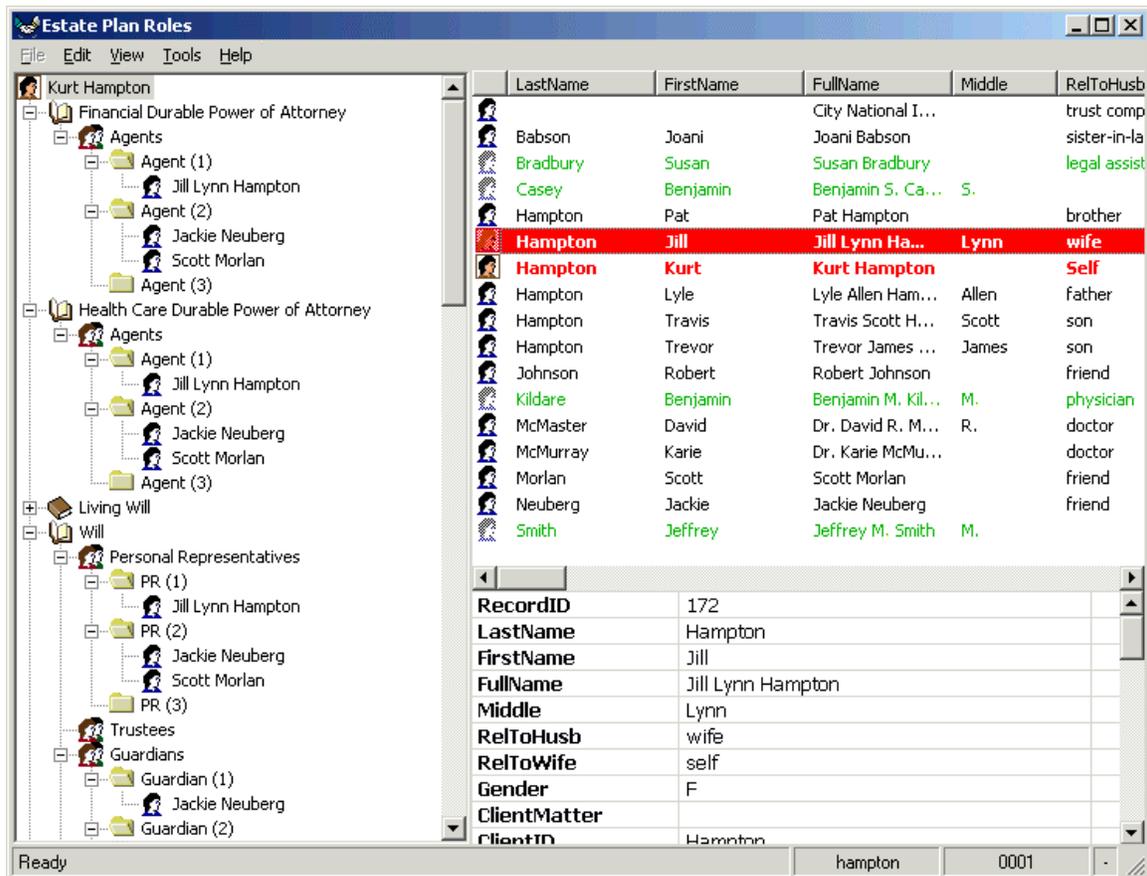


Eidelman Associates

EP People™ Fiduciary Chooser™

User Manual



Eidelman Associates

November 12, 2001

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EP People Fiduciary Chooser for EP Expert™

I. Introduction

A. **Documentation.**

When you first use the program, you should review the “*Quick Start To Using EPPeople*,” which contains a step-by-step list of what to do to create the data and assign the roles for an estate plan. It is not a substitute for this documentation, however.

Also, there is a list of undocumented features or various notes and screen shots to be incorporated into the manual at the end of this documentation.

B. ***This is a Work in Progress***

Our EPPeople module of EP Expert and this documentation are works in progress. As technology changes, and as more law firms get experience with it and request additional features, this program will continue to be enhanced in a number of ways. These enhancements may include the estate planning functionality, the way it integrates with the WinDraft environment, its user interface and programming interface, and the way the setup/installation works. Consequently, do not be alarmed if the version you are working does look or work exactly as described in this document.

Please visit www.lawtech.com/windraftupdate for further information. And please send us an email, or give a call, as you find issues or have suggestions, either as to the program itself or the documentation.

We believe that this manual and the combination of the examples we have set up for your practice system will be sufficient to allow both users and WinDraft System Authors to work effectively with the program. If there are items that are new enough that they haven't been documented, we apologize, and thank you for working with us as we add new features. We believe that it is better to use our latest (tested) work than programming with an older version, even if the documentation isn't yet complete.

C. *Why EPPeople?*

EPPeople solves a difficult document programming problem. In the past, it has been extremely complex and tedious to program fiduciaries for estate planning documents, especially when “mirror image” documents for Husband and Wife are required.

In programming estate planning documents, half of the battle is dealing with people and their roles in the different documents. Simply stated, it is complicated to a degree that far exceeds the amount of effort it takes to solve the problem one project at a time.

Database designers speak of “many-to-many” relationships, and here we have many-to-many-to-many-to-many-to-many. There are husbands and wives, each of whom have many documents, each of which have many fiduciary roles, each of which can have an array of people associated with them (many successors, and at each level of succession, there can be one or more co-fiduciaries), and each person may have a different relationship to the husband and wife.

That complex data structure is compounded by the need to be able to insert this information into documents with great flexibility in the way the data is combined and formatted. The way the information is merged into the documents may vary from state to state, firm to firm, and attorney-to-attorney, depending on the law and the drafting style of the attorneys.

II. The Solution

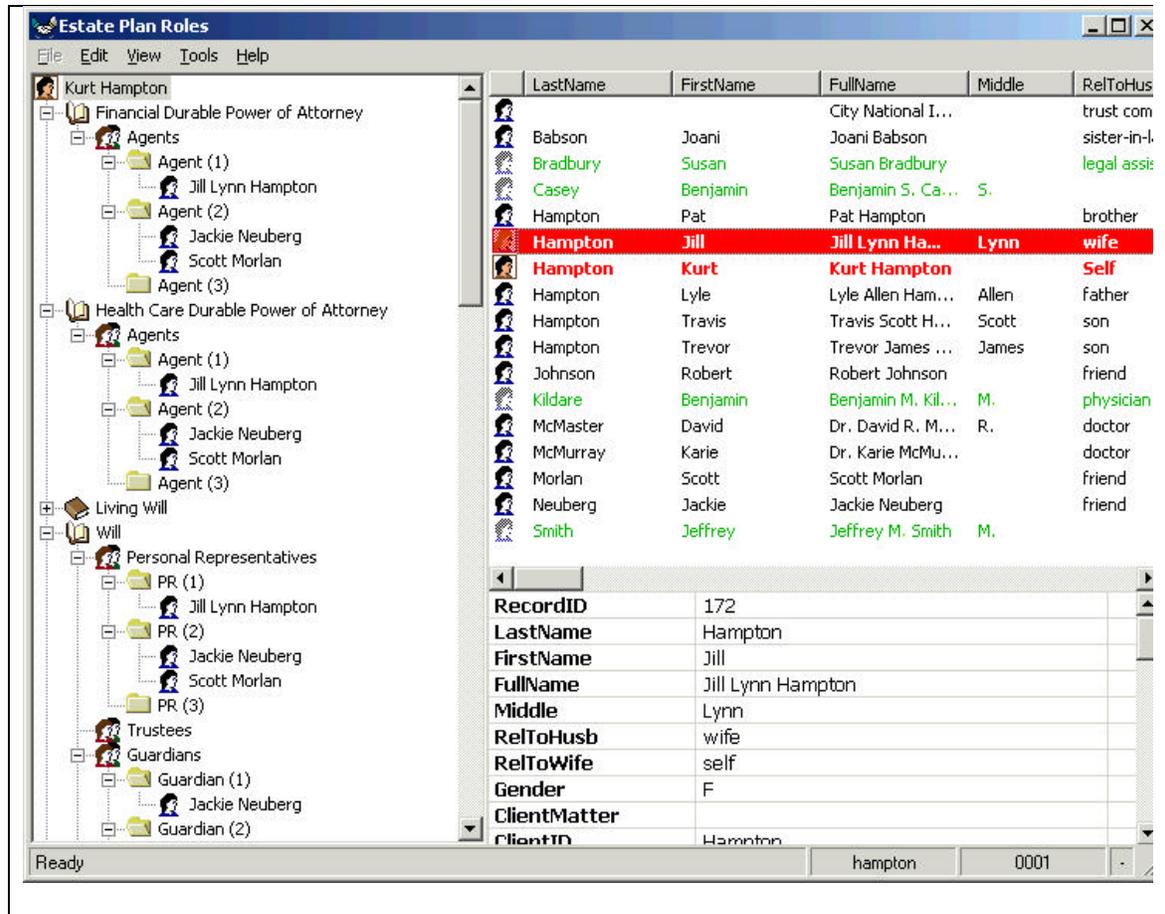
EP Expert now includes a flexible, user-friendly approach to managing the information about people and their roles in the documents; it is called EPPeople. It combines an Windows Explorer-like “tree control,” drag-and-drop interface, and advanced programming approaches using XML¹ and COM².

A. *EP Fiduciary Chooser*

1. Screen – What it looks like

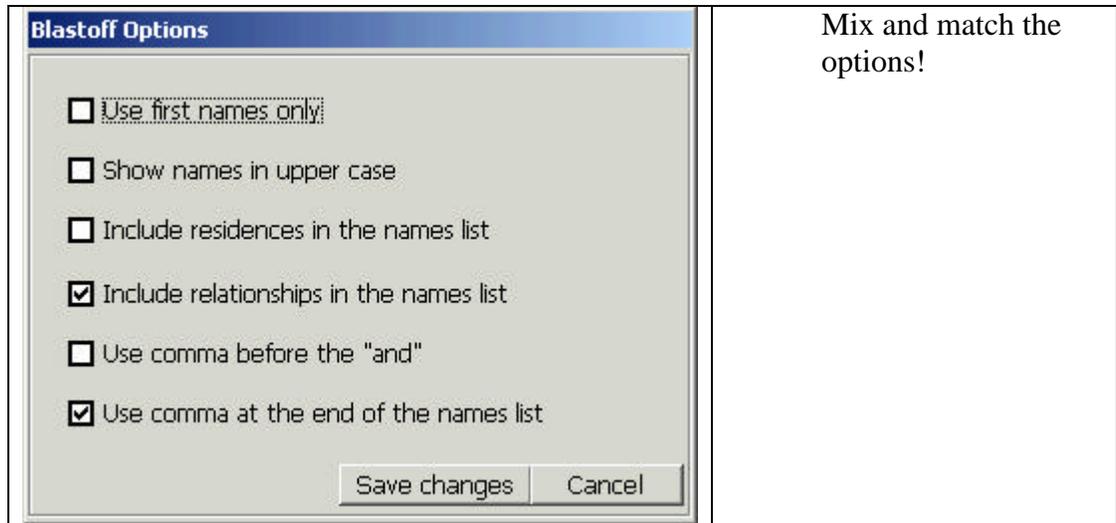
¹ XML – Extensible Markup Language – See www.xml.org, www.msdn.microsoft.com/xml, and “Why I like XML,” <http://www.xmlmag.com/upload/free/features/xml/2000/04fal00/dw0004/dw0004.asp>.

² COM – Microsoft’s “Component Object Model” architecture. See <http://www.microsoft.com/com/>.



2. Benefits to Users

- User-friendly
- Powerful
- Fast
- Only enter each name once, then drag-and-drop the person to the role in the right document.
- Automatically handles punctuation and wording
- Offers great flexibility in the formats you can use to output data into a document:



Examples: The phrases below are variable outputs that can fill in the blank in the following sentence. "I appoint _____ to serve as initial Trustee."

Depending upon the options chosen, here are some ways EP Expert can automatically fill in the blank:

- John A. Smith
- John A. Smith, Fred Smith, and Sally F. Johnson
- my wife, Sally Johnson, my brother, Fred Smith, and my sister, Jane McMurphy
- my brother, ROBERT SMITH, residing in St. Louis, Missouri, and my sister, SALLY F. ROGERS, now residing in San Francisco, California.

3. Benefits to System Authors

- Easier and faster to program
- Consistent naming convention for fiduciary variables
- Great flexibility
- Lower cost
- Removes drudgery from dealing with fiduciaries.

4. The Technology

Uses the modern XML format to store data about the roles. This offers dozens of advantages, including flexibility, compatibility, and ease of use. The programs are written in Microsoft Visual Basic, and interact with your

choice of database. (By default, it's an Access 2000 MDB file (Jet 4.0), but it could also be Access 97, SQL Server, or others).

B. *Entering the People*

1. *Architecture and Benefits:*

The people are stored in a database table. This has several advantages:

- Easy to enter the data
- Enter each person's information just once
- Use the data for other purposes, such as marketing, conflicts of interest searching, and matter management.
- Compatible with other databases the firm uses.

The data is typically stored in Access or SQL Server tables.

III. *Working with the EPPeople.exe Program*

In normal use, the program will be accessed using the first method described below, as an ActiveX program called from within WinDraft's Wddata.exe checklist.

EPPeople can be accessed in two ways:

A. *EPPeople Automatically Linked to the WinDraft Checklist*

EPPeople.exe is an ActiveX component in the Microsoft COM architecture. (See www.microsoft.com/com.) COM stands for "Component Object Model," and is an architecture by which one application can "talk" to another application programmatically.

WinDraft, through its VBScript interface (WinDraft 4.0 and later), and EPPeople both support COM, and can talk to each other programmatically. That is, WinDraft events (button clicks, blastoff, etc.) can launch a VBScript subroutine that tells EPPeople what to do, and vice versa.

The WinDraft practice system checklist now has automatic events and buttons on the WinDraft checklist that activate automatic File New, File Open, and File Save functions so that the user does not need to worry about what the EPPeople file is named, where it is saved, etc. The EPPeople data is saved right within the WinDraft WDD file when it is saved (using Save As), so that neither the user nor any document management system need to worry about managing them

Import/Export Role Data

In normal operation, File|New, File|Open, File|Save, etc. are handled in the WinDraft checklist, and they will automatically create, save and close the

EPPeople Roles data files, saving the data within the WinDraft checklist. If you need to import and export the people information from the WDD file, there are now buttons on the checklist for that:

The screenshot shows a software interface with the following elements:

- A text input field labeled "Client Number *" containing the text "Hampton".
- A text input field labeled "Matter Number *" containing the text "0001".
- A section titled "Use EPPeople to" with two sub-points:
 - (a) edit the cast of characters in the database, and
 - (b) assign roles (drag and drop people to document roles)
- Two buttons: "Cast of Characters" and "Assign Roles".
- A section titled "UTILITY buttons to work with a set of roles for this checklist:"
- Three buttons: "New set of People", "Export Roles...", and "Import Roles..."

B. *EPPeople as a stand-alone Program*

You can also run EPPeople like any other program. That is, it can be launched from the Start|Programs menu, or from Windows Explorer. It has its own File Open, File Save/Save As functions, and to output data to WinDraft, it has its own File|Blastoff function.

To use it in this way, separately launch EPPeople, work with it as a separate program, and use the Windows Taskbar or Alt-Tab to move between WinDraft, Word and EPPeople, just as you do with other programs.

IV. Working with Data

EPPeople can work with data in a firm's own database or case management system, or even with Microsoft Outlook. If set up that way, then your firm may enter clients, matters and people using a different interface.

The examples below assume that you are adding and editing clients, matters and people through our very basic interface described below.

A. *Clients and Matters*

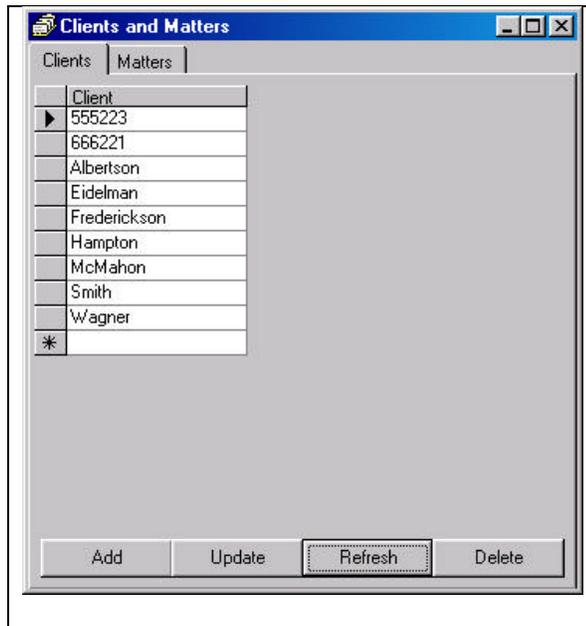
Before you can add people for a client/matter, you need to add a client and matter code.

In normal operation, you add the client and matter code in the WinDraft interface under the File Info screen. When you click the "Assign Roles" button, the system

will automatically create a new EPPeople roles file with the correct client and matter automatically inserted into the database.

Manually, you can also click on the View|Clients and Matters menu choice, and then add a client and matter by clicking on the appropriate tab and add button.

Refresh will sort the list in alphabetical order.



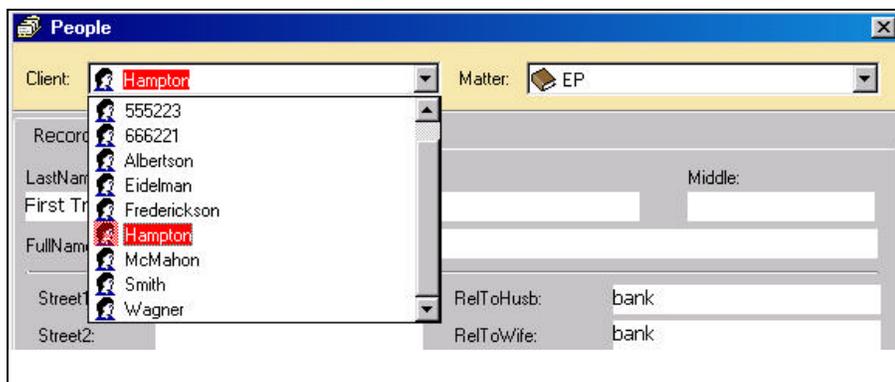
(Implementation Note: It is also possible to have a drop-down box on the WDDATA screen to select the client and matter. Call Eidelman Associates about this customization. In a document management setting, e.g., DOCS Open, it will select files from DOCS Open. Our database will also integrate with the DOCS database or any ODBC database for that matter.)

B. Working with People

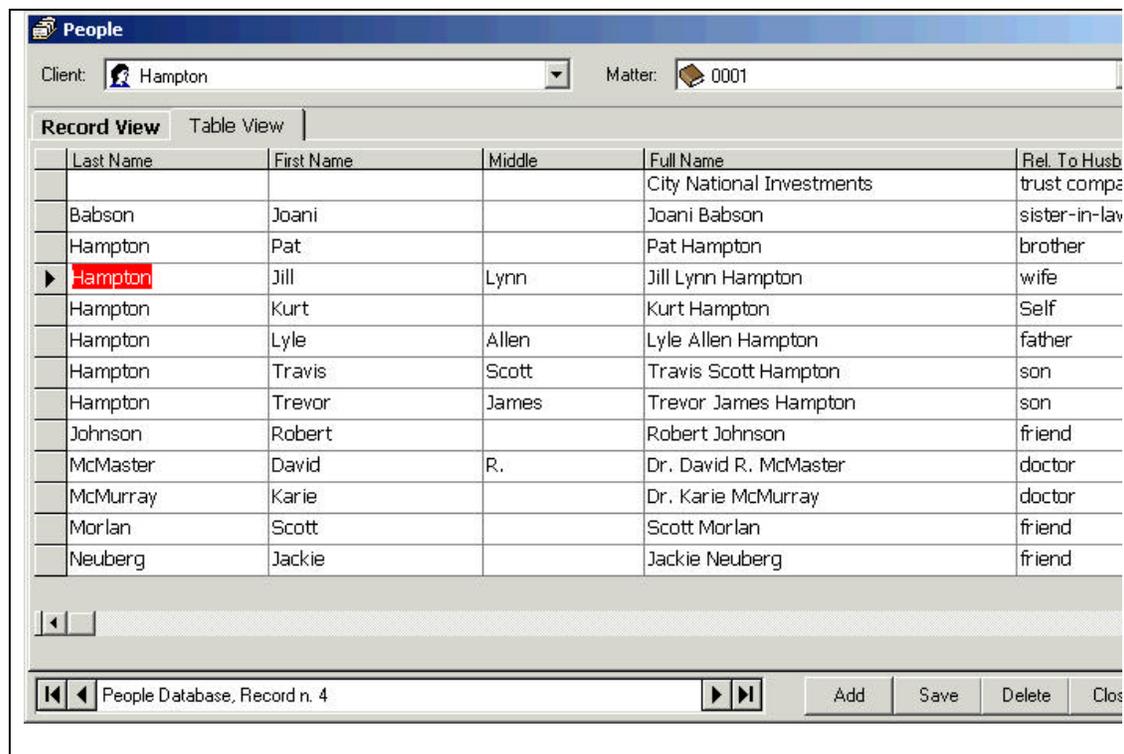
To work with the people, click on the View|People menu, and add as many people as you want for the matter you are working with. You can come back at any time and add more people or make changes.

NOTE: You can filter the data so that you can view ALL the data, or just one client or client/matter.

NOTE FURTHER: when working with people in EPPeople, it will display both matters relevant to that Client and people who are assigned to a special matter called "Common." "Common" is used, for example, to put in the names of attorneys or staff members who frequently serve as either fiduciary or witness.



1. Table View Screen: Enter and view data in table view:



2. Record View Screen: A form for one record at a time

C. **Working with the Roles Tree**

If you are using the standard WinDraft setup:

When you open an existing WinDraft checklist, it will automatically launch EPPeople and load the right people and roles.

When you create a new WDD file with a new Client.Matter:

- First, go to the File Info screen.
- Second, enter the Client and Matter number into the client and matter fields.
- Third, click the “Assign Roles” button.

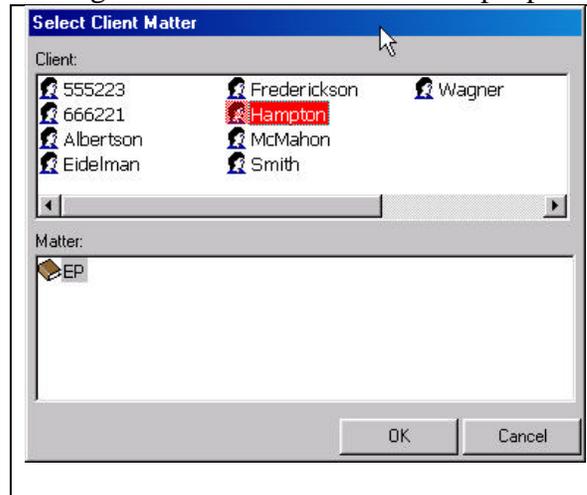
(If the EPPeople interface is in back of the checklist, you may have to click on the EPPeople task on the task bar at the bottom of your screen OR you can alt-TAB to get to the EPPeople screen. You can then add the people to the database, then drag and drop the people to the right roles.

If you launched EPPeople manually, to create a new file from the EPPeople interface, simply run File|New.

1. **Select a Client-Matter**

(If you haven't already entered the data for the client, matter and people, you should do that first.)

First, select a client and matter to work with. This is required to populate the right side of the screen with the people.

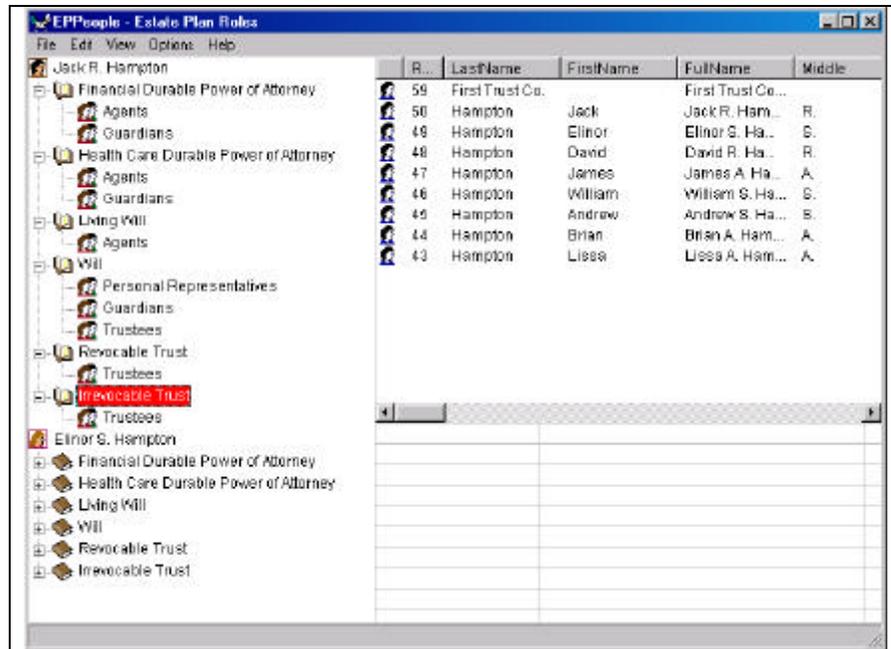


2. The Roles Tree

Here is what the tree looks like before you drag and drop any people to the roles on the left side of the tree control:

As you can see, the husband and wife are at the highest level, then their documents, followed by the roles for those documents.

You can expand and collapse the tree in the same way as with other Windows programs and WinDraft's checklist program.

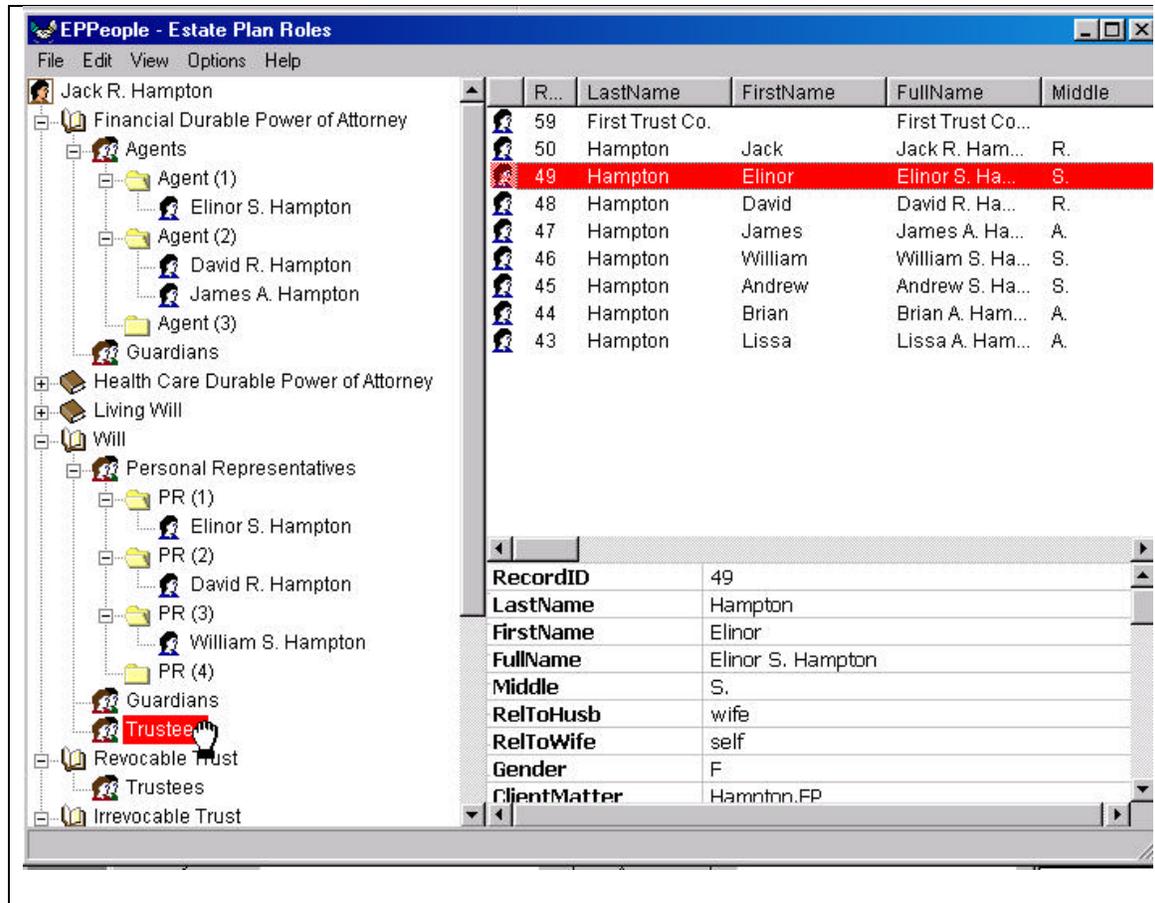


3. Drag and Drop

Start with the Husband's documents. Click on a person on the right, drag them onto the role on the left, and release the mouse button to "drop" the person on the role.

You can have co-fiduciaries by dropping two or more people on any given role.

As you add a person to a role, the system will automatically keep count. That is, if you add Agent(1), the interface will open up Agent(2), and so forth. There is no limit to the number of levels you can have, and there is no limit to the number of people you can have at any level. (Note: The WinDraft System Author must make sure that the document language and the corresponding variables are consistent with the number of levels of roles etc.).



4. Copying Branches of the Tree

a) Copy any Node to any Like Node

The copy function is extremely flexible.

You can copy any node to any node that has the same type of information.

Example:

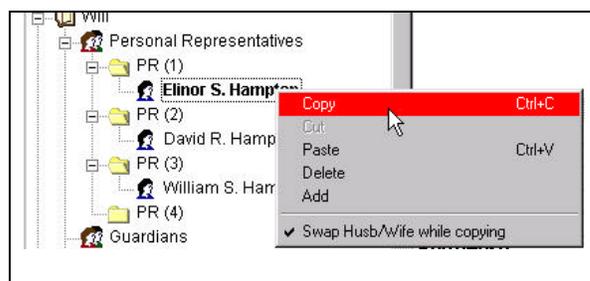
Copy What	To	What gets copied
Husband	Wife	All people, in all roles, for all documents
Husband's Will	Wife's Will	All people and all roles for the will only.
Husband's FDPOA	Husband's HDPOA	All people and all roles for the DPOA

Husband's FDPOA Agents	Wife's Will Personal Reps	All people for the selected roles
---------------------------	------------------------------	--------------------------------------

NOTE: You cannot currently copy all DPOA people to all Will, because the Will doesn't have agents, and the DPOA doesn't have Personal Representatives. That stated, you can do just about anything else.

Copy and paste work just like other Windows application. You can execute them from either the Edit menu, or by clicking the right mouse button on the node you want to copy from and paste to, like this:

Right Mouse Click:



NOTE: If you make a mistake, simply delete the new information you copied.

b) Mirror Image Copying

Just as EP Expert offers an elegant way to handle “mirror image” documents for husband and wife, EPPeople offers an elegant way to handle mirror-image fiduciaries when it copies.

When you copy from Husband's roles to Wife's roles, **the system will automatically swap the Husband and Wife roles, pronouns and the order in which they are mentioned in the documents.** All you have to do is check the “swap” option:



Mirror image copy examples:

Copy From Husband	Pasted to Wife

5. Working with the Tree Display

In general, there is nothing new to learn about working with the tree. It is essentially the same as working with the WinDraft checklist tree or the Windows Explorer tree.

There are a few minor items to note:

1. If you drag a person onto another person, the person you drop will be inserted above the person who was already there.

But if you drag a person onto a role, the person will be placed at the bottom of the list of people for that role.

Be careful when doing this, as it will affect how the people are mentioned in the documents.



2. When working with the data, pressing F5 or Edit|Clean up Tree Display will close all nodes that are empty, open nodes that have people in them, and update the display of any data that has changed. This is a helpful cosmetic tool to handle as the last item after entering all people and all roles.
3. When editing data for people and clients/matters, pressing Edit|Refresh People List will refresh the data with any new data that has changed. This particularly applies to a multi-user setting where another user has changed data for a record you have open on the screen.

D. The People List

The people list contains information about the people relevant to a client's file. The colors help distinguish *common people* (in green), *grantors* (in red), and the people filed under the current client (in black).

Common people can be hidden using the **View | Common People** menu.

(Note that the lines they are on remain, but appear blank. Thus, you won't want to use this feature if you have a large number of attorneys, etc.)

By default, people in the list are sorted by last name. However, sorting is possible by any of the columns in the list by clicking on the corresponding column header. It's also possible to rearrange the columns in the list by dragging and dropping the column headers.

Double-clicking on a person in the list takes you directly to the record view of that person.

E. Saving Your Data

WinDraft has two modes to have the WinDraft checklist program save the data. It can either be saved as a separate .EP file, or it can be saved within the standard WinDraft data file – the normal method.

If using EPPeople as a stand-alone program, use File|Save to save the data as a .EP file.

V. Blast-Off to Output Your Data to WinDraft

A. *How to Blastoff*

In normal operation, EPPeople will blast off automatically when you blastoff from WinDraft's checklist screen.

If the script has not been set up to do that, or if you are operating EPPeople as a separate application, then click the File|Blastoff menu.

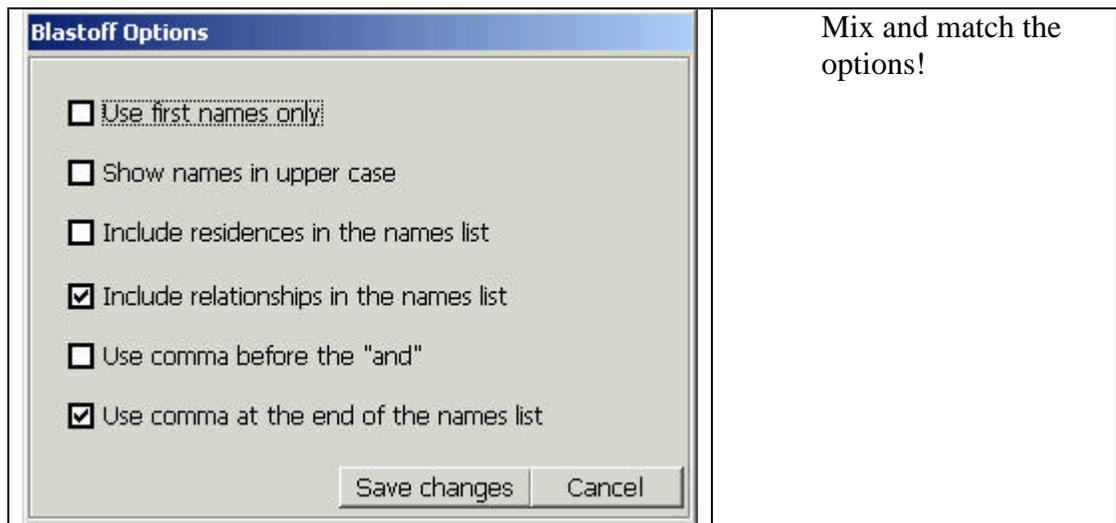
B. *What Happens*

EPPeople will output a number of temporary data files to the Windows TEMP directory so that WinDraft can read that data as it assembles documents. What those files are and what is in them is described in the Technical Notes section below.

C. *Blastoff Options*

WinDraft will output the .Names information with various options (See below). Select those options by clicking on the appropriate choices on the "Options" menu.

The options are saved in the WinDraft.ini file, so they may be different if you change machines or login as someone else.



You can mix and match the options in various combinations.

These options generally speak for themselves, except that the two "comma" options.

- “Use Comma before the “and””
 - Yes – “John Smith, Bob Jones, and Fred Jones”
 - No – “John Smith, Bob Jones and Fred Jones”
- “Use comma at the end of the names list”:
 - Yes – Use this to insert the names in a sentence, such as “I appoint my brother, Robert Smith, to be my Trustee.
 - No – Use this if the people will be listed in a column, and you don’t want the final comma. For example:

“I appoint the following Trustees, to serve in the order named:

First, my brother, Robert A. Smith
 Second, my sister, Sally A. Smith
 Third, my uncle, John F. Smith

Although there are times you might like to mix and match them, at this point the selection is all or nothing.

If you use relationships:

- The system will automatically handle the mirror image relationships correctly. For example, in a second marriage, the husband’s would say “my son, John,” and the wife’s would say “my step-son, John,”.
- If the person names him or herself as trustee, it will output “myself” instead of “my self, John A. Smith,”.

Note that the order will be the same as you see on the tree. If the husband names himself and his wife, it would say “I appoint myself and my wife, Sally A. Smith.” If he lists her first, then it would say “I appoint my wife, Sally A. Smith, and myself to be Trustee.

VI. Printing the EPPeople

There are now at least 6 ways to print out the data that’s in the EPPeople XML file:

A. BASIC PRINT	Version 2.1 and higher has a File Print menu choice that prints out a basic printout of the people and roles.
B. OUTPUT DATA IN TEXT FILE Data is output automatically to a tab-delimited text file that looks like this when attached	The EPPeople data is available for you to print out or otherwise use the role data. Each time we “blast off,” the system outputs not only the data for WinDraft to use in the current set of documents, but an ASCII text file that can be used in any number of different ways. (The format is a tab-delimited table, with the name of the field at the top of each column in the table in the first row.

to or imported into an Access file. Right now it goes into the data directory and is named client.matter.txt.

Grantor	Document	Role	Invol	Entity	Fields	RecordID	LastName	FirstName	FullName	Middle	RefToHusb
husb	FOPOA	Agent	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
husb	FOPOA	Agent	2	Person	1	207	Ferguson	Todd	Todd Alan Fergu	Alan	son
husb	FOPOA	Agent	2	Person	2	208	White	April	April Susanna V	Susanna	step-daughter
husb	HDPOA	Agent	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
husb	HDPOA	Agent	2	Person	1	207	Ferguson	Todd	Todd Alan Fergu	Alan	son
husb	LWMI	Agent	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
husb	LWMI	Agent	2	Person	1	207	Ferguson	Todd	Todd Alan Fergu	Alan	son
husb	WII	PR	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
husb	WII	PR	2	Person	1	208	White	April	April Susanna V	Susanna	step-daughter
husb	WII	Trustee	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
husb	WII	Trustee	2	Person	1	208	White	April	April Susanna V	Susanna	step-daughter
husb	WII	Guardian	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
husb	WII	Guardian	2	Person	1	208	White	April	April Susanna V	Susanna	step-daughter
wife	FOPOA	Agent	1	Person	1	206	Ferguson	Roger	Roger J. Fergus	J.	self
wife	FOPOA	Agent	2	Person	1	207	Ferguson	Todd	Todd Alan Fergu	Alan	son
wife	HDPOA	Agent	1	Person	1	206	White	April	April Susanna V	Susanna	step-daughter
wife	HDPOA	Agent	2	Person	1	208	White	Roger	Roger J. Fergus	J.	self
wife	HDPOA	Agent	2	Person	1	208	White	April	April Susanna V	Susanna	step-daughter
wife	LWMI	Agent	1	Person	1	206	Ferguson	Roger	Roger J. Fergus	J.	self
wife	LWMI	Agent	2	Person	1	208	White	April	April Susanna V	Susanna	step-daughter
wife	WII	PR	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
wife	WII	PR	2	Person	1	207	Ferguson	Todd	Todd Alan Fergu	Alan	son
wife	WII	Trustee	1	Person	1	206	Ferguson	Susan	Susan Ferguson		wife
wife	WII	Trustee	2	Person	1	208	White	April	April Susanna V	Susanna	step-daughter
wife	WII	Guardian	1	Person	1	207	Ferguson	Todd	Todd Alan Fergu	Alan	son
wife	WII	Guardian	2	Person	1	208	White	April	April Susanna V	Susanna	step-daughter

C. MICROSOFT ACCESS REPORT WIZARD

Sample Access Report Created with a few mouse clicks in the report Wizard

EPPeople Report 2

Grantor *husb*

Document FDPOA

Role Agent

Level 1

<i>Entity</i>	<i>FullName</i>	<i>RefToHusb</i>	<i>RefToWife</i>
Person	Susan Ferguson	wife	self

Level 2

<i>Entity</i>	<i>FullName</i>	<i>RefToHusb</i>	<i>RefToWife</i>
Person	Todd Alan Ferguson	son	step-son
Person	April Susanna White	step-daughter	daughter

Document HDPOA

Role Agent

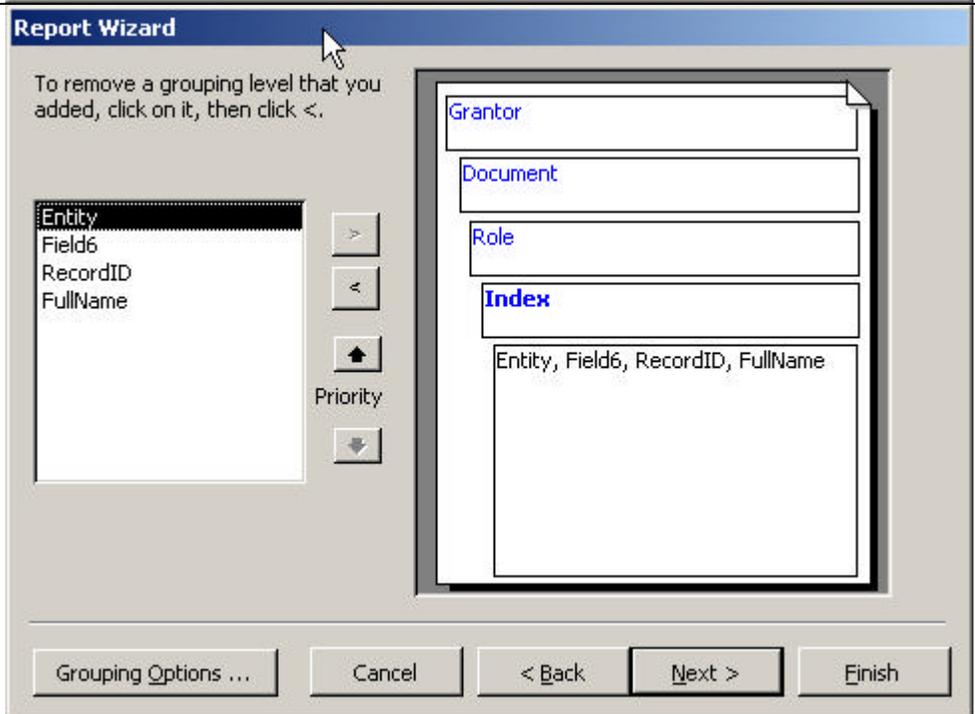
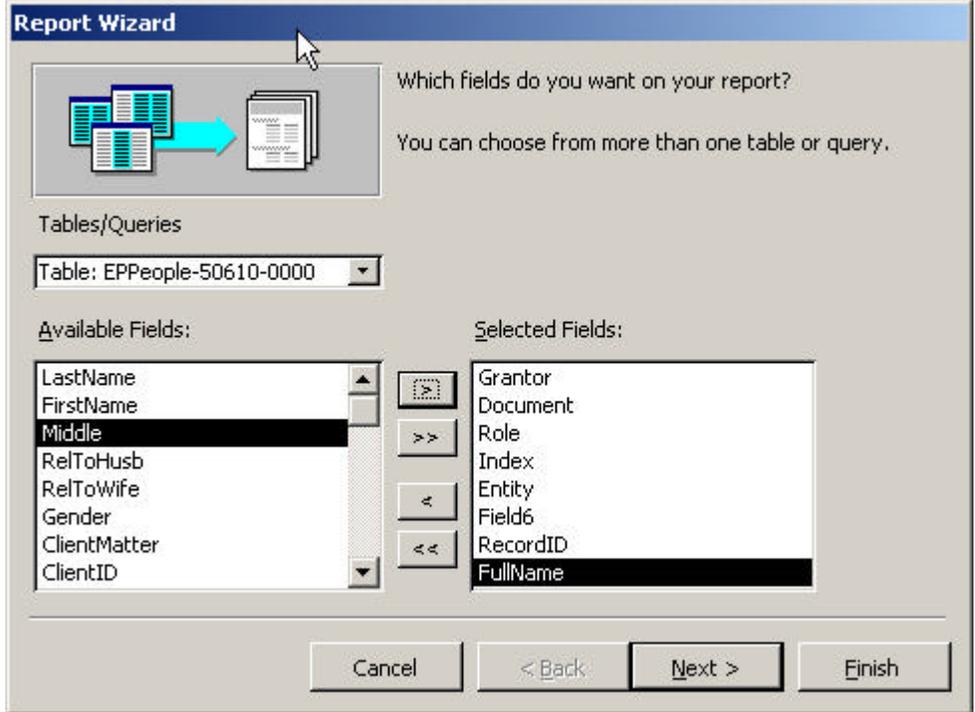
Level 1

<i>Entity</i>	<i>FullName</i>	<i>RefToHusb</i>	<i>RefToWife</i>
Person	Susan Ferguson	wife	self

Level 2

<i>Entity</i>	<i>FullName</i>	<i>RefToHusb</i>	<i>RefToWife</i>
Person	Susan Ferguson	wife	self

The above was created with a report Wizard that looked like the next few screens.

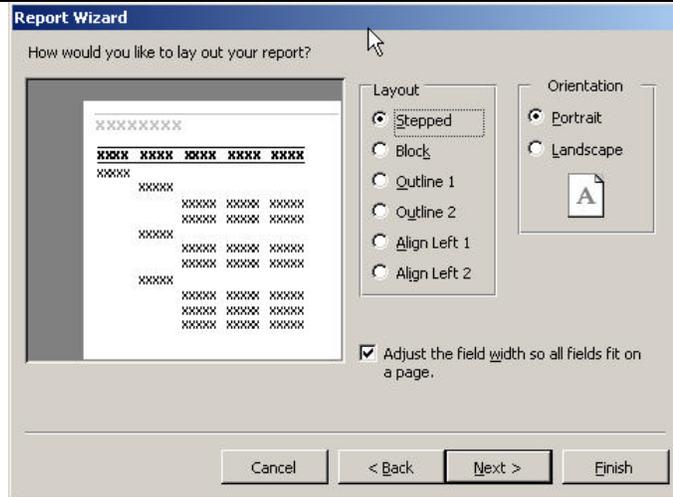


Layout Options in the Wizard include the following.

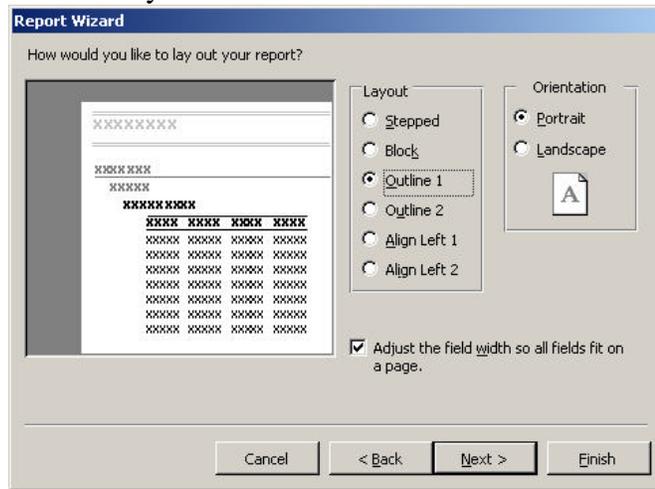
You can also pick color schemes,

Stepped Layout

fonts, etc.



Outline Layout



Designer View of the Report created by the Wizard. From here, you can change the text and formatting.

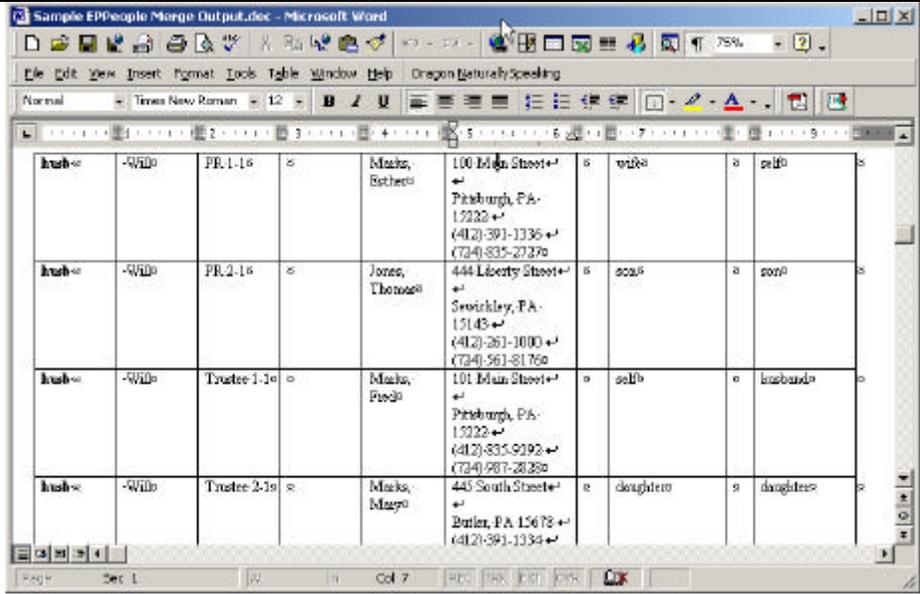
Report Header				
<i>EPPeople Report 2</i>				
Page Header				
Grantor Header				
<i>Grantor</i>		<i>Grantor</i>		
Document Header				
Document		Document		
Role Header				
Role		Role		
Index Header				
<i>Level</i>	<i>Entity</i>	<i>Index</i>	<i>FullName</i>	<i>RetToHusb</i>
	<i>Entity</i>		<i>FullName</i>	<i>RetToWife</i>
Detail				
	Entity		FullName	RetToWife
Page Footer				
=Now()		="Page " & [Page] & " of " & [Pages]		

D. EXCEL PIVOT TABLE

The text file can also be read into an Excel table and manipulated in a pivot table that looks like the example to the right.

(Status – We haven't yet created a generic way to create this.)

	A	B	C	D	E	G
9	Grantor	Document	Role	Index	FullName	
10	Husb	Family	Child	1	Trevor James Morgan	
11				2	Travis Scott Morgan	
12		FDPOA	Agent	1	Jill Lynn Morgan	
13				2	Lyle Allen Morgan	
14				3	City National Investments	
15					Robert Johnson	
16				4	Scott Mitchell	
17		HDPOA	Agent	1	Jill Lynn Morgan	
18				2	Joani Burger	
19			Physician	1	Susan S. Edwards, M.D.	
20				2	Jeffrey M. Keightly, M.D.	
21		RT	Beneficiary	1	Trevor James Morgan	
22				2	Travis Scott Morgan	
23			DeathTrustee	1	Jill Lynn Morgan	
24				2	Lyle Allen Morgan	
25				3	City National Investments	
26					Robert Johnson	
27				4	Scott Mitchell	
28			DisabTrustee	1	Jill Lynn Morgan	
29				2	Lyle Allen Morgan	
30				3	City National Investments	
31					Robert Johnson	
32				4	Scott Mitchell	
33			Trustee	1	Jill Lynn Morgan	
34					Kurt Morgan	
35		Will	Guardian	1	Joani Burger	
36			PR	1	Jill Lynn Morgan	
37				2	Lyle Allen Morgan	
38				3	City National Investments	
39					Robert Johnson	
40				4	Scott Mitchell	

<p>E. WORD MAILMERGE. Word MailMerge can incorporate the data into Word documents. The repeat loops aren't working quite the way we'd like (there seems to be no way to suppress the output in the columns that should be group fields, such as <code>husb</code>, <code>will</code>, etc. (Arita).</p>	 <p>The screenshot shows a Microsoft Word document titled 'Sample EPPeople Merge Output.doc'. The document contains a table with four rows of data. The columns represent different fields: a name (e.g., 'Minks, Beth'), an address (e.g., '100 Main Street'), a relationship (e.g., 'wife'), and another relationship (e.g., 'self'). The first row shows 'Minks, Beth' at '100 Main Street', Pittsburgh, PA, with relationships 'wife' and 'self'. The second row shows 'Jones, Thomas' at '444 Liberty Street', Sewickley, PA, with relationships 'son' and 'son'. The third row shows 'Minks, Fred' at '101 Main Street', Pittsburgh, PA, with relationships 'self' and 'husband'. The fourth row shows 'Minks, Mary' at '443 South Street', Butler, PA, with relationships 'daughter' and 'daughter'.</p>
<p>F. HTML (optionally using XSL) XML/HTML/XSL</p>	

VII. EPPeople Technical Notes

If you are just a WinDraft user, rather than an IS person or system author, you do not need to worry about the following information.

A. *Authoring – Programming the Documents*

(There are more examples in an appendix. See XIII, Appendix – More Authoring Examples.)

1. **Getting the Data into the Documents using GETDATA**

With the EPPeople program, the beginning of each document template will generally have two GETDATA command lines to get these temporary “blastoff files.” Other GETDATA commands are in EPStart.doc or GRGender.doc on the subdocs directory. Those GETDATA commands are:

- Estate Planning questions other than fiduciaries.
- Fiduciaries – all (with long paths for variable names – e.g. (Husb.Will.Trustee(1).Name)

- Fiduciaries – husb or wife for all documents (medium length paths for variable names – Will.Trustee(1).Name
- Fiduciaries – each document (shortest length paths for variable names – Trustee(1).Name.

These files are automatically written to and read from the Windows TEMP directory, which we get from the Windows API.

2. “Scope” of the Variables

Each variable for a person or a role level can be referred with or without the “path” that shows what document and which grantor it relates to.

For improved readability and less risk of errors, we recommend that you refer to a variable by using the shortest version of the name. (Note: If you *want* to use the longer name, you *can*. It does no harm. It’s just that the shorter names are easier to understand when you are reading the document.)

Example of how to use the variable for Initial Trustees in the husband’s revocable trust (at the Role Level):

Example – If var is used in this document	Example “Home” document of the var.	Variable as used in the document– Initial Trustee(s) in the Husband’s Revocable Trust	GETDATA reads data from this temp text file	Explanation
Husband’s Rev Trust	Husb’s Rev Trust	[Trustee(1).Names]	husb.will.txt	Scope: Only in the “home” document. If a var is in its “home” document, no qualifying path is required. You can optionally use a longer path name, but it is better style not to, both for readability and portability.
Husband’s Pour-over Will	Husb’s Rev Trust	[RT.Trustee(1).Names]	husb.txt	Scope: In any of husb’s docs. Because the <i>will</i> is calling a <i>trust</i> variable, you need to put “RT.” in front of it. But you don’t need the “husb.” because it is the husb’s doc calling another document of the husb.
Letter to both clients summarizing the documents.	Husb’s Rev Trust	[Husb.RT.Trustee(1).Names]	wdoutputall.txt	Scope: Any document. You need the full path because it’s being called from a document that is not only not the “home” document, but not even the husband’s document.

Example with Same Variables down to the Person Level:

Note: When referring to a person, rather than a role, in the examples above, the use of the Husb. or Wife. and document. to the left of the role is the same as the example above, but you replace the “.Names” with “.Person(1).Name”, etc.

Example – If var is used in this document	Variable – First Person serving as Initial Trustee or co-trustee in the Husband’s Revocable Trust

Husband's Rev Trust		[Trustee(1).Person(1).Name]	
Husband's Pour-over Will		[RT.Trustee(1).Person(1).Name]	
Letter to both clients summarizing the documents.		[Husb.RT.Trustee(1).Person(1).Name]	

3. Using Personal Pronoun Functions

a) *How the functions work*

EP Expert uses a gender “function” that works like this:

I give to [HimHer(GrantorSpouse)], to be
[HisHers(GrantorSpouse)]...

If [GrantorSpouse] in this example = 1 (for male), the sentence will output

I give to him, to be his...

If [GrantorSpouse] in this example = 2 (for female), the output will be:

I give to her, to be hers...

To see how these variables work, see GenderTerms.RUL, an ASCII file on the practice system subdocs directory. It identifies every gender-specific and number-specific term that has been set up, and you can add your own.

b) *Using the functions with EPPeople*

When using the output from EPPeople:

When working with an individual person, what goes in the parentheses is the index variable for that role.person, such as:

For each person, there is a name, state, zip, etc., and there is always a .index, which will have the following values:

Value of .index	Gender and number	[HeShe(person(1).index)]
1	One male	he
2	One female	she
3	Multiple people	they

4	One entity (corp, etc.)	it
---	-------------------------	----

JAE NOTE: Originally, we used to always use “.index”. However, now EPPeople will also output the root variable with no “dot” that is the same as .index. This makes the appearance of functions much easier to read, such as [HeShe(Trustee(1))] instead of [HeShe(Trustee(1).index)]. The use of “.index” is now optional.

To the extent that other parts of the manual discuss or give examples using the .index, they apply equally to the root variable without the .index.

The “.index” will be output both for each role.person and each row.level (eg. Initial trustee, first successor, etc.) and the number of each person who may act as cotrustee at any level. Thus, you can use either or both of the following:

“[Trustee(1).Names] shall serve as Initial Trustee.”

“[Trustee(1).Name] shall serve as Initial Trustee.”

- Note that the above has one .Name/.Names for each level of succession of a role. This is how you refer to the one or more people in a role collectively in the middle of a sentence. The role(level) variables, such as [Trustee(1).Name], are for the 1 to n people in that role, collectively, who may be a fiduciary or co-fiduciaries.

You cannot use this to insert names individually into a document, such as in a column list or in beneath a signature line. For that, see the example below.

- The author can use either “Name” or “Names” interchangeably in the template.)

Here's how you use the pronoun functions:

Desired result: I f he shall survive ...

WinDraft coding: I f [HeShe(Trustee(1))] shall survive...

“I appoint [Trustee(1).Person(1).Name], who lives at [Trustee(1).Person(1).Street], [Trustee(1).Person(1).City].

- *Note that here there is one variable for each PERSON. By going to the person level, you deal with each person individually. You would use this form of the variables when working with one person at a time, such as inserting their names beneath signature lines.*

4. Using Word fields

This document is not to explain how to use fields.³

You can embed a field with a set command near the beginning of the document.

Note: You can avoid the “bad cosmetics” of the “Error. Bookmark Not Found” message by setting the Word field variable near the top of the document. When you then recalculate (Cntrl A, Cntrl F9) this will eliminate the “Error” message. If you do not SET the Word field near the top of the document, you WILL get the “Error” message, but when the document merges the value will be correct. Therefore, this is a cosmetics issue.

When WinDraft runs, it will replace the WinDraft variable so that the value of the WinDraft variable is used by Word in recalculating Word fields. For example:

{SET Agent1HeShe “[HeShe(Agent(1))]” }

This will allow you to insert the field {Agent1HeShe} anywhere in the document and have it insert the WinDraft variable.

We do this frequently with the grantor and grantor’s spouse variables, and with the first level fiduciaries, such as agent in DPOA’s, (Durable Power

³ You can read about that elsewhere, e.g. Insert, Field in Word, then click Help. This will get you started.

of Attorney), but not with variables that are only used one or two times in a document.

5. Using the Fiduciary Variables in Context

a) **Without FOR Loops**

Simply insert them in a sentence wherever they go. Such as, “I appoint [Trustee(1).Names] to serve as co-Trustees.”

b) **With FOR Loops**

The sequences of levels represented by the number in parentheses allow them to be used in a FOR loop. See WinDraft author’s manual for how FOR loops work.

An Example that shows the syntax is as follows:

I appoint the following Trustees, who shall serve in the order listed below:

[;; the next line will insert a line for each trustee:]

[FOR I = 1 TO Trustee.Levels INCLUDE “TrusteeName.doc”]

(In this example, TrusteeName.doc includes one line, like this:

[;; TrusteeName.doc]

[Trustee(I).Name]

c) **Combining The Two Approaches**

Here's an example that uses the two approaches, depending on whether or not there is just one trustee:

[IF Trustee.Levels = "1"]

I appoint [Trustee(1).Names] to serve as Trustee.

[ELSE]

I appoint the following Trustees, who shall serve in the order listed below:

[;; the next line will insert a line for each trustee:]

[FOR I = 1 TO Trustee.Levels INCLUDE “TrusteeName.doc”]

[ENDIF]



B. Authoring – Programming the Checklist

- 1. Use VBScript or JavaScript programming in a .WDS file to have variables and Events in WinDraft’s checklist interact dynamically with EPPeople.EXE.**
- 2. Events that interact with EPPeople can include Windraft system events (Blastoff, Save, Open), or can be programmed to react when the user exits from a field or clicks an Author-defined button.**
- 3. You can also interact with EPPeople’s Database or XML files from other parts of the system, such as blastoff programs in Word VBA, etc.**

C. Authoring – Editing Templates

1. Understanding EPPeople Templates and Data Files

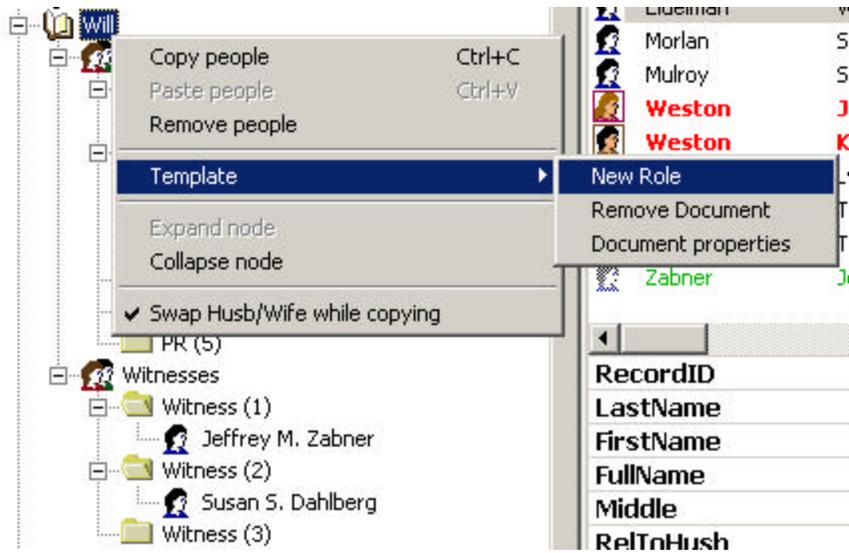
When you create a new data file that contains EPPeople data, that data is stored in XML, and it is based on an XML file stored on ...\\template with names like “General.ept” (for married husband and wife), “wifeonly.ept”, etc.

If you want to change the relevant grantors (husb, wife or both), documents, or roles, you do that the same way in a client data file and in the templates.

- a) First, open the data file or template file.**
- b) Second, right mouse click on the appropriate level and make the changes you want.**
- c) Finally, save the data file or template.**

2. How to create a new role or document

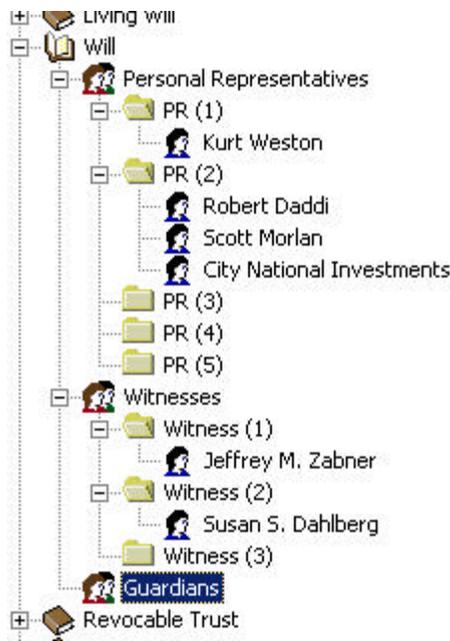
To create a new role or document, right-click on the node hosting the new item and select **Template** → **New node** from the popup menu, where *node* is either a document or a role:



Enter the name of the new node in *Text to display* and the corresponding blastoff code in *Blastoff Text*.



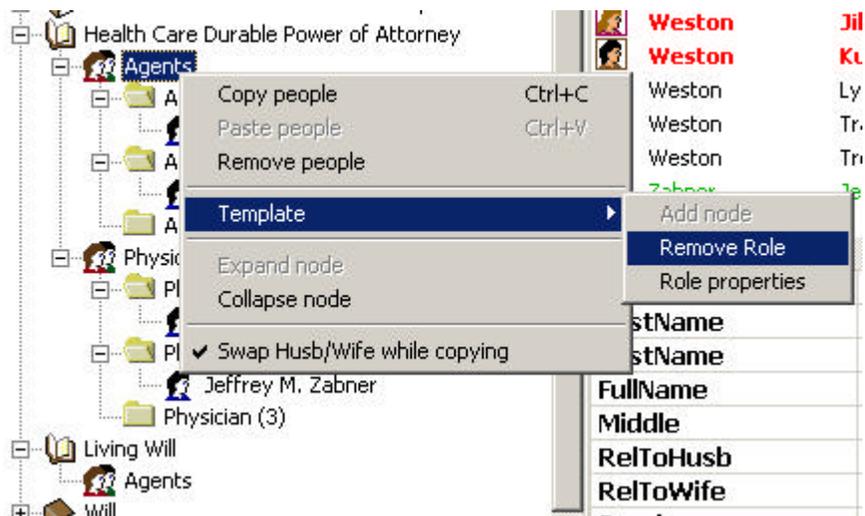
In example above, after clicking on *Create Role*, a new role will be added to the *Will* document, as shown below.



Only documents and roles can be added to the template. Levels are automatically added when dragging people onto a role or onto the last level of a role. Grantors cannot be added although they can be removed from the template, as explained in the following section.

3. How to remove a role, document or a grantor

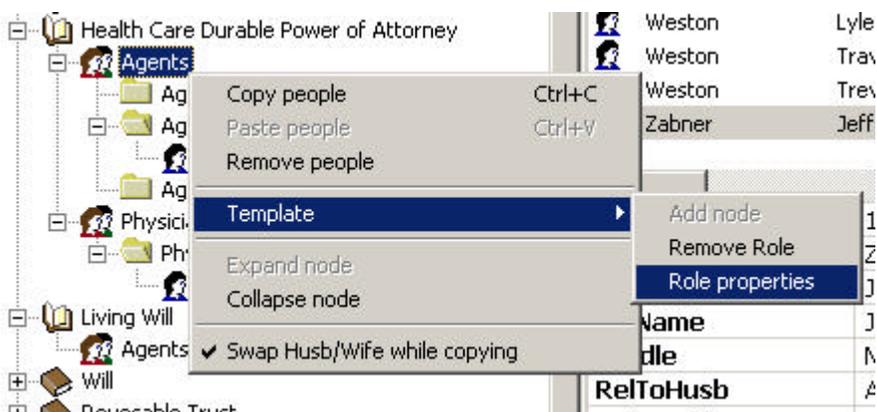
Right-click on the node that you want to remove and select **Template > Remove node**, where *node* can either be a document, a role or a grantor.



By removing a grantor, you can create templates for *Man-Only* or *Woman-Only* estate planning.

4. How to change the properties of a node

Right-click on the document or role that you want to modify and select **Template > Node properties**, where *node* is either a document or role.



Change the properties of the node in the following dialog box, and click on *Apply*.

The *Node properties* menu applies only to roles and documents.

5. How to reorganize the tree structure

It's possible to rearrange roles and documents in the template by drag & drop. When dragging roles or documents, you need to keep the SHIFT key pressed. This is to distinguish the Drag and Drop operation on template nodes from the Drag and Drop on people, and to avoid accidental rearrangements of the tree structure.

6. Summary

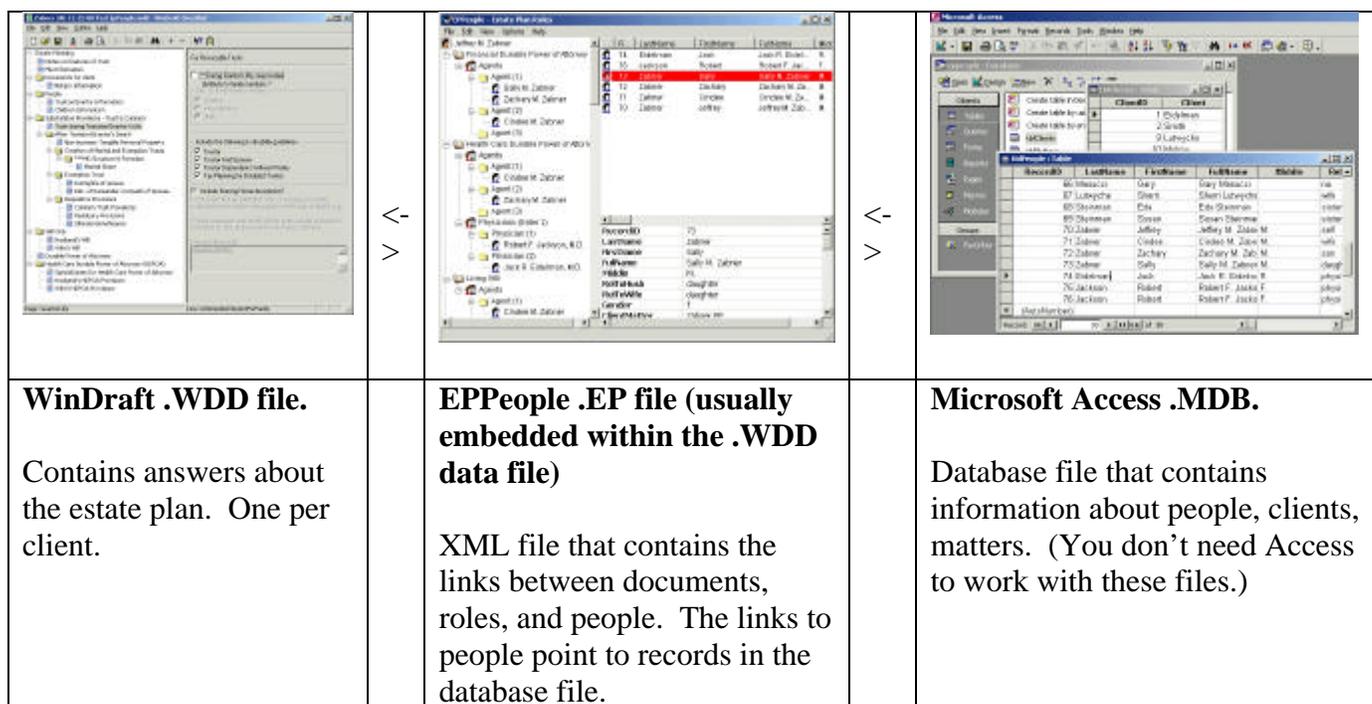
These are the template operations available for each type of node in the tree:

Person	N/A
Level	N/A
Role	Remove role Role properties
Document	New role Remove document Document properties
Grantor	New document Remove grantor

D. "Under The Hood" -- Working with EPPeople Role Files

1. How the Files Fit Together

Under the new system, a complete set of data consists of 3 types of data files that "talk to each other."



a) About XML

XML (Extensible Markup Language) is a format for data that is taking the computing world and the Internet by storm. It is a hierarchical format (like an outline) that stores data in an ASCII text file that you can edit with Notepad, Word, or specialized editors like XMLSpy and EditML.

What's so good about XML is that it is a format that, unlike most other formats, it can be read both by humans and by computers.

See "Get Up to Speed with XML"

(<http://www.xmlmag.com/upload/free/features/xml/1999/01win99/bfwin99/bfwin99.asp>) and "Why I like XML"

(<http://www.xmlmag.com/upload/free/features/xml/2000/04fal00/dw0004/dw0004.asp>). Also see www.xml.org.

EPPeople stores information about the fiduciary roles and other roles in an XML format.

b) **General.EPT**

If you want to change the grantor, documents or roles in a client data file or a template for a new one, it's easy. Just right click on the grantor, document, or role, then click "Template", and select the appropriate action.

For single people, there are template files called: "ManOnly.EPT" and "WomanOnly.EPT".

When you create a new data file, the system creates a new file that defines the documents, roles, and output information. It does so based on a "template" file called "General.ept" or another template file that has the file extension ".EPT". The EPT files are stored on a directory set in WinDraft.ini, which by convention is the practice system \Template directory.

The content and format of a General.EPT file looks like this:

```
<?xml version="1.0"?>
<ep>
  <grantor display="Husband" output="Husb" id="11">
    <document output="FDPOA" display="Financial Durable Power of Attorney">
      <role output="Agent" display="Agents"/>
    </document>
    <document output="HDPOA" display="Health Care Durable Power of Attorney">
      <role output="Agent" display="Agents"/>
    </document>
    <document output="LivWill" display="Living Will">
      <role output="Agent" display="Agents"/>
    </document>
    <document output="Will" display="Will">
      <role output="PR" display="Personal Representatives"/>
      <role output="Guardian" display="Guardians"/>
    </document>
    <document output="RT" display="Revocable Trust">
      <role output="Trustee" display="Initial Trustees"/>
      <role output="DisabTrustee" display="Disability Trustees"/>
      <role output="DeathTrustee" display="Death Trustees"/>
    </document>
    <document output="IT" display="Irrevocable Trust">
      <role output="Trustee" display="Trustees"/>
    </document>
    <document output="Family" display="Family">
      <role output="Child" display="Children"/>
      <role output="Husb" display="Husband"/>
      <role output="Wife" display="Wife"/>
    </document>
  </grantor>
  <grantor display="Wife" output="Wife" id="12">
    <document output="FDPOA" display="Financial Durable Power of Attorney">
      <role output="Agent" display="Agents"/>
    </document>
    <document output="HDPOA" display="Health Care Durable Power of Attorney">
```

As you can see, the General.EPT file defines the documents, roles and output, but has no information in it about people.

There can be different .EPT templates for different firms, states and factual situations. By default they are named General.EPT, but they can also have other names, and a macro can use different EPT files to create a new .EP roles file depending on the facts.

c) **Client .EP files:**

As mentioned above, EPPeople has two modes of operation:

- Normal: Integrated so that EPPeople data is saved with the WDDATA Checklist, so there are no separate EPPeople data files.
- Special: Launched by itself from Windows.

Except for importing and exporting, in normal operation the user does not need to worry about .EP files. WinDraft “stuffs” them into the normal .WDD WinDraft checklist data file and manages them automatically.

The following was written before we started storing them in the WDD file. Everything below except for File operations is still valid.

The EPPeople role files are formatted in XML, and have file names that end with “.EP”. They are generally stored on the practice system data directory, such as \windraft\epFirm\data. They look like the following example:

(JAE Note: The XML file now has the person’s name in it as well, which will synchronize the info if the person id has changed in the database. (This would occur, for example, if the data were entered in one MDB, then imported into another.) JAE: Please paste in a new picture.)

```

- <cep clientmatter="Zabner.ep">
- <grantor display="Husband" output="Husb" id="70">
- <document output="FDPOA" display="Financial Durable Power of Attorney">
- <role output="Agent" display="Agents">
- <level order="1">
  <person id="79" />
  <person id="72" />
</level>
- <level order="2">
  <person id="71" />
</level>
<level order="9" />
</role>
</document>
- <document output="HDPOA" display="Health Care Durable Power of Attorney">
- <role output="Agent" display="Agents">
- <level order="1">
  <person id="71" />
</level>
- <level order="2">
  <person id="72" />
</level>
<level order="9" />
</role>
- <role output="Physician" display="Physicians (Enter 2)">
- <level order="1">
  <person id="76" />
</level>
- <level order="2">
  <person id="74" />
</level>
</role>
</document>

```

Note that the file is the same as the EPT template file, except that it contains additional information about each person and about the levels for each fiduciary role.

Because the person's name, address, and other personal information is looked up in a database, the EP file does not contain the actual information about each person, but rather an index field that is a link to the person's information in the database.

d) **Technical Notes on Working with the XML and MDB files**

This approach works great, as long as the environment is stable, in that:

- **The database must match the .EP data file.** If you email an .EP file to someone who is set up with a different database, or different version of the same database, the "person ID" field will point to the wrong person, and it won't work right.

(At the moment, there is no way to combine 2 different database files unless they started from the same one and are replicas that can be sync'd using MS synchronization technology. This is what a firm will use to share network databases and off-line databases used on laptops.)

- **The roles defined in the .EP file must match the roles used in the documents.** If an .EP file has roles and people in it, and we create a new role by adding it to the documents and NEW.EPT, the new role will be picked up

by new .EP files created from that point on, but the new role won't automatically be added to the existing .EP files.

(Programming note: This will be changed in a future version that will be released in January, 2001.)

Neither of these is a problem in a production setting, but this can be inconvenient for a developmental, testing environment in which you want to email sample data files and databases around. For testing, until you get it the way you want it, it is best to be as flexible as possible.

(Programming Note: Should we eliminate the need for the MDB file and store all the data in the XML file? We'll have to see how much the users see the MDB as an advantage vs. something that gets in the way. It's much better in a stable, network environment, but a pain if users are emailing data files around and don't have enough tech support to handle database synchronization.)

VIII. New Features Not Yet Documented

This is a list of features that have been added to the program, but not yet documented:

- More robust output of children information:
 - His, hers, ours
 - Step children, natural/adopted children, all children
 - .ChildOf
- .TypeCode output
(Each role has a variable .TypeCode, such as [Trustee(1).TypeCode]. It is a text string that contains one or more characters: G for Grantor, S for Spouse, O for at least one other real person, and C for Corporation.)
- Using vbscript to pull beneficiaries and children into the WinDraft checklist
 - (Add Husb & wife info into checklist)

It is possible to set up a button or other event in the WinDraft checklist so that when you click it, fields from the roles table are imported into the Checklist.

For example, you can set up a FOR loop in the checklist for beneficiaries, with questions about the trusts being set up for each of them, and a Role in

the EPPeople tree called “Beneficiaries” for the Revocable Trust. When you click the button, the people will be pulled in from the tree into the checklist. You can then answer the questions, blast off, and get a separate trust with correct names and other info from both the checklist and EPPeople merged into the document. Call EA if you are interested in an example of this.

- Husb. and Wife. variables for mirror image. (Move from WDOpen.dot into WinDraft.dot)
- **Editing the template, moving nodes. Also can change General.ept this way.**
- **Sorting, moving columns**
- **Double Click on person in roles tree to edit a person.**

Explain – Switch to, Retry messages with export, etc.

Explain setup issues -- Explain about self-registering and our Wise update.

New WDS buttons:

The screenshot shows a software interface with the following elements:

- A text input field labeled "Client Number *" containing the text "Hampton".
- A text input field labeled "Matter Number *" containing the text "0001".
- A section titled "Use EPPeople to" with two sub-points: "(a) edit the cast of characters in the database, and" and "(b) assign roles (drag and drop people to document roles)".
- Two buttons: "Cast of Characters" and "Assign Roles".
- A section titled "UTILITY buttons to work with a set of roles for this checklist:".
- Three buttons: "New set of People", "Export Roles...", and "Import Roles...".

IX. Wish List

Tooltips in data entry.

File Name: EPPeopleManual.doc

X. Appendix – Setup and Troubleshooting

A. Setup and Architecture

Setup depends upon the configuration of the firm's network, etc. Generally it can be described as follows:

1. **3 Parts of Setup (These may be combined into one or more setup routines.**
 - a) ***Set up DLL's and registry settings to make the Windows installation compatible with all of tools being used. (All Microsoft. They are latest versions of ADO, XML, etc.)***
 - b) ***Set up Application files you need to run the EPPeople part of the application. They go on Drive C: if you are a typical local user, and on a network "share" (a shared directory) if you are working on a network.***
 - c) ***Programming or setting up the practice system variables and WinDraft scripting to "lock into" the EPPeople way of doing it, including stylistic and legal drafting issues.***
2. **Troubleshooting: Temp Blastoff Text Files on Temp Directory**
 - a) ***Temp File Output Location.***

Where are the temp files?

The temp files are on your Windows temp directory, which varies depending on your setup.

The different modules of WinDraft pass data to each other by writing the data to temporary files, which we call "Blastoff files." They are in an ASCII text format and can be edited with Notepad, Word or your favorite editor.

In earlier versions of WinDraft, the temp directory was set in the WinDraft.ini file.

Current versions of WinDraft rely on Windows, and Windows uses the temp directory. Typical settings are:

Operating Environment	Default Settings
Windows 3.1, NT, 2000	\temp
Windows 95/98	\windows\temp\
NT, Win2K, XP Profiles	C:\Documents and Settings\jae-nt5\Local Settings\Temp

Here is a directory display of 2 of the files in my temp directory in my jae-nt5 login profile:

Husb.FDPOA...	C:\Documents and Settings\jae-nt5\Local Settings\Temp	2 KB	Text Document	12/9/2000 7:50 PM
Husb.txt	C:\Documents and Settings\jae-nt5\Local Settings\Temp	2 KB	Text Document	12/9/2000 7:50 PM

(The temp directory can be obtained programmatically from a Windows System Object in VB, Windows API in VB or C++, and in batch files using the TMP or TEMP environment variable.)

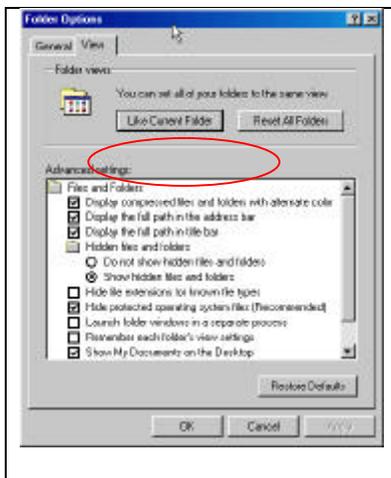
b) Making your Temp files Visible

Q. I can't find the temp files, even by searching my entire hard disk. Am I in the twilight zone?

A. No, you aren't in the twilight zone. The files are hidden from your display.

If you want to "go under the hood" and look at the temporary blastoff files and you can't find them:

I have found that on a Win 2K machine, and some other environments, searching for the temp files and trying to find them by navigating the \documents and settings folder that contains the profile, comes up blank, and I've gotten very frustrated that I knew they were there but couldn't find them. The trick is that you have change your file settings because they are hidden away. (Change them on the Tools\Folder Options menu.)



B. Note on Database Connections:

WinDraft.ini practice system now has the following items:

EPCConnectionString=

See http://www.able-consulting.com/ADO_Conn.htm#DSN for examples of the kinds of entries that can be put in here. (There are links from there to Microsoft documentation on the various options.) This setting is used to make EPPeople compatible with a people database that is in a wide variety of formats, connected using a variety of methods and drivers. Typical entries would be:

```
EPCConnectionString=DSN=EP People  
EPCConnectionString=Dbq=n:\windraft\EPFirmIntitials\data\eppeople.mdb
```

C. Troubleshooting EPPeople Issues – Following the data

We may hear, "I added three additional people, but they didn't stick. They didn't come into the document." Troubleshooting this is difficult unless we know the specifics. Here are the things to look for:

1. Database Entries

Are the people you entered in the database? If you add a person, that person should still be in the database, whether or not you dragged any of the people into roles or saved the WinDraft data file. (Take a look with EPPeople's view people menu choice, or from the data checklist by clicking on the "Edit People" button. Or you can go into the EPPeople.mdb file with Access and take a look.)

Is the client code field right? Note that the client number in the client database and the EPPeople XML data must match. Generally, this must also match the Client number in the checklist. Please don't change client numbers unless you are sure you know what you are doing or you may get unpredictable results.

2. The Roles Tree

If you dragged and dropped the people into the roles tree, are they still there? Don't forget that if you add them to the roles tree, you still have to Save within the WinDraft checklist in order for the role data to be saved.

3. "Blast-off" Temp Text Files

When you "blast off," EPPeople will output a number of text files to your Windows TEMP directory. (If you don't know how to find your temp dir, search for one of the files. They have file names like `husb.txt`, `husb.rt.txt`, etc. See Troubleshooting: Temp Blastoff Text Files on Temp Directory, below.) Open these files and see if the data is in there. If the data is in the roles tree, and if EPPeople is operating correctly, then blast-off should output the data to these files.

4. Variables Merged into the Documents

If the data is in the temporary blastoff files, but not coming into the documents, then there may be a problem with the GETDATA commands in the model documents. GETDATA commands to pull in the right data are in the model documents, generally organized like this:

Variables for which the document is the "home" document.	DOT files being merged (eg. <code>FDPOAHusb.dot</code> , <code>RT_Wife.dot</code> , etc.)
Variables for all documents	<code>..\subdocs\EPStart.Doc</code>
Variables for all of man's documents or all of woman's documents.	<code>..\subdocs\GRGender.doc</code> or <code>EPStart.doc</code>

D. Setup Procedures on Windows 95 and NT

EPPeople Setup Notes

Loading Windows Components that EPPeople Uses

Most files and setup notes are on <http://eahome.lawtech.com:85/~clifiles/eppeople2/>

JAE 11/12/2001

A. Table of components you need to load for each Windows environment:

(As you can see, if you have Windows XP, you don't have to load anything except our setup file. If you have Windows 95, you need to load everything.)

	Win 95	Win 98/ ME	Win NT	Win2000 (Ships with IE 5.0)	Win XP (Ships with IE 6.0)
DCOM	Yes.				
MSI (Microsoft Win. Installer)	Yes		Yes		
MDAC 2.5 or higher	Yes -- Load unless IE 5.0 or higher is loaded*				
XML 3.0	Yes -- Load unless IE 6.0 (ships with Win XP) or higher is loaded *				

* Note – Even if you already have MDAC 2.5 and XML 3.0, it's a good idea to update to the latest versions if you don't have them. See below.

B. Steps to set up EPPeople in a Windows 95 and NT environment will be:

With Windows 95 or NT, loading all of these may require rebooting the computer 3 or 4 times or so. Also, note:

- o If the EPPeople setup tells you that you have a more recent component and that you should probably keep it, go ahead and click Yes to keep the newer version on your system.
- o If EPPeople setup tells you it needs to update your Windows and reboot, remember that after you do that, you need to run EPPeople setup again.

1. Take a clean machine to test with that already has Word and WinDraft set up and working right.

2. Load any needed Microsoft drivers to bring the Windows components up to current levels.

a. **DCOM and MSI for Windows 95.** Only needed if you have Windows 95 and they

have not been installed by some other program:

- **DCOM** (for Windows 95) .
Download from Microsoft (<http://www.microsoft.com/com/resources/downloads.asp>) or from Lawtech: [dcom95.exe](#). There is also an update for Windows 98.
- **Microsoft Windows Installer (MSI)** (any version is OK for our needs)
 - New version 2.0 for Windows NT and 2000 (ships with Windows XP):
<http://www.microsoft.com/downloads/release.asp?releaseid=32832&NewList=1>.
 - Version 1.2 for Win 9X and ME:
<http://www.msdn.microsoft.com/downloads/sample.asp?url=/msdn-files/027/001/455/msdncompositedoc.xml>

b. **MDAC 2.5 or higher.**

(Included with IE 5.0 and higher. SQL Server 2000 client setup installs 2.6.) (See <http://support.microsoft.com/view/dev.asp?ID=hl&pg=mdac.asp>) for a (FAQ about MDAC, and <http://support.microsoft.com/view/dev.asp?ID=hl&pg=mdac.asp> to get to the MDAC download page. If you want to go to 2.6 without loading 2.5 first, talk to Jim about the JET issue before you load it or load 2.5, then upgrade to 2.6.)

Only needed if you don't have IE 5.0 or higher or another program that has loaded current MDAC drivers. The MS Web page has a component checker utility that checks your system for what you have.

c. **XML 3.0 Parser** (MSXML 3.0)

Included in IE 6.0 and higher (ships with Win XP).

As of November 1, 2001, the current version is SP2.

<http://download.microsoft.com/download/xml/SP/3.20/W9X2KMeXP/EN-US/msxml3sp2Setup.exe>, or see www.microsoft.com/xml.

3. Run the EPPeople setup.exe (after unzipping it). (Current version 2.0.2).

Files are on <http://eahome.lawtech.com:85/~clifiles/eppeople2/>.

Install EPPeople.exe to the same folder as you have the other WinDraft executables. (Generally c:\program files\windraft).

- 4. PRACTICE SYSTEM SETUP.** Run the practice system setup per EA instructions. (*Note: Loading EPPeople without the practice system setup is not enough. The practice system setup is required to create needed ini file settings and copy the necessary files to the system.*)

The setup file will copy the practice system files to the network or c:\windraft\epxxx (where the epxxx will be your firm's practice system name), and add EPPeople entries into the WinDraft.ini file. See Technical Notes below for discussion of changes to WinDraft.ini.)

- 5. TESTING:** Test and troubleshoot any issues.

(Note: When you first open the checklist program, but without any data loaded, the EPPeople program is loaded but hidden. You have to open a data file or click one of the buttons on the People screen in the checklist before the EPPeople program displays.)

- Load EPPeople by itself.
 - From Windows, not WinDraft's checklist, load epeople. (Start|Programs|WinDraft|EPpeople)
 - Create a set of roles – File|New, Hampton, 0001, and you should get a populated tree.
 - Test as appropriate (drag and drop some roles, then File|Save),
 - Then File|Exit. (*Note: If it works without error, then that means that EPPeople is loaded and working properly, including XML parser and MDAC.*)

- Use a sample data file.
 - Open a sample data file (Hampton)
 - Make sure there are people in the roles table and no error messages (other than possibly the "switch to or retry")
 - Blast off the financial durable power of attorney (FDPOA).

(Note: If this works, then the OLE Automation aspects are working properly, so that WinDraft's checklist program, WDDATA, can correctly "talk to" EPPeople, and drafting engine, WinDraft.wll, and the forms are correctly reading the EPPeople output.)

- Go through the steps in the "Quick Start to using EPPeople" to create a new one, and blast off. If that works, then you are in business. (*Note: There have been some settings, all involving machines created through a cloning process, such as "Ghost," in which everything worked fine with an existing data file, but creating a new data file caused an error message.*)

C. EXPLANATION.

What's going on with this program is that WDDATA.EXE, written in

C++, and EPPeople.exe, written in VB, talk to each other using Microsoft's Component Object Model (COM) architecture, including database integration using ADO (which requires that current MDAC drivers), and stores the data in XML format. If the DLL's aren't all current and the registry settings aren't all correct, then either the EPPeople program doesn't work right at all, or the integration between the two programs doesn't work well.

It's pretty easy with Windows 2000, Office 2000, and IE 5.5 already installed on a PC, because we just need to install our program and the XML parser (one click, no reboot) and everything works right.

With Win95 and NT 4, it can be tricky, and loading all the components needed to bring Windows up to current DLL's can be a pain. If you can use Ghost or other cloning method to make that work on other machines it really helps, so that you don't have to keep rebooting for each machine.

We should go through this process on a test machine, get it working figure out what adjustments are needed, then probably nuke it and do it again, and then clone that one.

Because of all the rebooting, it's good to multi-task, so that you can be doing something else while waiting for the computer to reboot. Don't waste a morning watching the screen while you load all this stuff.

D. Technical Notes – WinDraft.ini settings

Changes to WinDRaft.ini for EPPeople. The lines indicated in yellow and italics below are the ones that are inserted in the WinDraft.ini file.

The ones in the [WinDraft section are those that store the output options, and are not needed for the program to run properly. (They are created under View|Options.)]

The ones for the practice system are required to support the database access. The path will differ depending on your setup. (network or local, practice system directory name, etc.)

```
[WinDraft]
ProgDir=C:\Program Files\WinDraft
WinDraftDir=C:\WinDraft
WatchAssembly=1
Author=1
Editor=1
DOCSOpen=0
UserID=
```

```
LogFile=C:\WINDOWS\TEMP\wdlog.txt
AlwaysWatch=0
SaveInDMSOn=0
epOptFirstNames=0
epOptUpperCase=1
epOptResidence=0
epOptRelationships=0
epOptCommaAnd=1
epOptFinalComma=0
```

```
[EPXXX-System]
DocDir=C:\WinDraft\EPXXX
SubDir=C:\WinDraft\EPXXX\SUBDOCS
WddDir=C:\WinDraft\EPXXX\DATA
```

XI. BMacro=BlastOffEstatePlanningOutputHusbWifeFiles

```
BFile=EPXXX.TXT
Script=EPXXX.int
DefTemplate=C:\WinDraft\EPXXX\TEMPLATE\WDFMT.DOT
AltTemplate=C:\WinDraft\EPXXX\TEMPLATE\WDFMTALT.DOT
AltFormat=0
ResetToStyles=0
ChecklistHelp=C:\WinDraft\EPXXX\TEMPLATE\EPXXX.nfo
ScriptHelp=EPXXX.nfo
ChecklistHelpURL=C:\WinDraft\EPXXX\htmlhelp
ScriptHelpURL=C:\WinDraft\EPXXX\htmlhelp
ChecklistTemplate=C:\WinDraft\EPXXX\TEMPLATE\EPXXX.wdt
EPConnectionString=DRIVER=Microsoft Access Driver (*.mdb); DBQ=C:\WinDraft\EPXXX\DATA\EPPeople.MDB
TemplatesDir=C:\WinDraft\EPXXX\TEMPLATE
DocumentsDir=C:\WinDraft\EPXXX\DATA
FileSection=EPXXX-Documents
```

A. MDAC Drivers

EPPeople requires MDAC 2.5 or higher. If it's not there, you may get an error message like this when you load a data file:

“(430) class does not support automation. Or does not support expected interface. Server busy - Lawtech program is not responding. Click appropriate to activate program and correct problem.”

Epeople then comes up not populated.

XII. Authoring -- Other Mirror-Image Functions

We added a function to EPPeople.exe that doesn't really have anything to do with people and roles. It makes it much easier for an author to ask separate questions for husband and wife, and have the system automatically plug the right information for the husband or wife when the documents are “blasted off.”

Most of the time, other than people and their roles, the same questions and answers are used for the husband and wife's documents.

There are a number of situations in which you want to ask separate questions for the husband and wife, such as specific gifts.

In the Checklist	In the Model Document
Precede variable name with “.husb” or “.wife”	Do not use Husb. Or Wife. In the variable name.
Example: Husb.SpecificGifts Wife.SpecificGifts	Example: [SpecificGifts]

This is handled in the Blastoff Macro called EstatePlanningBlastoffOutputHusbWifeFiles. It outputs two files, one for husb and one for wife that can be pulled in with a GETDATA command.

XIII. Appendix – More Authoring Examples

A. Will

<p>ARTICLE VII APPOINTMENT OF PERSONAL REPRESENTATIVE</p> <p>I appoint [PR(1).Names] to be my personal representative.</p> <p><i>[IF PR(2).count > "0"];; if there is a 2nd level PR];; if levels = exactly 2, put it in the para. If more than 2, put them in a list.]</i></p> <p>If [PR(1).Names] cannot act, or [isare(PR(1))] unwilling to act, I appoint[IF PR.Levels = "2"][PR(2).Names].</p> <p>[ELSE</p> <p>], in the order named, the following successor personal representatives:</p> <p><i>[FOR I = 2 TO PR.Levels INCLUDE "PersRep.doc"];</i></p> <p>][ENDIF]</p> <p><i>[ENDIF]</i></p>

I direct that my personal representatives not be required to furnish bond, surety, or other security.

[IF MinorChildYN = "Y"]

ARTICLE VII APPOINTMENT OF GUARDIAN

*[IF GrantorIsMarried = "Y"]*If my spouse does not survive me, *[ENDIF]*I appoint [Guardian(1).Name] to be the guardian of my minor children.

[IF Guardian.Levels > "1"]

If [HeShe(Guardian(1))] is unable or unwilling to serve, I appoint [Guardian(2).Name] as my successor guardian.

[ENDIF]

[ENDIF][; minor children]

XIV. Authoring – The EPPeople Output

A. Getdata Commands

Note that each template with have to get the data that is relevant to that document.

Here are guidelines:

- Always get the data for that specific document if there are roles defined in that document. (Eg. Husb.will.txt for the Husband's Will template, WillHusb.dot).
- If you are doing the husband's documents (or joint), get Husb.txt. If you are doing the wife's document (not joint), get Wife.txt.
- If you are using data relating to the other spouse or otherwise need or you need Husb. And Wife. info, get WDOOutputAll.txt.

B. Examples

1. The User's View:



2. The Blastoff File temporary Data

At blastoff, the system will output a number of temporary “blast off data files” that WinDraft reads using a GETDATA command.

There are 3 levels of files that contain the same data with different “paths” for the variables.

WDOOutputAll.txt

Husb.txt and Wife.txt

Husb.Will.Txt and other document-specific information

Here is the output with the full path for each variable for the agents in the screen shown above.

a) In WDOOutputAll.txt

```
husb.FDPOA.Agent(1).Count = 2
husb.FDPOA.Agent(1).Names = JILL LYNN HAMPTON and ROBERT JOHNSON
husb.FDPOA.Agent(1).Name = JILL LYNN HAMPTON and ROBERT JOHNSON
husb.FDPOA.Agent(1).Person(1).RecordID = 172
husb.FDPOA.Agent(1).Person(1).LastName = Hampton
husb.FDPOA.Agent(1).Person(1).FirstName = Jill
husb.FDPOA.Agent(1).Person(1).FullName = Jill Lynn Hampton
husb.FDPOA.Agent(1).Person(1).Middle = Lynn
husb.FDPOA.Agent(1).Person(1).RelToHusb = wife
husb.FDPOA.Agent(1).Person(1).RelToWife = self
husb.FDPOA.Agent(1).Person(1).Gender = F
husb.FDPOA.Agent(1).Person(1).ClientMatter = UNANSWERED
husb.FDPOA.Agent(1).Person(1).ClientID = Hampton
husb.FDPOA.Agent(1).Person(1).MatterID = 0001
```

husb.FDPOA.Agent(1).Person(1).DOBMMDDYYYY = UNANSWERED
husb.FDPOA.Agent(1).Person(1).DateOfBirth = UNANSWERED
husb.FDPOA.Agent(1).Person(1).DateOfDeath = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Street1 = 4329 Timberdale Road
husb.FDPOA.Agent(1).Person(1).Street2 = UNANSWERED
husb.FDPOA.Agent(1).Person(1).City = Miami
husb.FDPOA.Agent(1).Person(1).ST = FL
husb.FDPOA.Agent(1).Person(1).State = Florida
husb.FDPOA.Agent(1).Person(1).Zip = 55555
husb.FDPOA.Agent(1).Person(1).Code = UNANSWERED
husb.FDPOA.Agent(1).Person(1).BusPhone = UNANSWERED
husb.FDPOA.Agent(1).Person(1).HomePhone = (305) 532-1457
husb.FDPOA.Agent(1).Person(1).EMail = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Pager = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Fax = UNANSWERED
husb.FDPOA.Agent(1).Person(1).MaritalStatus = UNANSWERED
husb.FDPOA.Agent(1).Person(1).AKAName = UNANSWERED
husb.FDPOA.Agent(1).Person(1).NickName = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Prefix = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Salutation = UNANSWERED
husb.FDPOA.Agent(1).Person(1).SalutationCouple = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Suffix = UNANSWERED
husb.FDPOA.Agent(1).Person(1).CityOrCounty = UNANSWERED
husb.FDPOA.Agent(1).Person(1).County = Miami-Dade
husb.FDPOA.Agent(1).Person(1).Country = UNANSWERED
husb.FDPOA.Agent(1).Person(1).GovernmentID = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Citizen = Cuba
husb.FDPOA.Agent(1).Person(1).CompetencyCode = UNANSWERED
husb.FDPOA.Agent(1).Person(1).AgentName = UNANSWERED
husb.FDPOA.Agent(1).Person(1).LivingArrangements = UNANSWERED
husb.FDPOA.Agent(1).Person(1).ClientOfFirm = UNANSWERED
husb.FDPOA.Agent(1).Person(1).PersonNotes = UNANSWERED
husb.FDPOA.Agent(1).Person(1).Name = JILL LYNN HAMPTON
husb.FDPOA.Agent(1).Person(1).Index = 2
husb.FDPOA.Agent(1).Person(1) = 2
husb.FDPOA.Agent(1).Person(1).Relationship = wife
husb.FDPOA.Agent(1).Person(2).RecordID = 167
husb.FDPOA.Agent(1).Person(2).LastName = Johnson
husb.FDPOA.Agent(1).Person(2).FirstName = Robert
husb.FDPOA.Agent(1).Person(2).FullName = Robert Johnson
husb.FDPOA.Agent(1).Person(2).Middle = UNANSWERED
husb.FDPOA.Agent(1).Person(2).RelToHusb = friend
husb.FDPOA.Agent(1).Person(2).RelToWife = friend
husb.FDPOA.Agent(1).Person(2).Gender = M
husb.FDPOA.Agent(1).Person(2).ClientMatter = UNANSWERED
husb.FDPOA.Agent(1).Person(2).ClientID = Hampton

husb.FDPOA.Agent(1).Person(2).MatterID = 0001
husb.FDPOA.Agent(1).Person(2).DOBMMDDYYYY = UNANSWERED
husb.FDPOA.Agent(1).Person(2).DateOfBirth = UNANSWERED
husb.FDPOA.Agent(1).Person(2).DateOfDeath = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Street1 = 6969 Atom Avenue
husb.FDPOA.Agent(1).Person(2).Street2 = UNANSWERED
husb.FDPOA.Agent(1).Person(2).City = Studio City
husb.FDPOA.Agent(1).Person(2).ST = CA
husb.FDPOA.Agent(1).Person(2).State = California
husb.FDPOA.Agent(1).Person(2).Zip = 90069
husb.FDPOA.Agent(1).Person(2).Code = UNANSWERED
husb.FDPOA.Agent(1).Person(2).BusPhone = UNANSWERED
husb.FDPOA.Agent(1).Person(2).HomePhone = (805) 234-9870
husb.FDPOA.Agent(1).Person(2).EMail = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Pager = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Fax = UNANSWERED
husb.FDPOA.Agent(1).Person(2).MaritalStatus = UNANSWERED
husb.FDPOA.Agent(1).Person(2).AKAName = UNANSWERED
husb.FDPOA.Agent(1).Person(2).NickName = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Prefix = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Salutation = UNANSWERED
husb.FDPOA.Agent(1).Person(2).SalutationCouple = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Suffix = UNANSWERED
husb.FDPOA.Agent(1).Person(2).CityOrCounty = UNANSWERED
husb.FDPOA.Agent(1).Person(2).County = Los Angeles
husb.FDPOA.Agent(1).Person(2).Country = UNANSWERED
husb.FDPOA.Agent(1).Person(2).GovernmentID = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Citizen = UNANSWERED
husb.FDPOA.Agent(1).Person(2).CompetencyCode = UNANSWERED
husb.FDPOA.Agent(1).Person(2).AgentName = UNANSWERED
husb.FDPOA.Agent(1).Person(2).LivingArrangements = UNANSWERED
husb.FDPOA.Agent(1).Person(2).ClientOfFirm = UNANSWERED
husb.FDPOA.Agent(1).Person(2).PersonNotes = UNANSWERED
husb.FDPOA.Agent(1).Person(2).Name = ROBERT JOHNSON
husb.FDPOA.Agent(1).Person(2).Index = 1
husb.FDPOA.Agent(1).Person(2) = 1
husb.FDPOA.Agent(1).Person(2).Relationship = friend
husb.FDPOA.Agent(1).Index = 3
husb.FDPOA.Agent(1) = 3
husb.FDPOA.Agent(1).TypeCode = SO
husb.FDPOA.Agent(2).Count = 1
husb.FDPOA.Agent(2).Names = JEFFREY M. SMITH
husb.FDPOA.Agent(2).Name = JEFFREY M. SMITH
husb.FDPOA.Agent(2).Person(1).RecordID = 173
husb.FDPOA.Agent(2).Person(1).LastName = Smith
husb.FDPOA.Agent(2).Person(1).FirstName = Jeffrey

husb.FDPOA.Agent(2).Person(1).FullName = Jeffrey M. Smith
husb.FDPOA.Agent(2).Person(1).Middle = M.
husb.FDPOA.Agent(2).Person(1).RelToHusb = UNANSWERED
husb.FDPOA.Agent(2).Person(1).RelToWife = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Gender = M
husb.FDPOA.Agent(2).Person(1).ClientMatter = UNANSWERED
husb.FDPOA.Agent(2).Person(1).ClientID = Common
husb.FDPOA.Agent(2).Person(1).MatterID = EP
husb.FDPOA.Agent(2).Person(1).DOBMMDDYYYY = UNANSWERED
husb.FDPOA.Agent(2).Person(1).DateOfBirth = UNANSWERED
husb.FDPOA.Agent(2).Person(1).DateOfDeath = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Street1 = 4510 E. Thousand Oaks Boulevard
husb.FDPOA.Agent(2).Person(1).Street2 = Suite 200
husb.FDPOA.Agent(2).Person(1).City = Westlake Village
husb.FDPOA.Agent(2).Person(1).ST = CA
husb.FDPOA.Agent(2).Person(1).State = California
husb.FDPOA.Agent(2).Person(1).Zip = 55555
husb.FDPOA.Agent(2).Person(1).Code = UNANSWERED
husb.FDPOA.Agent(2).Person(1).BusPhone = UNANSWERED
husb.FDPOA.Agent(2).Person(1).HomePhone = UNANSWERED
husb.FDPOA.Agent(2).Person(1).EMail = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Pager = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Fax = UNANSWERED
husb.FDPOA.Agent(2).Person(1).MaritalStatus = UNANSWERED
husb.FDPOA.Agent(2).Person(1).AKAName = UNANSWERED
husb.FDPOA.Agent(2).Person(1).NickName = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Prefix = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Salutation = UNANSWERED
husb.FDPOA.Agent(2).Person(1).SalutationCouple = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Suffix = UNANSWERED
husb.FDPOA.Agent(2).Person(1).CityOrCounty = UNANSWERED
husb.FDPOA.Agent(2).Person(1).County = Ventura
husb.FDPOA.Agent(2).Person(1).Country = UNANSWERED
husb.FDPOA.Agent(2).Person(1).GovernmentID = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Citizen = UNANSWERED
husb.FDPOA.Agent(2).Person(1).CompetencyCode = UNANSWERED
husb.FDPOA.Agent(2).Person(1).AgentName = UNANSWERED
husb.FDPOA.Agent(2).Person(1).LivingArrangements = UNANSWERED
husb.FDPOA.Agent(2).Person(1).ClientOfFirm = UNANSWERED
husb.FDPOA.Agent(2).Person(1).PersonNotes = UNANSWERED
husb.FDPOA.Agent(2).Person(1).Name = JEFFREY M. SMITH
husb.FDPOA.Agent(2).Person(1).Index = 1
husb.FDPOA.Agent(2).Person(1) = 1
husb.FDPOA.Agent(2).Person(1).Relationship =
husb.FDPOA.Agent(2).Index = 1
husb.FDPOA.Agent(2) = 1

husb.FDPOA.Agent(2).Person(2).Index = 0
husb.FDPOA.Agent(2).Person(2).Name = UNANSWERED
husb.FDPOA.Agent(2).TypeCode = O
husb.FDPOA.Agent.Levels = 2
husb.FDPOA.Agent.Count = 2

C. In Husb.FDPOA.txt

Agent(1).Count = 2
Agent(1).Names = JILL LYNN HAMPTON, and ROBERT JOHNSON
Agent(1).Name = JILL LYNN HAMPTON, and ROBERT JOHNSON
Agent(1).Person(1).RecordID = 172
Agent(1).Person(1).LastName = Hampton
Agent(1).Person(1).FirstName = Jill
Agent(1).Person(1).FullName = Jill Lynn Hampton
Agent(1).Person(1).Middle = Lynn
Agent(1).Person(1).RelToHusb = wife
Agent(1).Person(1).RelToWife = self
Agent(1).Person(1).Gender = F
Agent(1).Person(1).ClientMatter = UNANSWERED
Agent(1).Person(1).ClientID = Hampton
Agent(1).Person(1).MatterID = 0001
Agent(1).Person(1).DOBMMDDYYYY = 12/17/46
Agent(1).Person(1).DateOfBirth = December 17, 1946
Agent(1).Person(1).DateOfDeath = UNANSWERED
Agent(1).Person(1).Street1 = 4329 Timberdale Road
Agent(1).Person(1).Street2 = UNANSWERED
Agent(1).Person(1).City = Miami
Agent(1).Person(1).ST = FL
Agent(1).Person(1).State = Florida
Agent(1).Person(1).Zip = 55555
Agent(1).Person(1).Code = UNANSWERED
Agent(1).Person(1).BusPhone = UNANSWERED
Agent(1).Person(1).HomePhone = (305) 532-1457
Agent(1).Person(1).EMail = UNANSWERED
Agent(1).Person(1).Pager = UNANSWERED
Agent(1).Person(1).Fax = UNANSWERED
Agent(1).Person(1).MaritalStatus = UNANSWERED
Agent(1).Person(1).AKAName = UNANSWERED
Agent(1).Person(1).NickName = UNANSWERED
Agent(1).Person(1).Prefix = UNANSWERED
Agent(1).Person(1).Salutation = UNANSWERED
Agent(1).Person(1).SalutationCouple = UNANSWERED

Agent(1).Person(1).Suffix = UNANSWERED
Agent(1).Person(1).CityOrCounty = UNANSWERED
Agent(1).Person(1).County = Miami-Dade
Agent(1).Person(1).Country = UNANSWERED
Agent(1).Person(1).GovernmentID = UNANSWERED
Agent(1).Person(1).Citizen = Cuba
Agent(1).Person(1).CompetencyCode = UNANSWERED
Agent(1).Person(1).AgentName = UNANSWERED
Agent(1).Person(1).LivingArrangements = UNANSWERED
Agent(1).Person(1).ClientOfFirm = UNANSWERED
Agent(1).Person(1).PersonNotes = UNANSWERED
Agent(1).Person(1).Name = JILL LYNN HAMPTON
Agent(1).Person(1).Index = 2
Agent(1).Person(1) = 2
Agent(1).Person(1).Relationship = wife
Agent(1).Person(2).RecordID = 167
Agent(1).Person(2).LastName = Johnson
Agent(1).Person(2).FirstName = Robert
Agent(1).Person(2).FullName = Robert Johnson
Agent(1).Person(2).Middle = UNANSWERED
Agent(1).Person(2).RelToHusb = friend
Agent(1).Person(2).RelToWife = friend
Agent(1).Person(2).Gender = M
Agent(1).Person(2).ClientMatter = UNANSWERED
Agent(1).Person(2).ClientID = Hampton
Agent(1).Person(2).MatterID = 0001
Agent(1).Person(2).DOBMMDDYYYY = UNANSWERED
Agent(1).Person(2).DateOfBirth = UNANSWERED
Agent(1).Person(2).DateOfDeath = UNANSWERED
Agent(1).Person(2).Street1 = 6969 Atom Avenue
Agent(1).Person(2).Street2 = UNANSWERED
Agent(1).Person(2).City = Studio City
Agent(1).Person(2).ST = CA
Agent(1).Person(2).State = California
Agent(1).Person(2).Zip = 90069
Agent(1).Person(2).Code = UNANSWERED
Agent(1).Person(2).BusPhone = UNANSWERED
Agent(1).Person(2).HomePhone = (805) 234-9870
Agent(1).Person(2).EMail = UNANSWERED
Agent(1).Person(2).Pager = UNANSWERED
Agent(1).Person(2).Fax = UNANSWERED
Agent(1).Person(2).MaritalStatus = UNANSWERED
Agent(1).Person(2).AKAName = UNANSWERED
Agent(1).Person(2).NickName = UNANSWERED
Agent(1).Person(2).Prefix = UNANSWERED
Agent(1).Person(2).Salutation = UNANSWERED

Agent(1).Person(2).SalutationCouple = UNANSWERED
Agent(1).Person(2).Suffix = UNANSWERED
Agent(1).Person(2).CityOrCounty = UNANSWERED
Agent(1).Person(2).County = Los Angeles
Agent(1).Person(2).Country = UNANSWERED
Agent(1).Person(2).GovernmentID = UNANSWERED
Agent(1).Person(2).Citizen = UNANSWERED
Agent(1).Person(2).CompetencyCode = UNANSWERED
Agent(1).Person(2).AgentName = UNANSWERED
Agent(1).Person(2).LivingArrangements = UNANSWERED
Agent(1).Person(2).ClientOfFirm = UNANSWERED
Agent(1).Person(2).PersonNotes = UNANSWERED
Agent(1).Person(2).Name = ROBERT JOHNSON
Agent(1).Person(2).Index = 1
Agent(1).Person(2) = 1
Agent(1).Person(2).Relationship = friend
Agent(1).Index = 3
Agent(1) = 3
Agent(1).TypeCode = SO
Agent(2).Count = 1
Agent(2).Names = JEFFREY M. SMITH
Agent(2).Name = JEFFREY M. SMITH
Agent(2).Person(1).RecordID = 173
Agent(2).Person(1).LastName = Smith
Agent(2).Person(1).FirstName = Jeffrey
Agent(2).Person(1).FullName = Jeffrey M. Smith
Agent(2).Person(1).Middle = M.
Agent(2).Person(1).RelToHusb = UNANSWERED
Agent(2).Person(1).RelToWife = UNANSWERED
Agent(2).Person(1).Gender = M
Agent(2).Person(1).ClientMatter = UNANSWERED
Agent(2).Person(1).ClientID = Common
Agent(2).Person(1).MatterID = EP
Agent(2).Person(1).DOBMMDDYYYY = UNANSWERED
Agent(2).Person(1).DateOfBirth = UNANSWERED
Agent(2).Person(1).DateOfDeath = UNANSWERED
Agent(2).Person(1).Street1 = 4510 E. Thousand Oaks Boulevard
Agent(2).Person(1).Street2 = Suite 200
Agent(2).Person(1).City = Westlake Village
Agent(2).Person(1).ST = CA
Agent(2).Person(1).State = California
Agent(2).Person(1).Zip = 55555
Agent(2).Person(1).Code = UNANSWERED
Agent(2).Person(1).BusPhone = UNANSWERED
Agent(2).Person(1).HomePhone = UNANSWERED
Agent(2).Person(1).EMail = UNANSWERED

Agent(2).Person(1).Pager = UNANSWERED
Agent(2).Person(1).Fax = UNANSWERED
Agent(2).Person(1).MaritalStatus = UNANSWERED
Agent(2).Person(1).AKAName = UNANSWERED
Agent(2).Person(1).NickName = UNANSWERED
Agent(2).Person(1).Prefix = UNANSWERED
Agent(2).Person(1).Salutation = UNANSWERED
Agent(2).Person(1).SalutationCouple = UNANSWERED
Agent(2).Person(1).Suffix = UNANSWERED
Agent(2).Person(1).CityOrCounty = UNANSWERED
Agent(2).Person(1).County = Ventura
Agent(2).Person(1).Country = UNANSWERED
Agent(2).Person(1).GovernmentID = UNANSWERED
Agent(2).Person(1).Citizen = UNANSWERED
Agent(2).Person(1).CompetencyCode = UNANSWERED
Agent(2).Person(1).AgentName = UNANSWERED
Agent(2).Person(1).LivingArrangements = UNANSWERED
Agent(2).Person(1).ClientOfFirm = UNANSWERED
Agent(2).Person(1).PersonNotes = UNANSWERED
Agent(2).Person(1).Name = JEFFREY M. SMITH
Agent(2).Person(1).Index = 1
Agent(2).Person(1) = 1
Agent(2).Person(1).Relationship =
Agent(2).Index = 1
Agent(2) = 1
Agent(2).Person(2).Index = 0
Agent(2).Person(2).Name = UNANSWERED
Agent(2).TypeCode = O
Agent.Levels = 2
Agent.Count = 2