QUICK START TO
USING WDDATA AND EPPEOPLE TOGETHER.

by JAE -- July 3, 2001

I. INTRODUCTION

A. BACKGROUND

WDDATA.EXE is the "WinDraft Data Entry" Program, which we also refer to as the WinDraft "Checklist." See *Quick Start to Using WinDraft* and the *WinDraft User's Guide* for more information on that.

This guide adds "quick start" information for lawyers, legal assistants, and legal secretaries on how to use the *EPPeople* "fiduciary chooser" program, which works in conjunction with the other WinDraft components.

See "*EPPeople Fiduciary Chooser User Manual* for complete information, including a full description of what this module does and how to use it, how to program it, and how to setup and support it. If you haven't done so, we recommend reading at least the beginning of that document before you read this so that you can see what the program does and how it helps you.

B. INTEGRATION WITH THE WINDRAFT CHECKLIST

Although EPPeople can be used independently, this documentation assumes that you will be using EPPeople with full WinDraft checklist integration. Thus, you perform most file operations for EPPeople within WDDATA.

C. SCREEN SHOTS MAY DIFFER

Note that your screens and systems may vary slightly from what you see in this document. If so, that is because either your practice system's integration is different, or because we have added features to EPPeople and WinDraft. Either way, we hope that if you follow the steps described here, you will be able to work with the programs as installed in your firm.

II. WORKING WITH DATA

First of all, this documentation assumes that you know how to use WinDraft, independent of EPPeople. **If you don't, please read the Quick Start to Using WinDraft.**

A. WORKING WITH AN EXISTING DATA FILE.

When you open the WinDraft Data Entry (Checklist) program, the EPPeople program will load automatically, but it will be hidden until you are working with data.

Click on File|Open to open an existing data file, such as the demo data, Hampton1.wdd.

When you do, WDDATA.exe will both open the data file and cause EPPeople.exe to access the "cast of characters" in the database and their roles for that data file.

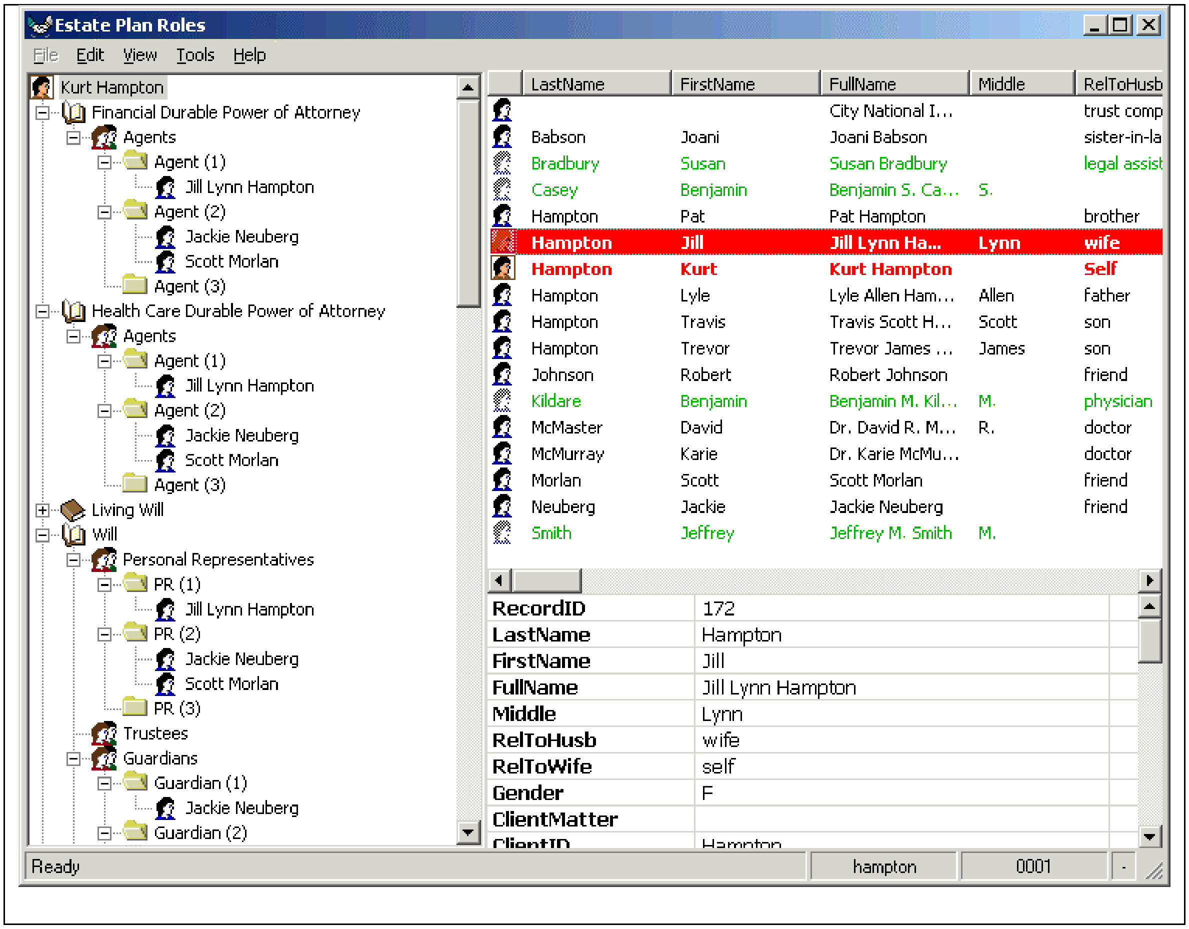
NOTE: Although WDDATA.exe and EPPeople.exe work together, they are two separate programs, and you often need to move back and forth between the two using standard Windows commands for moving between windows.

You can either:

- use the A T keys to switch back and forth between the WinDraft checklist and the EPPeople windows, **or**
- click on the Windows task bar at the bottom of the screen, which looks something like this:

(And note that with Windows NT and 2000, sometimes WinDraft can't switch the "focus" to the EPPeople window, and you need to manually switch windows.)

The EPPeople screen will look something like this:

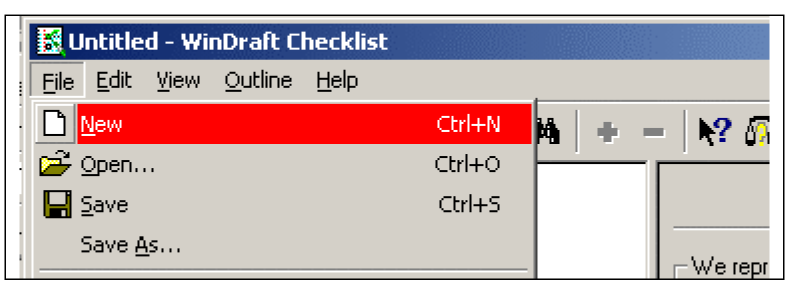


See the full EPPeople user manual for a full description of how to drag and drop data and work with the other options.

When the data is the way you want it to be, switch back to the WinDraft checklist, and click "blastoff." (Use Alt-Tab or click on the WinDraft checklist icon on the Windows task bar at the bottom of the screen to switch between the programs.)

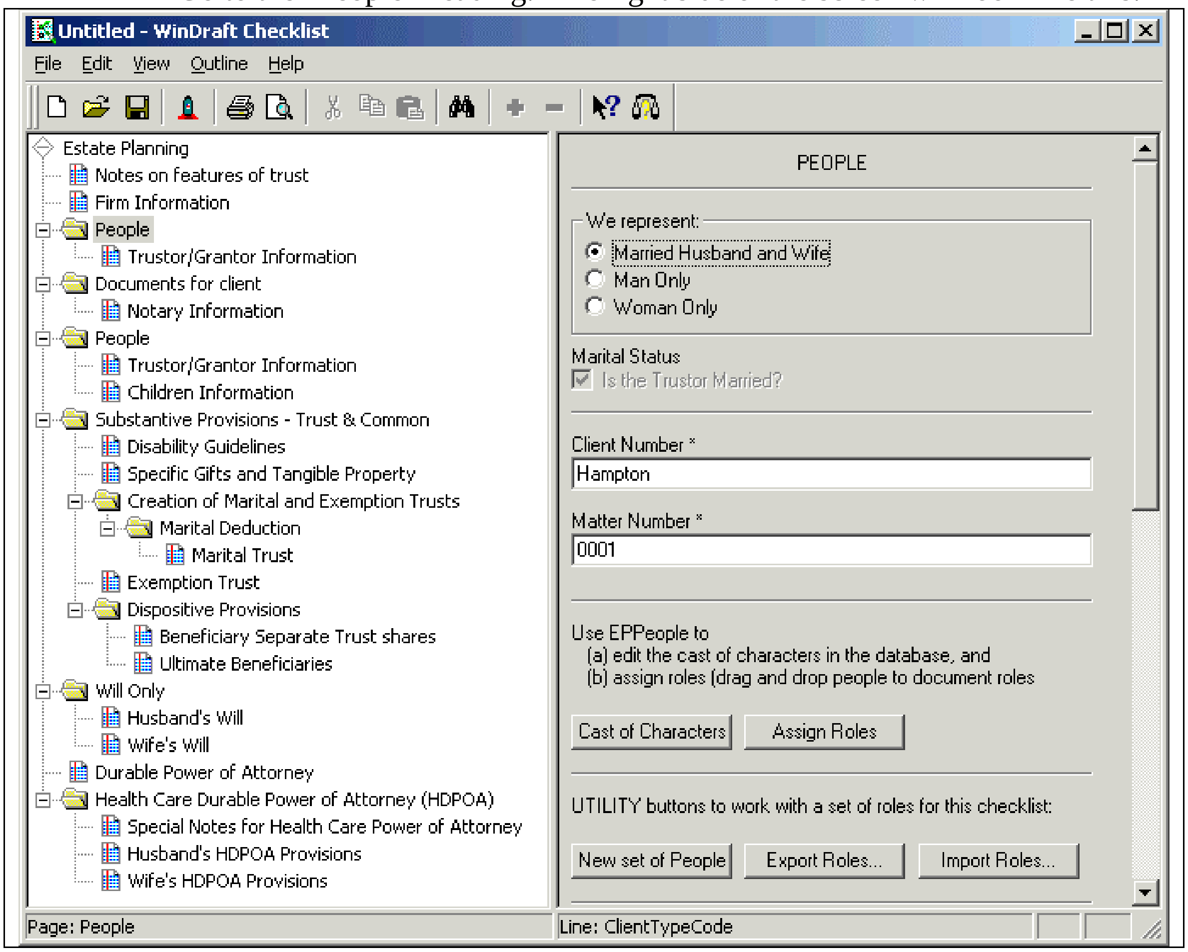
B. *Working with a New Data File*

1. In the WinDraft Checklist, Click File|New to Create a New Data File.



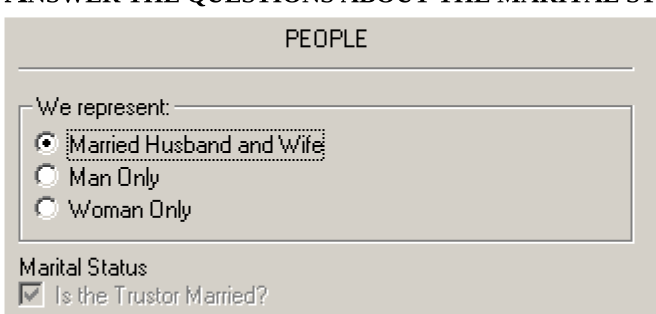
2. CLICK ON THE "PEOPLE" HEADING.

Go to the "People" heading. The right side of the screen will look like this:



(Note that your practice system may have these questions and buttons on different screens, such as FileInfo, depending on how your system has been set up.)

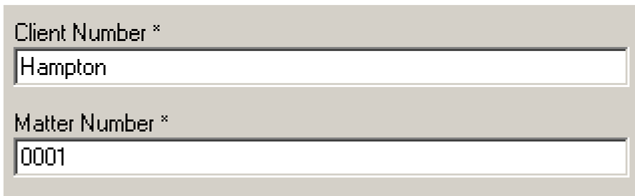
3. ANSWER THE QUESTIONS ABOUT THE MARITAL STATUS OF THE CLIENT:



(If you don't answer these questions when you create your EPPeople roles, the system will assume that the client is married and use the template for married people when it creates the document roles. If you forget to click single, that's OK. You can always delete the unneeded roles later.)

4. ENTER THE CLIENT AND MATTER CODE.

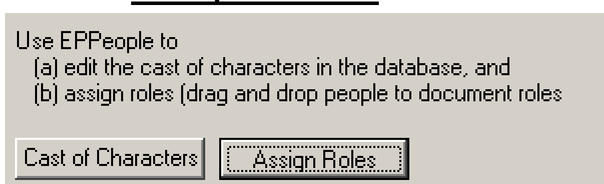
Note that this can be letters or numbers. If you practice in a large firm, it would typically be something like 100234 and 0001. In a smaller firm, you might just insert the client's name as the "Client Number."



Note that once you enter the client and matter code for a group of people, they stick, and you can't change them without a hassle. Therefore, make sure you enter the client number correctly.

5. ENTER PEOPLE IN THE DATABASE

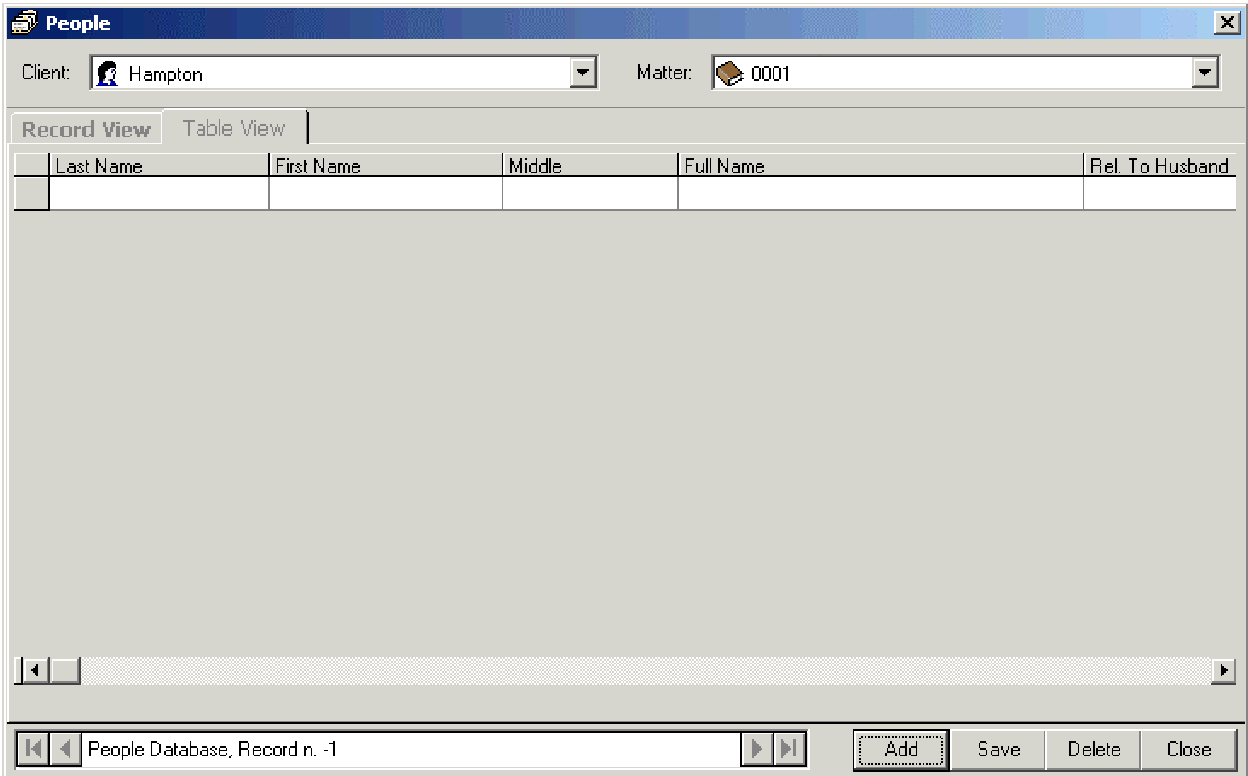
a) Click the <u>Cast of Characters</u> button to load EPPeople



If you click on "Cast of Characters," the system will switch the focus from the WinDraft checklist to the EPPeople program's data entry screen for entering people into the database.

(Note: If you are already in the EPPeople program, or if you click on Assign Roles first, which takes you into the EPPeople program and the "roles tree," you can get to the same screens to enter people into the database by clicking the View|People menu choice.)

The screen to enter people looks like this:

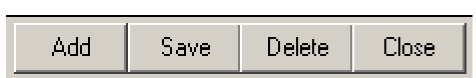


	The icon on the task bar at the bottom of your Windows screen will look like this:

Click the "Add" button at the bottom of the screen to add a person to the database.

You'll see that the grayed-out tabs for "record view" and "table view" become black. You can click on the tab to move back and forth between record view and table view.

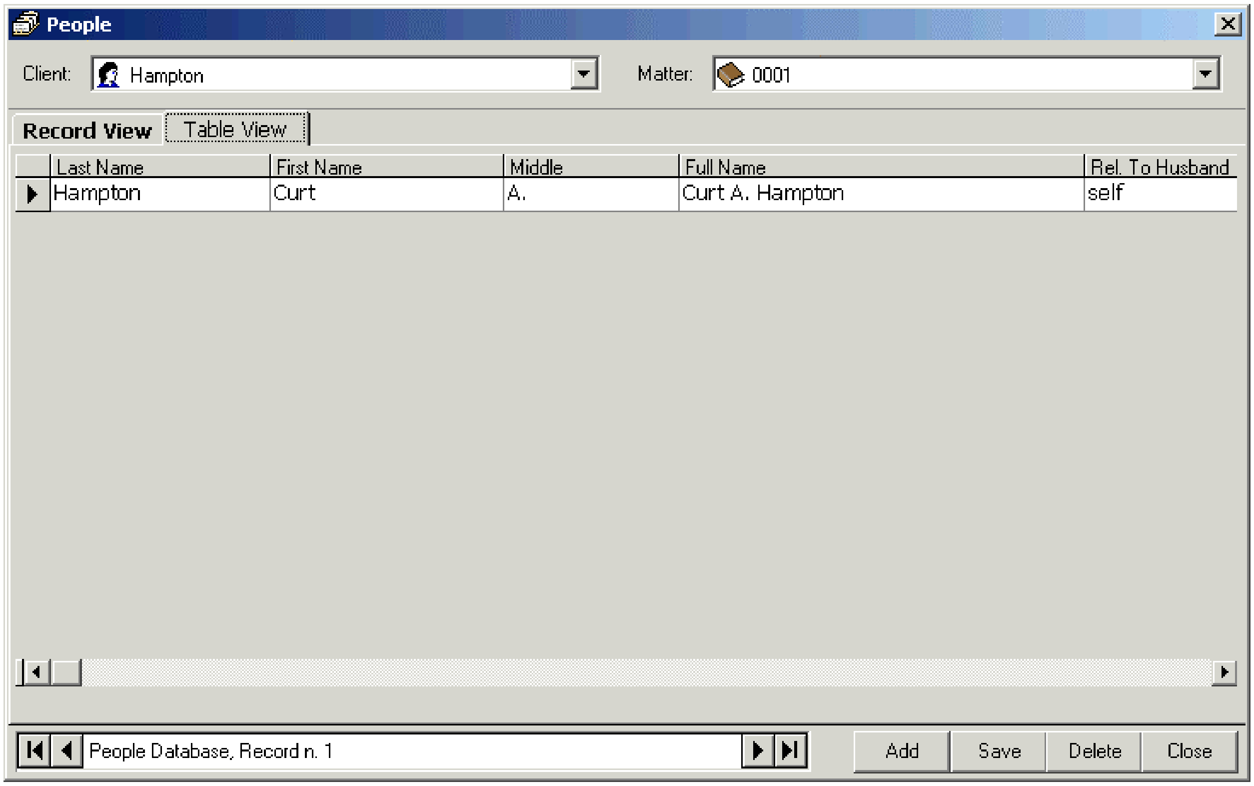
(In either view, the Add, Save, Delete and Close buttons at the bottom of the screen work the same.)



(1) Table View

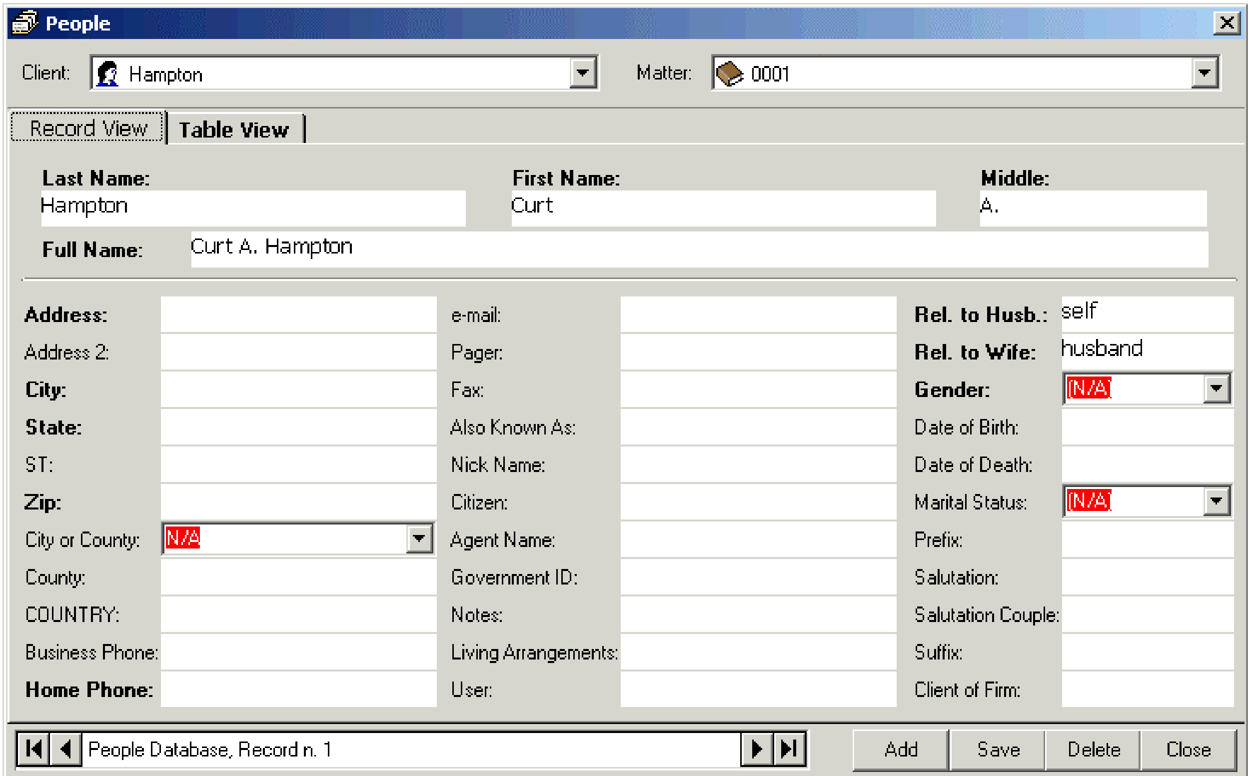
Table view allows you to see all of the people on one screen, but you can't see all of their data unless you scroll to the right.

This is "Table View:" As you add more records, you'll see them in a table that looks like an Excel spreadsheet. You can scroll to the right to add and edit the data. Each time you want to add another record, click the "Add" button.



(2) Record View

Record view lets you see all of the data for just one person at a time, but you can see all of the data for that person, like this:



(3) Navigating through the Records.

If you want to go back and forward through the people, there are two ways to navigate. Either go into table view and scroll up and down through the list. Or, in record view, you can click the arrows at the bottom of the screen.

You can see what record number you are on, and the arrows let you to the beginning, the previous record, the next record, or the end, respectively.

(4) Data You Must Enter

Be sure to enter at least the name information, gender, state, and relationship information. For relationship, enter both relationship to the husband and to the wife. This is critical, and must be entered, at least for the clients and their children.

Clients: For the man, enter "self" for relationship to husband. For the woman, enter "self" for relationship to wife. (You must do this, even if the client is single.)

Children: Use "**son**" or "**daughter**" for the Relations to Husband and Relationship to Wife. The system will also output special data for stepchildren, so if your firm as implemented a system that handles these, you can also use "**step-son**" and "**step-daughter**."

At least for the clients, be sure to enter **state**. (Enter state abbreviation in the ST field, and the state spelled out in the State field.)

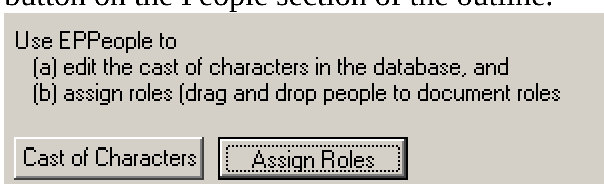
The rest of the fields are optional. (Of course, you should enter any fields that are needed in your practice systems.) If addresses are needed in your firm's documents, be sure to enter them.

See the full EPPeople User Manual for more information on entering these fields and how they are used.

(5) When you are done, click "Close."

6. ASSIGN ROLES USING DRAG AND DROP INTERFACE.

If you are in the WinDraft checklist interface, click on the "Assign Roles" button on the People section of the outline.



If you are in EPPeople already from having entered the people, simply begin dragging and dropping people from the list on the right side to the roles on the left side. (If you can't see the documents and all of their roles, click on them, and they open up. Or click on a node, then click "Edit|Expand Node" on the menu.

a) Drag and Drop

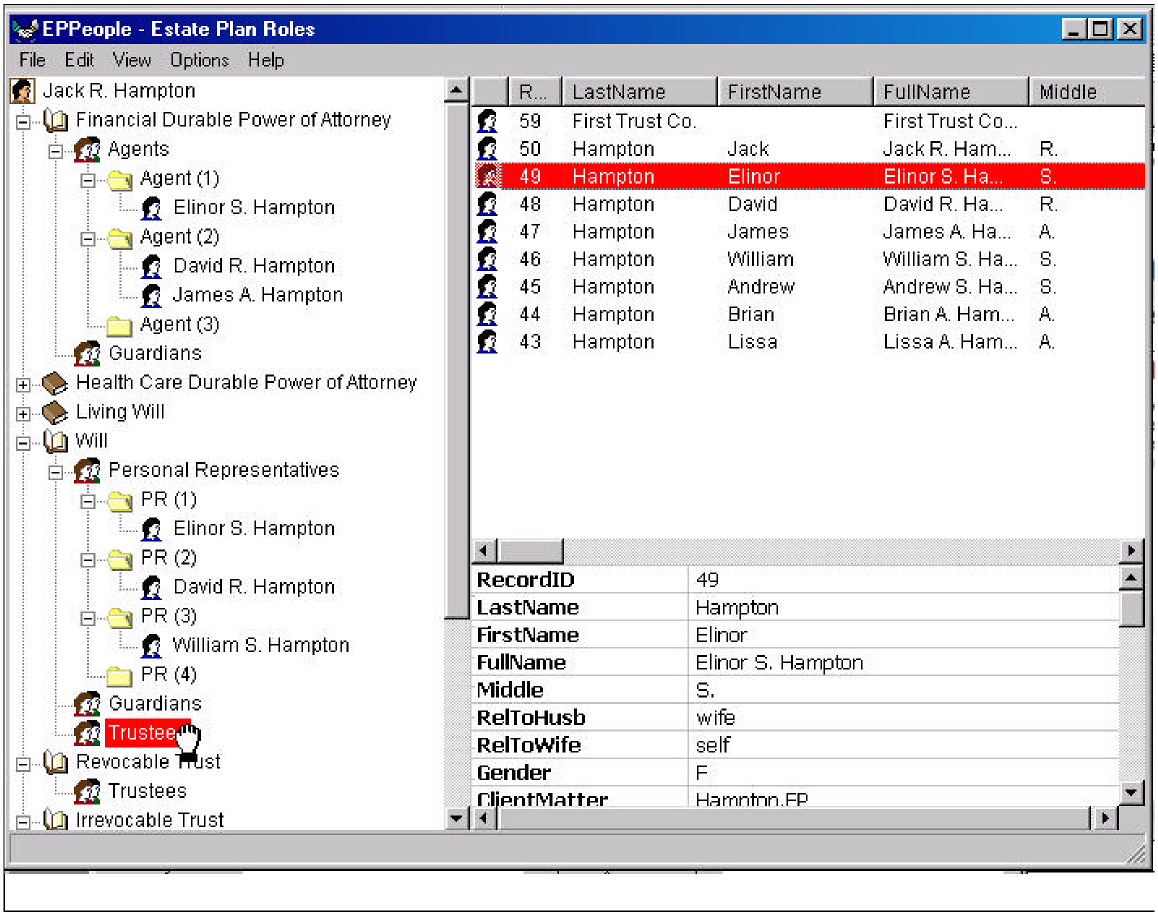
Start with the Husband’s documents. Click on a person on the right, drag him or her onto the role on the left, and release the mouse button to “drop” the person on the role.

(You may have to first double click on a document or role to open it up, depending on whether the roles are visible.)

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 that if you want to change the display of people on the right side of the screen, you can drag the column headings to change the order, and you can click on a column heading to sort on that column. The default is sorting by last name, but, for example, if you want to see the children sorted in order of age, you can click on the "date of birth" column to sort by age.

To assign roles, simply click on a person on the right, hold down the mouse key, drag them to a role on the left side, and release the mouse. Start with the Huband's Durable Power of Attorney agents.

b) ***Copying Nodes of the Tree***

Note that you can copy just about any node on the tree. Click on the husband's FDPOA agents, for example, and copy. Then click on the husband's health care power of attorney, right mouse click, and paste. Or you can simply click on the Financial DPOA, copy, click on the Health care DPOA, and paste. See the full EPPeople manual for more information.

First use copy and paste to copy fiduciaries, as desired, for each of the husband's documents.

Then, click on the husband. Copy. Then click on the wife, and Paste. You'll get the complete mirror image. Then you can make any manual changes to the wife's fiduciaries.

7. SAVE

When you have the data the way you want it, press Alt Tab or click the WinDraft checklist icon on the task bar,. 

and save your data file. Saving the WinDraft data file will also save the role information from EPPeople in the same data file.

8. ENTER OR EDIT OTHER DATA ON THE CHECKLIST.

(See QuickStart to Using WinDraft for more information on steps that are not related to people.) Save again, as appropriate.

9. BLAST OFF!