clicking on Insert/Styles/New Style. Create the styles in the template, save the template as a template, and now you can make use of this combination of styles simply by opening the template.

6. Forms

Word allows you to create forms which prompt you for information to be inserted. These features are useful for assembling repetitive documents or creating easy-to-use internal or client forms. All of the features are “field codes”, unique Word codes used to insert dynamic text into a document, that is, text which changes from one document or area of the document to another. Tables of contents, page numbers, cross-references, merge fields and time and date codes are all field codes in Word. All of the Word document automation fields can be inserted from the Forms toolbar. To load it, right click on the toolbar and select “Forms.” Following are the form fields available in Word:

Fillin

The FILLIN field allows you to create a single instance of a variable. If you want the same answer elsewhere, you would have to insert another FILLIN field code requesting it. A FILLIN field can be inserted by clicking on Insert/Field and selecting “Fill-in.” The screen will request the prompt you want to appear in the document. Click OK and you’ve created your fill-in prompt.

TIPS AND TRICKS: Don’t use a space in the prompt. Word will truncate anything after the space and you’ll get only the first word. If you need more than one word string the prompt together LikeThis.

a. Ask

The ASK field eliminates the limitations of the FILLIN field by allowing you to insert the same information in multiple locations in a document. The field is inserted in the same manner as an ASK field but it must be followed by a REF field which stores the answer to the prompt in a bookmark. To do this, first create the ASK field which will prompt you for a bookmark name as well as a prompt, create the bookmark, then insert a REF field immediately following the ASK field referencing the bookmark. Wherever you want the same information to appear, insert another REF field referring to the same bookmark.

b. Text Form Field

The text form field is simply a grayed box appearing in the document where a user can type in information. No prompt will appear, only the gray box which notifies the user that input is expected.

c. Checkbox

This field is a grayed box. When the user clicks in the box, an “X” is inserted inside. In order to use this feature it is necessary to “protect” the document. This enables the ability to fill in the box but disables the user from changing the text or features of the form itself. The form can be protected from the forms toolbar, or by clicking on Tools/Protect Document. In versions of Word prior to XP, if the user unprotects a protected form, all fields filled in would be reset to the blank state. That does not occur in Word XP.

d. Dropdown

The dropdown field permits the user to insert a dropdown box with choices which can be automatically inserted at the location of the field. To create a dropdown field, click on the drop-down field icon on the forms toolbar. You will be prompted to enter the choices. After entering the choices, click OK and your field will appear. In order to make the drop-down choices available you must protect the document (Tools/Protect Document).

e. Field Switches

Word has sophisticated capabilities for formatting text in fields. By the use of “switches” in the field code you can format responses. The Format (*) field switch specifies how to display field results. The following format instructions determine the use of uppercase and lowercase letters; number formats — for example, whether "9" is displayed as "ix" (roman numerals) or "ninth" (ordinal text) and character formats. Format switches also retain a field results formatting when the field is updated.

(i) Capitalization formats

*** Caps**

The first letter of each word. For example, { FILLIN "Type your name:" * Caps } displays "Julie Tanner" even if the name is typed in lowercase letters.

*** FirstCap**

The first letter of the first word. For example, { COMMENTS * FirstCap } displays "Weekly report on sales".

*** Upper**

All letters. For example, { QUOTE "word" * Upper } displays "WORD".

*** Lower**

None of the result; all letters are lowercase. For example, { FILENAME * Lower } displays "weekly sales report.doc".

Note: This switch has no effect if the entire field that contains the switch is formatted as small capital letters.

(ii) Number Formats

***alphabetic**

Displays results as alphabetic characters. The result has the same case as the word "alphabetic" in the [field code](#). For example, { SEQ appendix * ALPHABETIC } displays "B" (instead of "2"), and { SEQ appendix * alphabetic } displays "b".

***Arabic**

Displays results as arabic cardinal numerals. For example, { PAGE * Arabic } displays "31".

***CardText**

Displays results as cardinal text. The result is formatted in lowercase letters unless you add a format switch to specify a different capitalization. For example, { = SUM(A1:B2) * CardText } displays "seven hundred ninety", and { = SUM(A1:B2) * CardText * Caps } displays "Seven Hundred Ninety".

***DollarText**

Displays results as cardinal text. Microsoft Word inserts "and" at the decimal place and displays the first two decimals (rounded) as arabic numerators over 100. The result is formatted in lowercase letters unless you add a format switch to specify a different capitalization. For example, { = 9.20 + 5.35 * DollarText * Upper } displays "FOURTEEN and 55/100".

***Hex**

Displays results as hexadecimal numbers. For example, { QUOTE "458" * Hex } displays "1CA".

***OrdText**

Displays results as ordinal text. The result is formatted in lowercase letters unless you add a format switch to specify a different capitalization. For example, { DATE \@ "d" *

OrdText } displays "twenty-first", and { DATE \@ "d" * OrdText * FirstCap } displays "Twenty-first".

***Ordinal**

Displays results as ordinal arabic text. For example, { DATE \@ "d" * Ordinal } displays "30th".

***roman**

Displays results as roman numerals. The result has the same case as the word "roman" in the field code. For example, { SEQ CHAPTER * roman } displays "xi", and { SEQ CHAPTER * ROMAN } displays "XI".

B. WORDPERFECT

WordPerfect has many of the same document automation features as Word but includes one which is unique to WordPerfect, the template, a fillable form.

1. Toolbars

Toolbars are created in WordPerfect by right clicking on the toolbar, then click settings. Now click Create and you will be prompted for a toolbar name. Enter it, hit enter and you will be taken to the command list. Click on a command, then add button, and you will see the button appear on the toolbar. If the toolbar exceeds one line, highlight it in the toolbar list, click on options and enter the number of lines you need in the appropriate window.

2. Quick Correct

This feature is virtually identical to Word's auto correct feature. It allows you to type a simple abbreviation and have the word processor insert text of almost any length but without formatting such as bold, and it cannot be used to insert graphics or WordPerfect characters such as ¶.

3. Quick Words

Quick Words works just like auto correct and quick correct, but allows you to insert formatted text or any kind of WordPerfect character such as §.

4. Templates

WordPerfect templates are not the same as Word templates. These are fillable forms which prompt you for information. The same prompt can be inserted multiple times in the same document but the user is only asked for the information once and the program inserts it at every other instance of the prompt. Personal information can be inserted for each user enabling you to create such documents as desktop published letterhead which will be customized for each user at the time of creation.

Templates are created by clicking on File/New/Create from Project/Options/Create WP Template. A context specific toolbar will appear which permits you to insert a document from which the template is to be created and to enter prompts using "Build Prompts" button on the toolbar.

C. POWER CODES

Automatic paragraph numbering, cross reference codes, automatic tables of contents and tables and columns are document assembly tools in and of themselves because they allow the computer to do the job of a typist and facilitate much faster document production. True document assembly programs such as HotDocs which allow creation and assembly of a document with alternate paragraphs cannot be used effectively unless these codes are included in the document. Without them clerical input would be required following assembly to add or correct paragraph numbers or cross references, thus defeating the efficiencies of document assembly.

1. Automatic Paragraph Numbering

Both Word and WordPerfect come with pre-installed numbering styles. If the style appears as the user wants it, it can be inserted as is. Or it can be used as the basis for a new style modified to the user's specifications.

Creating and accessing numbering styles is very different in Word than in WordPerfect. In WordPerfect, styles saved in the user's default template are always available in any document opened or created by the user. Word styles can be saved in the user's default template, normal.dot, but the styles are only available in documents opened or created in normal.dot and must be copied to any other templates where the user wants to use them, or to documents sent electronically created in another user's default or other template. Understanding how to create styles and store them in templates can save hours of clerical and lawyer time in formatting documents.

TIPS AND TRICKS: When you use automatic paragraph numbers in either program, a new number will be inserted any time you hit return although you can create the style so that it does not enter a new number but reverts to normal or another style in Word, or no numbering in WP. Some users don't like automatic numbering because they don't understand how to go back and forth between levels. If you want to go to a previous level and you hit backspace you'll return to the left margin and turn off automatic numbering. The way to go back a level in Word is to invoke the Outlining toolbar (or insert the arrow icons on any other toolbar in use) and click on the back arrow. If you want to go forward a level, hit the tab key in either program. When you use automatic numbering in WP a context specific toolbar will appear which includes the back and forward arrows. You can also move a paragraph up or down in the document using these toolbar arrows. In Word, select the text of the paragraph and press the up or down arrow. In WP simply place your cursor behind the number and click the up or down arrow.

2. Cross Reference

Both Word and WordPerfect permit you to enter a code for an internal paragraph reference rather than typing the number, then generate the codes when editing has been done and have them automatically change if a paragraph number is changed. You must use automatic paragraph numbering in order to use the feature since in both programs the code refers to the automatic number.

a. Word

The feature in Word is a field code referencing the automatic paragraph number and much quicker and easier to insert than in WordPerfect. In Word a screen appears which lists all of the paragraphs by number and allows you to click on the paragraph to insert the code. The codes will not automatically change if the paragraph number to which it refers changes. You must regenerate the codes by selecting the whole document (Ctl A) then hitting F9. If you have a reference to a paragraph you've deleted an error message will appear where the reference was located like this "**Error: Bookmark not found.**"

b. WordPerfect

The code in WordPerfect is a paired code which requires that you to insert a code for the reference and another code for the target, or number being referred to. To insert the code in WP, click on Tools/Reference/Cross Reference and a context specific toolbar will appear. Select what you want to reference in the reference drop-down menu, then name the reference in the target window. Place your cursor at the location of the reference and click on “Mark Reference.” Now place your cursor after the automatic paragraph number code you want to reference and click on “Mark Target.” A question mark will appear where you’ve marked the reference until you generate the references using the generate button on the toolbar. Generating the cross reference codes will also regenerate an automatic table of contents in both programs.

3. Table of Contents

Automatic tables of contents are also quite different in Word than in WordPerfect. Word allows you to generate tables of contents automatically from heading and numbering styles whereas WP requires that you to insert paired codes around the text and number codes to be in the table of contents.

a. Word

To insert a table of contents in Word, click on Insert/Reference/Table of Contents. Now click on the Table of Contents tab then options. In Options enter the level at which you want each style you would like in the table of contents using numbers (1, 2, 3 etc.). You will see a button for “Use hyperlinks instead of page numbers.” If you click on this, the page numbers in the table of contents will be hyperlinks which when clicked will take you to the referenced page. Click in “Formats” to determine the appearance of the table of contents.

TIPS AND TRICKS: Because Word is paragraph oriented and each paragraph is the same style as the previous paragraph, if you want the table of contents to include only the number and a heading which is followed by text, you must turn off the style after the paragraph heading or all of the text in the paragraph will be inserted in the table of contents.

If you use a style where you insert a return after the heading and before the text, be sure to select the text of the paragraph and change its style to normal or some style other than the heading style.

If your heading is immediately followed by the text of the paragraph, and you are using a version of Word earlier than XP, you will need to insert a hidden paragraph mark and change the style of the text as well. To insert a hidden paragraph mark, hit enter after the heading, then select the paragraph mark (you must turn on Show/Hide to see it), click in Format/Font/Hidden. The paragraph mark will now not generate a return when the document is printed but will show up as a return on your screen when you have Show/Hide on. Now select the text following the hidden paragraph mark and make it any style other than the style of the heading.

If you are using Word XP, you can insert a Style Separator after the heading. This will automatically change the text following to normal (or any other style you select) and result in only the number and heading being inserted in the table of contents.

b. WordPerfect

In order to create a table of contents in WordPerfect you must select the automatic number code and heading text, and click on Tools/Reference/Table of Contents. A context-specific toolbar will appear and you can select the level at which you want the entry. Click in Define to tell WP how many levels you want and how you want them to look. Click generate when you've marked your entries or to regenerate after revising the document. As with Word, you can make the references hyperlinks when you generate by clicking the button for hyperlinks in the dialog window.

4. Columns and Tables

Many users insert tabs to separate tabular data such as signatures at the end of document. Using tabs makes any modification of the text very difficult because a change in the text on the left results in changing the position of the text on the right a tab stop or two away.

Tabular information can better be formatted in columns or tables, both very simple to insert and use in Word or WordPerfect. If you align columnar text in cells of a table or columns you can move easily from one column or cell to another using the tab key, and data inserted in a column or cell of a table remains in the same location regardless of data inserted elsewhere in the column or in other cells. The borders surrounding cells in tables can be removed in either program leaving a column like appearance but permitting changing the width of the rows by simply dragging the gray border which is apparent on the screen, but which disappears when the document is printed. Seventy-five percent of spreadsheet functions are available in WordPerfect tables (select the formula toolbar from the table menu item at the top of the screen) making tables useful for a variety of chores which would otherwise have to be done in a spreadsheet.