

ProDoc Tech Tip

Finding the Forms You Need in ProDoc

We often have long-time ProDoc subscribers tell us of their astonishment over finding forms they simply assumed were not contained in ProDoc. This surprises us as well since we make it so easy to search for specific forms in ProDoc.

Sometimes the issue is that the needed form is in a different ProDoc volume. Whatever the reason, be sure to try out our robust **Search for Forms** feature in ProDoc.

The quickest, best way to search for forms throughout all of your ProDoc volumes is outlined below.

1. On the **Quick Click Menu** choose **Find Forms** as shown in *Figure 1*.

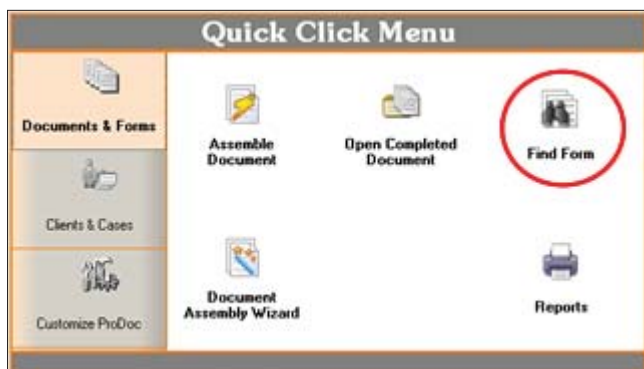


Figure 1 - Choose Find Form on the Quick Click Menu

2. If you have ProDoc configured without the **Quick Click Menu** showing, click **File**►**Find Forms** as shown in *Figure 2*.

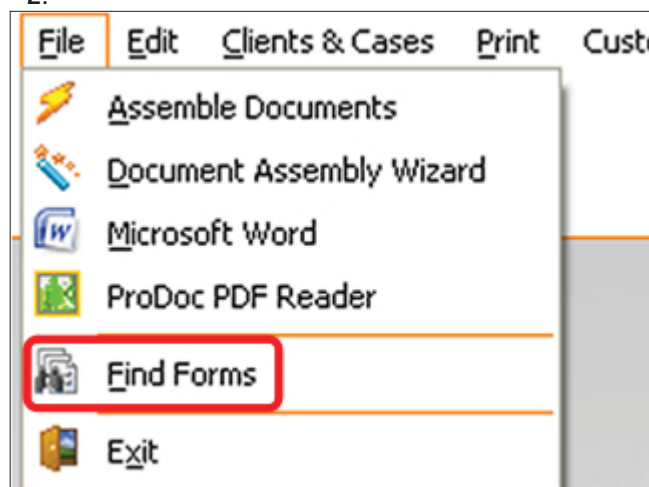


Figure 2 - Alternate Way to Find Forms

3. The **Search** window opens as shown in *Figure 3*. Choose the Volumes from which to search on the left side of the window by one of several methods:

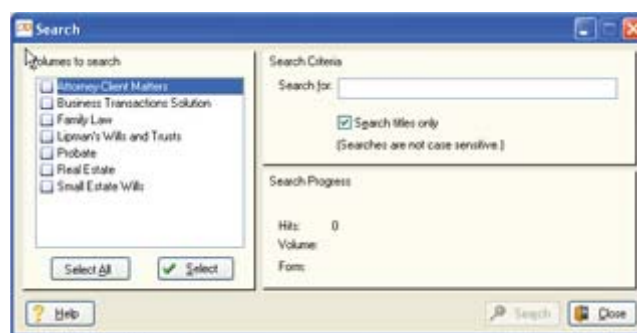


Figure 3 - The Search window

- a. Click the **Select All** button to search all volumes. When all installed volumes are selected, this button's title is changed to **Unselect All**, or
 - b. Click the desired volume title, which places a check mark in the box. Click a selected volume title again to deselect it. You may also search in multiple volume titles by checking the appropriate volumes, or
 - c. Click the **Select** button to select a highlighted volume title or de-select a selected highlighted title.
4. You may not even know the title of the document, but you probably do know a few key words that should either be in the title or in the text of the document. Enter a word or phrase in the **Search for** field. You don't need to worry about capitalization.
 5. If you feel your search word/phrase can be found in a form title, leave the **Search titles only** box checked. This makes the search much faster. If the odds are that the word/phrase won't be in a title, uncheck the box. Titles will still be checked for matches, and all text in every form will also

be checked.

6. **Figure 4** shows a sample search for *guardian ad litem* (B) in all ProDoc volumes available to the user (A), in the titles and in the body of the forms (**Search titles only** is deselected (C)).

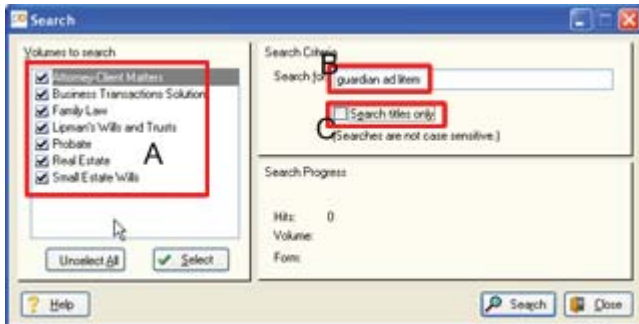


Figure 4 - Ready to Begin Search

7. Click the **Search** button to begin the search.
8. As the search continues, the progress bar shows the search status. Number of matches, the volume currently being searched, and the form currently being searched are continuously updated until the search is complete.
9. Each matching form is listed in the applicable volume "tree" as shown in **Figure 5**.



Figure 5 - The Search Results

10. To view the form, click on it to highlight (**Figure 6**) it and then click the **View** button to ascertain that it is the one for which you were searching. You can also use the **Print List** button to print the window contents.
11. **Figure 7** shows the form contents displayed. For a more detailed view, you can click on your word processor icon (it will display an icon for your default word processor) and the form template will open for you.
12. When you are finished with the window, click the **Close** button.

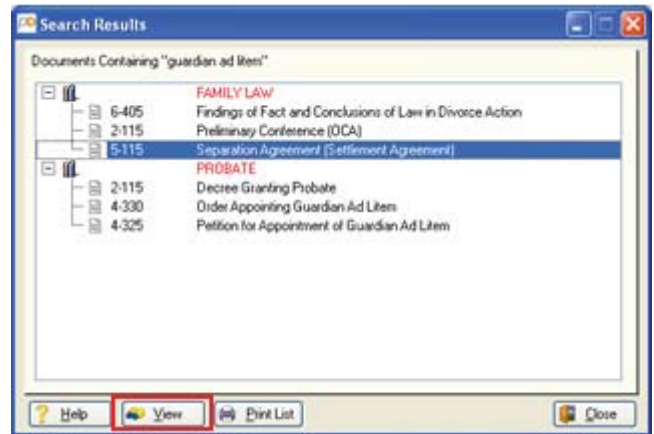


Figure 6 - Highlight the Form You Wish to View



Figure 7 - View the Form Contents

Note that when you are selecting forms during a document assembly session, creating form sets, or editing master form templates you can also search for the form you need in a single volume using the **Find** function.

For more help with this feature, you can:

- a. Use ProDoc's **Help** system located on the toolbar in ProDoc,
- b. Consult the software manual that you can download from <http://tinyurl.com/pd-manuals>,
- c. Use the training videos available at our web site at <http://tinyurl.com/pd-adv-training>, or
- d. Call our Technical Support team at (800) 759-5418.

Finally, if you can't find the form you need, email us at volumedevelopment@prodoc.com to tell us about it and we might add it in the future. It really helps if you can supply us with a template of your own copyright-free form from which we can begin. This is also a great way to get a new form that uses much of your language entered into ProDoc.