User's Manual

Continuing Education of the Bar
1111 Franklin Street
Oakland, CA 94607
ceb.com

Essential Forms Technical Support
Monday-Friday 9:00 am - 5:00 pm PST
(800) 870-1101
tech_support@ceb.ucla.edu

CEB Sales/Customer Service
Monday-Friday 7:30 am - 5:00 pm PST
(800) 232-3444
customer_service@ceb.ucla.edu

Table of Contents

Getting Started

The Basics

Using Our Essential Features

Other Tips & Techniques

Thank you for choosing

We appreciate your business, and we want your experience using this software to be both pleasant and productive.

Getting Started:

Installing the software

This software is designed to be **self-installing**. However, if your computer has CD auto-start turned off, the software will not be installed automatically. Here's how to install it **manually** in five easy steps:

- Insert the Essential Forms CD into your computer's CD drive.
- *Right*-click the Windows icon and choose **File Explorer** (Windows 8 or later) or *Left*-click the Start button and choose **Computer** (Windows 7 or earlier)
- *Double*-click the icon for the Essential Forms CD.
- *Double*-click the icon titled **Update** or **Update.exe**.
- Follow the on-screen instructions to complete the installation.

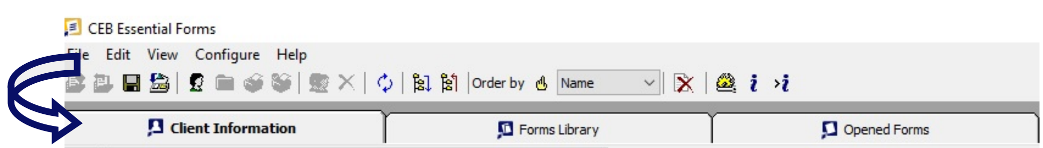
To start the software:

[Windows 8 or later] Right-click ***Start* | *Search* |** [and type] ***Essential Forms***

[Windows 7 or earler] Left-click ***Start* | *All Programs* | *CEB Essential Forms* | *Essential Forms***

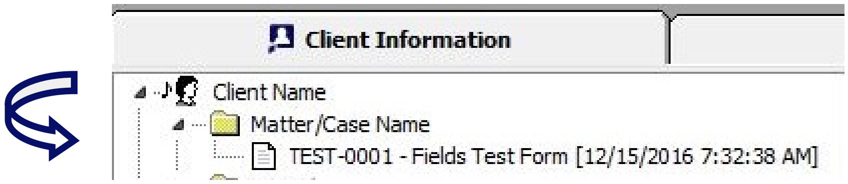
The Three Tabs-What They Do

When you first start Essential Forms you'll see four folder tabs near the top of your screen. The first *three* are called **Client Information, Forms Library,** and **Opened Forms** and they are the key to using this software. They look like this:



- **Client Information tab:**

This is where you will store information about each client, and where the completed forms are ***saved*** for each matter/case. The organization follows the standard Windows® *files & folders* format and looks like this:



- **Forms Library tab:**

This tab is where all of the ***blank*** fillable forms are stored. This includes **Judicial Council forms** and any **local county forms** to which you subscribe. Here is where you make your selection to create *new* forms for your client.

- **Opened Forms tab:**

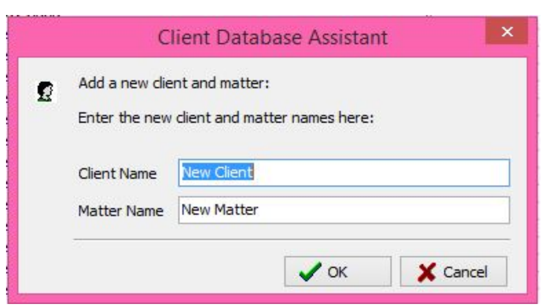
This is the “workspace” where you will find every form that you currently have open for a client/matter. At the *bottom* of this screen, there will be a tab for *each* open form. To view that form you simply click on that tab.

The Basics:

Adding a New Client

In most cases, you will be filling out more than one form for a client, so it is a good idea to enter *reusable* information (client name, address, etc.) just once into the client profile database contained in the **Client Information** tab. When you open a new form, the information that you’ve entered into the client database will automatically fill into each form that you open. Here’s how:

- Click on the Client Information tab,
- Click on the **New Client**  icon on the tool bar, *or*
- Select **File|New Client** on the Menu Bar. A screen called the **Client Database Assistant** will appear, which looks like this:



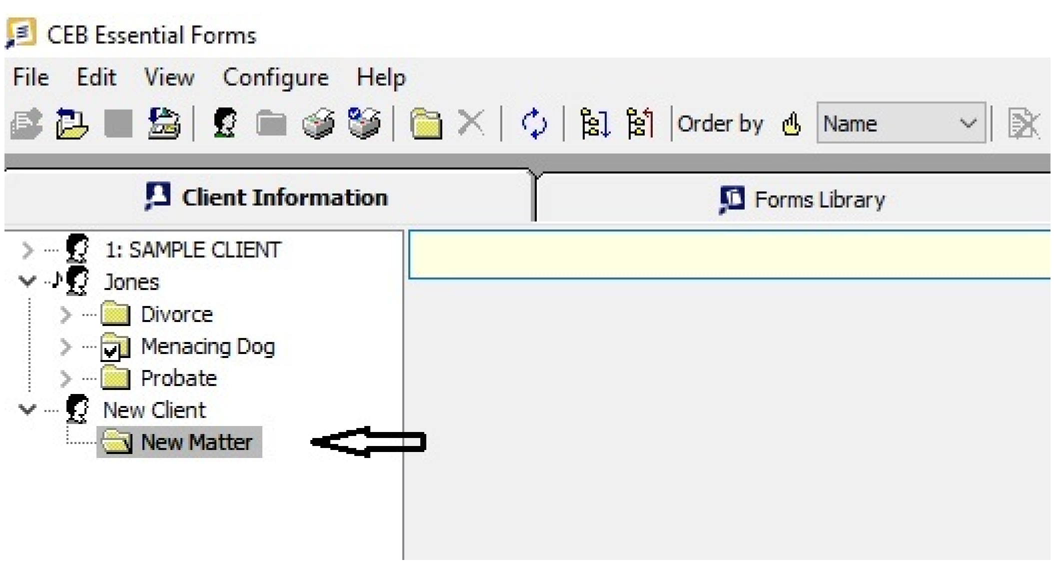
- Fill in the **Client Name** and the **Matter Name**. The matter name can be a case type such as "Probate" or "Dissolution", or a case number, or anything else that will help you distinguish it from other matters for that client. The default name is "New Matter", which will be used if nothing else is entered.

- Click the **OK** button, and you will see a dialog box which asks you to **Select Filing Court.** From the pull-down list, select one of the courts you have previously entered and click the **"Use this court"** button. If you need to add another court, click the **"Add/Edit stored courts"** button. (see screen below)

- Next you will see the **Select Filing Attorney** screen. Again from the pull-down list, select one of the attorney names you have previously entered and click the **"Use this attorney"** button. If you need to add another attorney, click the **"Add/Edit stored attorneys"** button. (see screen below)

- Click the **OK** button, and your new client folder will appear on the left-hand side of the **Client Information** screen.

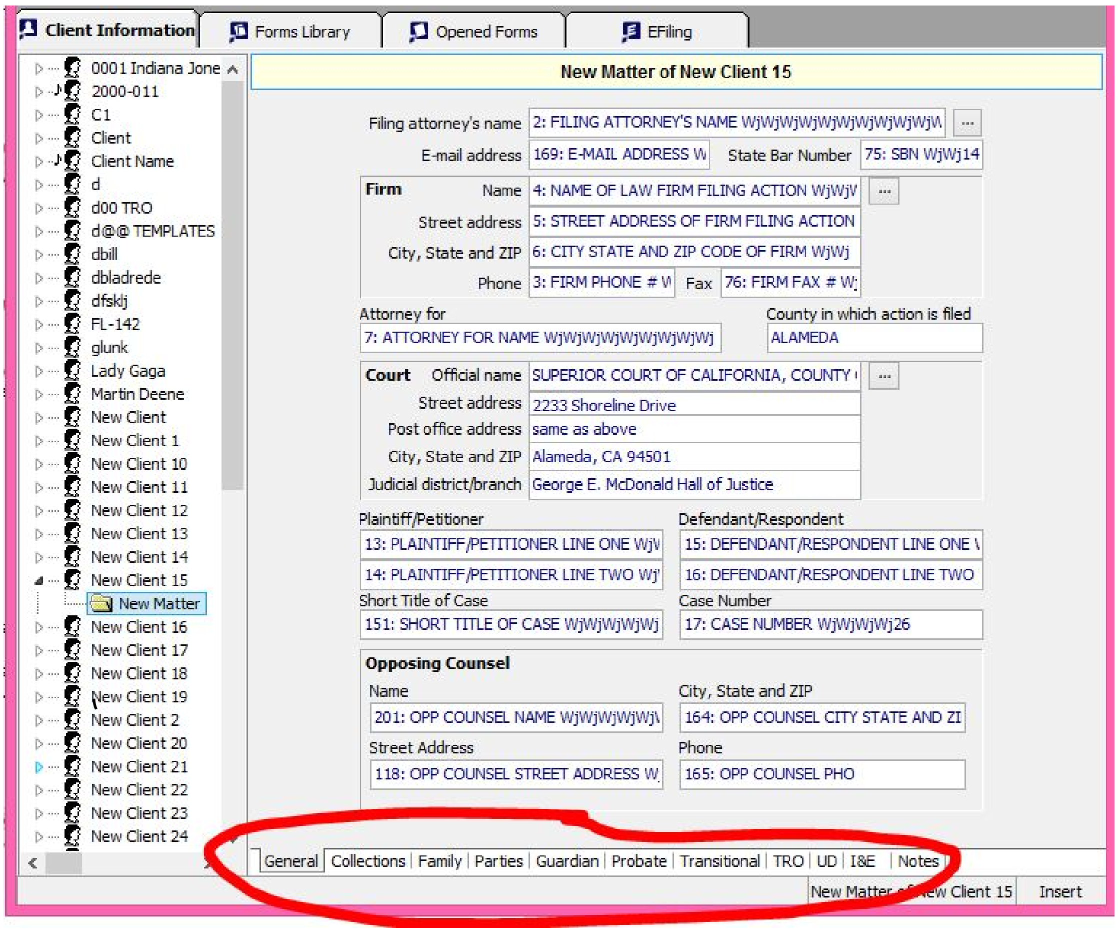
- To see all the matters for this client, click on the right arrow ▷ to the left of the client's name. This will expand the folder as can be seen below:



TIP When you see a right arrow ▷ next to a folder or icon, this means that the folder has something in it. Clicking on the arrow ▷ will open and expand the folder allowing you to view the contents. A down arrow ◢ indicates that the folder is already open and the contents are displayed. By clicking on the down arrow ◢ you can collapse and close the folder.

- Now that you've created a client, click on the **Matter** folder icon and the **Client Profile** data-entry screen displays on the right-hand side of the window. Here is where you enter the appropriate client information, which will be inserted automatically into any new forms you fill out for this client.

- Notice that the data-entry screen has several tabs located at the *bottom* of the screen, as shown below. We recommend *always* completing the General tab and then filling the other data-entry tabs that are appropriate to your case.



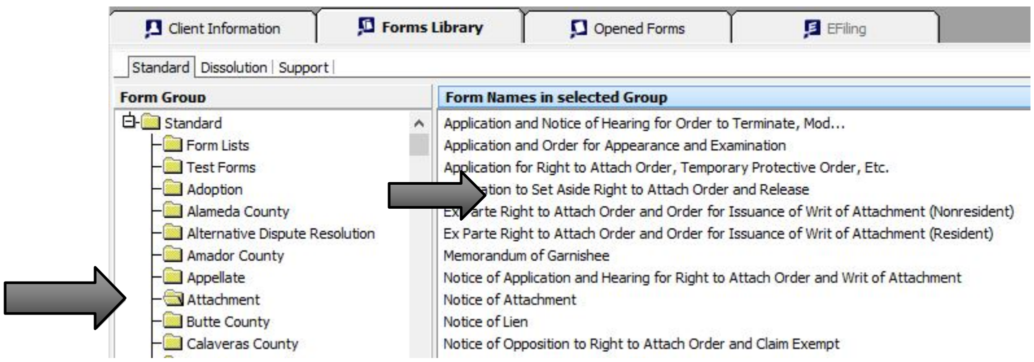
TIP Be sure to complete the information in *all* of the data-entry tabs that relate to your matter. It is to your advantage to completely fill in the fields in the database. Once you have done so, you will not have to repeat any of this information when you create a form for your client. You can change or add information in these tabs at any time.

- You can save the client profile by clicking either the **Save** icon, or by clicking **Save Changes** from the **Edit** Menu. Any time later you can create *additional* new matters by *selecting* the client and then clicking on **New Matter** from the **File** menu.

How to Select & Open a Blank Form

After you have added a new client and created a client profile you will want to select and open a blank form to work on. Here's how:

- Click on the **Forms Library** tab.
- On the left side of the screen under a tab called **Standard**, you will find a series of **Form Groups.** These are *blank* forms, arranged alphabetically in groups designated by the Judicial Council.
- Scroll down to the form group you are interested in and click on the folder. On the right side of the screen will be displayed all of the forms contained in that group. Here is an example of how the screen looks.



- Select the form you want by clicking on the form name with your left mouse button.
- To open the form either double-click the form name, hit Enter on your keyboard, or use the **Open Selected Forms** icon. The view on your screen will automatically switch to the **Opened Forms** tab screen and your form will now be displayed for you to begin filling.

TIP You can select and open multiple forms at once by using any of the following Windows™ blocking techniques:

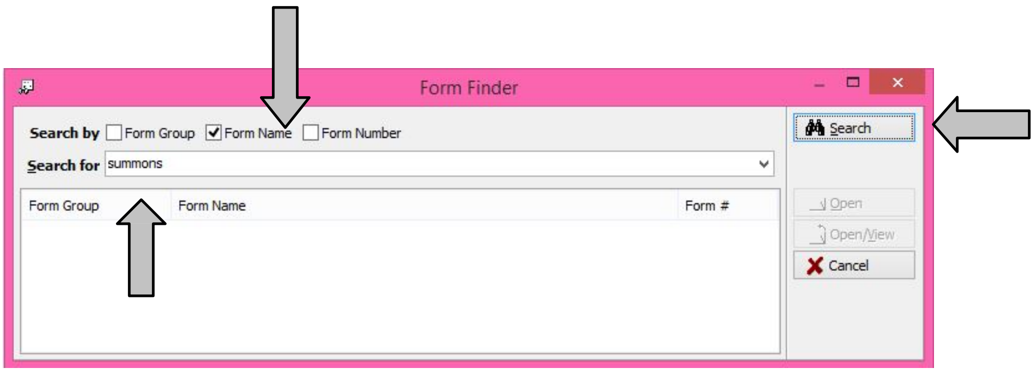
- Hold down the <Ctrl> key and left-click your mouse on the forms you want to open, in any order you wish.
- To select a range of forms, click on the form at the top of the range, and then hold the <Shift> key and click on the form at the bottom of the range.
- To select all of the forms in a group simply click on any form in the group and then hold down the <Ctrl> key and the <A> key.

To open the forms you have selected after using any of these techniques, simply click on the **Open Selected Forms** icon.

Searching for a Specific Blank Form

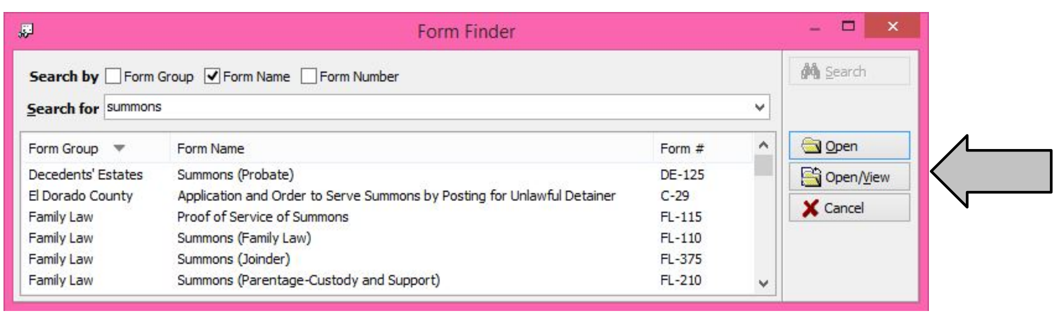
Judicial Council Forms can be difficult to find because they are not always categorized in intuitive form groups. Here's how to find them.

- Click on the **Forms Library** tab.
- Click on the binoculars  icon in the toolbar, or use the **Find** command from the **File** menu. This will open a window called **Form Finder**, as shown below.
- Check the **Form Name** or **Form Number** box and enter the word or number you want to search for, and then click the **Search** button:



TIP When you first open this window, open it to maximum size. That way you'll be able to read the full names on the forms. The easiest way to search is to type just *one* unique word from the form name. That way you will always find a list of forms to choose from.

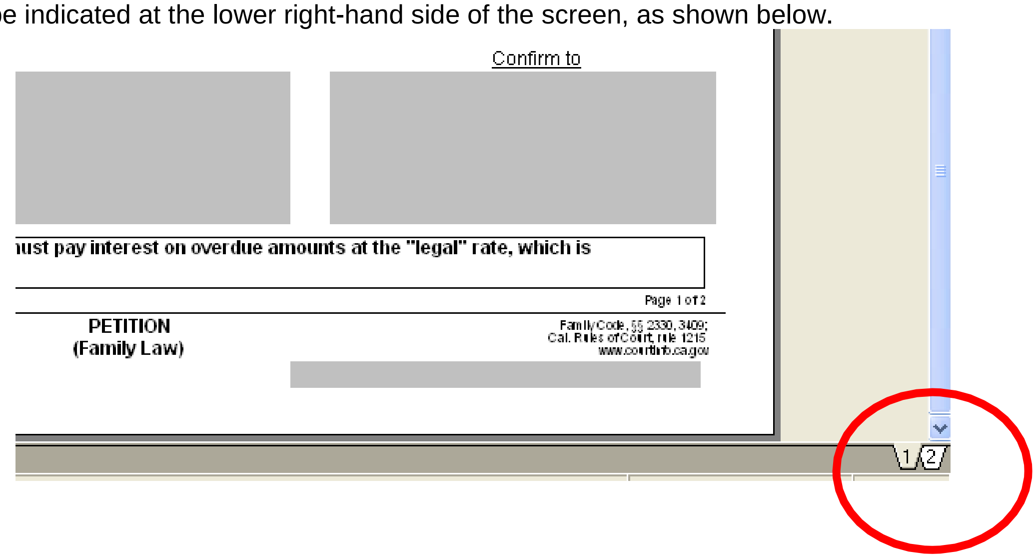
- Select the form(s) you want to view and click on the **Open/View** button on the *right* side of the window. This is illustrated below:



TIP Printing a listing of the forms in a group is easy. In the Forms Library tab, the first index entry in the Standard folder is called Form Lists. Here you'll find listings of all Judicial Council Forms and any local county forms to which you subscribe. Just *double*-click to open any of these lists to view and print.

Filling in Blank Forms

1. Click the **Client Information** tab.
2. Scroll down to the client you want, then click on the sign next to the **Client** icon. This will expand and display all the **Matter** folders for that client.
3. Click the appropriate **Matter** folder icon for that client. This tells the program which client/matter data will be used to populate the form(s), and what folder the completed form(s) will be saved in.
4. Select the blank form you want to work on for this matter.
   - Click the **Forms Library** tab.
   - Select the desired **Form Group** from the list.
   - *Double*-click on the **Form Name/Number** from those displayed on the right side of the screen.
   - The view will automatically switch to the **Opened Forms** screen with the selected form displayed. Notice that the data from the client/matter profile has been automatically inserted into the form.
5. Fill out the remaining fields on the form. If this is a multiple-page form, the page number will be indicated at the lower right-hand side of the screen, as shown below.

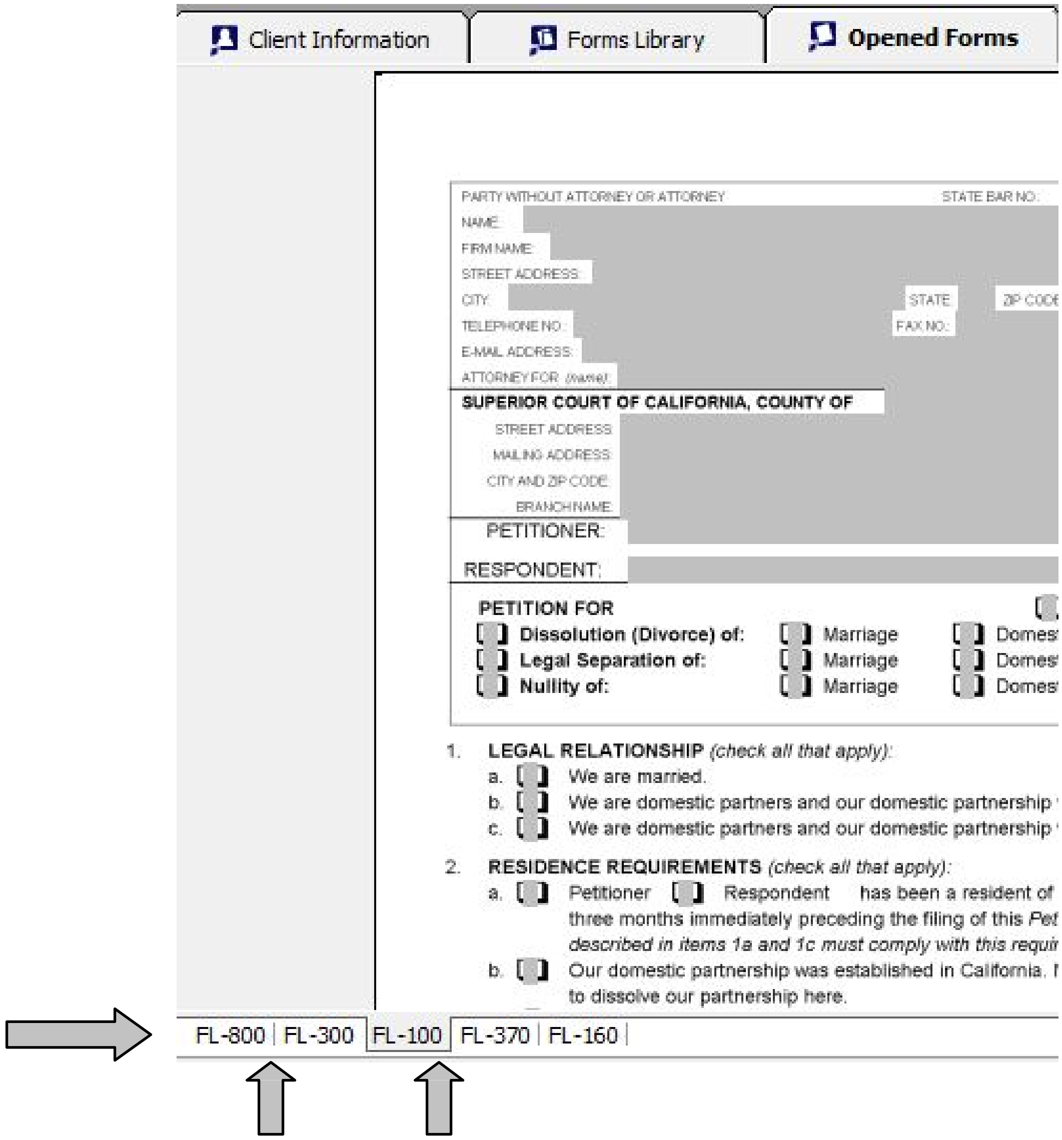


TIP You can move from *field to field* by using your “tab” key, or simply place your cursor directly in any field and left-click.

6. To print a form, simply click the **Print** button on the tool bar, *or* you can click **Print form** on the **File** menu.

7. Save the completed form by clicking the **Save Form** button on the tool bar, *or* select **Save form** from the **File** Menu. (If desired, you may enter a descriptive comment for the form to be saved. If you do so, you will notice that a “musical note” icon will appear next to the form name in the Matter folder. This indicates that there is a note associated with the form).

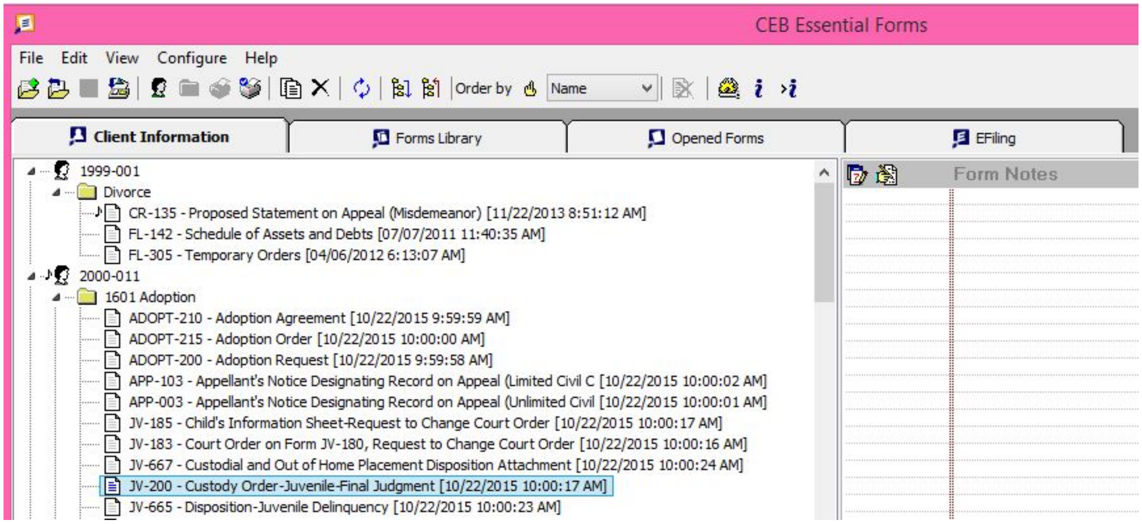
TIP You can open, create and/or edit multiple forms at once for the same client/matter without having to close any other form. The bottom of the screen has a separate tab for each opened form. (see illustration below). Simply click on a tab to move between the forms. This feature allows you to view and copy data from one form to another.



Finding Saved Forms

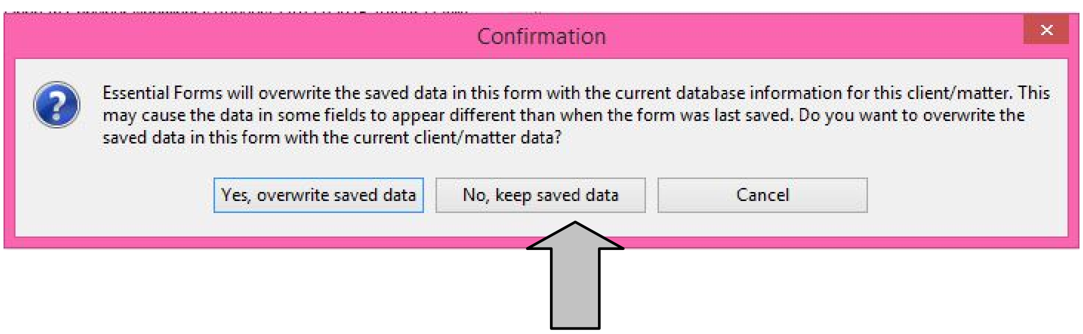
Once you have completed and saved a form for a client/matter you can recall it to the screen for editing or printing. Here's how:

- Select the **Client Information** tab**.**
- Scroll down to the client name you are looking for, and then click on the arrow next to the **Client** icon. This will expand and display the various matter folders for that client.
- Now click the arrow next to the matter folder you want. This opens up that matter folder and displays all of the saved forms for that matter, as illustrated on the next page. Note that it also shows you the date and time that each form was last saved.



- *Double-click* on the saved form you want to work on and it will be displayed in the **Opened Forms** tab. You may now edit the form if desired. Don't forget to save the form if you make any changes!

TIP The program may display a warning screen (as shown below) asking you if you would like to overwrite your saved form with the current database information. Unless you have recently made changes to your database information, or if you are not sure, you should click on the "No, keep saved data" button. If you click on the "Yes" button it will *overwrite* any fields in the saved form with data from the client/matter database, including any database fields that may have been left blank.



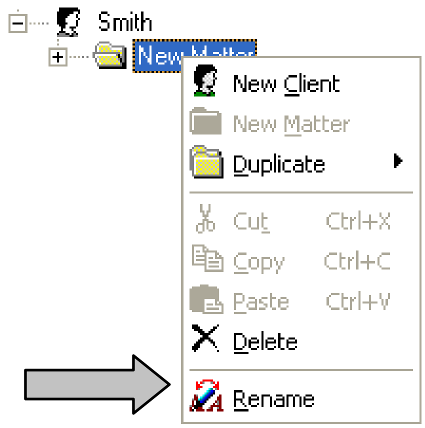
Renaming Clients, Matters, and Saved Forms

From time to time, you may need to edit or rename a *Client* or *Matter* folder or a *Saved Form*. Here's the procedure to rename:

- Using the *right* mouse button, click the **Client** icon, the **Matter** folder, or the **Saved Form** icon itself.

This will bring up a pull-down menu.

- Click **Rename** at the bottom of this menu, as shown below:



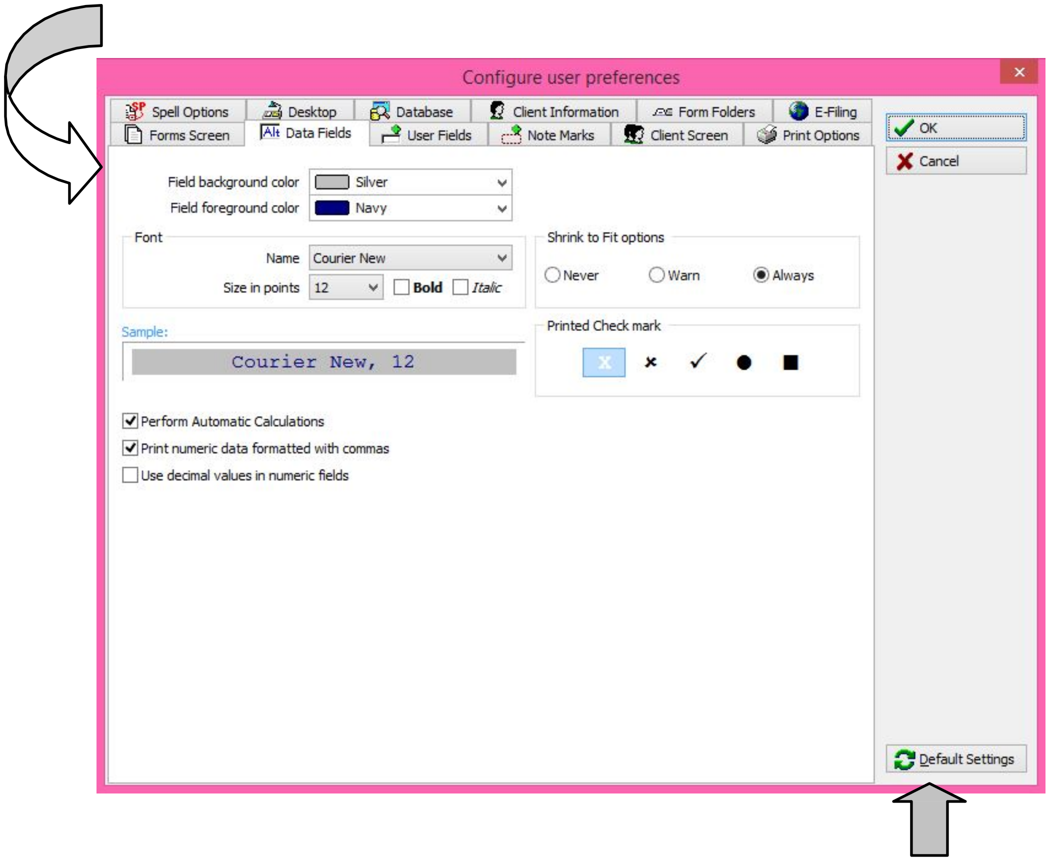
- The selected client, matter, or saved form name field will now become *active* (highlighted), so just start typing the desired name. Click on either the folder or matter icon itself, or hit the Enter key on your keyboard, to save your changes.

Using Our Essential Features:

Configuration Settings

You can *customize* many of the default settings and operations of the special features described in this section. Here's how to change these settings.

- Select **Configure,** then **Preferences**  from the **Menu** bar.
- A window called **Configure user preferences** will be displayed. Click on *any* of the twelve tabs and adjust the settings to your preference, as illustrated on the next page.

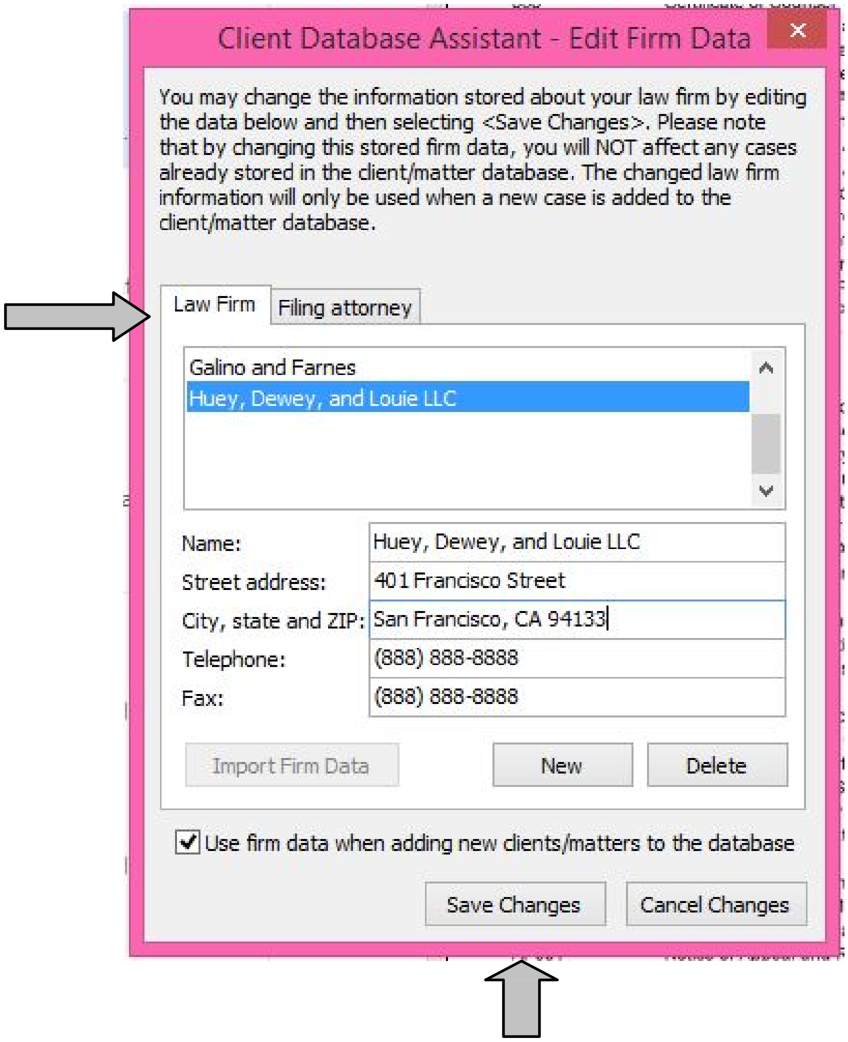


TIP When you have adjusted any setting(s) as desired, you can save the new setting(s) by clicking the "OK" button in the upper right corner of the Configure user preferences screen. You may restore the program to using its original default settings by clicking the "Default Settings" button, as shown above.

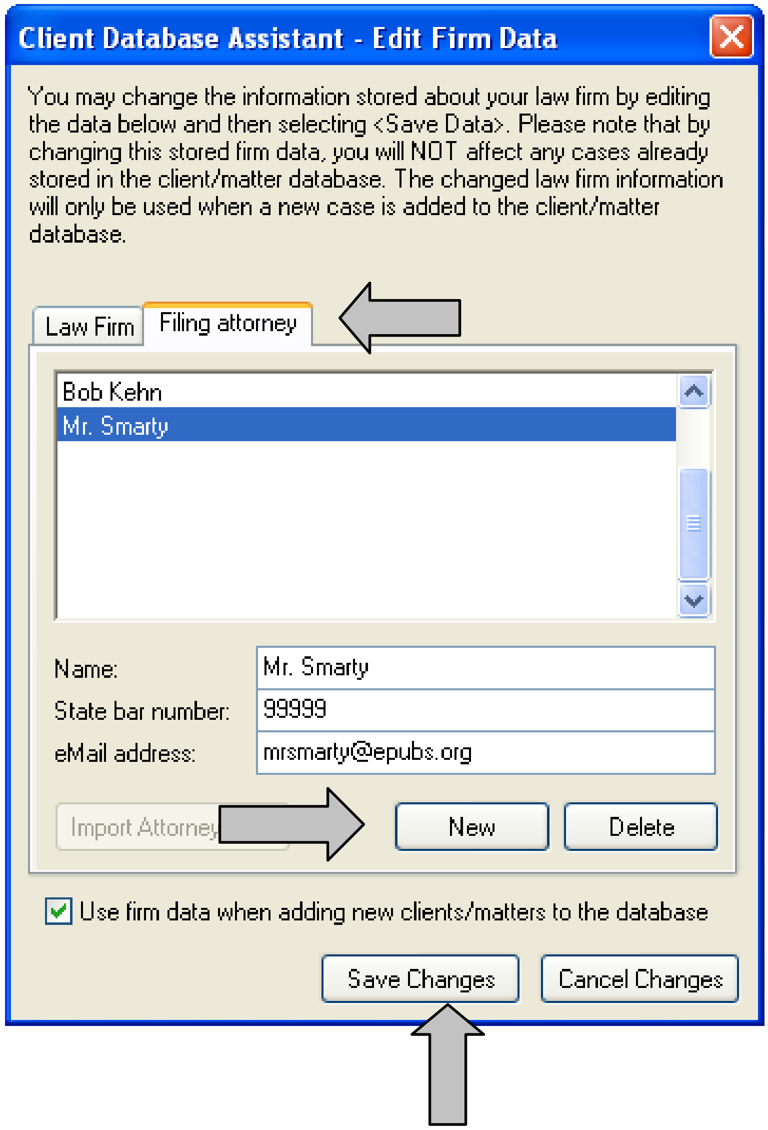
Adding & Editing Firm Data

If you elect to use this feature, the **Firm** database is designed so that you enter firm information, such as its name and address, and/or the attorneys' names and bar numbers, only once. This information then will be added automatically when new clients and matters/cases are created. Please note that this information will NOT overwrite any data already stored for any existing clients and matters. If you need to edit the Firm database or add additional attorneys, here is the procedure:

- Select **Configure** and **Firm Data** from the **Menu** bar.
- You will now see a window called **Client Database Assistant-Edit Firm Data.** Click on the **Law Firm** tab inside the window.
- Check the **Use firm data when adding new clients/matters to the database** checkbox in order to make the Client Database Assistant window active, which then allows you to enter information for your law firm.
- Just add your firm information, or select your firm from the list, make whatever changes you desire and click on the **Save Changes** button at the bottom. If you want to add another law firm to this list, simply click the **New** button, fill in the appropriate information and save your data. You may also delete any law firms from this list by highlighting their entry and clicking on the **Delete** button:



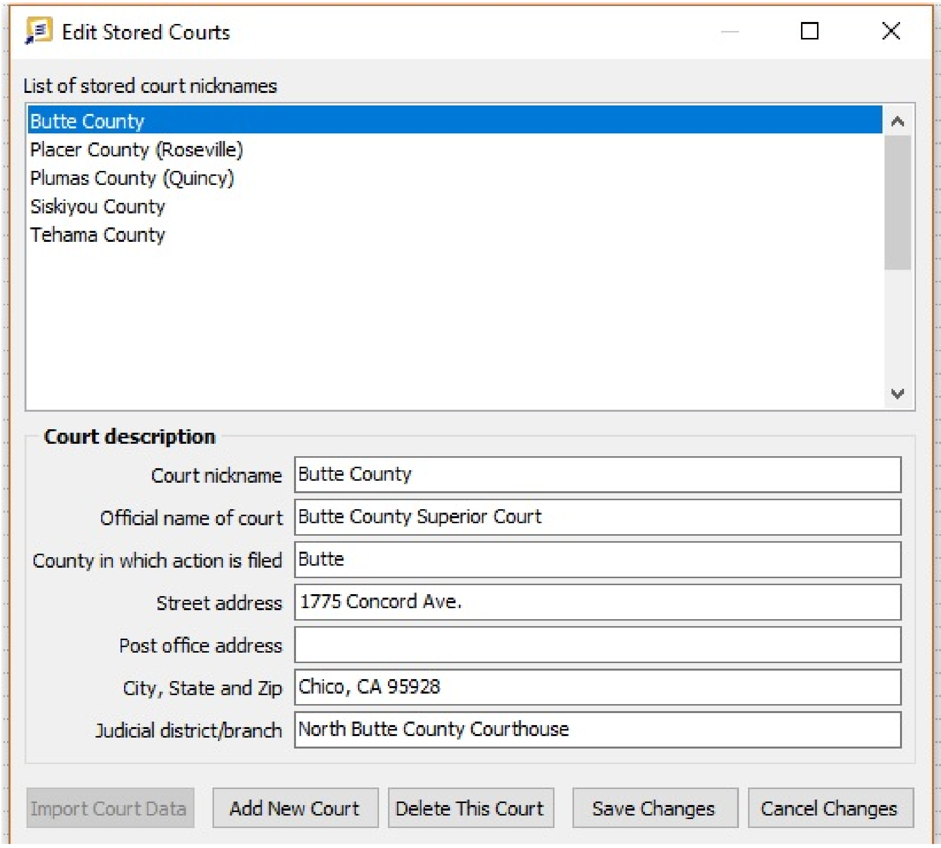
- Note that if you want to use the firm data for an *existing* client, you can do so by clicking on the **Import Firm Data** button inside the window. You will see a screen showing your list of clients, from which you select the one containing the firm data you want to import. Don't forget to click on the **Save Changes** button after you have finished.
- If, after viewing the data, you determine no changes are necessary, simply click on the **Cancel Changes** button.
- You can also edit or add attorneys to this database. Select the tab labeled **Filing attorney**, then choose the attorney that you wish to edit, and make whatever changes you desire. Don't forget to click on the **Save Changes** when you are finished. If you want to add another attorney to this list, simply click the **New** button, fill in the appropriate information and save your data. You may also delete any attorneys from this list by highlighting their entry and clicking on the **Delete** button:



Adding & Editing Court Data

If you elect to use this feature, the **Court** database is designed so that you enter information about each court, such as its name and address, only once. Then when you add new clients and matters/cases, you simply select the court the matter will be filed in and the court data will automatically be filled into the Client matter/case database. If you need to edit the Court database or add additional courts, here is the procedure:

- Select **Configure** and **Court Data** from the **Menu** bar.
- You will now see a window called **Edit Stored Courts.** If you need to change some of the existing information, simply select that court in the list of stored courts and change the appropriate information in the Court description fields. When finished, click on the **Save Changes** button.



- You can also add new courts to this database by simply clicking on the **Add New Court** button and filling in the Court description fields.

- If you no longer need to use a specific court, you can delete it from the Court list by highlighting it, and then clicking on the Delete This Court button.

Shrink-to-Fit

As you edit your forms, you will probably notice that sometimes there is not enough space in a field to enter all of the data. Our **Shrink-to-Fit** feature will automatically reduce the size of your font as you type so you can fit more text in the field. The field starts with a 12-point font by default. When the cursor reaches the end of the field, the font will change to 10-point, and then to 8-point if necessary. We don't shrink the font any smaller than that to keep it readable. The Shrink-to-Fit feature is set to "Always" by default so that its operation is automatic. If you wish to change this, see below:

TIP You may adjust this feature's operation by going to the top menu bar, selecting "Configure"/ "Preferences" . Click on the "Data Fields" tab and towards the bottom of the page and select the choice you want. Here is how each choice operates.

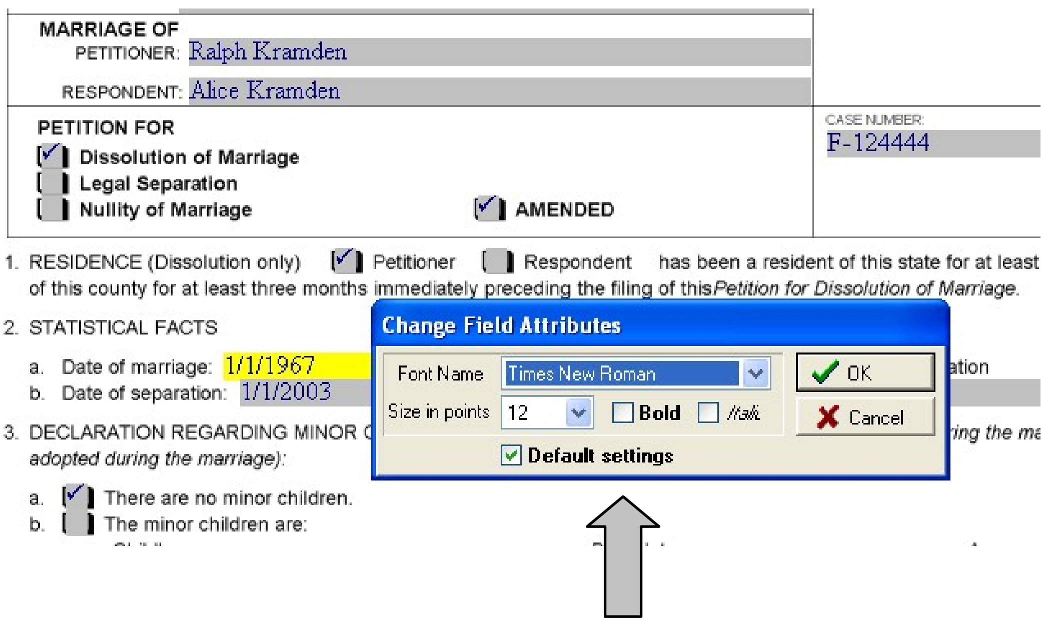
Always: Shrinks-to-fit automatically as you type. This is the *default* value.

Warn: Displays a dialog box when a field has been filled, offering shrink-to-fit options.

Never: Disables Shrink-to-Fit (however, font size may still be manually adjusted).

In addition to using the “Shrink-to-fit” feature, you might want to try other fonts that have different spacing patterns to allow you to squeeze more text into a field. Here’s how to change the font for that field:

- Click in the field with your *right* mouse button and select **Attributes** from the menu. This will bring up a window called “Change Field Attributes”. Here is where you can change or reset the font, font size, and other attributes for that field. Make your changes and click on the **OK** button. This change will be for that field *only* and will not affect any other field on the form. An example is shown below.

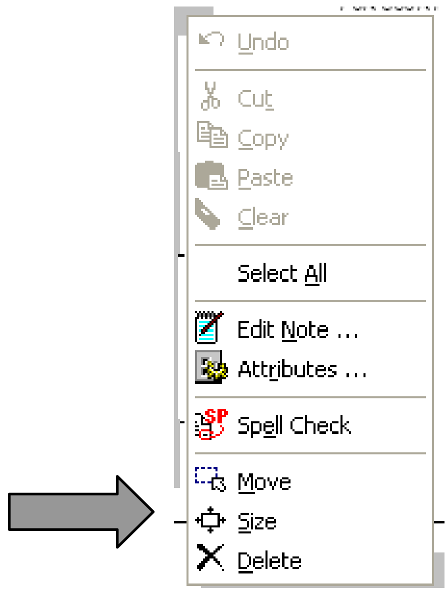


Adding a New Field

Often, even if you use the Shrink-to-Fit feature, the field sizes on Judicial Council- and court-designed forms are still not large enough for your data. Or maybe there is no existing field where you wish to put your information. The answer is to add a new field. This added field can be *any size* and can be placed in *any location* you want. Here’s how to add a field:

- Click on the **Edit** menu at the top, then select **Add User Field**; *or*
- Click the **Add User Field**  button on your tool bar.
- Either method will make your cursor *active*. Move the cursor to where you want to create a new field.
- Now click and *hold down* the left mouse button while you drag your mouse right (or left) and then down (or up) to draw a rectangular text field. *Release* the left mouse button when this field occupies the size and position you want. (Note that it is possible to add a field by just using this step without using any of the first two methods mentioned above).
- Click in the *new* field and begin typing.

TIP You can move, re-size, delete, or change all of the characteristics of this field by simply clicking on the new field with your *right* mouse button to get the properties menu. Here is what that menu looks like:



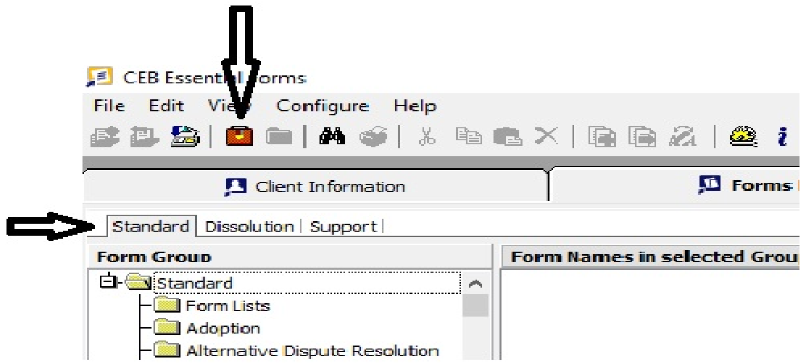
Creating Custom Form Folders

Essential Forms installs a *Standard* folder containing the entire set of Judicial Council forms, any local county Superior Court forms you subscribe to, and complementary Non-Judicial Council forms. The **Custom Form Folders** feature allows you to:

- Quickly find and open your most commonly used forms by creating folders of blank forms in groups that make sense to you. This will allow you to store the forms you need on a regular basis in one place. You can create as many custom folders as you like.
- Using standard Windows *drag and drop* controls and edit commands, forms can be copied to, moved among, arranged in, or deleted from your folders.

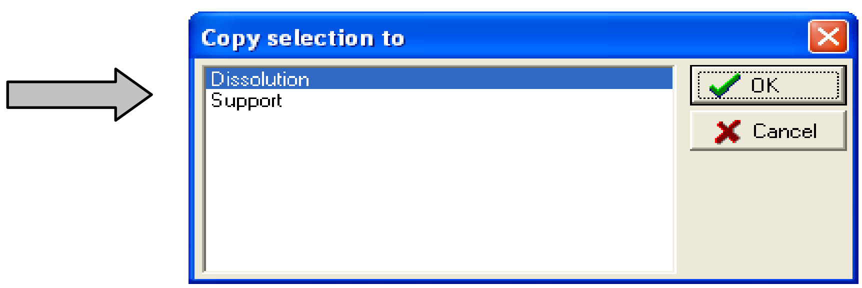
HERE'S HOW:

- Click on the **Forms Library** tab at the top of your screen.
- On the menu bar select **File|New Folder**, or click on the **New Folder** button on the tool bar.
- Type in the name that you want to call your custom folder. We recommend you use short names such as "Probate" or "Disso".
- Press the **Enter** key to create your new tab. The new folder will appear to the right of the Standard tab as shown below. You are now ready to start choosing the forms you will put into your new folder.



- Click on the tab labeled **Standard**, which contains blank copies of every form, including any local county forms to which you subscribe. Select the appropriate form group. The names and numbers of the forms in that group will now be displayed on the right side of the screen.

- Select the form you want to copy and then click the **Copy Selection to Another Folder** icon from the toolbar. This will bring up a dialog box enabling you to choose which folder to copy the form into, as shown below:



- Select a folder and click **OK**. A copy of the form will be placed in the selected folder.

- If you prefer, you can use the copy and paste functions from the **Edit** menu to accomplish this task; *or*

- Another technique is to drag any form from the forms list (click and hold down your left mouse button) and drop that form into your new custom folder (by releasing the mouse button). Repeat this for every form you want in your new folder.

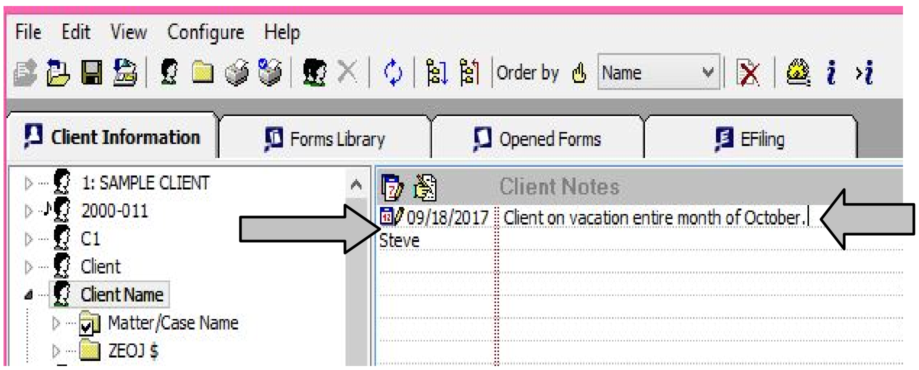
TIP By using any of the standard Windows file selection techniques, you can copy multiple forms at once to the new folder.

Adding Your Own Notes

Sometimes you'll want to attach notes or instructions to a form. You can do so for an entire form or for specific sections of the form. You can create **three** different types of notes, depending on what you want to accomplish.

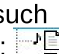
1. **Client Notes, Matter Notes, and Form Notes:** Use this technique when you want to record a note that can be seen when you select a client, matter, or saved form in the Client Information screen. Here's how you do it.

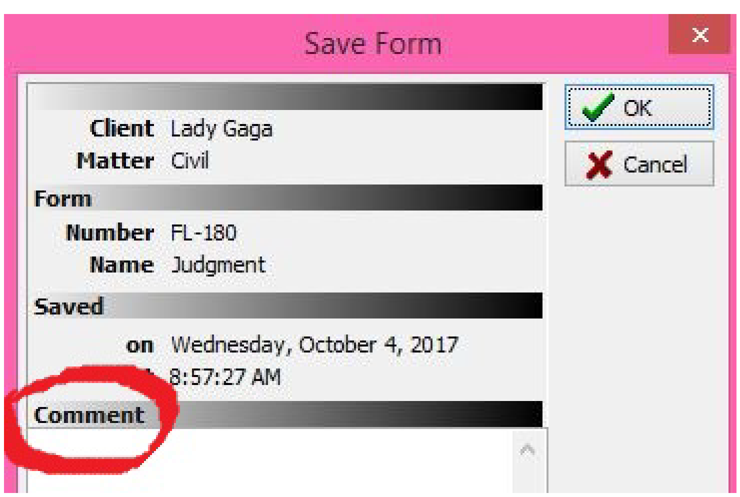
   - Click on the **Client Information** tab.
   - Click on the c**lient, matter**, or saved form name or the icon next to the name.
   - This will display the **Client Notes**, **Matter Notes**, or **Form Notes** window on the *right* side of the screen shown below (to display the Matter Notes, click the *Notes* tab at the bottom after selecting the desired matter):



- To create a new note, click on the **Add Notes** icon  in the upper left corner of the Client/Matter/Form Notes screen. This will imprint the date (and also the logon user ID if you are using the program on a network). Now just type in your note to the right of the ruler line.

- If you want to edit a previous note, click on the **Edit Notes**  icon.

TIP When you save a form for the first time, or select **Save New** when saving a previously saved form, Essential Forms will display a **Save Form** window. This window contains a **Comment** box in which you can type a note before saving the form, as shown below. This comment will display in the "Form Notes" window discussed above, and can be edited there. A form containing such a note will display on the Client Information screen with a musical note mark: 



2. **Open Form Notes:** Use this option when the note or instruction applies to the entire form.

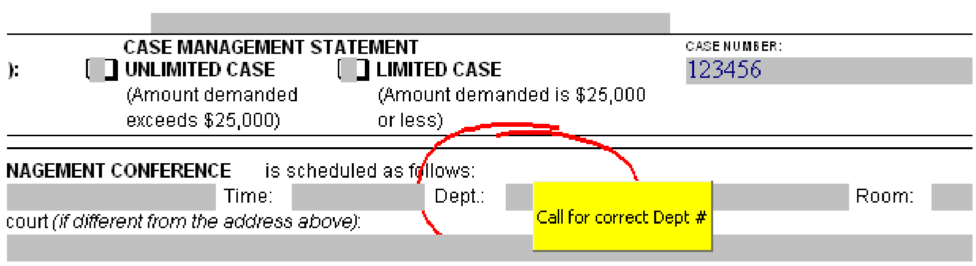
- With the form open on the Opened Forms tab, select **Form Notes** from the **View** menu, *or*
- Click on the **Form Notes** button located on the tool bar. This will bring up a window into which you add your notes or instructions.
- When you have finished typing your note, click the red X in the upper right-hand corner of the form notes window to save the note and close the window.

TIP The Form Notes button will change from black to blue to indicate the presence of a note for that form.

3. **Note Marks:** Use this option when you want to leave a *visual cue* on the form with an attached note. These note marks appear onscreen when you view the form, but do *not* appear on a printed copy of the form.

- With the form open on the Opened Forms tab, select **Add Note Mark** from the **Edit** menu, *or*
- Click the **Add Note Mark** button on the toolbar. This will make your cursor active. Move the cursor to the location where you want to place your note.
- Click and hold your *right* mouse button down and drag the mouse right (or left) and down (or up). You will see a dotted rectangle appear between the point where you started and the point your mouse is currently at. Release the mouse button and a stylized red oval will appear at that location.

- Put your cursor inside the circle's boundary and click with your right mouse button. This will give you several menu choices for that note. Click "Edit Note" to type your note, or any of the other choices as desired. Whenever you hover your mouse within the circle, the text of your note will pop up on a yellow background, as shown here:



Using the Automatic Calculation Feature

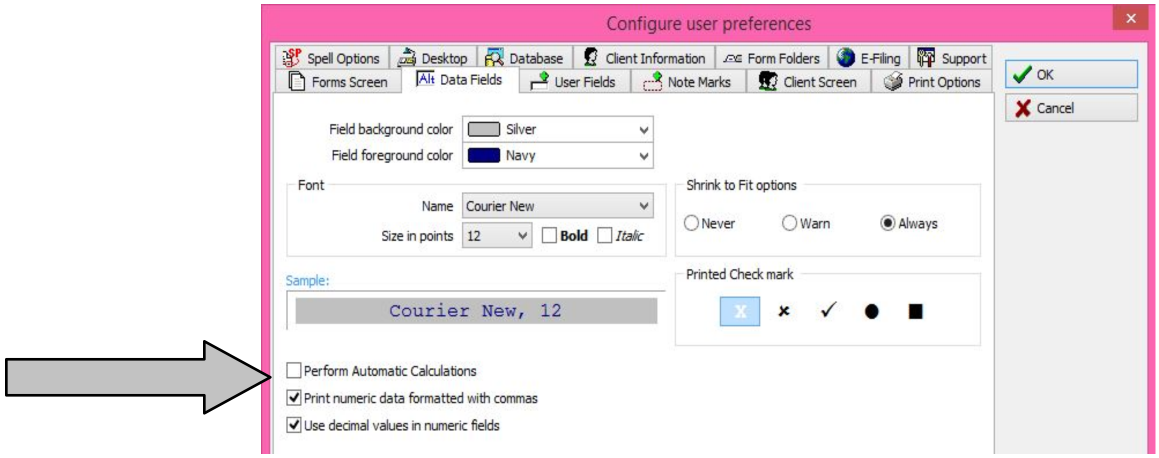
There are many court forms which require you to perform mathematical calculations and type the results on the form. **Essential Forms** will automatically perform these calculations and enter the totals in the appropriate fields by default.

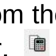
TIP If you would like to modify these totals manually, for example by deleting zeros, you will need to *disable* this feature, as follows:

- Click on **Configure** and select **Preferences** from the menu bar at the top of the page.
- This will bring up the **Configure User Preferences** screen, which has a number of tabs.

Click on the tab called **Data Fields.**

- Toward the bottom of this tab is a checkbox labeled "Perform Automatic Calculations". Simply *uncheck* this box and click **OK** to disable this feature, as shown below:



- Even with this feature disabled, you can still force the program to calculate totals by clicking on the **Edit** menu from the toolbar and then selecting **Calculate,** *or* clicking the Calculate button on the toolbar. 

Configuring Decimals

When calculating monetary data, Essential Forms uses *whole-dollar values* by default. For example, one hundred twenty dollars would appear as "$120". Any calculations performed will be rounded to the nearest whole dollar (for example, 100 dollars divided by three would appear as "$33"). If you need monetary data displayed using both dollars and cents (e.g., $33.33), you can configure the program to automatically do so by following these steps:

- Click on **Configure** and select **Preferences**  from the menu bar at the top of the page.
- This will bring up the **Configure User Preferences** screen, which has a number of tabs. Click on the tab called **Data Fields.**
- At the bottom of this tab is a checkbox labeled "Use decimal values in numeric fields". Simply *check* this box and click **OK**, as shown in the illustration above.
- The program will automatically insert the decimal point in numeric fields as you type.

Other Tips & Techniques:

Creating Form Templates

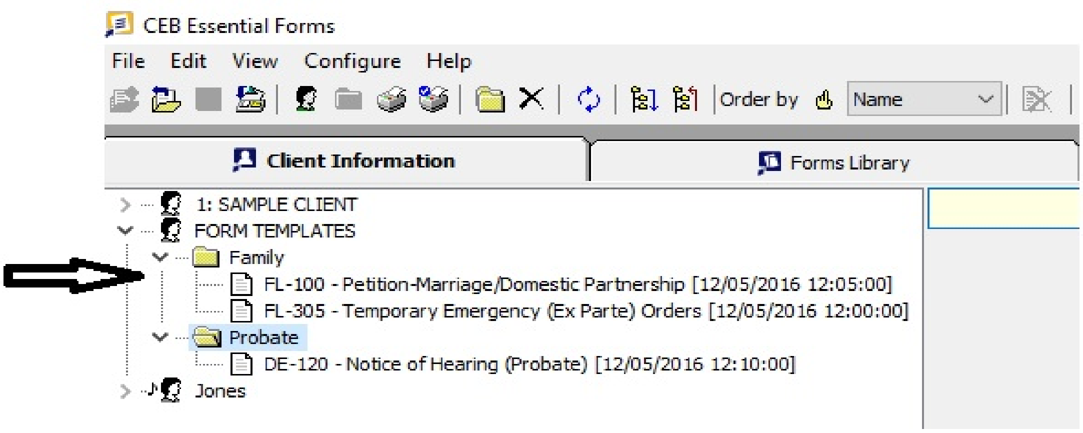
If you use forms where most of the data remains the same from client to client you can speed up the process of filling in these forms by creating form *templates*. Once you have created a form template with the pre-filled data, you simply can copy that template to another client's folder and all of the data from that client's database will also flow into the form. Here's an example of how to create and use form templates:

1. Create a ***new*** Client folder and name it “FORM TEMPLATES” to distinguish it from your real clients. You may also want to set up several “Matter” sub-folders for different types of cases, as shown in the illustration below. Fill in the client/matter profiles with your firm data and any other information that will tend to remain the same from case to case.

2. Select the appropriate “Matter” folder and then click on the **Forms Library** tab. Select and open up as many new forms as you would like. Then click on the **Opened Forms** tab.

3. Now fill in *only* the template data that you want to carry over to *every* client, and once you have completed this task, be sure to **save** the forms.

4. Click on the **Client Information** tab and look for your “FORM TEMPLATES” folder. Here is an example of how it might appear.



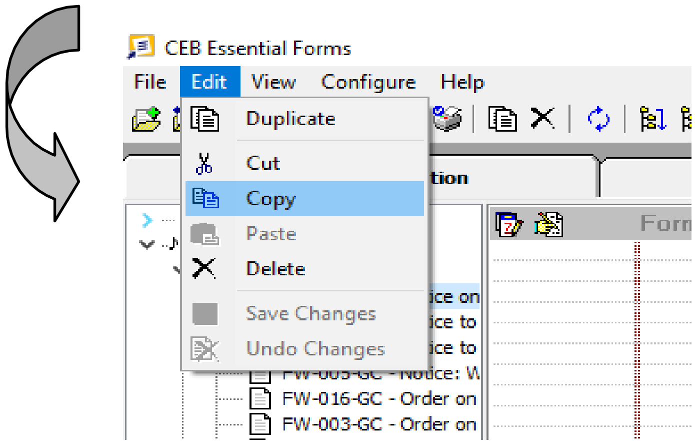
Now you are ready to use these pre-filled Form Templates in your client’s matters.

Using Form Templates

Once you have created a Form Template folder you may want to use one or a set of its forms in a client’s matter. Any form templates you copy into a client’s matter folder will automatically fill in with the data from that client’s matter. There are several ways to do this:

1. From your “Form Templates” folder select the form that you want to copy to a client’s matter folder.

2. Select **Copy** from the **Edit** Menu at the top, as shown on the next page:



3. Now scroll to the client you want, open it, and click on the matter folder where the copy will be placed.

4. Click on the **Edit** Menu again and select **Paste**. This will place a copy of that template form into the selected client/matter folder. Now you can double-click on that form, to open it, and the form will now reflect the client/matter database information *and* all of your pre-filled template data. Add any other information you want to the form and save it.

TIP You can also accomplish the same result by using these other methods:

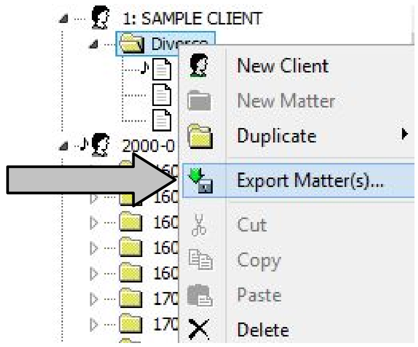
- Use Windows copy (Ctrl+C) and paste (Ctrl+V) functions; or
- Use the Windows drag-and-drop function to simply drag a form from your Form Template folder and drop it into the appropriate client's matter folder.

Exporting Client Matters & Saved Forms

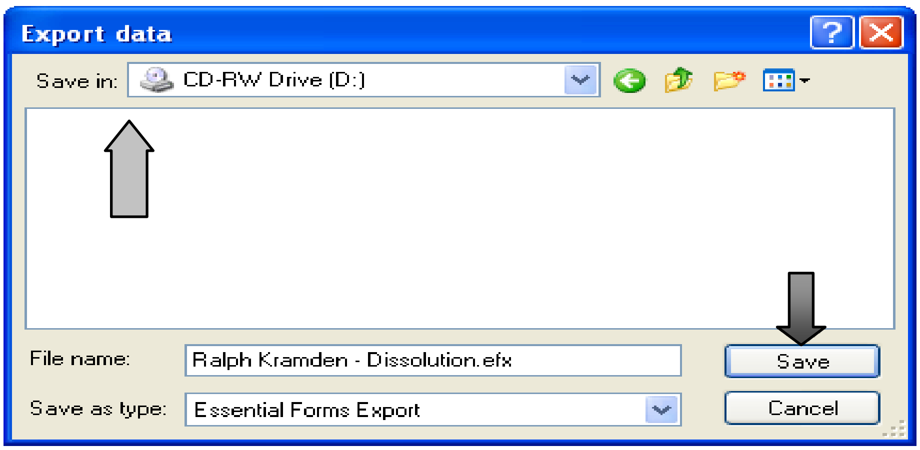
If you want to work on a client's matter at another location or computer, you can do this by *exporting* it (including any saved forms that have been created for that matter) to portable media such as a USB thumb drive or CD, and then *importing* it into a copy of Essential Forms installed at the other computer.

The export feature works by copying the information contained in the client's matter database and all of the saved forms contained in that matter folder onto the portable media that you choose. You *cannot* export data by selecting the client. You must select the *matter*. Here's how to use this feature:

1. Click the **Client Information** tab.
2. Open the client folder and find the matter folder you wish to export. You can select multiple matters for the same client using the standard Windows selection techniques if desired.
3. Either click the selected matter(s) with your *right* mouse button, *or* select the **File** menu at the top of your screen and then select **Export Matters** as shown on the next page.



4. You will see the “**Export data**” window as shown below. Select the appropriate media drive and folder where you want to export the matter data and click on the “Save” button.

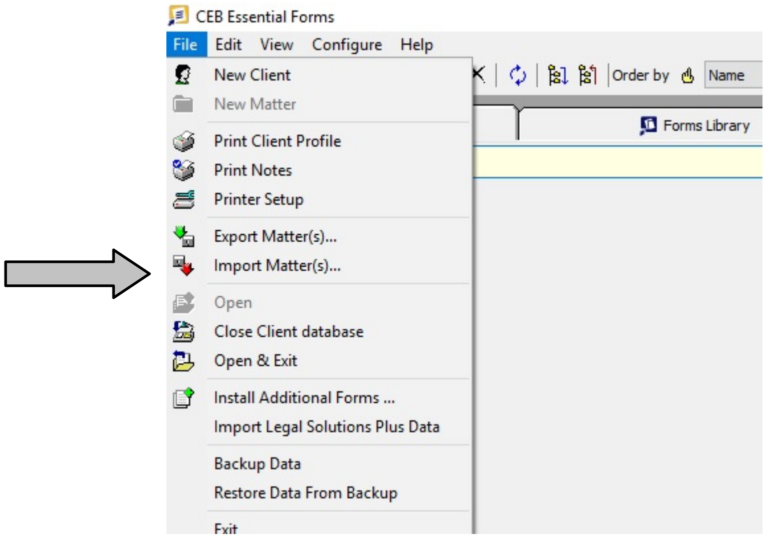


5. Now you can take the media with the exported data to your new location, where you can import this data into Essential Forms on another computer (as explained below).

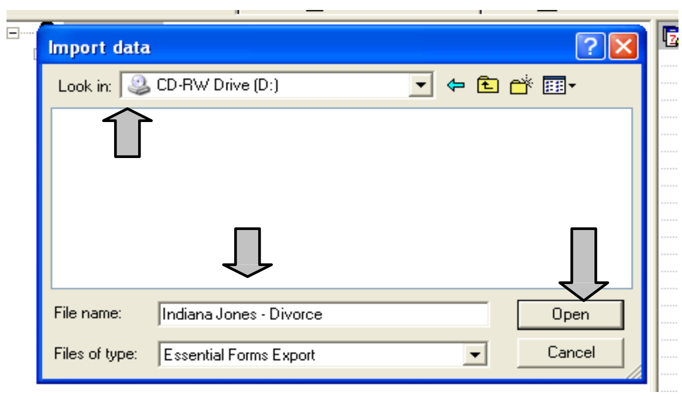
Importing Client Matters & Saved Forms

Once you have exported your client/matter data to a portable medium you can continue working on it by importing it into Essential Forms on a computer at another location. Here’s how:

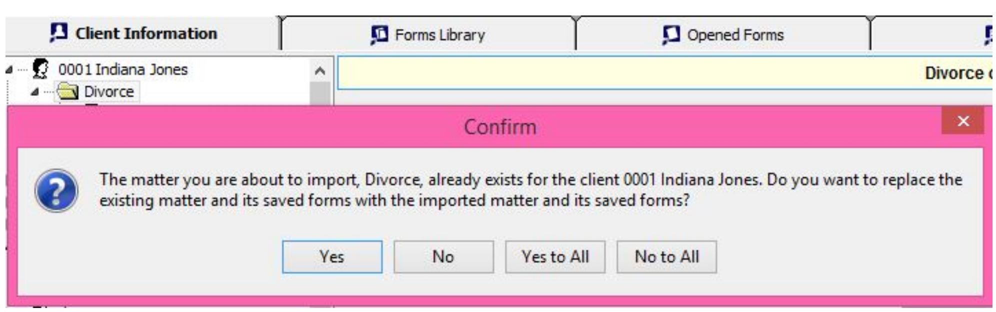
1. Open the **Essential Forms** program on the computer you plan to work on. Select the **File** menu at the top menu bar. Then select **Import Matter(s)** from the pull-down menu, as shown on the next page:



2. You will see an **Import data** window as shown below. Browse to the drive or media containing your exported data and you will see the file name(s) of the exported matter(s). Select one or more matters for import and click the "**Open**" button.



3. The client data will automatically be imported into Essential with all of its associated saved forms. If the copy of Essential Forms you're importing to already has a client and matter with the same names, you will get a confirmation screen asking you if you want to replace the existing matter with the new imported matter, as shown below. Select the appropriate button.



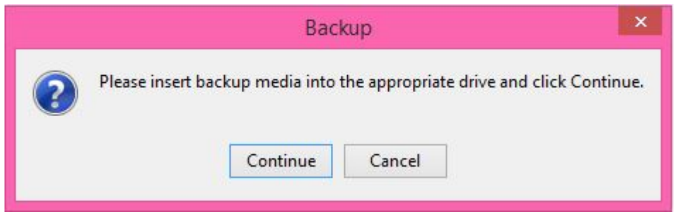
TIP If the matter you want to import already exists under the same client and matter names, but contains different saved forms, you can preserve both matters and form sets by *renaming* the *existing* matter before importing the exported matter from the other copy of Essential Forms. See pages 12-13 for details on renaming matters.

Backing Up Your Data

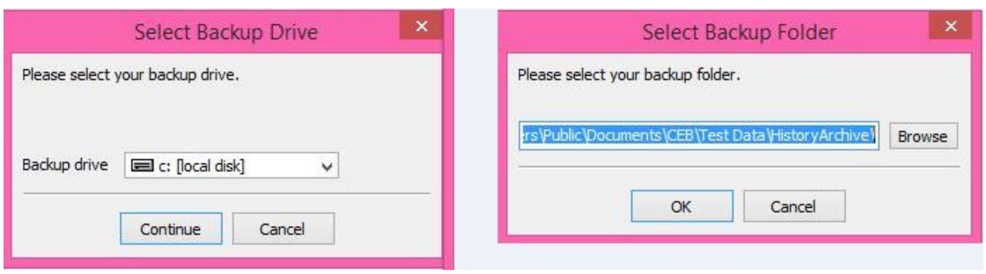
We recommend that you develop a routine to back up your Essential Forms data in order to prevent the loss of your client files if you should experience a hard-drive crash. We have provided a simple utility to accomplish this task. This utility will back up all the data you've created in Essential Forms, including the client database and saved forms. Here is how:

1. Click on **File** on the top menu bar and then select **Backup Data** from the pull-down menu.

2. You will see the following dialog box pop up, asking you to insert the backup media. After you have inserted the media (CD, portable hard drive, USB thumb drive, etc.), *or* if you are saving your backup directly to your hard drive or a network drive, click **Continue**.



3. Next you will see a pop-up (shown below left) asking to select your backup drive. Select the appropriate drive, click **Continue**, browse to the folder on that drive where you want your backup to be saved (shown below right) and click **OK**.



4. When the data backup is finished, Essential Forms will display a pop-up window indicating that the backup was successful. Click **OK** to return to the program.

TIP You can also use the backup feature to move your entire client database to another computer. Just be aware that it will overwrite any existing Essential Forms data on that other computer.

Restoring Your Data

In the event that your client database is lost or corrupted due to a hard-drive crash or power failure, you can **restore** it, assuming that you have previously made a backup of those files.

TIP Essential Forms automatically makes a complete backup of your data whenever you run the installation program from the Judicial Council forms update CD or its equivalent downloadable version. These backups are stored in your Essential Forms data folder in a subdirectory called Release Backups, with further subdirectories for each update period. For example, the folder 1707 would contain a backup for each time the July 2017 update CD or download equivalent was run.

You can also use the restore data utility to move your entire set of client data files from one computer to another. Just be aware that this utility will overwrite any data already existing in the data folder where the restore is done. Here is how to restore your backed-up data:

1. From the top menu bar, click **File** and then select **Restore Data From Backup** from the pull-

down menu.

2. If Essential Forms can't automatically locate your backup file, it will display a pop-up window asking you to select the drive where your backed-up data is located (as shown below left). Select the appropriate drive, click **Continue**, then browse to the appropriate folder and click **OK** (as shown below right):

3. Next you will see a pop-up screen indicating that the program has located the backup data set and asking you if you want to restore this data set to Essential Forms. Remember that it will overwrite any client files that exist, so be sure this is what you want to do. You can also look for the backed-up data in another location. If you are unsure what to do, it is recommended that you call Technical Support before proceeding. Normally when using this utility you would want to restore the data. If you do, click **Restore data**.

4. You will then see one more warning screen to confirm this is what you want to do. Click **Restore data**.

5. The program will now restore all the data in the chosen backup file. This may take several minutes depending upon the number of client files you had backed up. When the program is finished, you will get a screen informing you that the data was successfully restored. You now have full use of the Essential Forms program with all of your restored clients and saved forms as of the date that you backed up your files.

Obsolete & Revised Forms

What happens to saved forms that have been revised by subsequent updates? The program performs several automatic processes when you install a new update. When you re-open a form that's been revised by the Judicial Council or by the local Superior Court, you may experience one of the following:

- If the saved form is still current, or if its revision did not affect its data fields, it will simply be loaded and displayed.

- If the saved form is no longer valid, Essential Forms will notify you that the form is *obsolete* and it will open in **read-only** mode. You can read and copy text you've entered on this form to the Windows clipboard, but the form can no longer be edited. If you print this form it will be *watermarked* as "**OBSOLETE**" in order to prevent its accidental filing.

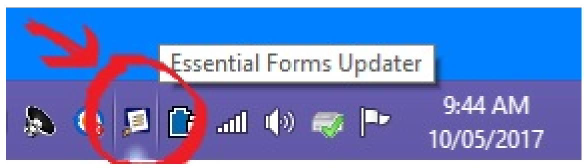
- If the form is not obsolete, but the revision has added, removed, or resized its data fields, it is possible that the saved form's data no longer matches the field structure of the revised form. In this case Essential Forms will inform you of this situation. You may load this form but it is likely that some of the saved data will be truncated, appear in the incorrect field, etc.

- In either of the last two cases, our recommendation is to click on the **Forms Library** tab, find and open a blank copy of the form (which will be the most recent revision available), and re-fill the form.

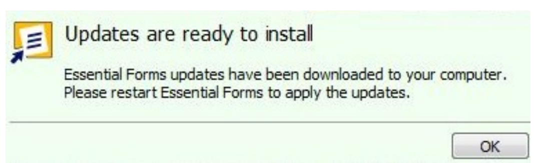
The Essential Forms Updater

CEB produces two Essential Forms Judicial Council forms update CDs per year, one in January and one in July. Installing these updates keeps your subscription current. In addition, if you subscribe to any county local forms add-on modules, you'll receive one or more CDs which will add those to your installation. If the county/ies to which you subscribe update their forms, and/or if the Judicial Council releases new or revised forms that take effect any other time besides January 1 or July 1, the **Essential Forms Updater** will automatically download these updated forms modules over the Internet to your computer and notify you when they're ready to install. Here's how it works:

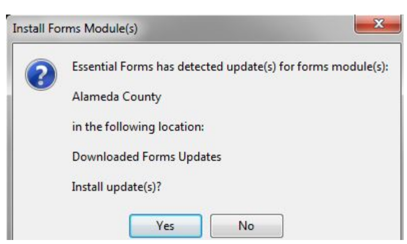
- Your Essential Forms subscription must be current. If a warning is displayed when you launch Essential Forms that "This program contains forms out of date as of…", your Essential Forms Updater cannot check for updated forms. You'll need to install a current Judicial Council forms update CD to restore your subscription to current status.
- When you open Essential Forms, the Essential Forms Updater will automatically launch as well, running in the background. When the Updater is running, you can find it in the *notification area* (bottom right-hand corner) of your Windows Desktop, as shown below (note that you may need to click "Show hidden icons" to see all the icons in your notification area):



- Once per day, the Updater will check our server, and if any updates are available for your installed forms modules, it will automatically download them to your computer.
- Once the available forms modules have been fully downloaded, the Updater and Essential Forms will both notify you that those updates are ready to install, as shown here:



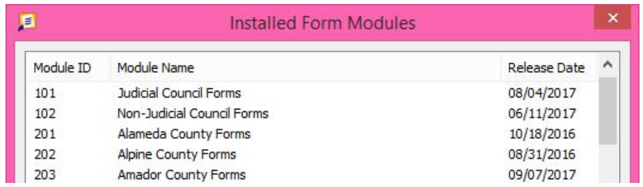
- To install the updated forms module(s), close Essential Forms (and if you're using it on a network, have all other users close Essential Forms as well) and reopen it. When Essential Forms opens, it will prompt you to install the updates, as shown here:



- Simply click **Yes** and follow the prompts to install the update(s).

TIP You can close the Updater, change its settings, or force it to check for updates by right-clicking on the Updater icon in the notification area and selecting the appropriate menu choice.

TIP You can check to see which forms modules you have installed in Essential Forms by selecting **Display Installed Modules** from the **View** menu. The resulting pop-up window will list all the forms modules currently installed on your system, along with the release date of each currently installed module, as shown here:



Module ID	Module Name	Release Date
101	Judicial Council Forms	08/04/2017
102	Non-Judicial Council Forms	06/11/2017
201	Alameda County Forms	10/18/2016
202	Alpine County Forms	08/31/2016
203	Amador County Forms	09/07/2017

System Requirements

Computer/Operating System

Any personal computer running:
Windows 7, 8, 8.1, or 10
(Pentium level recommended)

Printer	Any Windows-compatible printer
Disk Space	300MB available space on hard drive
Network?	Each copy of Essential Forms is shipped ready to run on a network or as a stand-alone application. Note that with a shared database, by default a customer subscription provides access to the data by only one user at a time. Should you desire more users to be able to access shared data simultaneously on your network, please contact CEB Customer Service at 1-800-232-3444 to purchase a 5, 10, 20, 25, 50, 75 or 100-user "Netpack" upgrade.

How To Contact Us

Still have questions? Check out our online FAQ's and start a live chat with a member of our Tech Support team - just click the chat icon on the bottom-right of the FAQ page.

Technical Support: **(800) 870-1101**
Monday-Friday 9:00 a.m.-5:00 p.m. PT
E-mail: **tech_support@ceb.ucla.edu**

Sales/Customer Service: **(800) 232-3444**
Monday-Friday 7:30 a.m. -5:00 p.m. PT
E-mail: **customer_service@ceb.ucla.edu**

On the Web: www.ceb.com