

Editing Tips for Lawgic Users

Microsoft Word 2010 (and newer)

Before you send your document to Word, be sure you check your settings!

IMPORTANT: For Word documents to be formatted properly:

1. Install all Microsoft Office Service Packs. You can click the **Check for Updates** link on the Microsoft web site to see if you need to install any.

2. Verify Your Formatting Items:

a. **Hidden Text:**

Click the **File Tab** in the upper left corner, click **Options**, click Display, and uncheck the 'hidden text' box.

b. **Field Codes:**

Click the **File Tab**, click **Options**, click **Advanced**, under **Show Document Content** uncheck 'show field codes' box.

c. **Smart Cut and Paste:**

Click the **File Tab**, click **Options**, click **Advanced**, under **Cut, Copy, and Paste** uncheck 'Use Smart Cut and Paste' box.

3. In **LAWGIC**: Be sure the 'New Styles' box is checked in the 'Set User Preferences' dialog box by selecting **Edit** on the **Lawgic menu** and then **Set Preferences**.

Now you are ready to Edit your Lawgic generated Word documents!

After Sending to Word...

Once a document has been sent to your word processor from Lawgic, you will get a pop-up screen that says: **FORMATTING COMPLETE.**

AFTER THE DOCUMENT IS EDITED, press Ctrl+A, and then F9 (or Alt+Shift+U) TO UPDATE REFERENCES.

Note: As an alternate to Alt+Shift+U or the F9 key, you can **Right-click** and select **Update Field**.

Referred to as the Autonumbering feature in Word, the (Ctrl A + F9) command completes the numerical updating and formatting of your document.

After making edits to your document it is VITAL that you execute the same command in order to update your formatting, cross references and numbering.

Step 1

- From the **'Home'** tab, in the **'Editing'** block choose **'Select'**, and then **'Select All'** or use the keyboard command of **Control A (Ctrl+A)**.

Step 2

- Press the **F9 key***. You will be presented with the **'Update Table of Contents'** dialog box.

*On occasion the **F9 key**, which updates field codes in Word, does not create the Table of Contents because it is programmed to perform another function. This is frequently the case if you are working on a laptop. In these cases you can **right-click** with your mouse in the highlighted area, and select **Update Field** as an alternative to F9.

- Select the **Update entire table** option, and then click **OK**.
- Click outside the highlighting to de-select the document.

Your Table of Contents, cross-references and numbering are now be updated.

Step 3

- **Save your file:** Once you have reviewed your document, and are ready to edit, you must save your document! To do so, go to the File menu and select **'Save As'** and then name and save your file.

Adding a New Paragraph or Article.....

Step 1: Locate an existing paragraph (or Article) that contains the same level of heading as the paragraph (or Article) that you want to add.

Step 2: Select the entire paragraph (or Article), including the heading. Note that the paragraph (or Article) number does not get highlighted. When properly selected it should look like this:

When selecting a **paragraph**:

ARTICLE 2
TRANSFERS TO TRUST

2.1 Original Trust Estate. We hereby convey to the Trustees all our interest in the assets listed on Schedule A, Schedule B, Schedule C, and Schedule D, which together with any assets later added to this Trust are referred to as the "Trust Estate." All assets listed on Schedule A have been conveyed to the Trustees and represent a portion of Joe's share of the Trust Estate. All assets listed on Schedule B have been conveyed to the Trustees and represent a portion of Alice's share of the Trust Estate. We have jointly conveyed any assets listed on Schedule C to the Trustees that were owned by us as joint tenants with rights of survivorship, as tenants by the entirety, or as tenants in common. Each of us has conveyed the property listed on Schedule D that is or was presently owned by one or the other of us, but is intended to be owned equally. We intend that all assets contributed by one of us and listed on a respective Schedule A or Schedule B be allocated to that Grantor's share of the Trust. Any assets listed on Schedule C or Schedule D are to be allocated equally to each Grantor's share of the Trust, so that each of our shares of those assets is equal to one-half of the total value of those assets.

2.2 Additional Contributions. Any person may transfer assets to the Trust Estate, if the Trustees agree to accept them. Unless otherwise specified in writing at the time of the

When selecting an **Article**:

ARTICLE 2
TRANSFERS TO TRUST

2.1 Original Trust Estate. We hereby convey to the Trustees all our interest in the assets listed on Schedule A, Schedule B, Schedule C, and Schedule D, which together with any assets later added to this Trust are referred to as the "Trust Estate." All assets listed on Schedule A have been conveyed to the Trustees and represent a portion of Joe's share of the Trust Estate. All assets listed on Schedule B have been conveyed to the Trustees and represent a portion of Alice's share of the Trust Estate. We have jointly conveyed any assets listed on Schedule C to the Trustees that were owned by us as joint tenants with rights of survivorship, as tenants by the entirety, or as tenants in common. Each of us has conveyed the property listed on Schedule D that is or was presently owned by one or the other of us, but is intended to be owned equally. We intend that all assets contributed by one of us and listed on a respective Schedule A or Schedule B be allocated to that Grantor's share of the Trust. Any assets listed on Schedule C or Schedule D are to be allocated equally to each Grantor's share of the Trust, so that each of our shares of those assets is equal to one-half of the total value of those assets.

2.2 Additional Contributions. Any person may transfer assets to the Trust Estate, if the Trustees agree to accept them. Unless otherwise specified in writing at the time of the transfer, those assets will be held as provided in this Trust. Assets added to the Trust Estate

Step 3: On the '**Home**' tab click **Copy** or use the keyboard command **Ctrl + C**. This copies the paragraph (or Article) to the Windows clipboard.

Step 4: Go to the location in the document where you want to add the new paragraph (or Article).

Step 5: Create a blank line by placing your cursor at the end of the paragraph (or Article) preceding where you want the new paragraph (or Article) to go and press **Enter**.

WARNING: Do not move your cursor away from the blank line you just created. If you place your cursor at the beginning of an existing heading or on the last line of an existing paragraph (or Article) Word will lose track of proper cross-references and/or will improperly format your paragraphs (Articles). If you do this accidentally, simply click the Undo button on your Toolbar (or, on the Edit menu, click Undo Typing, or press Ctrl + Z) and reposition your cursor on a blank line.

Step 6: To **Paste** use the keyboard command: **Ctrl + V**. You may have to delete a blank line in your document after pasting to achieve proper spacing.

Step 7: Type your new Heading in front of the heading you have just pasted and then delete the old heading. You may also simply highlight the heading and overwrite it. **Do not delete or overwrite the final punctuation mark of the heading or you will lose your formatting!**

Step 8: Type the new paragraph text (or copy/paste text from another source) in front of the paragraph (or Article) text you have just pasted and then delete the old paragraph text. You may also simply highlight the paragraph text and overwrite it. **Do not delete or overwrite the final punctuation mark of the paragraph or you will lose your formatting!**

IMPORTANT: When you are editing, the Word will automatically renumber the paragraphs (or Article) but it will NOT automatically update the Table of Contents or any cross-references. Therefore **after each edit, you should update as shown starting at step 9.**

Step 9: From the '**Home**' tab, in the '**Editing**' block choose '**Select**', and then '**Select All**' or use the keyboard command of **Control A (Ctrl+A)**.

Step 10: Press the **F9 key***. You will be presented with the '**Update Table of Contents**' dialog box.

*If the **F9 key**, which updates field codes in Word, does not bring up the '**Update Table of Contents**' dialog box you can **right-click** with your mouse in the highlighted area, and select **Update Field** as an alternative to F9.

Step 11: Select the **Update entire table** option in the dialog box, and then click **OK**.

Step 12: Click outside the highlighting to de-select the document.

➤ Your Table of Contents, cross-references and numbering are now updated.

Step 13: **Save your file**

BEST PRACTICE: After every edit,

*** Perform the Control A and F9 command,**

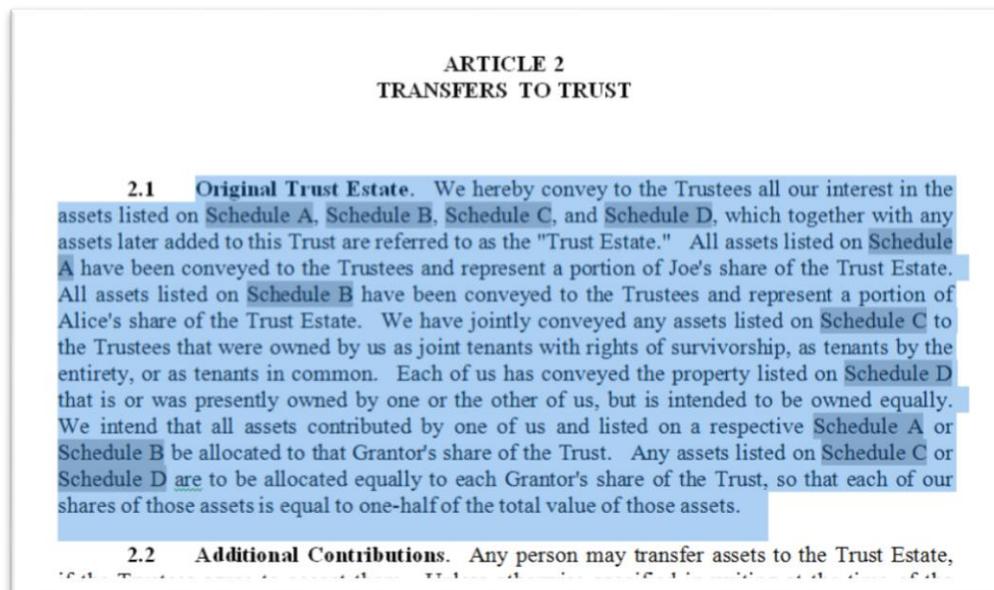
*** Choose: 'Update entire table' in the pop-up box and click 'Ok'.**

*** SAVE your document and then proceed with additional edits.**

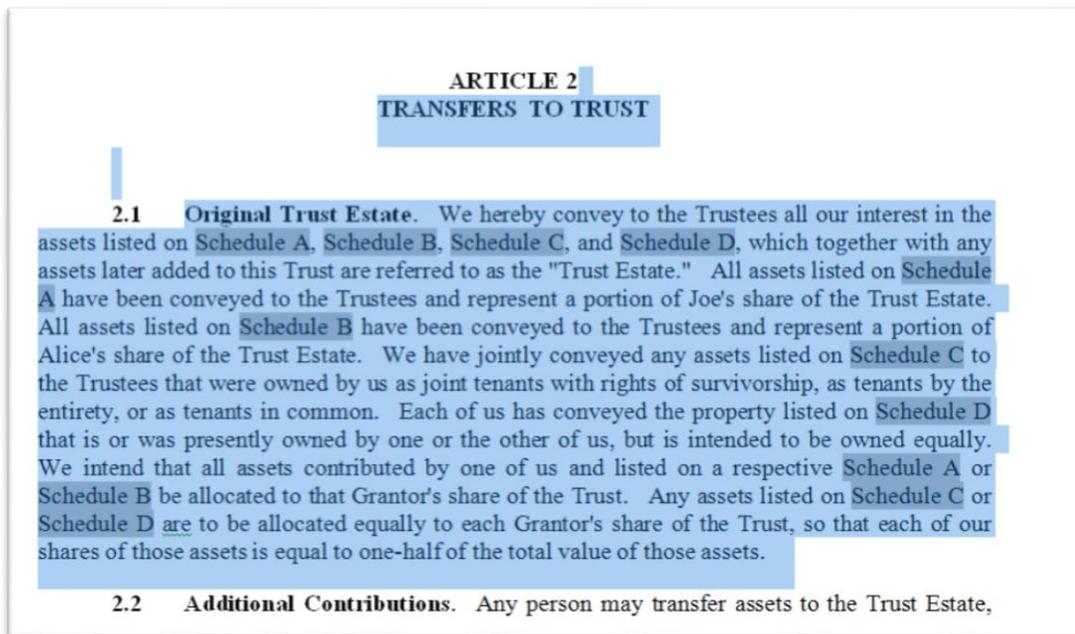
Moving (Deleting) Paragraphs or Articles...

Step 1: Select the paragraph (or Article) that you would like to move or delete (including the headings). When properly selected it should look like this:

When selecting a **paragraph**:



When selecting an **Article**:



Step 2: On the **'Home'** tab click **Cut** (in the **Clipboard** section) or press **Ctrl + X** . Do not delete as "deleting" is different than "cutting" in Windows.

Step 3: If you are moving a paragraph (or Article), create a blank line by placing your cursor at the end of the paragraph preceding the new paragraph (or Article) and press **Enter**.

WARNING: Do not move your cursor away from the blank line you just created. If you place your cursor at the beginning of an existing heading or on the last line of an existing paragraph (or Article) Word will lose track of proper cross-references and/or will improperly format your paragraphs (Articles). If you do this accidentally, simply click the Undo button on your Toolbar (or, on the Edit menu, click Undo Typing, or press Ctrl + Z) and reposition your cursor on a blank line.

Step 4: To insert the moved paragraph (or Article), use the keyboard command **Ctrl + V**. This step is not necessary if you are simply deleting a paragraph.

NOTE: When either moving or deleting a paragraph (or Article), you may have to delete a blank line in your document after pasting to achieve proper spacing.

IMPORTANT: When you are editing, the program will automatically renumber the paragraphs (or Article) but it will NOT automatically update the Table of Contents or any cross-references. Therefore **after each edit, you should update as shown starting at step 5.**

Step 5: From the **'Home'** tab, in the **'Editing'** block choose **'Select'**, and then **'Select All'** or use the keyboard command of **Control A (Ctrl+A)**.

Step 6: Press the **F9 key***. You will be presented with the **'Update Table of Contents'** dialog box.

*If the **F9 key**, which updates field codes in Word, does not bring up the **'Update Table of Contents'** dialog box you can **right-click** with your mouse in the highlighted area, and select **Update Field** as an alternative to F9.

Step 7: Select the **Update entire table** option in the dialog box, and then click **OK**.

Step 8: Click outside the highlighting to de-select the document.

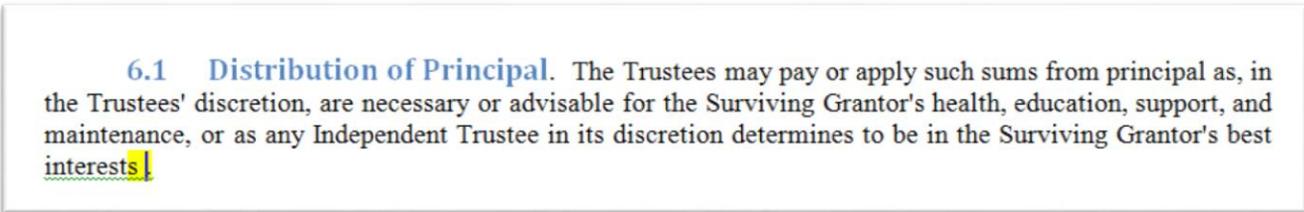
➤ Your Table of Contents, cross-references and numbering are now updated.

Step 9: **Save your file**

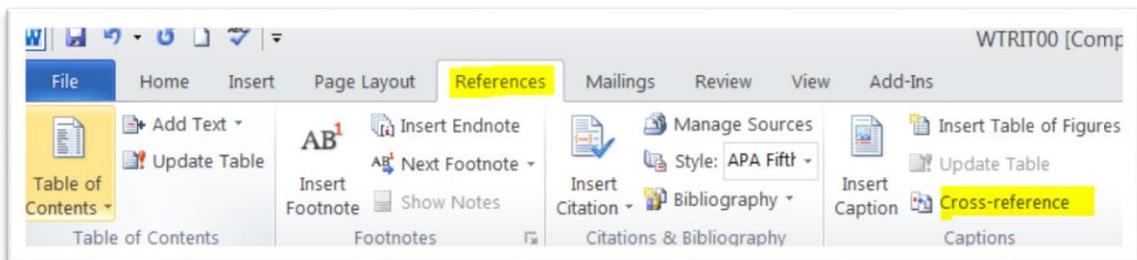
BEST PRACTICE: After every edit,
* Perform the Control A and F9 command,
* Choose: 'Update entire table' in the pop-up box and click 'Ok'.
* SAVE your document and then proceed with additional edits.

Adding a Cross reference...

Step 1: Go to the location in your document where you want to add a Cross reference and add a space:



Step 2: Click the References tab and in the 'Captions' section choose 'Cross-reference':



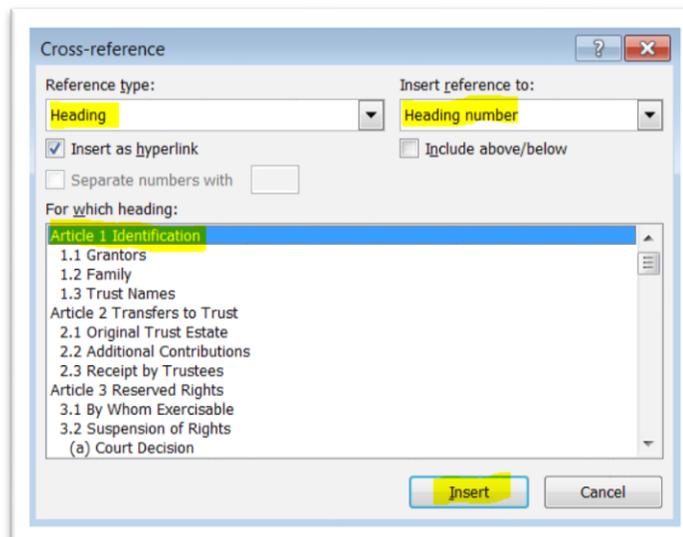
You will get a Pop-up box.

Step 3: Under **Reference Type**, choose 'Heading' and

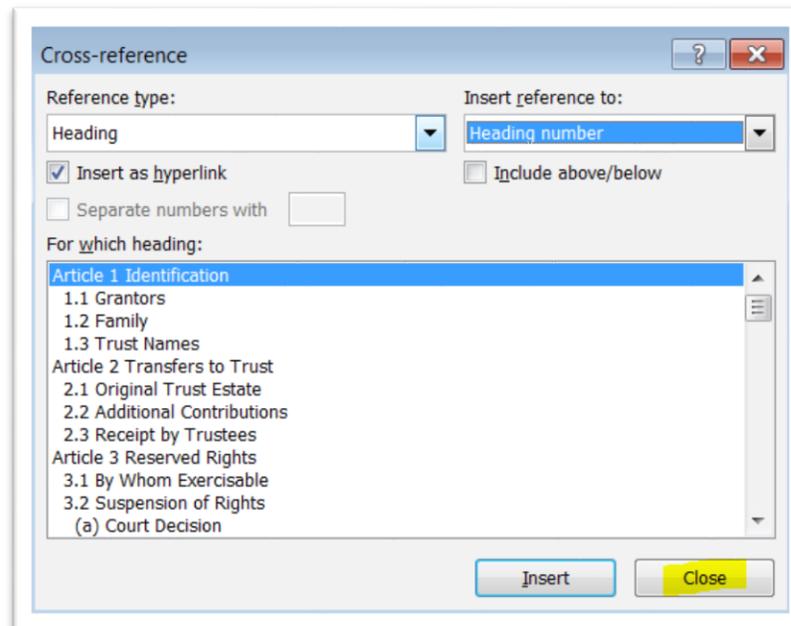
Step 4: Under **Insert reference to:** choose 'Heading Number'

Step 5: Under **For which heading:** scroll to the appropriate location and click the Article you want to cross reference. Be sure to click the Article to refer to (not the sub paragraph).

Step 6: click the **Insert** button, the 'Cancel' button will then change to a 'Close' button.



Step 7: Click the '**Close**' button. This will insert the desired cross reference.



End result:

6.2 Distribution of Principal. The Trustees may pay or apply such sums from principal as, in the Trustees' discretion, are necessary or advisable for the Surviving Grantor's health, education, support, and maintenance, or as any Independent Trustee in its discretion determines to be in the Surviving Grantor's best interests **Article 1**.

You can then add your reference text:

6.2 Distribution of Principal. The Trustees may pay or apply such sums from principal as, in the Trustees' discretion, are necessary or advisable for the Surviving Grantor's health, education, support, and maintenance, or as any Independent Trustee in its discretion determines to be in the Surviving Grantor's best interests **as provided in Article 1**.

IMPORTANT: When you are editing, the program will automatically renumber the paragraphs (or Article) but it will NOT automatically update the Table of Contents or any cross-references. Therefore **after each edit, you should update as shown starting at step 5.**

Step 8: From the **'Home'** tab, in the **'Editing'** block choose **'Select'**, and then **'Select All'** or use the keyboard command of **Control A (Ctrl+A)**.

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Step 10: Select the **Update entire table** option in the dialog box, and then click **OK**.

Step 11: Click outside the highlighting to de-select the document.

- Your Table of Contents, cross-references and numbering are now updated.

Step 12: **Save your file**

Step 13: Continue editing your document. Be sure to '**Save**' often!

When Auto-numbering no longer works...

If you extensively edit a document and inadvertently delete the formatting codes so that auto-numbering no longer works, you might want to try re-creating the document by doing the following:

Step 1. Open Lawgic and select **File** at the **Select Title/File** dialog box. Then, select the answer file that you used to create the document.

Step 2. Click **Continue** until you get to the All Questions Answered dialog box and send the document to the word processor by selecting **Send Document to Word Processor**. You now have the original document with the correct formatting codes before it was edited.

Step 3. Use the *document compare* utility in Word (under the **Tools** or **Tools/Track Changes** menu) to *compare* the original document, which has the correct formatting, to the edited document.

Step 4. Use the *accept/reject changes* utility in Word (under the **Tools** or **Tools/Track Changes** menu) to 'accept' the edited changes in the original document.

Step 5. Update the numbering and the Table of Contents by clicking **Select All** from the **Edit** menu and then the **F9 key**. You will now have a document which has your edits as well as the correct formatting.

Be sure to select **Save As** on the **File** menu to name and save your document.

NOTE: To ensure that Word will automatically perform the Control A /F9 update every time you **print** your document do the following:

- Click the windows icon, then 'Word Options' and then click 'Display' and under 'Printing Options' select 'Update Fields before printing'.