



# Turner

User Guide

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# Welcome to Turner

Turner is a powerful tool for drafting and analyzing contracts.

To learn about getting started with Turner, see Chapter 2, "Creating, Opening, and Saving a Document" on page 11.

**Note:** This user guide is not intended to be a guide to drafting contracts, provide legal advice, or create an attorney-client relationship. This user guide, and Turner itself, cannot substitute for the advice of an attorney. You should consult an attorney before you enter into any contract.

# Chapter 1

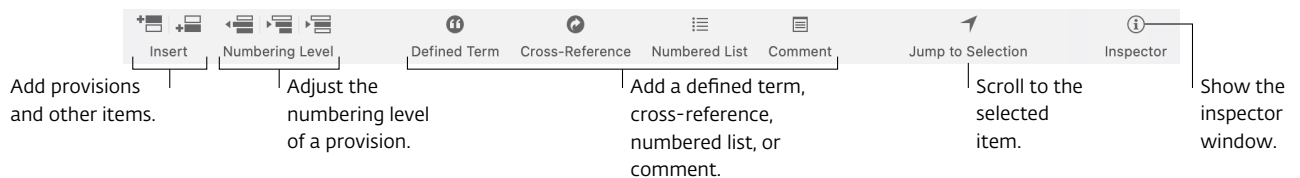
## Tools and Techniques

Learn about controls you can use to edit and navigate your document.

### 1.1 The Toolbar

The toolbar gives you easy access to many tools you use when working with Turner documents. Hold the pointer over a toolbar button to see a description of what it does.

Here is the default set of toolbar buttons:



You can customize the toolbar to suit your working style.

**To customize the toolbar:**

1. Choose View > Customize Toolbar, or Control-click inside the toolbar and then choose Customize Toolbar from the shortcut menu. The Customize Toolbar dialog appears.
2. Make changes to the toolbar.
  - To add a button to the toolbar, drag its icon to the toolbar.
  - To remove a button from the toolbar, drag it out of the toolbar.
  - To rearrange buttons in the toolbar, drag them.
  - To restore the default set of toolbar buttons, drag the default set to the toolbar.
  - To show only icons or only text in the toolbar, use the Show pop-up menu.
3. Click Done.

In addition to using the Customize Toolbar dialog, you can customize the toolbar in the following ways:

- To remove a button from the toolbar, hold down the Command key while dragging the button out of the toolbar.
- To move a button, hold down the Command key while dragging the button in the toolbar.

To show or hide the toolbar, choose View > Show Toolbar or View > Hide Toolbar.

## 1.2 Navigation Tools

You can use a variety of tools to navigate your document.

Click the Back and Forward buttons to go to items to which you've previously navigated.

Use the Provisions menu to go to a provision.

Use the Defined Terms menu to go to where a defined term is defined.

Navigate by clicking uses of defined terms.

The screenshot shows a legal document editor interface. On the left is a Navigator pane with a tree view of document sections. The main area displays Article II, 'Effects of the Merger', with section 2.1 'Effect on Capital Stock'. Subsection (a) 'Cancellation of Treasury Stock' is highlighted with a blue box. The top toolbar includes navigation buttons (Back, Forward), a Provisions menu, a Defined Terms menu, and a Link menu. Annotations with lines point from the text above to these specific toolbar elements.

Use the Navigator to manage provisions, defined terms, cross-references, related items, drafting errors, comments, and ancillaries.

Here are ways to navigate a document:

- Scroll through your document using a mouse or a trackpad. As you scroll, the name of the part of the document to which you've scrolled appears at the bottom of the Turner window. To stop this information from appearing, choose Turner > Preferences, and then deselect the Show Location checkboxes in the General pane of Turner preferences.
- To go to the next item in your document, press Tab. To go to the previous item, press Shift-Tab.
- To go to a provision, do any of the following:
  - Click a provision to select it, and then use the arrow keys.
    - Press the Up Arrow key to go to the provision above the selected one, and press the Down Arrow key to go to the provision below the selected one.



- Press the Left Arrow key to go to the provision that contains the selected one, and press the Right Arrow key to go back.
- Click the Provisions menu at the top of the Turner window, and then choose a provision.
- Choose Navigate > Go to Provision, and then choose a provision from the submenu.
- Click a cross-reference. See Section 3.4, “Using Cross-References” on page 20 to learn more about cross-references.
- Use the Provisions Navigator. See Section 4.4, “Navigating Provisions” on page 34 to learn more.

See Chapter 4, “Working with Provisions” on page 28 to learn more about provisions.

- To go to items that are related to a provision, a list item, or another part of your document, use the Related Items Navigator; see Section 1.4, “The Related Items Navigator” on the next page to learn more.
- To go to where a defined term is defined, do any of the following:
  - Click the Defined Terms menu at the top of the Turner window, and then choose a defined term.
  - Choose Navigate > Go to Defined Term, and then choose a defined term from the submenu.
  - Click the Link button at the top of the Turner window, and then click a use of a defined term.
  - Hold down the Option key while you click a use of a defined term.
  - Use the Defined Terms Navigator. See Section 5.4, “Finding Defined Terms” on page 41 to learn more.

See Chapter 5, “Working with Defined Terms” on page 36 to learn more about defined terms.

- To go to provisions or other items to which you’ve previously navigated, click the Back and Forward buttons at the top of the Turner window. To choose from a list of items, hold down the buttons. To clear navigation history, choose Navigate > Clear History.
- As you navigate your document, you may scroll away from the provision or other item that you’re working with. To go to the provision or other item that you’re working with, click the “Jump to Selection” button in the toolbar, choose Navigate > Jump to Selection, or press Command-J.

## 1.3 The Navigator

You can use the Navigator to navigate and manage defined terms, drafting errors, comments, and more.

To show the Navigator, choose View > Show Navigator. To show a particular Navigator, click one of the buttons at the top of the Navigator. From left to right, these buttons show these Navigators: Provisions, Defined Terms, Cross-References, Related Items, Drafting Errors, Comments, and Ancillaries.



You can copy the contents of the Drafting Errors, Comments, and Ancillaries Navigators to the Clipboard, and then paste this content elsewhere; see Section 6.2, “Managing Drafting Errors” on page 47, Section 6.3, “Using Comments” on page 48, and Section 9.2, “Managing Ancillaries” on page 54 to learn more.

To learn about this Navigator	Go to
Provisions	Section 4.4, “Navigating Provisions” on page 34
Defined Terms	Section 5.4, “Finding Defined Terms” on page 41
Cross-References	Section 3.4.3, “Managing Cross-References” on page 22
Related Items	Section 1.4, “The Related Items Navigator” on this page
Drafting Errors	Section 6.2, “Managing Drafting Errors” on page 47
Comments	Section 6.3, “Using Comments” on page 48
Ancillaries	Section 9.2, “Managing Ancillaries” on page 54

## 1.4 The Related Items Navigator

You can use the Related Items Navigator to find items that are related to an item that you choose. For example, you can use the Related Items Navigator to find provisions that contain cross-references to the provision that you’re working with. To show the Related Items Navigator, choose View > Show Related Items Navigator.

**Here are ways to use the Related Items Navigator:**

- To view items that are related to the one that you’re working with, choose Current Item from the Scope menu at the top of the Related Items Navigator. To view items that are related to a provision, choose a provision from the Scope menu.
- To sort items in the Related Items Navigator alphabetically or in the order in which they appear in your document, click the Item button at the top of the Navigator. To sort items in the Navigator by number of items, click the Count button at the top of the Navigator.
- To see more information about an item in the Navigator, click the disclosure triangle next to the item.
- To go to an item listed in the Navigator, click the item.

## 1.5 Assistant Editors

You can use Assistant Editors to work with many parts of a document at the same time. To show an Assistant Editor, click the Add Assistant Editor button (+) at the top right of the Turner window, choose View > Assistant Editors > Add Assistant Editor, or press Command-Option-Return.

**Here are ways to use an Assistant Editor:**

- Review related content in different parts of a document side by side.
- Copy and paste text and other content from one part of a document to another.

- Search for words and phrases in an Assistant Editor without losing your place in the main editor. See Section 3.2, “Finding and Replacing Text” on page 14 to learn how to search for words and phrases.
- Insert cross-references to provisions by clicking them in an Assistant Editor. See Section 3.4, “Using Cross-References” on page 20 to learn about cross-references.

## 1.6 The Inspector Window

You can use the controls in the inspector window to set up the overall characteristics of your document, including text appearance, provision numbering, and more. You can also use the controls in the inspector window to manage elements in your document, including numbered lists, signature blocks, and more. Hold the pointer over controls in the inspector window to see a description of what they do.

To open the inspector window, choose View > Show Inspector, or click Inspector in the toolbar. To open another inspector window, choose View > New Inspector.

Click the buttons at the top of the inspector window to show a particular inspector.



— Click a button at the top of the inspector window to show one of the seven inspectors: Document, Provisions, Definitions List, Numbered List, Front Matter, Signature Block, and Print & Export.

To learn about	Go to
The Document inspector	Section 3.3, “Formatting Overall Text Appearance” on page 19
The Provisions inspector	Chapter 4, “Working with Provisions” on page 28
The Definitions List inspector	Chapter 5, “Working with Defined Terms” on page 36
The Numbered List inspector	Section 3.5, “Using Numbered Lists” on page 22
The Front Matter inspector	Chapter 7, “Working with Introductory Sections and the Document Title” on page 49
The Signature Block inspector	Chapter 8, “Working with Signature Blocks” on page 52
The Print & Export inspector	Chapter 10, “Printing and Exporting a Document to Other Formats” on page 56

## 1.7 Keyboard Shortcuts and Shortcut Menus

You can use keyboard shortcuts to perform many of Turner’s menu commands and tasks. To see a list of keyboard shortcuts you can use in Turner, choose Help > Keyboard Shortcuts.

In addition to keyboard shortcuts, you can use shortcut menus. To show a shortcut menu, Control-click an item in your document.

## Chapter 2

# Creating, Opening, and Saving a Document

Create a new document or import an existing document from another application. Save a copy of your document.

### 2.1 Creating a New Document

It's easy to create a new Turner document.

**To create a new document:**

- Choose File > New, or press Command-N.

If you want new Turner documents to include preset content and formatting attributes, you can create a Turner document with the content and formatting attributes you prefer, save this document, and then set Turner to base new documents on this saved document. To do this, choose Turner > Preferences, and then use the Default Document controls in the General pane of Turner preferences. To learn how to save a Turner document, see Section 2.4, "Saving a Document" on the next page.

You can import documents created in other applications (such as Microsoft Word) into Turner. See Section 2.2, "Importing a Document" on this page to learn how.

### 2.2 Importing a Document

You can import documents created in other applications (such as Microsoft Word).

You can also import documents you download as HTML files from the Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system (<https://www.sec.gov/edgar>) provided by the US Securities and Exchange Commission. You can download HTML files from the EDGAR system using Safari and other web browsers. To learn how to download files using Safari, see Safari Help.

Turner can import the following file formats: Microsoft Word (DOCX), PDF, Rich Text Format (RTF), EDGAR HTML, and plain text (TXT).

**Note:** To import a Microsoft Word DOC file, you must first export the DOC file to a file format that Turner can import (like DOCX and RTF), and then import this file. To learn how to export DOC files to other file formats, see Word Help.

**Here are ways to import a document:**

- Drag the document to the Turner application icon in the Dock.
- In Turner, choose File > Open, select the document in the Open dialog, and then click Open.

To learn tips for cleaning up documents you import, see Appendix A, “Tips for Working with Imported Documents” on page 66.

If you need to import a file format that Turner does not support, try opening the document in another application and saving it in a format that Turner can import, or copy and paste the contents of the document into a new Turner document.

You can export Turner documents to Microsoft Word (DOCX), PDF, Rich Text Format (RTF), EDGAR HTML, plain text (TXT), and EDGAR plain text. See Section 10.2, “Exporting Turner Documents to Other File Formats” on page 60 to learn more.

Instead of starting with a document you import, you can start with a new document. See Section 2.1, “Creating a New Document” on the previous page to learn how.

## 2.3 Opening an Existing Document

There are several ways to open a document created with Turner.

**Here are ways to open a Turner document:**

- To open any Turner document, choose File > Open, select a document, and then click Open.
- To open a document you’ve worked on recently, choose File > Open Recent, and then choose a document from the submenu.

## 2.4 Saving a Document

As you work, Turner automatically saves your document to a default location and with a default name. You can choose a new name for your document and save it to another location.

To learn about	Go to
Saving your document for the first time	Section 2.4.1, “Saving a Document for the First Time” on the next page
Saving a copy of a document with a new name or location	Section 2.4.2, “Saving a Copy of a Document” on the next page
Undoing changes you don’t want to save	Section 2.4.3, “Undoing Changes” on the next page

### 2.4.1 Saving a Document for the First Time

When you save your document for the first time, you choose a name and location for your document. After you save your document for the first time, you can press Command-S to save it as you work.

To save a document for the first time:

1. Choose File > Save, or press Command-S.
2. In the Save As field, enter a name for your document.
3. Use the Where pop-up menu to choose where you want to save your document. Click the disclosure triangle to the right of the Save As field to view more options.
4. Click Save.

### 2.4.2 Saving a Copy of a Document

If you want to make a copy of your document (to create a backup copy or multiple versions, for example) you can save the document using a different name or in another location.

To save a copy of a document:

1. Hold down the Option key, and then choose File > Save As. You can also press Command-Option-Shift-S.
2. In the Save As field, enter a name for the copy of your document.
3. Use the Where pop-up menu to choose where you want to save the copy. Click the disclosure triangle to the right of the Save As field to view more options.
4. Click Save.

The original copy of your document is closed, and the new copy is open. To work with the original copy, choose File > Open Recent, and then choose the original copy from the submenu.

### 2.4.3 Undoing Changes

You can undo changes you make to your document if you don't want to save them. To undo a change, choose Edit > Undo or press Command-Z. To redo a change you've undone, choose Edit > Redo or press Command-Shift-Z.

## 2.5 Closing a Document without Quitting Turner

When you're finished working with a document, you can close it without quitting Turner.

Here are ways to close a document and keep Turner open:

- To close the document you're working with, choose File > Close, or click the close button in the upper-left corner of the Turner window.
- To close all open Turner documents, hold down the Option key and choose File > Close All.

## Chapter 3

# Working with Text

Use cross-references, numbered lists, and provisos. Format text throughout your document. Find and replace text. Add page breaks, paragraph breaks, and line breaks.

### 3.1 Selecting Text

You can use a variety of techniques to select text that you want to work with.

Here are ways to select text:

- To select letters and other characters, click in front of the first character and then drag across the characters you want to select.
- To select a word, double-click it.
- To select all of the text in a provision or other item that you're working with, press Command-A. To expand this selection, press Command-A again.
- To select a range of text, click the start of the range, and then click the end of the range while holding down the Shift key.
- To extend the selection one character at a time, press Shift-Left Arrow or Shift-Right Arrow.
- To extend the selection one line at a time, press Shift-Up Arrow or Shift-Down Arrow.

### 3.2 Finding and Replacing Text

You can use the Find & Replace pane to find words and phrases. You can also use tokens in the Find & Replace pane to find amounts, times, uses of defined terms, and more. As you find words and phrases, you can replace them with something else.

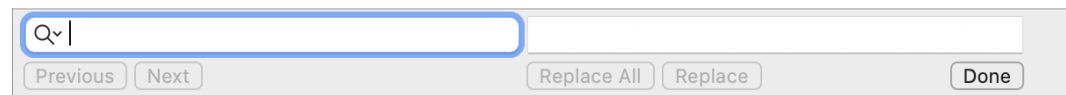
To learn about	Go to
Finding and replacing text generally	Section 3.2.1, "Finding and Replacing Text Generally" on this page
Finding numbers, amounts of money, and dates and times	Section 3.2.2, "Finding Numbers, Amounts of Money, and Dates and Times" on the next page
Finding uses of defined terms	Section 3.2.3, "Finding Uses of Defined Terms" on page 18

### 3.2.1 Finding and Replacing Text Generally

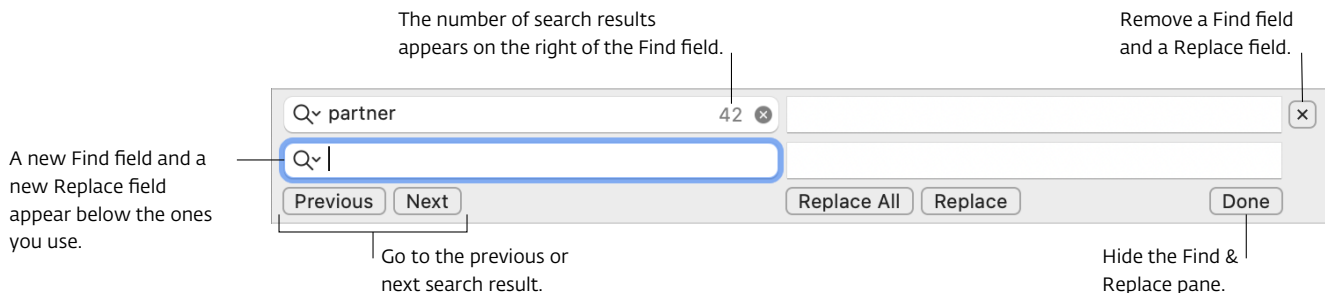
You can find all instances of words and phrases in your document. As you find words and phrases, you can replace them with something else. You can find and replace up to six words and phrases at a time.

#### To find text:

1. Choose Edit > Find > Find to show the Find & Replace pane.



2. Type the text you want to find in the Find field. As you type, a list of tokens appears below the Find field. You can use the tokens to find numbers, amounts of money, dates, and more; see Section 3.2.2, "Finding Numbers, Amounts of Money, and Dates and Times" on the next page to learn how. You can also use tokens to find uses of defined terms; see Section 3.2.3, "Finding Uses of Defined Terms" on page 18 to learn more.
3. Press Return. The text for which you've searched becomes highlighted, and the number of search results appears on the right of the Find field. A new Find field and a new Replace field appear below the ones you used, and you can enter more text you want to find in the new Find field.



To limit search results, click the magnifying glass in the Find field, and then select Match Case or Whole Words.

**Match Case:** When Match Case is selected, you search for the uppercase and lowercase letters you enter in the Find field exactly as you enter them. When Match Case is deselected, you can use uppercase and lowercase letters interchangeably in the Find field. For example, if you search for *partner* when Match Case is selected, you find *partner* but not *Partner*. If you search for *partner* when Match Case is deselected, you find both *partner* and *Partner*.



**Whole Words:** When Whole Words is selected, you find only what you enter in the Find field. When Whole Words is deselected, you find text that contains what you enter in the Find field. For example, if you search for *partner* when Whole Words is selected, you find *partner* by itself, but not in words like *partnership*. If you search for *partner* when Whole Words is deselected, you find *partner* by itself and in words like *partnership*.

4. Click Previous or Next to go to the previous or next search result.
5. To remove a Find field and the Replace field next to it, click the Remove button (×) to the right of the Replace field.
6. When you're finished searching, click Done.

**To replace text:**

1. Choose Edit > Find > Find to show the Find & Replace pane.
2. Enter the text you want to replace in the Find field, and enter the replacement text in the Replace field next to the Find field.
3. Click the buttons below the Replace field to replace text.

**Replace All:** Click to replace every occurrence of the text in the Find field with the text in the Replace field.

**Replace:** Click to replace the highlighted occurrence of the text in the Find field with the text in the Replace field, and then immediately go to the next occurrence.

4. When you're finished replacing text, click Done.

In addition to words and phrases, you can find amounts of money, dates and times, and more; see Section 3.2.2, "Finding Numbers, Amounts of Money, and Dates and Times" on this page to learn how. You can also find uses of defined terms; see Section 3.2.3, "Finding Uses of Defined Terms" on page 18 to learn more.

### 3.2.2 Finding Numbers, Amounts of Money, and Dates and Times

You can use tokens in the Find field to find numbers, amounts of money, dates, and more. You can insert tokens in the Find field by using the Find pop-up menu or by using the menu that appears when you type text in the Find field.

**Here are ways to insert tokens in the Find field:**

- Click the magnifying glass in the Find field, and then choose a token from the Find pop-up menu.
- Start typing the token you want to insert in the Find field, and then choose it from the menu that appears below the Find field.

Here are tokens you can use to find numbers, amounts of money, and dates and times:

Use this token	To find this	For example
number	Digits, comma-separated numbers, decimals, percentages, and numbers in word form	1 1.0 one 50% fifty percent fifty per cent fifty per centum 10,000,000 10 million ten million 1st first 58th fifty-eighth
money	Amounts of money denominated in the currencies listed in Appendix B, "Finding Amounts of Money" on page 69	\$100 one hundred euros 100 zł 100 ringgits
duration	Durations formatted in common ways	one (1) business day tenth Business Day 15 consecutive Trading Days thirty (30) consecutive calendar days 181st day four consecutive Fiscal Quarters
date	Dates formatted in common ways	August 30, 2010 30 Aug 2010 30th of August 1st day of January
time of day	Times of day formatted in common ways	9:30AM 9:30 a.m. 9:30am 9:30 12:00 noon 5:00p.m. 5:00 pm 5:00 5 PM 12:00 midnight
unit of time	Commonly used measures of time	seconds minutes hours days weeks months quarters years anniversary

Use this token	To find this	For example
word	Any word	—

You can use **number**, **word**, and the other tokens together with text to find a variety of phrases. Here are examples:

When you search for this	You can find phrases like this
<b>number</b> shares	1,000 shares 10 million shares ten million shares
<b>word</b> stock	A Stock B Stock Common Stock Preferred Stock
<b>number</b> to <b>number</b>	4.25 to 1.00 3.0 to 1.0 one to one
<b>number</b> ( <b>number</b> )	ten (10) fifty percent (50%) one hundred (100,000)
<b>money</b> ( <b>money</b> )	ten million dollars (\$10,000,000) fifty pounds sterling (£50.00) one million euros (€10,000,000,000)

In addition to amounts, times, and so on, you can use tokens to find uses of defined terms. To learn how, see Section 3.2.3, “Finding Uses of Defined Terms” on this page.

To learn about finding text generally, see Section 3.2.1, “Finding and Replacing Text Generally” on page 15.

### 3.2.3 Finding Uses of Defined Terms

You can use tokens in the Find field to find uses of defined terms. When you search for a defined term token, you find both singular and plural uses of the defined term represented by the token.

**To find all uses of a defined term:**

1. Choose Edit > Find > Find to show the Find & Replace pane.
2. Do any of the following:
  - Click the magnifying glass in the Find field, choose Defined Term Uses, and then choose a defined term from the submenu.
  - Start typing the defined term you want to find in the Find field, and then choose a defined term token from the menu that appears below the Find field.
3. Press Return.

You can also use the Defined Terms Navigator to find uses of defined terms. To learn how, see Section 5.4, “Finding Defined Terms” on page 41.

To learn more about defined terms, see Chapter 5, “Working with Defined Terms” on page 36.

In addition to uses of defined terms, you can use tokens to find numbers, amounts of money, dates, and more. To learn how, see Section 3.2.2, “Finding Numbers, Amounts of Money, and Dates and Times” on page 16.

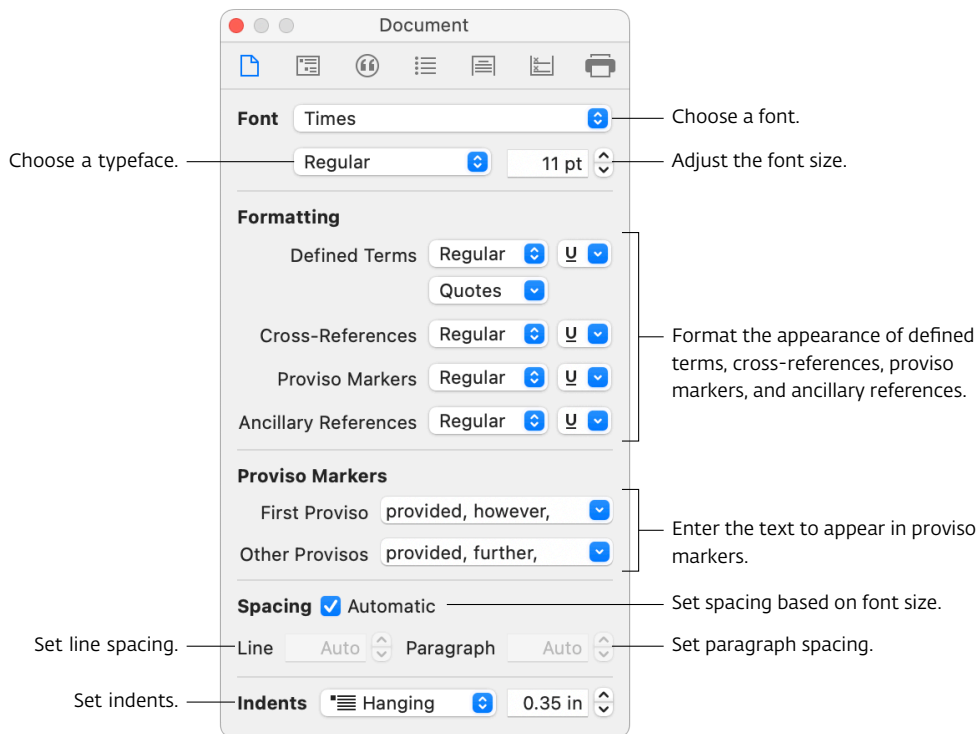
To learn about finding text generally, see Section 3.2.1, “Finding and Replacing Text Generally” on page 15.

### 3.3 Formatting Overall Text Appearance

You can choose a font to use throughout your document. You can also format the appearance of defined terms, cross-references, and more. Additionally, you can adjust line spacing, paragraph spacing, and indents throughout your document.

To format text throughout your document:

1. Click Inspector in the toolbar, and then click the Document button at the top of the inspector window.
2. Use the controls in the Document inspector.



**Font:** Use the Font controls to choose a font for your document and adjust its size.

**Formatting:** Use the Formatting controls to format the appearance of defined terms (see Chapter 5, “Working with Defined Terms” on page 36), cross-references (see Section 3.4, “Using Cross-References” on the next page), proviso markers (see Section 3.6, “Using Proviso Lists” on page 25), and ancillary references (see Section 9.3, “Using Ancillary References” on page 55).

- To choose a typeface for one of these items, use the typeface pop-up menu to the right of the item.

- To make one of these items underlined, click the Underline button to the right of the item, and then choose Underline All or Underline Words. Underline All includes spaces and punctuation in underlines, while Underline Words excludes spaces and punctuation from underlines. Click the Underline button and choose None to remove underlines.

**Note:** When you format cross-references, you format prefixes and provision numbers (for example, *Section 1.01*), but not other text that might be part of a cross-reference (for example, *the proviso to*).

- To enclose defined terms in quotation marks, choose an option from the Quotes pop-up menu.

**Note:** You cannot edit quotation marks created by using the Quotes pop-up menu. Additionally, you cannot find these quotation marks by using the Find & Replace pane. See Section 3.2, “Finding and Replacing Text” on page 14 to learn more about finding text.

**Proviso Markers:** Use the Proviso Markers controls to edit the text of proviso markers.

- Use the First Proviso field to edit the text of the first proviso marker in proviso lists.
- Use the Other Provisos field to edit the text of all proviso markers after the first proviso marker in proviso lists.

**Spacing:** Use the Spacing controls to set the space between paragraphs and lines of text. To set spacing automatically based on the font size, select the Automatic checkbox. Deselect this checkbox to set spacing yourself. To adjust the space between lines of text, use the arrows next to the Line field. To adjust the space between paragraphs, use the arrows next to the Paragraph field.

**Indents:** Use the Indents controls to choose how provisions and other items are indented. Use the Style pop-up menu to make provisions and other items use hanging indents, first line indents, or no indents. Use the Width pop-up menu to set the width of indents.

In addition to overall text appearance, you can format the appearance of provision numbers and titles; see Section 4.2.2, “Formatting Provision Numbers” on page 30 and Section 4.2.3, “Formatting Provision Titles” on page 31 to learn how.

## 3.4 Using Cross-References

You can create cross-references. A cross-reference can refer to any of the following items:

- A provision (see Chapter 4, “Working with Provisions” on page 28)
- An item in a numbered list (see Section 3.5, “Using Numbered Lists” on page 22)
- A proviso in a proviso list (see Section 3.6, “Using Proviso Lists” on page 25)
- A definition in a definitions list (see Section 5.2, “Using a Definitions List” on page 38)
- An introductory section (see Section 7.1, “Working with Introductory Sections” on page 49)
- The signatures (see Chapter 8, “Working with Signature Blocks” on page 52)

If any of these items change as you work on your document, Turner updates cross-references to them automatically.

To learn about	Go to
Creating and removing cross-references	Section 3.4.1, "Inserting and Deleting a Cross-Reference" on this page
Adjusting the text of a cross-reference	Section 3.4.2, "Editing a Cross-Reference" on the next page
Viewing a list of cross-referenced items and the number of times each item is cross-referenced	Section 3.4.3, "Managing Cross-References" on the next page

If you delete the item to which a cross-reference refers, the Proofreader flags this invalid cross-reference as a drafting error. See Section 6.1, "Checking for Drafting Errors" on page 43 to learn more about the Proofreader.

When you click a cross-reference, you go to the item to which the cross-reference refers. To learn about other ways to navigate your document, see Section 1.2, "Navigation Tools" on page 7.

You can view a list of items that cross-reference the item you're working with in the Related Items Navigator. To learn more, see Section 1.4, "The Related Items Navigator" on page 9.

### 3.4.1 Inserting and Deleting a Cross-Reference

You can insert a cross-reference by choosing from a menu or by choosing an item in your document. You can also delete cross-references.

**To insert a cross-reference by choosing from a menu:**

- Position the insertion point where you want to insert the cross-reference, choose Insert > Cross-Reference To, and then choose a provision from the submenu.

**To insert a cross-reference by choosing an item in your document:**

1. Position the insertion point where you want to insert the cross-reference, and then do any of the following:
  - Click the Cross-Reference button in the toolbar.
  - Choose Insert > Cross-Reference.
  - Press Command-R.
2. Do either of the following:
  - Click the item you want to cross-reference.
  - Use the arrow keys to choose the item you want to cross-reference, and then press Return.

If you change your mind about inserting a cross-reference by choosing an item in your document, click an item that you cannot cross-reference, press the Esc (Escape) key, or click the Cross-Reference button in the toolbar.

You can change the text of a cross-reference after you insert it; see Section 3.4.2, "Editing a Cross-Reference" on the next page to learn how.

**To delete a cross-reference:**

- Position the insertion point to the right of the cross-reference, and then press the Delete key twice.

### 3.4.2 Editing a Cross-Reference

You can change how a cross-reference is displayed.

To change how a cross-reference is displayed:

1. Hold the pointer over a cross-reference to see its menu arrow.
2. Click the menu arrow, and then choose an option from the pop-up menu.

You can format the appearance of cross-references by using the Cross-References pop-up menu in the Document inspector; see Section 3.3, "Formatting Overall Text Appearance" on page 19 to learn more.

### 3.4.3 Managing Cross-References

You can use the Cross-References Navigator to manage cross-references. The Cross-References Navigator groups cross-references by the items they references. The Cross-References Navigator shows cross-referenced items on the left, and the number of cross-references to each item on the right.

Here are ways to use the Cross-References Navigator:

- To sort cross-references by referenced item, count, or location, click one of the buttons at the top of the Navigator.
- To see more details about cross-references to an item, click the disclosure triangle next to the item.

To learn about cross-references generally, see Section 3.4, "Using Cross-References" on page 20.

## 3.5 Using Numbered Lists

You can use numbered lists to enumerate items within provisions. You can also use numbered lists to number items in part of your document different from the way provisions are numbered in the rest of your document. See Section 4.2.1, "Numbering Provisions" on page 29 to learn more about provision numbering.

To learn about	Go to
Adding and removing numbered lists and list items	Section 3.5.1, "Creating and Working with Numbered Lists" on this page
Adjusting the appearance of numbered lists	Section 3.5.2, "Formatting Numbered Lists" on page 24
Using numbered lists and provisions to create complex language	Section 3.5.3, "Using Numbered Lists and Provisions Together" on page 24

You can cross-reference items in a numbered list as you would cross-reference provisions and other items. To learn more about cross-references, see Section 3.4, "Using Cross-References" on page 20.

### 3.5.1 Creating and Working with Numbered Lists

You can add and delete numbered lists.

**To create a numbered list:**

- Position the insertion point where you want the list to begin, and then do any of the following:
  - Click the Numbered List button in the toolbar.
  - Choose Insert > Numbered List.
  - Press Command-L.

A numbered list with one list item appears.

**Here are ways to end a numbered list:**

- To end a numbered list as you're typing it, press Return twice.
- To end a numbered list before its current end point, position the insertion point within the last item in the numbered list you want to end, and then choose Format > Numbered List > End Numbered List or press Command-K.

You can press Command-Option-K to end either a numbered list or a proviso list, whichever is selected. See Section 3.6, "Using Proviso Lists" on page 25 to learn more about proviso lists.

**To delete a numbered list:**

- Position the insertion point within the numbered list you want to delete, and then choose Format > Numbered List > Delete Numbered List.

**Here are ways to work with list items:**

- To add a list item, position the insertion point within a numbered list, and then choose Format > Numbered List > Add List Item or press Return.
- To add a list item before the one you're working with, position the insertion point within a list item, and then choose Insert > Item Before or press Command-Option-Up Arrow.
- To add a list item after the one you're working with, position the insertion point within a list item, and then choose Insert > Item After or press Command-Option-Down Arrow.
- To delete a list item, position the insertion point within the list item you want to delete, and then choose Format > Numbered List > Delete List Item.
- To move a list item before the preceding one, position the insertion point within the list item you want to move, and then choose Format > Move Before Preceding Item or press Command-Option-Control-Up Arrow.
- To move a list item after the following one, position the insertion point within the list item you want to move, and then choose Format > Move After Following Item or press Command-Option-Control-Down Arrow.
- To merge list items together, select the list items you want to merge, and then choose Format > Merge or press Control-M.

You can also format the appearance of a numbered list; see Section 3.5.2, "Formatting Numbered Lists" on the next page to learn how.

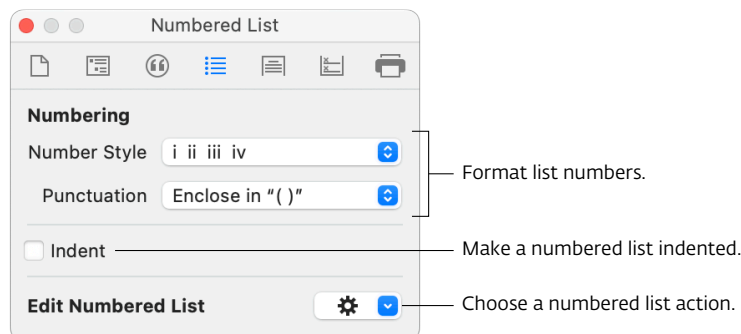


### 3.5.2 Formatting Numbered Lists

You can format a numbered list by using the controls in the Numbered List inspector. Before you format a numbered list, you must position the insertion point within the numbered list you want to format.

To adjust the appearance of a numbered list:

1. Click Inspector in the toolbar, and then click the Numbered List button at the top of the inspector window.
2. Use the controls in the Numbered List inspector.



**Number Style:** Use the Number Style pop-up menu to choose how items in a numbered list are numbered (for example, 1 2 3 4 or A B C D).

**Punctuation:** Use the Punctuation pop-up menu to choose how list numbers are punctuated (for example, 1. 2. 3. 4. or (1) (2) (3) (4)).

**Indent:** Select the Indent checkbox to make a numbered list indented in the same way that provisions are indented throughout your document. See Section 3.3, "Formatting Overall Text Appearance" on page 19 to learn how to set indents. Deselect this checkbox to make a numbered list an inline list.

**Edit Numbered List:** Use the Action pop-up menu to add list items, end a numbered list, and do other numbered list actions.

### 3.5.3 Using Numbered Lists and Provisions Together

You can use numbered lists together with provisions to create complex language. For example, you can use numbered lists and provisions to do the following:

1. Begin a provision.
2. Add clauses to the provision with increased indentation.
3. Add text, a proviso list, or other content to the end of the provision without increased indentation.

To do this:

1. Create a provision and add text to it.
2. Create a numbered list and add text to it.
3. In the Numbered List inspector, select Indent to make list items in the numbered list indented.

4. Use the Right Arrow key to set the insertion point after the numbered list, and then begin typing to add text to the end of the provision.

See Section 4.3, “Editing Provisions” on page 31 to learn how to create a provision. See Section 4.3.8, “Converting Provisions to Numbered Lists” on page 34 to learn how to replace provisions with a numbered list.

## 3.6 Using Proviso Lists

Some contracts include items that are introduced with phrases like *provided that*, *provided*, *however*, and so on. In Turner, these items are called *provisos*. Provisos are contained within *proviso lists*. The phrases that introduce provisos are called *proviso markers*.

**To create a proviso list:**

- Position the insertion point where you want the proviso list to begin, and then do any of the following:
  - Choose Insert > Proviso List.
  - Press Command-Shift-L.

A proviso list with one proviso appears.

**Here are ways to end a proviso list:**

- To end a proviso list as you’re typing it, press Return twice.
- To end a proviso list before its current end point, position the insertion point within the last proviso in the proviso list you want to end, and then choose Format > Proviso List > End Proviso List.

You can press Command-Option-K to end either a proviso list or a numbered list, whichever is selected. See Section 3.5, “Using Numbered Lists” on page 22 to learn more about numbered lists.

**To delete a proviso list:**

- Position the insertion point within the proviso list you want to delete, and then choose Format > Proviso List > Delete Proviso List.

**Here are ways to work with provisos:**

- To add a proviso, position the insertion point within a proviso list, and then choose Format > Proviso List > Add Proviso or press Return.
- To add a proviso before the one you’re working with, position the insertion point within a proviso, and then choose Insert > Item Before or press Command-Option-Up Arrow.
- To add a proviso after the one you’re working with, position the insertion point within a proviso, and then choose Insert > Item After or press Command-Option-Down Arrow.
- To delete a proviso, position the insertion point within the proviso you want to delete, and then choose Format > Proviso List > Delete Proviso.
- To move a proviso before the preceding one, position the insertion point within the proviso you want to move, and then choose Format > Move Before Preceding Item or press Command-Option-Control-Up Arrow.

- To move a proviso after the following one, position the insertion point within the proviso you want to move, and then choose Format > Move After Following Item or press Command–Option–Control–Down Arrow.

You can edit and format proviso markers by using the controls in the Document inspector; see Section 3.3, “Formatting Overall Text Appearance” on page 19 to learn more.

You can cross-reference provisos as you would cross-reference provisions and other items. To learn more about cross-references, see Section 3.4, “Using Cross-References” on page 20.

## 3.7 Using Page Breaks, Paragraph Breaks, and Line Breaks

You can add page breaks, paragraph breaks, and line breaks to your document.

To learn about	Go to
Adding a page break	Section 3.7.1, “Inserting a Page Break” on this page
Adding a paragraph break	Section 3.7.2, “Inserting a Paragraph Break” on this page
Making text start on a new line	Section 3.7.3, “Inserting a Line Break” on the next page

### 3.7.1 Inserting a Page Break

You can add a page break to make content start on a new page when you print or export your document.

To insert a page break:

1. Position the insertion point where you want to add a page break.
2. Choose Insert > Page Break.

To remove a page break, set the insertion point after the page break, and then press the Delete key.

In general, you do not need to add page breaks to avoid typesetting errors when you print or export your document. To learn more, see Section 10.3.2, “Pagination” on page 63. To learn about printing and exporting generally, see Chapter 10, “Printing and Exporting a Document to Other Formats” on page 56.

In addition to page breaks, you can add paragraph breaks and line breaks to your document; see Section 3.7.2, “Inserting a Paragraph Break” on this page and Section 3.7.3, “Inserting a Line Break” on the next page to learn more.

### 3.7.2 Inserting a Paragraph Break

You can use a paragraph break to create a new paragraph without creating a new numbered provision.

To insert a paragraph break:

1. Position the insertion point where you want to add a paragraph break.
2. Choose Insert > Paragraph Break.

To remove a paragraph break, set the insertion point at the beginning of a paragraph, and then press the Delete key.

As you work on your document, you may want to use the Return key to insert paragraph breaks. To do this, choose Turner > Preferences, and then use the Return Key controls in the General pane of Turner preferences.

In addition to paragraph breaks, you can add page breaks and line breaks to your document; see Section 3.7.1, “Inserting a Page Break” on the previous page and Section 3.7.3, “Inserting a Line Break” on this page to learn more.

### **3.7.3 Inserting a Line Break**

You can use a manual line break (also called a soft return) if you want to start a new line without creating a new provision or a new paragraph. Line breaks are useful for mailing addresses, contact information, and other kinds of content that often appear on multiple lines.

**To insert a line break:**

1. Position the insertion point where you want to add a line break.
2. Choose Insert > Line Break or press Option-Return.

In general, you do not need to add line breaks to avoid typesetting errors when you print or export your document. To learn more, see Section 10.3.2, “Pagination” on page 63. To learn about printing and exporting generally, see Chapter 10, “Printing and Exporting a Document to Other Formats” on page 56.

In addition to line breaks, you can add page breaks and paragraph breaks to your document; see Section 3.7.1, “Inserting a Page Break” on the previous page and Section 3.7.2, “Inserting a Paragraph Break” on the previous page to learn more.

# Chapter 4

## Working with Provisions

Choose how to number provisions and format provision numbers. Add titles to provisions and format provision titles.

### 4.1 Understanding Provisions

*Provisions* are useful for representations and warranties, covenants, and other items that often appear in contracts. Turner documents always have at least one provision.

To learn about	Go to
Formatting the appearance of provisions and numbering provisions throughout your document	Section 4.2, "Formatting Provisions" on this page
Selecting provisions, creating new provisions, and adding content to provisions	Section 4.3, "Editing Provisions" on page 31
Going to provisions	Section 4.4, "Navigating Provisions" on page 34

### 4.2 Formatting Provisions

You can choose how provisions are numbered throughout your document. You can also format the appearance of provision numbers and titles.

To learn about	Go to
Choosing how provisions are numbered	Section 4.2.1, "Numbering Provisions" on the next page
Formatting the appearance of provision numbers	Section 4.2.2, "Formatting Provision Numbers" on page 30
Formatting the appearance of provision titles	Section 4.2.3, "Formatting Provision Titles" on page 31

## 4.2.1 Numbering Provisions

Provisions are numbered hierarchically up to nine levels. You can choose how provisions are numbered at each level of hierarchy. For example:

- You can number provisions at level one *Article I, Article II, Article III*, and so on; you can number provisions at level two *Section 1.01, Section 1.02, Section 1.03*, and so on; and you can number provisions at level three *(a), (b), (c)*, and so on.
- You can number provisions at level one *1, 2, 3*, and so on; you can number provisions at level two *1.1, 1.2, 1.3*, and so on; and you can number provisions at level three *1.1.1, 1.1.2, 1.1.3*, and so on.

You can choose a preset numbering scheme for provisions, and you can also customize provision numbers. If you choose to customize provision numbers, it's a good idea to choose a preset numbering scheme that's similar to the customized numbering scheme you want to create before you begin customizing.

**To choose a preset numbering scheme:**

1. Click Inspector in the toolbar, click the Provisions button at the top of the inspector window, and then click Numbering.
2. Click the Choose Provision Numbering pop-up menu, and then choose an option.

**To customize provision numbers:**

1. Click the Choose Provision Numbering pop-up menu in the Numbering pane of the Provisions inspector, and then choose More Options.
2. Set provision numbers using the controls in the Provision Numbering window.

**Prefix:** Use the Prefix pop-up menus to add a prefix (such as *Section*) to a provision number.

**Number Style:** Use the Number Style pop-up menus to choose how provisions are numbered at each numbering level.

**Punctuation:** Use the Punctuation pop-up menus to choose how provision numbers are punctuated at each numbering level.

With this number style	And this punctuation option	Provision numbers look like this
I II III IV	End with "."	I. II. III. IV.
1 2 3 4	End with ")"	1) 2) 3) 4)
a b c d	Enclose in "( )"	(a) (b) (c) (d)

**Prepending:** Use the Prepending pop-up menus to choose how provision numbers at level one are prepended to provision numbers at level two, how provision numbers at level two are prepended to provision numbers at level three, and so on.

For example, you may want to number provisions at level one *I, II, III*, and so on; and level two *1.1, 1.2, 1.3*, and so on (in other words, you may want to prepend level one provision numbers to level two provision numbers as Arabic figures instead of Roman numerals). To do this, choose I II III IV in the Number Style pop-up menu at level one, choose "Prepend as 1. 2. 3. 4." in the Prepending pop-up menu at level one, and choose 1 2 3 4 in the Number Style pop-up menu at level two.

Options you choose in a Prepending pop-up menu at one numbering level affect how provision numbers appear at other numbering levels. The following table illustrates one example.

At this level	With this number style	This punctuation option	And this prepending option	Provision numbers look like this
1	I II III IV	None	Prepend as 1. 2. 3. 4.	I II III IV
2	01 02 03 04	End with “.”	Prepend as 1.01 1.02 1.03 1.04	1.01. 1.02. 1.03. 1.04.
3	A B C D	Enclose in “( )”	None	1.01(A) 1.01(B) 1.01(C) 1.01(D)
4	i ii iii iv	Enclose in “( )”	Prepend as i. ii. iii. iv.	(i) (ii) (iii) (iv)
5	a b c d	Enclose in “( )”	None	i.(a) i.(b) i.(c) i.(d)

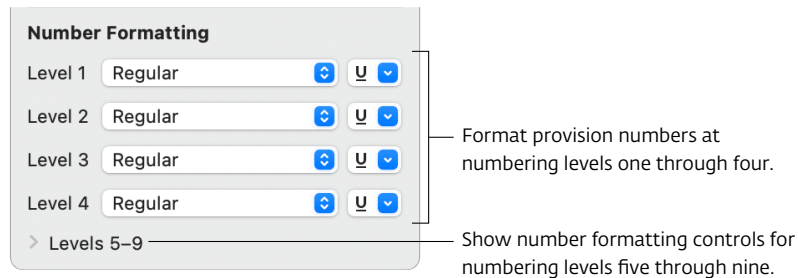
You can format the appearance of provision numbers at each numbering level; see Section 4.2.2, “Formatting Provision Numbers” on this page to learn how.

## 4.2.2 Formatting Provision Numbers

You can format the appearance of provision numbers using the controls in the Numbering pane of the Provisions inspector.

To format the appearance of provision numbers:

1. Click Inspector in the toolbar, click the Provisions button at the top of the inspector window, and then click Numbering.
2. Use the Number Formatting controls.

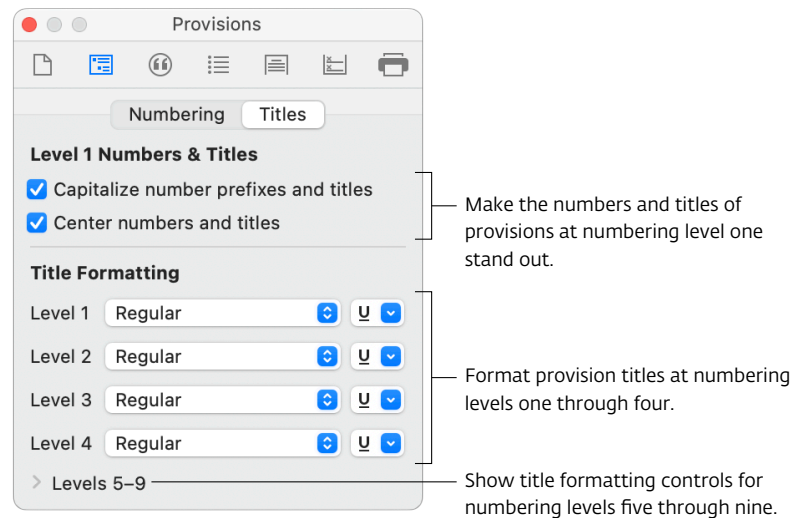


- To choose a typeface for provision numbers at a numbering level, use the typeface pop-up menu to the right of that level number.
- To make provision numbers at a numbering level underlined, click the Underline button to the right of that level number, and then choose Underline All or Underline Words. Underline All includes spaces and punctuation in underlines, while Underline Words excludes spaces and punctuation from underlines. Click the Underline button and choose None to remove underlines from provision numbers.
- To show formatting controls for numbering levels five through nine, click the Levels 5–9 disclosure triangle.

See Section 4.2.1, “Numbering Provisions” on the previous page to learn more about provision numbers.

### 4.2.3 Formatting Provision Titles

You can format the appearance of provision titles using the controls in the Titles pane of the Provisions inspector.



To show the Titles pane of the Provisions inspector:

- Click Inspector in the toolbar, click the Provisions button at the top of the inspector window, and then click Titles.

Here are ways to format the appearance of provision titles:

- To make the numbers and titles of provisions at numbering level one stand out, use the checkboxes below Level 1 Numbers & Titles.
- To change the appearance of provision titles at each numbering level, use the Title Formatting controls.
  - To choose a typeface for provision titles at a numbering level, use the typeface pop-up menu to the right of that level number.
  - To make provision titles at a numbering level underlined, click the Underline button to the right of that level number, and then choose Underline All or Underline Words. Underline All includes spaces and punctuation in underlines, while Underline Words excludes spaces and punctuation from underlines. Click the Underline button and choose None to remove underlines from titles.
  - To show formatting controls for numbering levels five through nine, click the Levels 5–9 disclosure triangle.

To learn more about provision titles, see Section 4.3.5, “Adding Titles to Provisions” on page 33.

## 4.3 Editing Provisions

You can easily add and remove provisions. You can also adjust the numbering level of provisions and give provisions a title.



To learn about	Go to
Selecting provisions	Section 4.3.1, "Selecting Provisions" on this page
Creating and deleting provisions	Section 4.3.2, "Adding and Removing Provisions" on this page
Promoting and demoting provisions to different numbering levels	Section 4.3.3, "Adjusting the Numbering Level of Provisions" on the next page
Moving provisions before or after other provisions	Section 4.3.4, "Moving Provisions" on the next page
Giving a provision a title	Section 4.3.5, "Adding Titles to Provisions" on the next page
Adding text, defined terms, and other kinds of content to provisions	Section 4.3.6, "Adding Content to Provisions" on page 34
Setting a provision in all caps	Section 4.3.7, "Setting Provisions with Uppercase Letters" on page 34
Replacing provisions with a numbered list	Section 4.3.8, "Converting Provisions to Numbered Lists" on page 34

### 4.3.1 Selecting Provisions

You select provisions before you work with them.

**Here are ways to select provisions:**

- Click anywhere in a provision.
- To select a provision whose content you're editing, press Shift-Return. See Section 4.3.6, "Adding Content to Provisions" on page 34 to learn about editing a provision's content.

### 4.3.2 Adding and Removing Provisions

You can easily add and remove provisions.

**To insert a provision:**

1. Click a provision to select it.
2. Do any of the following:
  - To insert a provision above the one you selected, choose Insert > Item Before or press Command-Option-Up Arrow key.
  - To insert a provision below the one you selected, choose Insert > Item After or press Command-Option-Down Arrow key.

**To delete a provision:**

1. Click a provision to select it.
2. Press the Delete key or choose Edit > Delete.

When you delete a provision, the Proofreader flags cross-references to this provision as drafting errors. To learn about cross-references, see Section 3.4, "Using Cross-References" on page 20; to learn more about the Proofreader, see Section 6.1, "Checking for Drafting Errors" on page 43.

### 4.3.3 Adjusting the Numbering Level of Provisions

You can adjust the numbering level of a provision.

**To change a provision's numbering level:**

- Click a provision to select it or set the insertion point within a provision, and then do any of the following:
  - To decrease the numbering level (promote to a more senior level of hierarchy), choose Format > Provision > Decrease Numbering Level, click the Decrease button in the toolbar, or press Command–Option–Left Arrow.
  - To increase the numbering level (demote to a more junior level of hierarchy), choose Format > Provision > Increase Numbering Level, click the Increase button in the toolbar, or press Command–Option–Right Arrow.
  - To make the provision even with its subprovisions, choose Format > Provision > Make Even with Subprovisions, click the Make Even button in the toolbar, or press Command–Option–Control–Right Arrow.

See Section 4.2.1, “Numbering Provisions” on page 29 to learn more about provision numbering.

### 4.3.4 Moving Provisions

You can move a provision before the provision that precedes it, or after the provision that follows it.

**To move a provision before the preceding provision:**

- Click a provision to select it or set the insertion point within a provision, and then choose Format > Move Before Preceding Item or press Command–Option–Control–Up Arrow:

**To move a provision after the following provision:**

- Click a provision to select it or set the insertion point within a provision, and then choose Format > Move After Following Item or press Command–Option–Control–Down Arrow:

### 4.3.5 Adding Titles to Provisions

You can add a title to a provision.

**Here are ways to work with provision titles:**

- To add a title to a provision, click the provision to select it, and then choose Format > Provision > Add Title or press Command–T.
- To modify a provision's title, click the provision to select it, click the provision's title, and then begin typing or deleting text.
- To remove a title from a provision, click the provision to select it, and then choose Format > Provision > Delete Title or press Command–T.

You can format the appearance of provision titles; see Section 4.2.3, “Formatting Provision Titles” on page 31 to learn how.

Provision titles are not checked by the Proofreader. To learn more about proofreading, see Section 6.1, “Checking for Drafting Errors” on page 43.

### 4.3.6 Adding Content to Provisions

You can add a variety of content to provisions, including text, defined terms, definitions lists, cross-references, ancillary references, numbered lists, provisos, line breaks, and paragraph breaks. You can also merge provisions together.

Here are ways to work with content in provisions:

- To add content to an empty provision, click the provision to select it, and then begin typing.
- To edit content in a provision, click the provision to select it, click the content you want to edit, and then begin typing.
- To delete content in a provision, click the provision to select it, select the content you want to delete, and then press the Delete key or choose Edit > Delete.

You may want to merge related provisions together. To do this, select the contents of the provisions you want to merge (by dragging, for example), and then choose Format > Merge or press Control-M.

To learn about working with text, defined terms, cross-references, and other kinds of content, see Chapter 3, “Working with Text” on page 14.

You can use provisions together with numbered lists to create complex language; see Section 3.5.3, “Using Numbered Lists and Provisions Together” on page 24 to learn more.

### 4.3.7 Setting Provisions with Uppercase Letters

You can easily set a provision in all uppercase letters

To make a provision all caps:

1. Select the provision you want to make all caps.
2. Choose Format > Provision > All Caps.

### 4.3.8 Converting Provisions to Numbered Lists

You can convert provisions to items in a numbered list. You may want to do this to include text, a proviso list, or other content after a series of subprovisions, but within the provision that contains these subprovisions.

To convert provisions to items in a numbered list:

1. Select the provision whose subprovisions you want to convert to a numbered list.
2. Choose Format > Provision > Convert Subprovisions to Numbered Lists.

To learn more about using provisions and numbered lists together, see Section 3.5.3, “Using Numbered Lists and Provisions Together” on page 24. To learn about numbered lists, see Section 3.5, “Using Numbered Lists” on page 22. To learn about proviso lists, see Section 3.6, “Using Proviso Lists” on page 25

## 4.4 Navigating Provisions

You can use the Provisions Navigator to navigate provisions. To show the Provisions Navigator, choose View > Show Provisions Navigator.

To use the Provisions Navigator to go to a provision, click the title of a provision in the Navigator.

To learn about additional ways to navigate provisions, see Section 1.2, "Navigation Tools" on page 7. To learn about provisions generally, see Chapter 4, "Working with Provisions" on page 28.

## Chapter 5

# Working with Defined Terms

Create new defined terms. List defined terms with their definitions. Show where defined terms are located within your document. Learn ways to manage defined terms.

You can create and use defined terms throughout your document. You can also list defined terms together with their definitions in a *definitions list*.

To learn about	Go to
Working with defined terms generally	Section 5.1, "Working with Defined Terms" on this page
Listing defined terms and definitions together	Section 5.2, "Using a Definitions List" on page 38
Using defined terms you've created	Section 5.3, "Using Defined Terms You Create" on page 40
Navigating defined terms	Section 5.4, "Finding Defined Terms" on page 41
Ways to manage defined terms	Section 5.5, "Managing Defined Terms" on page 41
Ways to avoid problems with defined terms	Section 5.6, "Guidelines for Creating Defined Terms in Turner" on page 42

## 5.1 Working with Defined Terms

You can create, edit, and delete defined terms.

To learn about	Go to
Creating a new defined term	Section 5.1.1, "Creating Defined Terms" on the next page and Section 5.6, "Guidelines for Creating Defined Terms in Turner" on page 42
Editing an existing defined term	Section 5.1.2, "Editing Defined Terms" on the next page

You can list defined terms with their definitions in a definitions list; see Section 5.2, “Using a Definitions List” on the next page to learn more. You can include an index of defined terms in the front of your document when you print or export; see Section 10.1.5, “Including a Table of Contents” on page 58 to learn how.

### 5.1.1 Creating Defined Terms

You can create new defined terms.

To create a new defined term:

1. Position the insertion point where you want to create the new defined term.
2. Do any of the following:
  - Click Defined Term in the toolbar.
  - Choose Insert > Defined Term.
  - Press Command-D.

A defined term appears.

3. Begin typing. When you're finished typing the defined term, click away from the defined term, or position the insertion point outside of the defined term by pressing the Left Arrow key or the Right Arrow key.

See Section 5.6, “Guidelines for Creating Defined Terms in Turner” on page 42 to learn about guidelines for creating defined terms in Turner. See Section 5.5, “Managing Defined Terms” on page 41 to learn about ways to manage defined terms you create.

In addition to creating defined terms throughout your document, you can add defined terms to a definitions list; see Section 5.2.3, “Adding Defined Terms and Definitions to a Definitions List” on page 39 to learn more.

You can edit and remove defined terms you create; see Section 5.1.2, “Editing Defined Terms” on this page to learn how.

### 5.1.2 Editing Defined Terms

You can edit and remove defined terms.

Here are ways to edit a defined term:

- To change the text of a defined term, click the defined term, and then begin typing or deleting text.
- To delete a defined term, position the insertion point to the right of the defined term, and then press the Delete key twice.

When you delete a defined term, the Proofreader flags each use of this defined term as a drafting error (unless the use is a capitalized word that the Proofreader ignores or the defined term started with a lowercase letter). See Section 6.1, “Checking for Drafting Errors” on page 43 to learn more about the Proofreader.

You can format the appearance of defined terms by using the Defined Terms controls in the Document inspector; see Section 3.3, “Formatting Overall Text Appearance” on page 19 to learn more.

## 5.2 Using a Definitions List

You can use a definitions list to alphabetically list defined terms with their definitions.

To learn about	Go to
Adding a definitions list to your document	Section 5.2.1, “Creating and Modifying a Definitions List” on this page
Selecting definitions lists	Section 5.2.2, “Selecting a Definitions List and Its Components” on the next page
Creating defined terms and definitions in a definitions list	Section 5.2.3, “Adding Defined Terms and Definitions to a Definitions List” on the next page
Editing defined terms and definitions in a definitions list	Section 5.2.4, “Editing Defined Terms and Definitions in a Definitions List” on page 40

You can cross-reference a definition in a definitions list as you would cross-reference provisions and other items. To learn more about cross-references, see Section 3.4, “Using Cross-References” on page 20.

To learn about working with defined terms outside of a definitions list, see Section 5.1, “Working with Defined Terms” on page 36.

### 5.2.1 Creating and Modifying a Definitions List

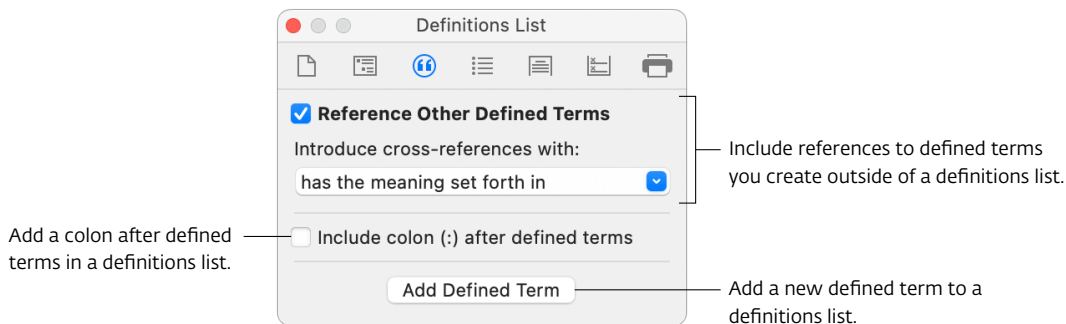
It’s easy to create a definitions list.

To create a definitions list:

1. Select the provision in which you want to create a definitions list.
2. Choose Insert > Definitions List.

To delete a definitions list, select the definitions list you want to delete, and then press the Delete key or choose Edit > Delete.

You can modify a definitions list by using the controls in the Definitions List inspector.



To modify a definitions list:

1. Click Inspector in the toolbar, and then click the Definitions List button at the top of the inspector window to show the Definitions List inspector.
2. Click the definitions list you want to modify to select it.
3. Use the controls in the Definitions List inspector to modify the selected definitions list.

**Reference Other Defined Terms:** Select this checkbox to include cross-references to defined terms you create elsewhere in your document in a definitions list. Enter text in the “Introduce cross-references with” text field to choose how to introduce cross-references to defined terms.

For example, if you create the defined term *Merger* in Section 1 of your document instead of adding it to your definitions list, then when you select Reference Other Defined Terms, *Merger* appears in your definitions list. The text in the “Introduce cross-references with” text field appears to the right of *Merger*, followed by a cross-reference to Section 1.

When you edit the defined term *Merger* in Section 1 of your document, the definitions list updates to reflect your changes. However, you cannot edit *Merger* in the definitions list.

You can modify the cross-reference as you would any other cross-reference in your document. See Section 3.4, “Using Cross-References” on page 20 to learn more.

If a reference to a defined term in a definitions list is not suitable, you can create a custom reference. To do this, add a duplicate of the defined term to the definitions list. To use the default reference instead of a custom reference, delete the duplicate defined term.

**Include colon (:) after defined terms:** Select this checkbox to add a colon (:) after defined terms listed in a definitions list. Deselect this checkbox to remove colons from defined terms listed in a definitions list.

## 5.2.2 Selecting a Definitions List and Its Components

You select definitions lists, and defined terms and definitions within a definitions list, before you work with them. When you select one of these items, a border appears around the item you’ve selected.

**Here are ways to select a definitions list:**

- If a defined term and its definition are not selected, click anywhere in the definitions list.
- If a defined term and its definition are selected, click outside the definitions list, and then click anywhere in the definitions list.

**To select a defined term with its definition:**

- Select a definitions list, and then click either a defined term or a definition within it. When a defined term and its definition are selected, you can press the Up Arrow key to move the selection to the next defined term and definition up, and the Down Arrow key to move the selection to the next defined term and definition down.

## 5.2.3 Adding Defined Terms and Definitions to a Definitions List

You can add defined terms and definitions to a definitions list. As you add defined terms to a definitions list, Turner keeps your definitions list in alphabetical order automatically.

**Here are ways to add a new defined term and definition to a definitions list:**

- Choose Format > Definitions List > Add Defined Term.
- Click Inspector in the toolbar, click the Definitions List button at the top of the inspector window, and then click the Add Defined Term button.
- Control-click a definitions list, and then choose Add Defined Term from the shortcut menu.
- Click a definitions list to select it, and then press Command-D.



See Section 5.1.1, “Creating Defined Terms” on page 37 to learn about creating defined terms elsewhere in your document. See Section 5.6, “Guidelines for Creating Defined Terms in Turner” on page 42 to learn about guidelines for creating defined terms in Turner. See Section 5.5, “Managing Defined Terms” on the next page to learn about ways to manage defined terms you create.

You can edit and delete defined terms you add to a definitions list; see Section 5.2.4, “Editing Defined Terms and Definitions in a Definitions List” on this page to learn how.

#### 5.2.4 Editing Defined Terms and Definitions in a Definitions List

You can edit and delete defined terms and definitions in a definitions list.

**To edit a defined term or a definition in a definitions list:**

- Select a defined term with its definition, click the defined term or the definition to set the insertion point, and begin typing.

**To delete a defined term and its definition from a definitions list:**

- Select a defined term with its definition, and then press the Delete key or choose Edit > Delete.

When you delete a defined term, the Proofreader flags each use of this defined term as a drafting error (unless the use is a capitalized word that the Proofreader ignores or the defined term started with a lowercase letter). See Section 6.1, “Checking for Drafting Errors” on page 43 to learn more about the Proofreader.

Defined terms listed in a definitions list are formatted the same as defined terms elsewhere in your document. See Section 3.3, “Formatting Overall Text Appearance” on page 19 to learn about formatting defined terms.

### 5.3 Using Defined Terms You Create

After you’ve created a defined term, you can use it simply by typing it. See Section 5.1.1, “Creating Defined Terms” on page 37 to learn how to create a defined term, and see Section 5.2.3, “Adding Defined Terms and Definitions to a Definitions List” on the previous page to learn how to create a defined term in a definitions list.

When you start typing a use of a defined term, Turner shows a list of defined terms that might be used to complete the one you’re typing. You can choose one of the suggested defined terms, or you can continue typing to refine or ignore the suggestions. To stop the list of defined terms from appearing as you type, choose Turner > Preferences, and then deselect “Automatically suggest ways to complete defined term uses” in the General pane of Turner preferences. You can also show or hide the list of suggested defined terms by pressing the Esc (Escape) key.

You can find every use of any defined term. See Section 3.2.3, “Finding Uses of Defined Terms” on page 18 to learn how.

The Proofreader always ignores singular and plural uses of defined terms when it checks for capitalized words and phrases that are not uses of a defined term. To learn more about the Proofreader, see Section 6.1, “Checking for Drafting Errors” on page 43.

## 5.4 Finding Defined Terms

You can use the Defined Terms Navigator to find defined terms. To show the Defined Terms Navigator, choose View > Show Defined Terms Navigator.

Here are ways to use the Defined Terms Navigator:

- To sort defined terms alphabetically or by number of uses, click one of the buttons at the top of the Navigator.
- To go to where a defined term is defined, click a defined term in the Navigator.
- To find a defined term in the Navigator, type all or part of the defined term you want to find in the search field at the bottom of the Navigator.
- To find all uses of a defined term, click the number of uses next to the defined term.

To learn about additional ways to find defined terms, see Section 1.2, “Navigation Tools” on page 7. To learn about defined terms generally, see Chapter 5, “Working with Defined Terms” on page 36.

## 5.5 Managing Defined Terms

You can use a variety of techniques to manage defined terms.

- Go to where a defined term is defined by using the Defined Terms menu at the top of the Turner window. Or, click the Link button at the top of the Turner window, and then click a use of a defined term in your document. You can also hold down the Option key while you click a use of a defined term in your document. See Section 1.2, “Navigation Tools” on page 7 to learn more.
- View a list of the defined terms contained and used in part of your document in the Related Items Navigator. To learn more, see Section 1.4, “The Related Items Navigator” on page 9.
- View a table of defined terms and the number of times each defined term is used in the Defined Terms Navigator. To learn more, see Section 5.4, “Finding Defined Terms” on this page.
- Find every use of a defined term by using defined term tokens in the Find & Replace pane; see Section 3.2.3, “Finding Uses of Defined Terms” on page 18 to learn how.
- Check for capitalized words and phrases that are not uses of a defined term and other drafting errors related to defined terms by using the Proofreader; see Section 6.1, “Checking for Drafting Errors” on page 43 to learn more about the Proofreader.
- List defined terms alphabetically with their definitions in a *definitions list*; see Section 5.2, “Using a Definitions List” on page 38 to learn how.
- Format the appearance of defined terms by using the Defined Terms controls in the Document inspector; see Section 3.3, “Formatting Overall Text Appearance” on page 19 to learn more.
- Include an index of defined terms after the table of contents when you print or export; see Section 10.1.5, “Including a Table of Contents” on page 58 to learn more.

## 5.6 Guidelines for Creating Defined Terms in Turner

It's a good idea (but not essential) to observe the following guidelines when you create defined terms in Turner:

- Avoid creating defined terms using only uppercase letters unless you want to use only uppercase letters when you use these defined terms throughout your document. For example, avoid creating the defined term *BUYER* if you want to use *Buyer* throughout your document. If you create the defined term *BUYER* and then use *Buyer* instead, the Proofreader will flag each use of *Buyer* as a drafting error.
- Avoid creating defined terms that include punctuation unless you want to include punctuation in these defined terms when you use them throughout your document. For example, avoid creating the defined term *Buyer.* (including the period) or *Buyer,* (including the comma) if you want to use *Buyer* throughout your document. If you create the defined term *Buyer.* or *Buyer,* and then use *Buyer* instead, the Proofreader will flag each use of *Buyer* as a drafting error.
- Avoid creating defined terms that contain more than one word that you would have to make singular or plural if you want to use these defined terms in both singular and plural forms. For example, avoid creating the defined term *Acquired Entity or Business* if you want to use *Acquired Entities or Businesses* throughout your document. If you create the defined term *Acquired Entity or Business* and then use *Acquired Entities or Businesses* instead, the Proofreader will flag each use of *Acquired Entities or Businesses* as a drafting error.

If these guidelines do not suit your drafting style, you can easily ignore any drafting error; see Section 6.2, "Managing Drafting Errors" on page 47 to learn how. To learn more about the Proofreader, see Section 6.1, "Checking for Drafting Errors" on the next page.

See Section 5.1.1, "Creating Defined Terms" on page 37 to learn how to create a defined term.

# Chapter 6

## Reviewing Documents

Check for drafting errors. Add comments to your document.

You can use the Proofreader to check your document for common kinds of contract drafting errors. You can also use comments to flag text you want to review later.

You can also check your document for misspellings. To learn about spell-checking, search for “Check spelling” in Mac Help.

To learn about	Go to
Checking your document for contract drafting errors	Section 6.1, “Checking for Drafting Errors” on this page
Navigating, ignoring, and restoring drafting errors	Section 6.2, “Managing Drafting Errors” on page 47
Flagging text to review later	Section 6.3, “Using Comments” on page 48

### 6.1 Checking for Drafting Errors

The Proofreader checks for the following kinds of drafting errors:

Kind of drafting error	For more information, see
Miscapitalized defined terms, duplicate defined terms, and capitalized words and phrases that are not uses of a defined term	Chapter 5, “Working with Defined Terms” on page 36
Invalid cross-references	Section 3.4, “Using Cross-References” on page 20
Invalid ancillary references	Section 9.3, “Using Ancillary References” on page 55

The Proofreader ignores some errors by default. To choose the kinds of errors that the Proofreader ignores, choose Edit > Proofreading > Proofreading Preferences, click General, and then use the controls in the General pane of Proofreading Preferences.

**Adjacent uses of defined terms:** When the Proofreader checks for capitalized words and phrases that are not uses of a defined term, it ignores adjacent uses of defined terms. To make

the Proofreader find adjacent uses of defined terms, deselect the “Ignore adjacent uses of defined terms” checkbox.

**Duplicate defined terms:** The Proofreader ignores pairs of singular and plural duplicate defined terms (for example, *Affiliate* and *Affiliates*) that appear in the same paragraph. To make the Proofreader find these items, deselect the “Ignore singular and plural duplicates in the same paragraph” checkbox.

**Miscapitalized defined terms:** The Proofreader finds only miscapitalized defined terms that have a mix of uppercase and lowercase letters. For example, if *Material Contract* is a defined term, then the Proofreader finds *material Contract*, but not *material contract*. To make the Proofreader find all miscapitalized defined terms, use the Miscapitalized Defined Terms controls.

As you work on your document, you may want the Proofreader to ignore some kinds of capitalized words and phrases when it checks for those that are not uses of a defined term.

**To make the Proofreader ignore capitalized words and phrases:**

- Choose Edit > Proofreading > Proofreading Preferences, click Ignored Phrases, and then select the kinds of capitalized words and phrases you want the Proofreader to ignore.

Select this	To make the Proofreader ignore these kinds of capitalized words and phrases
Accounting and finance terms	Goldman, Sachs & Co. PricewaterhouseCoopers Baa3 New York Stock Exchange <i>The Wall Street Journal</i>
Arbitration forums	American Arbitration Association Judicial Arbitration and Mediation Services JAMS
Business entities	Paper Software LLC Paper Software, Inc. OOO Paper Software Paper Software, SA/NV Paper Software s.à r.l.
Business entity terms	Board of Directors Audit Committee Chief Executive Officer Assistant Secretaries Articles of Formation Class A Series B
Canadian government bodies	Bank of Canada Canada Mortgage and Housing Corporation Department of Foreign Affairs and International Trade
Canadian statutes	Bankruptcy and Insolvency Act Food and Drugs Act Winding-up and Restructuring Act

Select this	To make the Proofreader ignore these kinds of capitalized words and phrases
Contact information	Attention Facsimile Email
Dates and times	Midnight Friday December Eastern Standard Time
Government bodies	Consumer Financial Protection Bureau Department of Justice Ministry of Defence
Incentive plans	Approved Share Option Scheme Long Term Incentive Plan Restricted Stock Plan
Intergovernmental organizations	European Union United Nations World Trade Organization
Jargon	Amended and Restated Plan of Merger Article Federal Form of Notice Stock Purchase Agreement Risk Factors
Law firms	Adams and Reese Krieg DeVault Wyatt, Tarrant & Combs
Medical and scientific terms	COVID Good Clinical Practices New Drug Application
Names and honorifics	James Smith, Esq. Dr. Mary Johnson
Places	Central America United States of America British Columbia New York City Bailiwick of Guernsey
Regulations and forms	International Traffic in Arms Regulations Form W-8BEN Regulation S-X Rule 144A Schedule 14D-9

Select this	To make the Proofreader ignore these kinds of capitalized words and phrases
Self-regulatory organizations	Accounting Principles Board Financial Industry Regulatory Authority Public Company Accounting Oversight Board
Statute titles	Bankruptcy Code Companies Act Treaty of Amsterdam
Technology terms	PDF Internet MIT License
UK government bodies	Bank of England Financial Services Trade and Investment Board Her Majesty's Treasury
UK public general acts	Contracts (Rights of Third Parties) Act Financial Services (Banking Reform) Act Income and Corporation Taxes Act
Uniform laws	National Conference of Commissioners on Uniform State Laws UCC Uniform Gifts to Minors Act
US federal courts	Supreme Court of the United States United States Court of Appeals for the Second Circuit United States Court of Federal Claims Southern District of New York
US federal government bodies	Federal Reserve System Patent and Trademark Office Electronic Data Gathering, Analysis, and Retrieval System Flood Insurance Rate Map
US federal statutes	COBRA Food, Drug, and Cosmetic Act Worker Adjustment and Retraining Notification Act
US state business entity regulators	Delaware Secretary of State Secretary of State of New York Virginia State Corporation Commission
US state business entity statutes	General Corporation Law of the State of Delaware New York Partnership Law Beverly-Killea Limited Liability Company Act
US state courts	Delaware Court of Chancery New York Supreme Court California Court of Appeal for the First District

The Proofreader always ignores the following kinds of capitalized words and phrases when it checks for those that are not uses of a defined term:

**Document title:** The Proofreader ignores the document title. To learn about the document title,

see Section 7.2, "Working with the Document Title" on page 50.

**Alphanumeric codes:** The Proofreader ignores alphanumeric codes (such as *B26354*).

**Capitalized words at the beginning of sentences:** The Proofreader ignores capitalized words that appear only at the beginning of sentences. In addition, the Proofreader ignores words commonly used to begin sentences (such as *The*, *Each*, and *Notwithstanding*) when they appear at the beginning of sentences, even if they also appear elsewhere.

**Currencies:** The Proofreader ignores currencies (such as *US Dollars*, *USD*, *Euros*, and *EUR*). To learn about the currencies Contract Tools detects, see Appendix B, "Finding Amounts of Money" on page 69.

**Numbers:** The Proofreader ignores numbers (such as *One*, *One Hundred Million*, and *First*).

**Provision titles:** The Proofreader ignores provision titles. To learn about provision titles, see Section 4.3.5, "Adding Titles to Provisions" on page 33.

**Singular and plural forms of defined terms:** You may use singular defined terms in their plural forms, and plural defined terms in their singular forms (for example, you may define *Subsidiary* but use *Subsidiaries*). The Proofreader ignores singular and plural forms of defined terms. To learn about defined terms, see Chapter 5, "Working with Defined Terms" on page 36.

**Signature blocks:** The Proofreader ignores text in signature blocks. To learn about signature blocks, see Chapter 8, "Working with Signature Blocks" on page 52.

Drafting errors have yellow underlining. To hide this underlining, choose Edit > Proofreading > Hide Drafting Error Underlining.

To learn more about a drafting error, Control-click the drafting error, and then choose "Show Drafting Error in Navigator" from the shortcut menu. You can also use the shortcut menu to ignore drafting errors. To learn about additional ways to manage drafting errors, including how to restore drafting errors you ignore, see Section 6.2, "Managing Drafting Errors" on this page.

## 6.2 Managing Drafting Errors

You can use the Drafting Errors Navigator to manage drafting errors. To show the Drafting Errors Navigator, choose View > Show Drafting Errors Navigator.

**Here are ways to use the Drafting Errors Navigator:**

- To sort drafting errors alphabetically, by number of errors, or by location, click one of the buttons at the top of the Navigator.
- To go to where a drafting error appears, click a drafting error in the Navigator. Press the Up Arrow key to go to the next drafting error up, and the Down Arrow key to go to the next drafting error down.
- To ignore a drafting error, click a drafting error in the Navigator to select it, and then click the Ignore button (×) at the bottom of the Navigator or press the Delete key.

To quickly ignore all drafting errors, choose Ignore All Drafting Errors from the Action pop-up menu at the bottom of the Navigator.

**Note:** You ignore categories of drafting errors, not individual drafting errors.



- To restore a drafting error you've ignored, choose Show Ignored Drafting Errors from the Action pop-up menu at the bottom of the Navigator to show ignored drafting errors in the Navigator. Then, select the ignored drafting error you want to restore, and click the Restore button at the bottom of the Navigator or press the Delete key.

To quickly restore all ignored drafting errors, choose Restore All Ignored Drafting Errors from the Action pop-up menu at the bottom of the Navigator.

- To copy drafting errors to the Clipboard, use Shift-click or Command-click to select drafting errors in the Drafting Errors Navigator, and then choose Edit > Copy or press Command-C.

To learn more about drafting errors, see Section 6.1, "Checking for Drafting Errors" on page 43.

## 6.3 Using Comments

You can use comments to help you remember items that you want to review later, to ask questions of other reviewers, and more.

You can use the Comments Navigator to manage comments. To show the Comments Navigator, choose View > Show Comments Navigator.

**Here are ways to use comments:**

- To create a comment, select text, and then click the Comment button in the toolbar or choose Insert > Comment. A yellow border appears around the text you selected. A comment appears in the Comments Navigator, and you can type text in the comment.
- To go to the part of your document to which a comment applies, select a comment in the Comments Navigator.
- To edit a comment, click the text of the comment in the Comments Navigator, and begin typing.
- To delete a comment, select a comment in the Comments Navigator, and then click the Delete button (–) at the bottom of the Comments Navigator or press the Delete key.
- To copy comments to the Clipboard, use Shift-click or Command-click to select comments in the Comments Navigator, and then choose Edit > Copy or press Command-C.
- To print or export your document with comments, make sure the "Include comments" checkbox in the Print & Export pane of the Print & Export inspector is selected before you print your document. To learn more about printing and exporting, see Chapter 10, "Printing and Exporting a Document to Other Formats" on page 56.

## Chapter 7

# Working with Introductory Sections and the Document Title

Add a title to your document. Create introductory sections. Choose a name by which you can refer to an introductory section in cross-references.

### 7.1 Working with Introductory Sections

*Introductory sections* are useful for recitals, preliminary statements, and other items that precede the main content in a contract.

To learn about	Go to
Creating and deleting introductory sections	Section 7.1.1, "Adding and Removing Introductory Sections" on this page
Adding a title to an introductory section	Section 7.1.2, "Formatting Introductory Sections" on the next page
Adding content to an introductory section	Section 7.1.3, "Adding Text to Introductory Sections" on the next page

#### 7.1.1 Adding and Removing Introductory Sections

In Turner, introductory sections appear in the *introduction* of your document. The introduction appears above the first provision.

**Here are ways to create an introductory section:**

- Choose Insert > Introductory Section.
- Click Inspector in the toolbar, click the Front Matter button at the top of the inspector window, and then click the Insert Introductory Section button.

- To insert an introductory section above one that you select, select an introductory section, and then choose Insert > Item Before or press Command–Option–Up Arrow key.
- To insert an introductory section below one that you select, select an introductory section, and then choose Insert > Item After or press Command–Option–Down Arrow key.

To delete an introductory section, click the introductory section you want to delete, and then press the Delete key or choose Edit > Delete.

You can add a title to an introductory section, and you can choose how to refer to an introductory section in cross-references. See Section 7.1.2, “Formatting Introductory Sections” on this page to learn more.

To learn how to add content to introductory sections, see Section 7.1.3, “Adding Text to Introductory Sections” on this page.

## 7.1.2 Formatting Introductory Sections

You can use the controls in the Front Matter inspector to add a title to an introductory section and to choose how to refer to an introductory section in cross-references. To show the Front Matter inspector, click Inspector in the toolbar, and then click the Front Matter button at the top of the inspector window.

Before you format an introductory section, you must select the introductory section you want to format.

**To choose a name by which you refer to introductory sections in cross-references:**

1. Go to the introduction, and then click an introductory section to select it.
2. In the Front Matter inspector, use the “Cross-Reference as” text field. You can choose a name by clicking the arrow to the right of the “Cross-Reference as” text field, and then selecting a name from the drop-down list. If none of the listed names are suitable, you can type your own in the “Cross-Reference as” text field.

**To add a title above an introductory section:**

1. Go to the introduction, and then click an introductory section to select it.
2. In the Front Matter inspector, select “Include title”.

To learn how to create an introductory section, see Section 7.1.1, “Adding and Removing Introductory Sections” on the previous page.

## 7.1.3 Adding Text to Introductory Sections

You can add text to introductory sections as you would add text elsewhere in your document. To learn more about working with text, see Chapter 3, “Working with Text” on page 14.

## 7.2 Working with the Document Title

You can include a title as the first item in your document.

**Here are ways to work with the document title:**

- To add a document title, choose Insert > Document Title. You can also add a document title by selecting the Document Title checkbox in the Front Matter inspector.

- To remove the document title, delete all of the text within the document title. You can also delete the document title by deselecting the Document Title checkbox in the Front Matter inspector.
- To modify the document title, click the document title, and then begin typing or deleting text.

You can include the document title either at the top of your document or on a cover page when you print or export; see Section 10.1.4, "Including the Document Title on a Cover Page" on page 58 to learn more.

# Chapter 8

## Working with Signature Blocks

Add and remove signature blocks. Add text to signature blocks.

### 8.1 Understanding Signature Blocks

*Signature blocks* are most useful for listing the parties to a contract and giving them a place to sign. When you print or export your document, signature blocks always begin on a new page. To learn about printing and exporting, see Chapter 10, “Printing and Exporting a Document to Other Formats” on page 56.

To learn about	Go to
Creating and deleting signature blocks	Section 8.2, “Adding and Removing Signature Blocks” on this page
Customizing signature blocks	Section 8.3, “Formatting Signature Blocks” on the next page
Adding party names and other content to a signature block	Section 8.4, “Adding Text to Signature Blocks” on the next page

### 8.2 Adding and Removing Signature Blocks

In Turner, you create signature blocks at the end of your document.

Here are ways to create a signature block:

- Choose Insert > Signature Block.
- Click Inspector in the toolbar, click the Signature Block button at the top of the inspector window, and then click the Insert Signature Block button.
- To insert a signature block above one that you select, select a signature block, and then choose Insert > Item Before or press Command–Option–Up Arrow key.
- To insert a signature block below one that you select, select an introductory section, and then choose Insert > Item After or press Command–Option–Down Arrow key.

To delete a signature block, click the signature block you want to delete, and then press the Delete key or choose Edit > Delete.

To learn how to customize a signature block, see Section 8.3, “Formatting Signature Blocks” on this page. To learn how to add text to a signature block, see Section 8.4, “Adding Text to Signature Blocks” on this page.

### 8.3 Formatting Signature Blocks

You can use the controls in the Signature Block inspector to format signature blocks. To show the Signature Block inspector, click Inspector in the toolbar, and then click the Signature Block button at the top of the inspector window.

Before you format a signature block, you must select the signature block you want to format.

**Here are ways to format a signature block:**

- To include the word *By* followed by a colon (:) before the signature line in a signature block, select “Include “By:” before signature line”.
- To include text above the signature line in a signature block, select “Include text above signature line”.
- To include text below the signature line in a signature block, select “Include text below signature line”.

To learn how to create a signature block, see Section 8.2, “Adding and Removing Signature Blocks” on the previous page. To learn how to add text to a signature block, see Section 8.4, “Adding Text to Signature Blocks” on this page.

### 8.4 Adding Text to Signature Blocks

You can add text to a signature block. To do this, click the signature block you want to edit, click where you want to add text, and then begin typing.

To learn how to customize a signature block, including how to include text above or below a signature line, see Section 8.3, “Formatting Signature Blocks” on this page.

# Chapter 9

## Working with Ancillaries

Create exhibits, schedules, and other ancillaries to refer to in your document. Learn how to use ancillary references.

### 9.1 Understanding Ancillaries

Some contracts refer to exhibits, schedules, and so on. In Turner, these items are called *ancillaries*.

**Note:** You cannot work with the content of ancillaries in Turner. You can create and edit the content of ancillaries using other applications, such as Pages and Numbers. If the content of an ancillary is a contract, consider using Turner to create this ancillary as a separate Turner document.

To learn about	Go to
Managing ancillaries	Section 9.2, "Managing Ancillaries" on this page
Referring to ancillaries	Section 9.3, "Using Ancillary References" on the next page

You can list ancillaries in the front of your document when you print or export; see Section 10.1.5, "Including a Table of Contents" on page 58 to learn more. You can refer to ancillaries by using *ancillary references*; see Section 9.3, "Using Ancillary References" on the next page to learn how.

### 9.2 Managing Ancillaries

You can use the Ancillaries Navigator to manage ancillaries. To show the Ancillaries Navigator, choose View > Show Ancillaries Navigator.

Here are ways to use the Ancillaries Navigator:

- To create a new ancillary, click the Add button (+) at the bottom of the Navigator.

- To delete an ancillary, click an ancillary in the Navigator to select it, and then click the Delete button (–) at the bottom of the Navigator or press the Delete key. When you delete an ancillary, the Proofreader flags references to this ancillary as drafting errors. To learn about ancillary references, see Section 9.3, “Using Ancillary References” on this page; to learn more about the Proofreader, see Section 6.1, “Checking for Drafting Errors” on page 43.
- To go to where a reference to an ancillary appears, click the disclosure triangle next to the ancillary, and then click a location.
- To set how an ancillary is referred to in ancillary references, click the ancillary you want to work with, click the Label field (on the left), and then type text.
- To set the title of an ancillary, click the ancillary you want to work with, click the Title field (on the right), and then type text.
- To copy ancillaries to the Clipboard, use Shift-click or Command-click to select ancillaries in the Ancillaries Navigator, and then choose Edit > Copy or press Command-C.

You can list ancillaries in the front of your document when you print or export; see Section 10.1.5, “Including a Table of Contents” on page 58 to learn more.

### 9.3 Using Ancillary References

You can create *ancillary references*. An ancillary reference displays the label of an ancillary listed in the Ancillaries Navigator.

**To create an ancillary reference:**

1. Position the insertion point where you want to create an ancillary reference.
2. Choose Insert > Ancillary Reference To, and then choose an ancillary from the submenu.

To quickly create an ancillary reference to a new ancillary, choose Insert > Ancillary Reference To > New Ancillary or press Command-Shift-R.

To delete an ancillary reference, position the insertion point to the right of the ancillary reference, and then press the Delete key twice.

You can format the appearance of ancillary references by using the Ancillary References pop-up menu in the Document inspector; see Section 3.3, “Formatting Overall Text Appearance” on page 19 to learn more.

To learn about ancillaries, see Section 9.2, “Managing Ancillaries” on the previous page.



# Chapter 10

## Printing and Exporting a Document to Other Formats

Set up your document for printing. Include a cover page and a table of contents. Add text to headers and footers. Export your document as a Microsoft Word file, a PDF file, and other file formats.

### 10.1 Printing Your Document

You can use a variety of tools to adjust how your document appears on paper.

To learn about	Go to
General information about printing	Section 10.1.1, "Printing Generally" on the next page
Adjusting the space between text and the edges of a page	Section 10.1.2, "Setting Page Margins" on the next page
Adjusting text appearance when you print	Section 10.1.3, "Hyphenation and Justification" on page 58
Adding a cover page	Section 10.1.4, "Including the Document Title on a Cover Page" on page 58
Adding a table of contents	Section 10.1.5, "Including a Table of Contents" on page 58
Including a legend after the last provision	Section 10.1.6, "Including a Legend" on page 58
Including comments	Section 10.1.7, "Including Comments" on page 59
Including line numbers	Section 10.1.8, "Including Line Numbers" on page 59

When you print your document, Turner replaces consecutive spaces with a single space, divides your document into pages, and does other typesetting tasks. See Section 10.3, "Typesetting In Turner" on page 62 to learn more.

### 10.1.1 Printing Generally

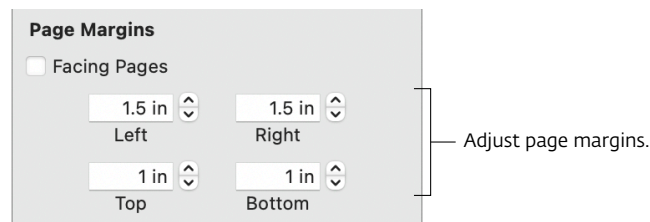
Before you print, you can set paper size and orientation, choose a range of pages to print, and more. To learn about printing generally, search for "Print documents" in Mac Help.

### 10.1.2 Setting Page Margins

You can adjust page margins (the amount of space between the content of your document and the edges of paper).

To change page margins:

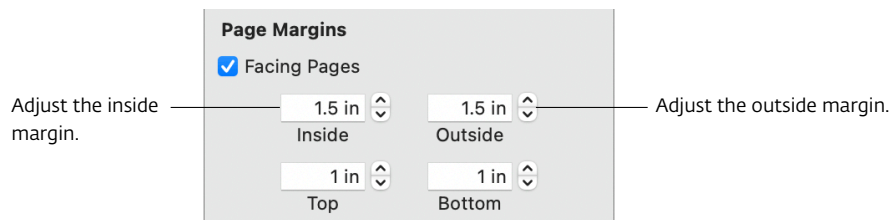
1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Print & Export.
2. Enter values in the Left, Right, Top, and Bottom fields.



If your document will be printed double-sided and bound, you may want to set page margins that account for which side of the page will go into the binding (the inside margin) and which will be loose (the outside margin). For example, you may want the inside margin to be wider than the outside margin to make room for the binding.

To set inside and outside margins:

1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Print & Export.
2. Select Facing Pages.
3. Enter values in the Inside and Outside fields.



### 10.1.3 Hyphenation and Justification

When you print your document, you can hyphenate words at the ends of lines of text. You can also justify text (align text to the left and right margins).

**To hyphenate text when you print:**

1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Print & Export.
2. Select “Hyphenate words over line breaks”.

**To justify text when you print:**

1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Print & Export.
2. Select “Justify text”.

### 10.1.4 Including the Document Title on a Cover Page

When you print your document, you can include the document title either at the top of the first page of your document or on a cover page. To learn about working with the document title, see Section 7.2, “Working with the Document Title” on page 50.

To include the document title on a cover page when you print, select the “Include document title on cover page” checkbox in the Print & Export pane of the Print & Export inspector. To include the document title at the top of the first page of your document, deselect this checkbox.

### 10.1.5 Including a Table of Contents

When you print your document, you can include a table of contents. In Turner, a table of contents shows provision numbers and titles on the left, and page numbers on the right. To learn more about provision numbers, see Section 4.2.1, “Numbering Provisions” on page 29; to learn more about provision titles, see Section 4.3.5, “Adding Titles to Provisions” on page 33.

To include a table of contents in your document when you print, select the “Table of Contents” checkbox in the Print & Export pane of the Print & Export inspector.

**To modify the table of contents:**

1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Print & Export.
2. Use the “Table of Contents” controls.

**Include list of ancillaries:** Select this checkbox to list ancillaries after the table of contents. To learn about ancillaries, see Chapter 9, “Working with Ancillaries” on page 54.

**Include defined terms index:** Select this checkbox to include an index of defined terms after the table of contents. To learn about defined terms, see Chapter 5, “Working with Defined Terms” on page 36.

### 10.1.6 Including a Legend

When you print your document, you can include a legend (for example, *Signature pages follow* or *Remainder of page intentionally left blank*) after the last provision.

To include a legend after the last provision, select the "Include legend after last provision" checkbox in the Print & Export pane of the Print & Export inspector. You can choose a legend by clicking the arrow to the right of the "Include legend after last provision" text field, and then selecting a legend from the drop-down list. If none of the listed legends are suitable, you can type your own in the text field.

### **10.1.7 Including Comments**

You can choose whether to include comments when you print your document.

**To include comments:**

1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Print & Export.
2. Select "Include comments".

To print without comments, deselect "Include comments".

See Section 6.3, "Using Comments" on page 48 to learn more about comments.

### **10.1.8 Including Line Numbers**

When you print your document, you can include line numbers in the left margin.

**To print your document with line numbers:**

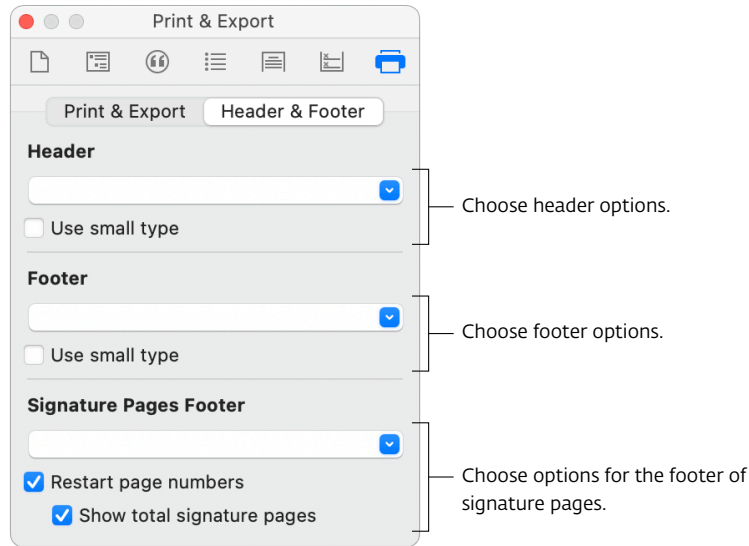
1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Print & Export.
2. Select "Include line numbers".

### **10.1.9 Using Headers and Footers**

You can make the same text appear at the top (header) and bottom (footer) of each page of your document when you print it.

**To add text to the header and footer of your document:**

1. Click Inspector in the toolbar, click the Print & Export button at the top of the inspector window, and then click Header & Footer.
2. Use the controls in the Header & Footer pane of the Print & Export inspector to edit headers and footers.



**Header:** In the Header field, enter the text that you want to appear in the header.

**Footer:** In the Footer field, enter the text that you want to appear in the footer.

**Signature Pages Footer:** In Turner, signature blocks appear on *signature pages*; see Chapter 8, “Working with Signature Blocks” on page 52 to learn about signature blocks.

In the Signature Pages Footer field, enter the text that you want to appear in the footer of the signature pages. If you want to number signature pages separate from the rest of your document, select “Restart page numbers”. If you want signature page numbers to include a total (for example, *1 of 10*), select “Show total signature pages”.

## 10.2 Exporting Turner Documents to Other File Formats

You can export your Turner document to a variety of file formats.

To learn about	Go to
Exporting your document to commonly used file formats	Section 10.2.1, “Exporting Turner Documents for Sharing with Others” on this page
Exporting your document for submission to the EDGAR system	Section 10.2.2, “Exporting Turner Documents for Submission to the EDGAR System” on the next page
Exporting your document as a TeX file	Section 10.2.3, “Exporting Turner Documents for Typesetting with X <sub>3</sub> TeX” on page 62

### 10.2.1 Exporting Turner Documents for Sharing with Others

You can export your document to file formats that those who aren’t using Turner may be able to use.

**PDF:** You can view and print PDF files in Preview, Safari, and other applications. You can edit PDF files with a PDF application. When you export your document as a PDF file, Turner creates hyperlinks for cross-references (see Section 3.4, “Using Cross-References” on page 20) and items in the table of contents (see Section 10.1.5, “Including a Table of Contents” on page 58).

When you export your document as a PDF file, Turner replaces consecutive spaces with a single space, divides your document into pages, and does other typesetting tasks. See Section 10.3, “Typesetting In Turner” on the next page to learn more.

**Microsoft Word (DOCX):** You can open and edit DOCX files in Microsoft Word.

When you export your document as a DOCX file, Turner uses a number sign (#) in place of page numbers in the table of contents and in other places. To replace number signs with page numbers, open the DOCX file in Word and update fields. To learn how to update fields in Word, search for “update fields” in Word Help. To learn how to add a table of contents to your document, see Section 10.1.5, “Including a Table of Contents” on page 58.

**RTF:** You can open and edit RTF files in Microsoft Word, Pages, and other word processors. When you export your document as an RTF file, most text formatting is preserved.

**Plain Text:** You can open and edit plain text files in many text editing applications, such as TextEdit. Exporting to plain text removes text formatting.

Documents exported to plain text are not suitable for the EDGAR system. If you want to submit a Turner document to the EDGAR system as a plain text file, export it as an EDGAR plain text file. See Section 10.2.2, “Exporting Turner Documents for Submission to the EDGAR System” on this page to learn how.

**To export a Turner document to PDF, Microsoft Word, RTF, or plain text file formats:**

- Choose File > Export To, and then choose PDF, Word, RTF, or Plain Text from the submenu.

## 10.2.2 Exporting Turner Documents for Submission to the EDGAR System

If you want to submit your Turner document to the Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system provided by the US Securities and Exchange Commission (SEC) as an exhibit to an SEC filing, you can export your document to file formats that are suitable for the EDGAR system:

**EDGAR HTML:** You can view or print EDGAR HTML files in Safari and other web browsers.

**EDGAR Plain Text:** Exporting to EDGAR plain text removes text formatting. Exporting to EDGAR plain text also replaces certain characters — such as “smart” quotation marks, most currency symbols (including £, €, and ¥), and letters with diacritics (such as á and ö) — with alternate characters or with a question mark (?).

You can open and edit EDGAR plain text files in many text editing applications, such as TextEdit. However, because of the requirements of the EDGAR system, if you edit your EDGAR plain text file in a text editing application, it may become unsuitable for the EDGAR system. For more information about the requirements of the EDGAR system, see the *EDGAR Filer Manual* (<https://www.sec.gov/edgar/filermanual>).

If you don’t need to submit your document to the EDGAR system, consider exporting it as a plain text file. Exporting as a plain text file preserves “smart” quotation marks, currency symbols, and letters with diacritics. See Section 10.2.1, “Exporting Turner Documents for Sharing with Others” on the previous page to learn how to export a document as a plain text file.

For detailed information about EDGAR HTML and EDGAR plain text, see Appendix C, “EDGAR HTML and EDGAR Plain Text” on page 75.

**To export a Turner document to EDGAR HTML and EDGAR plain text:**

- Choose File > Export To, and then choose EDGAR HTML or EDGAR Plain Text from the submenu.

### 10.2.3 Exporting Turner Documents for Typesetting with X<sub>3</sub>T<sub>E</sub>X

You can export your document as a T<sub>E</sub>X (pronounced “tekh”) file suitable for typesetting with X<sub>3</sub>T<sub>E</sub>X (pronounced “zee-tekh”).

You should rarely need to export your document as a T<sub>E</sub>X file, but you may want to do this to share it with a publisher that works with T<sub>E</sub>X. Or, if you’re familiar with T<sub>E</sub>X, you may want to do this to customize your document’s typography. You can open and edit T<sub>E</sub>X files in many text editing applications, such as TextEdit.

To export a Turner document as a T<sub>E</sub>X file:

- Choose File > Export To, and then choose T<sub>E</sub>X from the submenu.

For more information about T<sub>E</sub>X, see the following resources:

To learn about	See
Installing T <sub>E</sub> X	MacT <sub>E</sub> X ( <a href="https://tug.org/mactex/">https://tug.org/mactex/</a> )
ΛT <sub>E</sub> X (pronounced “lah-tekh” or “lay-tekh”)	ΛT <sub>E</sub> X ( <a href="https://en.wikibooks.org/wiki/LaTeX">https://en.wikibooks.org/wiki/LaTeX</a> ) ΛT <sub>E</sub> X 2 <sub>ε</sub> for authors ( <a href="https://ctan.org/pkg/usrguide">https://ctan.org/pkg/usrguide</a> ) ΛT <sub>E</sub> X 2 <sub>ε</sub> for class and package writers ( <a href="https://ctan.org/pkg/clsguide">https://ctan.org/pkg/clsguide</a> ) ΛT <sub>E</sub> X 3 programming conventions ( <a href="https://ctan.org/pkg/l3kernel">https://ctan.org/pkg/l3kernel</a> )
X <sub>3</sub> T <sub>E</sub> X	X <sub>3</sub> T <sub>E</sub> X ( <a href="https://xetex.sourceforge.net">https://xetex.sourceforge.net</a> )
T <sub>E</sub> X programming	T <sub>E</sub> X by Topic ( <a href="https://www.eijkhout.net/tex/tex-by-topic.html">https://www.eijkhout.net/tex/tex-by-topic.html</a> ) <i>The T<sub>E</sub>Xbook</i> by Donald E. Knuth, Addison-Wesley Pub. Co., 1984
T <sub>E</sub> X generally	Getting Started with T <sub>E</sub> X, ΛT <sub>E</sub> X, and Friends ( <a href="https://tug.org/begin.html">https://tug.org/begin.html</a> ) The Comprehensive T <sub>E</sub> X Archive Network (CTAN) ( <a href="https://ctan.org">https://ctan.org</a> )

## 10.3 Typesetting In Turner

When you print your document or export it as a PDF file, Turner replaces consecutive spaces with a single space, divides your document into pages, and does other typesetting tasks.

To learn about	Go to
Removing consecutive spaces	Section 10.3.1, “Consecutive Spaces” on this page
Dividing your document into pages	Section 10.3.2, “Pagination” on the next page

### 10.3.1 Consecutive Spaces

In Turner, when you print your document or export it as a PDF file, consecutive spaces are replaced with a single space.

As you work on your document, you may want to replace consecutive spaces with a single space. To do this, choose Edit > Collapse Spaces. Choosing Edit > Collapse Spaces also removes spaces from the beginning and end of paragraphs, along with spaces that appear after opening quotation marks and before closing quotation marks.

To learn about printing, see Section 10.1, “Printing Your Document” on page 56. To learn about exporting your document as a PDF file, see Section 10.2.1, “Exporting Turner Documents for Sharing with Others” on page 60.

### 10.3.2 Pagination

In Turner, you view your document without page breaks. Your document is divided into pages (*paginated*) when you print your document or export it as a PDF file. As your document is paginated, it is typeset in a way that avoids common typesetting errors, such as widow and orphan lines; lines that begin with cross-reference numbers (like the *I* in *Article I*); and lines that end with list numbers (like *(i)*). In general, you do not need to add page breaks or line breaks to avoid typesetting errors when you use Turner.

To learn about printing, see Section 10.1, “Printing Your Document” on page 56. To learn about exporting your document as a PDF file, see Section 10.2.1, “Exporting Turner Documents for Sharing with Others” on page 60. To learn about page breaks, see Section 3.7.1, “Inserting a Page Break” on page 26. To learn about line breaks, see Section 3.7.3, “Inserting a Line Break” on page 27.



## Chapter 11

# Deactivating Turner and Managing Your Subscription

Deactivate Turner on your current Mac in order to activate it on a different Mac. Update your billing information or cancel your subscription.

### 11.1 Deactivating Turner

If you want to install Turner on a different Mac, you should first deactivate Turner on your current Mac.

**To deactivate Turner:**

1. Choose Turner > Preferences.
2. Click Subscription at the top of the Turner preferences window to show the Subscription pane.
3. Click the Action pop-up menu to the right of the Activation Key field, and then click Deactivate Turner.

**Note:** When you deactivate Turner, you do not cancel your subscription; see Section 11.2, “Managing Your Turner Subscription” on the next page to learn how to cancel your subscription.

When you activate Turner on a different Mac, you must enter an activation key. If you need to retrieve a lost activation key, visit <https://papersoftware.com/activation>.

If you forget to deactivate Turner on one Mac before you try to activate it on another, you can deactivate Turner on your other Mac computers when you activate Turner on your current Mac.

**To deactivate Turner on your other computers:**

1. On your current Mac, enter your activation key, and then click Activate. An alert message that says “Maximum activations reached” appears.
2. Click Yes to deactivate Turner on your other computers and activate Turner on your current Mac. If you change your mind about deactivating Turner on your other computers, click No.

## 11.2 Managing Your Turner Subscription

You can update your billing information or cancel your Turner subscription.

Here are ways to manage your Turner subscription:

- Choose Turner > Manage Subscription.
- Choose Turner > Preferences, click Subscription, click the Action pop-up menu to the right of the Activation Key field, and then click Manage Subscription.
- Click the link that appears below the Order ID in your billing confirmation emails.

To transfer your Turner subscription to another computer, you can deactivate Turner on your current computer (see Section 11.1, “Deactivating Turner” on the previous page to learn how), and then activate Turner on another computer.

## Appendix A

# Tips for Working with Imported Documents

Learn how to clean up imported documents quickly and easily.

Here are common cleanup tasks for imported documents and tips for doing them quickly and easily.

To learn about	Go to
Avoiding problems with tables of contents in imported documents	Appendix A.1, "Removing a Table of Contents before Importing" on this page
Avoiding problems with ancillaries in imported documents	Appendix A.2, "Including the Content of Ancillaries within a Document" on the next page
Techniques for finding cross-references that Turner does not find	Appendix A.3, "Checking for Undetected Cross-References" on the next page
Making text appear after a list of subprovisions	Appendix A.4, "Including Text after a List of Subprovisions" on page 68
Cleaning up contact information	Appendix A.5, "Working with Contact Information" on page 68

To learn how to import a document, see Section 2.2, "Importing a Document" on page 11.

### A.1 Removing a Table of Contents before Importing

When importing a document, Turner may interpret a table of contents as a list of provisions. For example, Turner may interpret the entry for Article I in a table of contents (instead of the real Article I) as the first provision in your document. When this happens, cleaning up a document after importing it may be very time consuming, and you may save time if you remove the table of contents from the document you want to import before you import it.

**Here are ways to remove a table of contents from a document you want to import:**

- Delete the table of contents in the file you want to import, and then import this edited file. You can edit DOCX and RTF files using a word processor, like Pages and Microsoft Word. You can edit TXT files using a text editor, like TextEdit. If you're familiar with HTML, you can edit EDGAR HTML files using a text editor, like TextEdit.
- Use Copy and Paste to create a new document that doesn't include a table of contents, and then import this new document. For example, copy and paste the contents (excluding the table of contents) of a PDF or an EDGAR HTML file into a new TXT file, and then import this TXT file.

To learn how to include a table of contents in a document when you print or export, see Section 10.1.5, "Including a Table of Contents" on page 58.

## A.2 Including the Content of Ancillaries within a Document

Ancillaries to contracts (like exhibits and schedules) sometimes include essential information (like a list of definitions). You cannot work with the content of ancillaries in Turner, and Turner does not import ancillaries. If the content of an ancillary is essential, it's a good idea to move this content to provisions (above the signatures) in the document you want to import before you import it.

**Here are ways to move content from an ancillary to provisions in a document you want to import:**

- Edit the file you want to import, and then import this edited file. You can edit DOCX and RTF files using a word processor, like Pages and Microsoft Word. You can edit TXT files using a text editor, like TextEdit. If you're familiar with HTML, you can edit EDGAR HTML files using a text editor, like TextEdit.
- Use Copy and Paste to create a new document that includes all of the content you want to import within provisions, and then import this new document. For example, copy and paste the contents (including items within an ancillary) of a PDF or an EDGAR HTML file into a new TXT file, and then import this TXT file.

To learn about ancillaries, see Chapter 9, "Working with Ancillaries" on page 54.

## A.3 Checking for Undetected Cross-References

When importing a document, Turner finds text that looks like cross-references, and then creates cross-references based on this text. However, Turner may not find all cross-references. For example, if Turner cannot find the item to which a cross-reference refers, then Turner will leave this cross-reference as text.

After importing a document, it's a good idea to check for cross-references that Turner didn't detect.

**Here are ways to check for undetected cross-references:**

- Use the Find & Replace pane to find words like *article*, *clause*, and *section*.
- Use tokens in the Find & Replace pane to find text that typically appears in cross-references. For example, you can search for `number . number` to find provision numbers (like 1.01), and you can search for `( word )` to find text like the (a) in *clause (a)*.

To learn more about the Find & Replace pane, see Section 3.2, “Finding and Replacing Text” on page 14. To learn more about cross-references, see Section 3.4, “Using Cross-References” on page 20.

## A.4 Including Text after a List of Subprovisions

Provisions in contracts sometimes include text, then a list of subprovisions, and then more text after the list of subprovisions (but not within it). For example, after some introductory text and a list of subprovisions, there might be a general exception (“Notwithstanding the foregoing...”).

When Turner imports documents from other file formats, it may interpret text that appears after a list of subprovisions as part of the last subprovision in the list. When this happens, the text that appears after a list of subprovisions may not be aligned as expected, and cross-references to list items and provisos within this text may not behave as expected.

**To make text appear after a list of subprovisions:**

1. Select the provision that contains a list of subprovisions and the text you want to include after this list of subprovisions.
2. Choose Format > Provision > Convert Subprovisions to Numbered Lists. The list of subprovisions in the provision you selected is converted to a numbered list.
3. Edit the last item in the numbered list to move text after the numbered list. Here are ways to do this:

**Cut and Paste:** Select the text you want to appear after the numbered list, press Command-X to cut this text, press the Right Arrow key to position the insertion point after the numbered list, and then press Command-V to paste this text after the numbered list.

**End Numbered List:** Position the insertion point where you want the numbered list to end, and then choose Format > Numbered List > End Numbered List.

To learn more about provisions, see Chapter 4, “Working with Provisions” on page 28. To learn more about numbered lists, see Section 3.5, “Using Numbered Lists” on page 22.

## A.5 Working with Contact Information

Contact information (like addresses and phone numbers) is often formatted differently from other content, and you may need to clean up contact information in documents you import.

**Here are tips for cleaning up contact information:**

- Insert paragraph breaks between blocks of contact information (for example, between the contact information of a party to a contract and this party’s counsel). To insert a paragraph break, choose Insert > Paragraph Break. If you need to insert numerous paragraph breaks, you may want to use the Return key to insert paragraph breaks. To do this, choose Turner > Preferences, and then use the Return Key controls in the General pane of Turner preferences. To learn more about paragraph breaks, see Section 3.7.2, “Inserting a Paragraph Break” on page 26.
- Insert line breaks between lines in a block of contact information (for example, between lines in a mailing address, or between a phone number and an email address). To insert a line break, choose Insert > Line Break or press Option-Return. To learn more about line breaks, see Section 3.7.3, “Inserting a Line Break” on page 27.

## Appendix B

# Finding Amounts of Money

Learn detailed information about the currencies you can find using the money token.

You can use the `money` token to find dollars (for example, *1 dollar* and *10 dollars*), cents (for example, *1 cent* and *10 cents*), and amounts of money denominated with a dollar sign (\$).

You can also use `money` to find amounts of money denominated in the following currencies:

Currency	Symbol	ISO 4217 code	For example
Argentine peso	AR\$, Ar\$	ARS	AR\$100 100 Argentine pesos 100 Argentinian pesos 100 ARS ARS 100
Australian dollar	A\$, AU\$, Au\$	AUD	A\$100 AU\$100 100 Australian dollars 100 AUD AUD 100
Brazilian real	R\$	BRL	R\$100 100 Brazilian reais 100 Brazilian reals 100 BRL BRL 100
British pound sterling	£	GBP	£100 100 pounds 100 British pounds 100 pounds sterling 100 GBP GBP 100

Currency	Symbol	ISO 4217 code	For example
Canadian dollar	C\$, CA\$, Ca\$, CAN\$, Can\$, CDN\$, Cdn\$	CAD	C\$100 Can\$100 CDN\$100 100 Canadian dollars 100 CAD CAD 100
Chilean peso	CH\$, Ch\$	CLP	CH\$100 100 Chilean pesos 100 CLP CLP 100
Chinese renminbi yuan	¥, RMB	CNY	¥100 RMB 100 100 Chinese yuan 100 renminbi 100 renminbi yuan 100 yuan 100 yuan renminbi 100 CNY CNY 100
Czech koruna	Kč	CZK	100 Kč 100 Kc 100 Czech korunas 100 Czech korunys 100 CZK CZK 100
Danish krone	kr, DKr	DKK	kr100 100 DKr 100 Danish krone 100 Danish kroner 100 DKK DKK 100
Egyptian pound	£E, E£, LE	EGP	£E100 E£100 LE100 100 Egyptian pounds 100 EGP EGP 100
Euro	€	EUR	€100 100 euros 100 EUR EUR 100
Hong Kong dollar	HK\$, H.K.\$	HKD	HK\$100 100 Hong Kong dollars 100 HKD HKD 100

Currency	Symbol	ISO 4217 code	For example
Hungarian forint	Ft	HUF	100 Ft 100 forints 100 HUF HUF 100
Indian rupee	₹, Rs	INR	₹100 Rs100 100 Indian rupees 100 INR INR 100
Indonesian rupiah	Rp	IDR	Rp100 100 Indonesian rupiahs 100 IDR IDR 100
Israeli new shekel	₪, NIS	ILS	₪100 NIS 100 100 shekels 100 new sheqels 100 new Israeli shekels 100 Israeli new shekels 100 sheqalim 100 ILS ILS 100
Japanese yen	¥	JPY	¥100 100 Japanese yen 100 yen 100 JPY JPY 100
Kenyan shilling	KSh	KES	KSh100 K. Sh. 100 100 Kenyan shillings 100 shillings 100 KES KES 100
Malaysian ringgit	RM	MYR	RM100 100 Malaysian ringgits 100 MYR MYR 100
Mauritian rupee	Rs	MUR	Rs100 100 Mauritian rupees 100 MUR MUR 100
Mexican peso	MEX\$, Mex\$	MXN	Mex\$100 100 Mexican pesos 100 MXN MXN 100



Currency	Symbol	ISO 4217 code	For example
New Zealand dollar	NZ\$, N.Z.\$	NZD	NZ\$100 100 New Zealand dollars 100 NZD NZD 100
Nigerian naira	₦	NGN	₦100 100 Nigerian naira 100 NGN NGN 100
Norwegian krone	kr, Nkr	NOK	kr100 100 Nkr 100 Norwegian krona 100 Norwegian krone 100 Norwegian kroner 100 Norwegian kronor 100 NOK NOK 100
Pakistani rupee	Rs	PKR	Rs100 100 Pakistani rupees 100 PKR PKR 100
Philippine peso	₱, PhP, Php, P\$	PHP	₱100 P\$100 100 Philippine pesos 100 Philippine pisos 100 PHP PHP 100
Polish złoty	zł	PLN	100 zł 100 zl 100 zlotys 100 złotys 100 PLN PLN 100
Qatari riyal	QR	QAR	QR100 100 riyals 100 QAR QAR 100
Romanian leu	L	RON	L100 100 leus 100 lei 100 RON RON 100

Currency	Symbol	ISO 4217 code	For example
Russian ruble	₽, pyб, PP, pp, P, p, RR, rr, Rub, rub	RUB	₽100 100 pyб 100 RR 100 rubles 100 roubles 100 RUB RUB 100
Saudi riyal	SR	SAR	SR100 100 Saudi riyals 100 Saudi Arabian riyals 100 SAR SAR 100
Singapore dollar	S\$	SGD	S\$100 100 Singapore dollars 100 SGD SGD 100
South African rand	R	ZAR	R100 100 rand 100 ZAR ZAR 100
South Korean won	₩	KRW	₩100 100 Korean won 100 KRW KRW 100
Swedish krona	kr, SKr	SEK	100 kr 100 SKr 100 Swedish krona 100 Swedish kronor 100 SEK SEK 100
Swiss franc	FR, Fr, SFR, SFr	CHF	Fr100 SFr 100 100 Swiss francs 100 CHF CHF 100
Taiwan new dollar	NT\$, N.T.\$	TWD	NT\$100 100 New Taiwan dollars 100 Taiwan new dollars 100 Taiwan dollars 100 TWD TWD 100
Thai baht	฿	THB	฿100 100 Thai bahts 100 THB THB 100

Currency	Symbol	ISO 4217 code	For example
Turkish lira	₺, TL	TRY	₺100 100TL 100 Turkish lira 100 TRY TRY 100
Ukrainian hryvnia	₴, грн, hrn	UAH	₴100 100 грн 100 hrn 102 hryvni 100 hryven' 100 UAH UAH 100
United Arab Emirates dirham	DH, Dh, dh	AED	Dh 100 100 dh 100 dirhams 100 AED AED 100
United States dollar	US\$, U.S.\$	USD	US\$100 U.S.\$100 100 US dollars 100 U.S. dollars 100 United States dollars 100 USD USD 100

To learn more about finding text, see Section 3.2, "Finding and Replacing Text" on page 14.

# Appendix C

## EDGAR HTML and EDGAR Plain Text

Learn detailed information about exporting Turner documents to EDGAR HTML and EDGAR plain text.

If you want to submit your Turner document to the Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system provided by the US Securities and Exchange Commission (SEC) as an exhibit to an SEC filing, you can export your document as an EDGAR HTML file or EDGAR plain text file. Both kinds of files use ASCII characters.

To learn about	Go to
EDGAR HTML	Appendix C.1, "EDGAR HTML" on this page
EDGAR plain text	Appendix C.2, "EDGAR Plain Text" on page 78
ASCII characters and compatible encodings	Appendix C.3, "ASCII Characters and Compatible Encodings" on page 78

### C.1 EDGAR HTML

Turner documents exported to EDGAR HTML are encoded using the American Standard Code for Information Interchange (ASCII). Non-ASCII characters are expressed as decimal numeric character references. For example, the opening double quotation mark ("), which is a non-ASCII character, is expressed as `&#8220;`.

Turner documents exported to EDGAR HTML use only elements and attributes that are both specified as suitable for the EDGAR system and part of HTML5 (<https://www.w3.org/TR/html5/>).

You can open and edit EDGAR HTML files in many text editing applications, such as TextEdit. If you edit an EDGAR HTML file in a text editing application, follow these guidelines:

**When editing an EDGAR HTML file:**

- Use only ASCII characters. If you can choose an encoding for your EDGAR HTML file using your text editing application, choose ASCII or an encoding that is backward-compatible with ASCII.

For more information, see Appendix C.3, “ASCII Characters and Compatible Encodings” on page 78.

- If you need to use non-ASCII characters, use character references instead of non-ASCII characters. You can use named, decimal numeric, or hexadecimal numeric character references. See the HTML5 specification (<https://www.w3.org/TR/html5/syntax.html#character-references>) for more information about character references.

**Note:** Section 5.2.2.6 of the *EDGAR Filer Manual (Volume II)* (<https://www.sec.gov/edgar/filermanual>) contains tables of certain non-ASCII characters and their numeric character references. Some numeric character references in these tables are Windows-1252 numeric character references. While many web browsers can interpret Windows-1252 numeric character references, these numeric character references do not conform to HTML5. Consider using numeric character references that conform to HTML5 instead of Windows-1252 numeric character references. Here are Windows-1252 decimal numeric character references and their HTML5 equivalents:

Character	Unicode name	Windows-1252 character reference	Instead consider
€	EURO SIGN	&#128;	&#8364;
,	SINGLE LOW-9 QUOTATION MARK	&#130;	&#8218;
ƒ	LATIN SMALL LETTER F WITH HOOK	&#131;	&#402;
„	DOUBLE LOW-9 QUOTATION MARK	&#132;	&#8222;
…	HORIZONTAL ELLIPSIS	&#133;	&#8230;
†	DAGGER	&#134;	&#8224;
‡	DOUBLE DAGGER	&#135;	&#8225;
ˆ	MODIFIER LETTER CIRCUMFLEX ACCENT	&#136;	&#710;
‰	PER MILLE SIGN	&#137;	&#8240;
Š	LATIN CAPITAL LETTER S WITH CARON	&#138;	&#352;
‹	SINGLE LEFT-POINTING ANGLE QUOTATION MARK	&#139;	&#8249;
Œ	LATIN CAPITAL LIGATURE OE	&#140;	&#338;
Ž	LATIN CAPITAL LETTER Z WITH CARON	&#142;	&#381;
‘	LEFT SINGLE QUOTATION MARK	&#145;	&#8216;
’	RIGHT SINGLE QUOTATION MARK	&#146;	&#8217;
“	LEFT DOUBLE QUOTATION MARK	&#147;	&#8220;
”	RIGHT DOUBLE QUOTATION MARK	&#148;	&#8221;
•	BULLET	&#149;	&#8226;
–	EN DASH	&#150;	&#8211;
—	EM DASH	&#151;	&#8212;

Character	Unicode name	Windows-1252 character reference	Instead consider
~	SMALL TILDE	&#152;	&#732;
™	TRADE MARK SIGN	&#153;	&#8482;
š	LATIN SMALL LETTER S WITH CARON	&#154;	&#353;
›	SINGLE RIGHT-POINTING ANGLE QUOTATION MARK	&#155;	&#8250;
œ	LATIN SMALL LIGATURE OE	&#156;	&#339;
ž	LATIN SMALL LETTER Z WITH CARON	&#158;	&#382;
ÿ	LATIN CAPITAL LETTER Y WITH DIAERESIS	&#159;	&#376;

- If you edit an EDGAR HTML file, you can use certain HTML elements and attributes. For lists of elements and attributes you can use in EDGAR HTML, see Section 5.2.2.3 of the *EDGAR Filer Manual (Volume II)* (<https://www.sec.gov/edgar/filermanual>).

**Note:** Certain elements in Section 5.2.2.3 of the *EDGAR Filer Manual (Volume II)* do not conform to HTML5. Here are elements you might consider using instead:

Instead of using	Consider using
<big>	<div style="font-size:larger; display:inline"> or <em style="font-size:larger; font-style:inherit">
<center>	<div style="text-align:center">
<dir>	<ul>
<font color="color" face="face">	<div style="color:color; font-family:face; display:inline"> or <em style="color:color; font-family:face; font-style:inherit">
<listing>	<pre>
<plaintext>	<pre>
<strike>	<div style="text-decoration:line-through; display:inline"> or <em style="text-decoration:line-through; font-style:inherit">
<tt>	<code>, <kbd> or <samp>
<xmp>	<pre>

The <isindex> element also does not conform to HTML5.

For more information about the EDGAR system, HTML, and CSS, see the following resources:

To learn about	See
The EDGAR system	<i>EDGAR Filer Manual</i> ( <a href="https://www.sec.gov/edgar/filermanual">https://www.sec.gov/edgar/filermanual</a> )
HTML	<i>HTML5</i> ( <a href="https://www.w3.org/TR/html5/">https://www.w3.org/TR/html5/</a> ) <i>HTML 4.01 Specification</i> ( <a href="https://www.w3.org/TR/html401/">https://www.w3.org/TR/html401/</a> ) <i>HTML 3.2 Reference Specification</i> ( <a href="https://www.w3.org/TR/REC-html32">https://www.w3.org/TR/REC-html32</a> )
CSS	<i>Cascading Style Sheets</i> ( <a href="https://www.w3.org/Style/CSS/">https://www.w3.org/Style/CSS/</a> )

---

In addition to EDGAR HTML, you can export documents to EDGAR plain text. See Appendix C.2, "EDGAR Plain Text" on this page for detailed information about EDGAR plain text. See Section 10.2, "Exporting Turner Documents to Other File Formats" on page 60 to learn about other file formats to which you can export a Turner document.

## C.2 EDGAR Plain Text

Turner documents exported as EDGAR plain text files are encoded using the American Standard Code for Information Interchange (ASCII). When you export a Turner document as an EDGAR plain text file, non-ASCII characters are replaced with alternate characters or with a question mark (?).

Lines of text in EDGAR plain text files have at most 80 characters.

EDGAR plain text files do not include any of the "ASCII/SGML tags" described in Section 5.2.1.3 of the *EDGAR Filer Manual (Volume II)* (<https://www.sec.gov/edgar/filermanual>).

You can open and edit EDGAR plain text files in many text editing applications, such as TextEdit. If you edit an EDGAR plain text file in a text editing application, follow these guidelines:

### When editing an EDGAR plain text file:

- Use only ASCII characters. If you can choose an encoding for your EDGAR plain text file using your text editing application, choose ASCII or an encoding that is backward-compatible with ASCII. For more information, see Appendix C.3, "ASCII Characters and Compatible Encodings" on this page.
- Avoid making any line of text longer than 80 characters. If a line of text in an EDGAR plain text file is longer than 80 characters, the file may be unsuitable for the EDGAR system.

For more information about the EDGAR system, see the *EDGAR Filer Manual* (<https://www.sec.gov/edgar/filermanual>).

In addition to EDGAR plain text, you can export documents to EDGAR HTML. See Appendix C.1, "EDGAR HTML" on page 75 for detailed information about EDGAR HTML. See Section 10.2, "Exporting Turner Documents to Other File Formats" on page 60 to learn about other formats to which you can export a Turner document.

## C.3 ASCII Characters and Compatible Encodings

If you edit an EDGAR HTML file or an EDGAR plain text file in a text editing application, you should use only characters in the American Standard Code for Information Interchange (ASCII). If you use other characters, your file may become unsuitable for the EDGAR system.

ASCII characters include spaces, newline characters, and the following characters:

**Uppercase Letters:** A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Lowercase Letters:** a b c d e f g h i j k l m n o p q r s t u v w x y z

**Arabic Numerals:** 0 1 2 3 4 5 6 7 8 9

**Punctuation Marks:** . , : ; ' " ! ? ( ) [ ] { }

**Miscellaneous Symbols:** # @ \$ % & \* + - = / \ < > | \_ ^ ` ~

If you can choose an encoding for your EDGAR HTML file or your EDGAR plain text file using your text editing application, you should choose ASCII or an encoding that is backward-compatible with ASCII. Otherwise, your file may become unsuitable for the EDGAR system. Encodings that are backward-compatible with ASCII include:

- UTF-8
- ISO/IEC 8859-1 (also called ISO Latin 1)
- Windows-1252 (also called Windows Latin 1)
- Mac OS Roman

For more information about EDGAR HTML files, see Appendix C.1, "EDGAR HTML" on page 75. For more information about EDGAR plain text files, see Appendix C.2, "EDGAR Plain Text" on the previous page. See Section 10.2, "Exporting Turner Documents to Other File Formats" on page 60 to learn about other formats to which you can export a Turner document.



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