



Using Answer Files in IowaDocs®/XpressDox

Datasets, which is what XpressDox calls answer files are the foundation of efficient work in IowaDocs®/XpressDox (herein referred to as IowaDocs®). This guide explains what datasets (herein referred to as answer files) are, how to save and organize them, and how to use them to streamline document assembly, edits, and long-running matters.

UNDERSTANDING ANSWER FILES

An answer file is a database of all the information you have supplied while completing an interview in IowaDocs®. Every client name, address, value, date, and checkbox you enter is stored in that file.

In IowaDocs®, the answer file is more important than the assembled document itself. The forms can always be regenerated from the answer file, so the data you collect is what truly needs to be preserved.

With a saved answer file you can:

- Resume an interview days or weeks later without re-entering any information.
- Recover from interruptions such as a dropped internet connection or browser closure.
- Edit and reassemble documents quickly when facts change or additional information becomes available.
- Run calculations across related schedules (for example, probate inventory totals) that depend on all answers being in one place.

KEY PRINCIPLE

The answer file is the most important file in IowaDocs®. Save it first, save it often, and save it to the cloud or desktop.

SAVING ANSWER FILES TO THE CLOUD

Cloud saving is the recommended method for all answer files. It's easier to keep your files organized inside IowaDocs®, protects you from local download clutter, and makes answer files easy to find and reuse.

To save an answer file to the cloud:

1. Begin or continue an interview for any IowaDocs® form.
2. At any point during the interview, click Save Answers.
3. Choose Save to Cloud.
4. Name the answer file using the client's name (for example, **Jones, Bill**).
5. Click Save to confirm.

When returning to the same client later, repeat the steps above, select the existing answer file, and confirm Overwrite to update it with any new information you have added.

**TIP**

Save often throughout long interviews and always save after clicking the Assemble button at the end of the interview. If anything interrupts your session, your work is preserved.

NAMING AND ORGANIZING ANSWER FILES

Consistent naming and folder structure makes answer files easy to locate months or years later.

Recommended practice:

- Create one folder per client under Answer Files.
- Name folders using last name, first name format (for example, **Jones, Bill**).
- Store a single answer file per client inside that folder.
- Name the answer file the same as the client. Do not create separate answer files for Schedule A, Schedule B, or other sub-forms.

IMPORTANT

Use one answer file per client. In probate, for example, the system needs all schedules in a single answer file to calculate totals correctly. Separate answer files for Schedule A, Schedule B, and the like will break those calculations.

Common exceptions where a separate answer file may be appropriate:

Situation	Why a Separate Answer File May Apply
Multiple real estate matters	When a client owns multiple unrelated properties, each requiring its own set of deeds or transfer documents.
Certain probate circumstances	A small number of specialized probate situations call for separate files. Consult your firm's practice before splitting probate answers.

LOADING A SAVED ANSWER FILE

Loading an answer file pulls your previously entered data into an interview so you can pick up exactly where you left off or build additional documents for the same client.

1. Open the form or interview you want to work on.
2. Click the Load Answers button.
3. Select the client's answer file from the File Explorer list.
4. Review the loaded answers. Update, add, or delete information as needed.
5. Click Save Answers and Overwrite the answer file when finished to keep the file current.

NOTE

If you close an interview without saving an answer file, IowaDocs® automatically preserves your most recent answers. When you return to that form, a green notification will appear indicating that unsaved data was loaded for you.



PREVIEWING BEFORE ASSEMBLY

The Preview button shows a read-only version of the document as it currently stands, so you can spot missing answers or formatting issues before committing to assembly.

1. During the interview, click Preview.
2. Review the document in your browser. Your answers appear highlighted so you can verify them quickly.
3. Close the preview window to return to the interview and make any corrections.

NOTE

The preview is read-only. Printed previews will display a PREVIEW ONLY marker and should not be used as final output.

ASSEMBLING DOCUMENTS

When your interview is complete, assemble the final document or set of documents.

1. Navigate to the final page of the interview to find the Assemble button.
2. Choose your preferred output format.
3. Click Save to Cloud (Answers) to update your answer file in the cloud.
4. Download each file to your computer. To choose a specific destination folder, right-click the download link and select Save Link As.

MANAGING ANSWER FILES IN FILE EXPLORER

The File Explorer in IowaDocs® lists all of your saved answer files and folders. Use it to rename, reorganize, or remove files as your practice evolves.

1. From the IowaDocs®, Manage menu, open File Explorer.
2. Browse to the client folder or answer file you want to manage.
3. Use the available actions to create new folders, move files, or delete files no longer needed.

IMPORTANT

Deletions in File Explorer are permanent. Once an answer file is deleted it cannot be recovered. Confirm that a matter is fully concluded and documented elsewhere before deleting.

BEST PRACTICES

- Save to the cloud, not to your local Downloads folder, whenever possible.
- Save early, save often. Never wait until the end of an interview to save answers for the first time.
- Keep one answer file per client so calculations, cross-schedule data, and other data remain accurate.



- Use consistent naming (last name, first name) for answer files (and folders, if utilized).
- Preview before assembling to catch missing or incorrect answers early.
- Load existing answer files when returning to a client rather than starting a new interview from scratch.
- Right-click Save Link As when downloading assembled documents to control where each file is stored.

QUICK REFERENCE: INTERVIEW BUTTONS

Button	Function
Save Answers	Saves your current answer file. Choose Save to Cloud for the recommended workflow.
Load Answers	Loads a saved client answer file into the current interview to resume or continue work.
Preview	Displays a read-only view of the document as it currently stands, with your answers highlighted.
Assemble	Generates the final document or documents. Found on the last page of the interview.
File Explorer (menu)	Central location for viewing, organizing, and deleting saved answer files and folders.

NEED HELP?

IowaDocs® Support is available Monday through Friday, 9:00 AM to 3:00 PM.

Email: support@iowadocs.net | **Website:** www.iowadocs.net

Troubleshooting & FAQ: www.iowadocs.net/troubleshooting.cfm

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