Forms don’t need to be dumb as bricks.
You can teach them, they’ll learn.

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

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

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

Imagine that.

Forms without mistakes.
We call them brilliant.
You will, too.
One-Page Cheat Sheet

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

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

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

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

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

   ▶ If you prefer, skip the remaining steps and watch these short videos instead.

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

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

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

4. **Use your new smart form to create a document**
   Open the form you created in Step 3. Type answers in the Questionnaire and click Fill on the Doxserá tab. Done!

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

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

Older Files: If you’re starting with an older document (Word 2003 or earlier), be sure to save it in one of Word’s new formats (.docx or .dotx) with the ‘Maintain Compatibility’ checkbox UNCHECKED.

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the name of the signer?</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>What’s the birthdate of the signer?</td>
<td></td>
</tr>
</tbody>
</table>

My name is [Signer]. I was born on [DOB].

Signed: ___________________

{SIGNER}
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Installing Doxserá®

Step 1: Is the File Blocked?
Windows sometimes blocks downloaded files to protect you from viruses.
Right-click the Doxsera.zip file you downloaded and choose Properties. If you see an Unblock button, click it to unblock the file, then click Apply, OK.

Step 2: Open the Installation File
Open the file you downloaded to see its contents. Double-click the Doxsera.docm file.
Depending on whether file extensions are visible on your computer, you may or may not see the .docm at the end of the filename: Doxsera or Doxsera.docm.
Step 3: Security Warnings?

If you see this …

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

If you see this …

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

Step 4: Close and Reopen Word

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

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

If the **Doxserá** tab does not appear, try restarting your computer. If that doesn’t work, please contact us at [www.theformtool.com/resources](http://www.theformtool.com/resources) so we can help you get started.
**Step 5: Enter License Code**
To activate Doxserá®, click **Options, License code** and enter the registered name and license code we emailed to you.

**Step 6: Sharing Information on a Network**
Doxserá® initially saves program information on your local computer. But if your firm owns more than one license, you will likely want to share program information with other people in your office. To do so, click **Options, Path** and enter the path to a shared folder on your network.

**Step 7: Updates**
Check for updates periodically at the Doxserá® website. To be notified when updates are available, subscribe to our newsletter at www.theformtool.com/newsletter.

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

<table>
<thead>
<tr>
<th>My name is Abigail Bentley. I was born on April 17, 1960.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signed: __________________</td>
</tr>
<tr>
<td>ABIGAIL BENTLEY</td>
</tr>
</tbody>
</table>

**Step 1: The Questionnaire**
Click **Questionnaire, Create** on the Doxserá tab to add a Questionnaire to the end of the form.

<table>
<thead>
<tr>
<th>My name is Abigail Bentley. I was born on April 17, 1960.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signed: __________________</td>
</tr>
<tr>
<td>ABIGAIL BENTLEY</td>
</tr>
</tbody>
</table>

If you need to buy a license, visit www.theformtool.com. If you’ve lost your license code, check your emailed receipt or log into your account at www.theformtool.com (click **Log In** in top right corner).
In this example, we need to ask the form user for the signer’s name and birthdate. Type the two questions in the Questionnaire, including a short label for each.

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

Signed: __________________

ABIGAIL BENTLEY

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the name of the signer?</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>What’s the birthdate of the signer?</td>
<td></td>
</tr>
</tbody>
</table>

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

Later on, Doxserá “locks” the Questionnaire so form users can’t accidentally alter it. But you can still add rows by clicking Row/Column, Add.

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

**Step 2: Add Fields**

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

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

Signed: __________________

ABIGAIL BENTLEY

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the name of the signer?</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>What’s the birthdate of the signer?</td>
<td></td>
</tr>
</tbody>
</table>
Several Field formats appear. For our first Field, the default is correct (Text, FreeForm), so click OK.

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

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

Use the same steps as above, but this time choose the DOB label and Date format.
Now select **ABIGAIL BENTLEY** and click the **Field** to add the last Field.

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

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

### Using a Form

#### Step 1: Type Answers

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

**My name is** [Signer]. I was born on [DOB].

Signed: __________________________

**ABIGAIL BENTLEY**

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the name of the signer?</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>What’s the birthdate of the signer?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the name of the signer?</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>What’s the birthdate of the signer?</td>
<td></td>
</tr>
</tbody>
</table>


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

**My name is** [Signer]. I was born on [DOB].

Signed: __________________________

**SIGNER**

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the name of the signer?</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>What’s the birthdate of the signer?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the name of the signer?</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>What’s the birthdate of the signer?</td>
<td></td>
</tr>
</tbody>
</table>

**Label**

**Question**

**Answer**

Horace Blixt

4/17/60
Step 2: Fill in the Form

Click ✈ Fill to fill in the form. Done!

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

Signed: __________________

HORACE BLIXT

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

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

<table>
<thead>
<tr>
<th>Old File Formats – Pre-2007 Files Need to Be Converted</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Word 2007</strong></td>
</tr>
<tr>
<td>Click the ✈ Office button (the round button in the top left corner), then click Save As.</td>
</tr>
<tr>
<td>In the Save as type box, choose Word Document (.docx) or Word Template (.dotx).</td>
</tr>
<tr>
<td>Near the bottom of the screen, make sure the Maintain compatibility with Word 97-2003 checkbox is UNCHECKED.</td>
</tr>
<tr>
<td>Click Save.</td>
</tr>
</tbody>
</table>

| **Word 2010 and Word 2013/2016**                       |
| Click File, Save As.                                  |
| In the Save as type box, choose Word Document (.docx) or Word Template (.dotx). |
| Near the bottom of the screen, make sure the Maintain compatibility with previous versions of Word checkbox is UNCHECKED. |
| Click Save.                                           |
| If you still see Compatibility Mode at the top of the screen, click File, Info, Convert. |

You can also click ⚡ Reset to return the form to its original state, ☸ Blanks to replace Fields with blank lines, or ☽ Petrify to convert all Fields to plain text and remove the Questionnaire.
Documents Versus Templates: As you create forms, you can save them as documents (files that end with .docx) or templates (files that end with .dotx). Doxserá® works fine with both types of files, but saving forms as templates does have one important advantage: When form users double-click a template file to open it, Word creates a new unsaved document based on that template. This makes it impossible for the form user to accidentally overwrite the original form -- when they click Save, they are prompted to save their brand new document elsewhere.

Creating Smarter Forms

Smart Answers

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

Text Answers

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

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

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

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

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

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

**Yes/No Answers**

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

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

Derived Answers

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

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

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

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

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>DateSign</td>
<td>Date of signing?</td>
<td>12/29/2012</td>
</tr>
</tbody>
</table>

List all the parties:

<table>
<thead>
<tr>
<th>Name</th>
<th>Street</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terry Porter</td>
<td>555 Main Street</td>
<td>Seattle</td>
<td>Washington</td>
<td>98101</td>
</tr>
<tr>
<td>Garth Blinth</td>
<td>123 Sycamore Lane</td>
<td>Chicago</td>
<td>Illinois</td>
<td>60290</td>
</tr>
<tr>
<td>Eva Roette</td>
<td>868 Meridian Drive</td>
<td>Houston</td>
<td>Texas</td>
<td>77001</td>
</tr>
</tbody>
</table>

To add a Grid, click **Questionnaire**, **Grid**, **Add**.

Field Types

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

Pronoun Fields

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

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

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

**Count Fields**

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

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

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

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

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the signer’s name?</td>
<td></td>
</tr>
<tr>
<td>Spouse</td>
<td>What’s the signer’s spouse’s name? (Leave blank if unmarried.)</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

See page 5 if you need a refresher course on inserting Fields.
Type an alternate second sentence to be used when the signer is unmarried.

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

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

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

Select the **Spouse** answer.

We only want this sentence to appear when there is a spouse, so select **is not empty** and click **OK**.
We’ll treat the last sentence similarly, but with an opposite Condition.

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

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

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

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

<table>
<thead>
<tr>
<th>Label</th>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer</td>
<td>What’s the signer’s name?</td>
<td>Betty Miller</td>
</tr>
<tr>
<td>Spouse</td>
<td>What’s the signer’s spouse’s name? (Leave blank if unmarried.)</td>
<td></td>
</tr>
</tbody>
</table>

**Lists**

Lists are like Fields, except they are used with series answers to add a whole series of items to a form.

To insert a List (shareholders, signers, children, executors, etc.), click **List**, select one of the series answers shown, select a format, then click **OK**.

Lists are another extremely flexible feature. See the [Expert User Guide](#) for examples of all sorts of built-in List formats, and learn how to create your own custom Lists.
Answers can be saved from one form and reused in a different form (for the same client, matter, or project on another day, for example).

**Saving Answers**

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

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

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

**Loading Answers**

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

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

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

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

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

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

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

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

**Math Formulae** and **Date Offsets** perform calculations -- from simple to extremely complex -- to automatically generate information and make document-altering decisions using mathematical and boolean operators and functions. Calculations are self-contained within the form, so there’s no need to go back and forth with an external spreadsheet.
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- Zip file .................................................. See Installing Doxserá
Some helpful resources at [www.theformtool.com](http://www.theformtool.com):

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