

# ProDoc Tech Tip

## Customize Default Document Formatting

The ProDoc Document Assembly program allows you to easily customize the formatting for your documents. This feature is extremely flexible; you can change the formatting for individual documents, for all the documents in a specific volume, or for every document you produce.

Used as shipped, with preset defaults, ProDoc produces well-formatted and legally precise finished documents. However, if you find yourself regularly changing document formatting in your word processor before printing, it would save you time to customize the forms before you assemble the documents.

You can change margins and fonts, include headers with your firm's letterhead and even graphics, add footers, change line spacing, or change paragraph justification, to name just a few options. These changes are saved in a configuration file which ProDoc imports into your finished document. You can change these settings once, and the finished documents will always include the changes you've made.

### 1. Customizing General Document Formatting

To customize your documents, perform the following steps:

- A. At the main menu click **Customize** ► **Document Formatting** as shown in *Figure 1*.

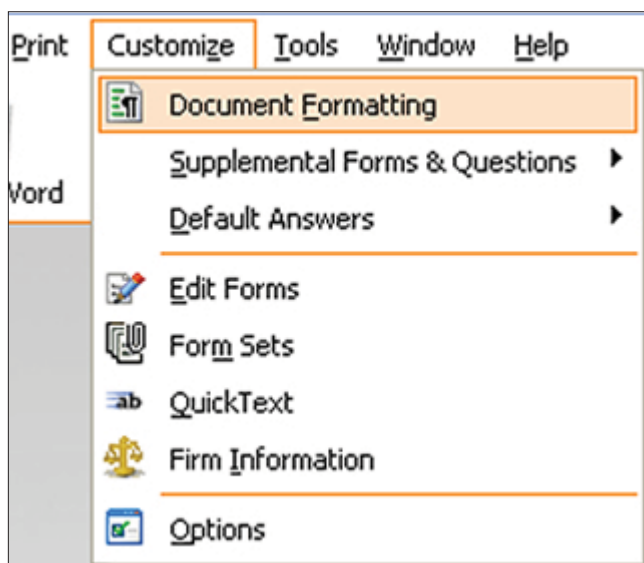


Figure 1 - Choose Document Formatting

- B. The **Default Formatting** window opens. No changed default formatting is shown (*Figure 2, E*) because we have not yet made any changes.

- C. Choose the document category to which to apply your revised default formatting:

- a. If you select **Global Settings** (*Figure 2, B*), all of the documents you assemble in ProDoc will have the formatting changes.

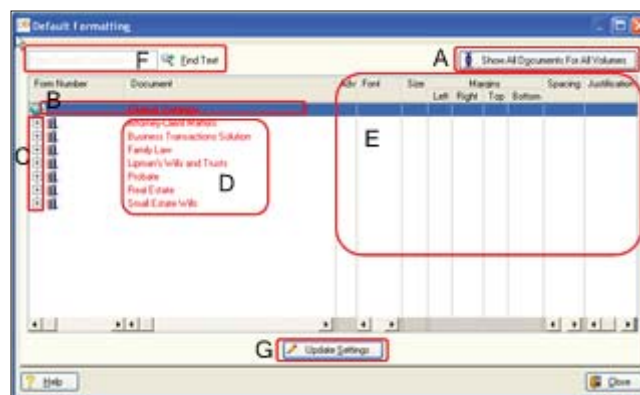


Figure 2 - Default Formatting Window

- b. If you select a specific volume by highlighting the volume name, (*Figure 2, D*), all forms you use in that volume will have the formatting changes.

- c. Or, you select a specific document. You have three options for finding the document to which to apply customized formatting.

- Click the + sign to left of a specific volume (*Figure 2, C*) to view all documents in that volume.
- Click **Show All Documents for All Volumes** (*Figure 2, A*) to open every volume so you can scroll through all documents available to you through your ProDoc subscription.
- Click on one of the volumes (*Figure 2, D*) and then type in a word or word string that can be found in the form followed by clicking the **Find Text** button (*Figure 2, F*).

d. After making your choice on the scope of your changes, click the **Update Settings** button (Figure 2, G).

D. The **Global/Volume/Document Formatting Options** window (the name depending on your choice in Step 2. C. c. above) opens and reveals your options for modifying the default formatting settings (Figure 3).

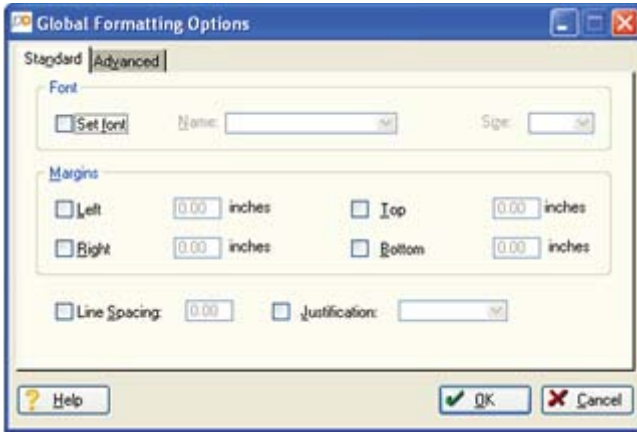


Figure 3 - The Formatting Options Window (For Global Settings in this example)

E. The **Standard** tab allows you to set the font, margins, line spacing and justification. Click the box to the left of formatting option you want to set and then add your desired value. When done, this window might look similar to Figure 4.

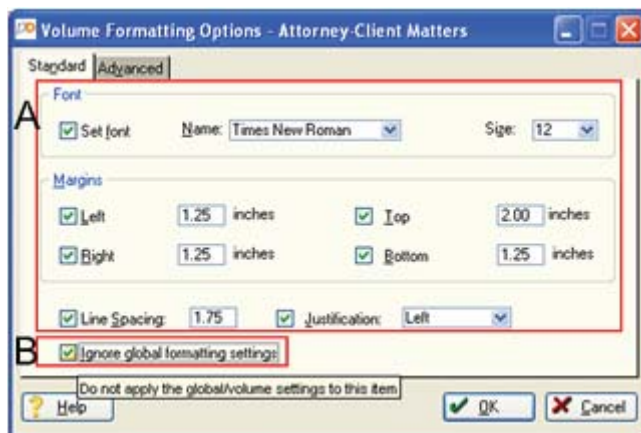


Figure 4 - Global Formatting Options Set

F. The **Ignore global formatting settings** (Figure 4, B) displays only when you are working on the volume formatting settings-not when you are working on the Global settings. When you check this box, the formatting settings here will override all Global settings for this volume. A similar override option for the Global and volume settings is available to you if/when you specify formatting settings for specific forms in ProDoc (Step 1, C, c above).

G. The **Advanced** tab will be explained more in Section 3.

H. Click **OK** to save these settings.

I. Click the **Help** button if you need help with these settings.

J. When you return to the **Default Formatting** window (Step 1. through 1. B.) you'll see that the newly revised default formatting choices are displayed. In this example, the formatting choices are displayed for all the volumes because we made the changes Globally (Figure 5, A).

All subsequently assembled documents to which the configuration file applies will contain the formatting changes you have just made.

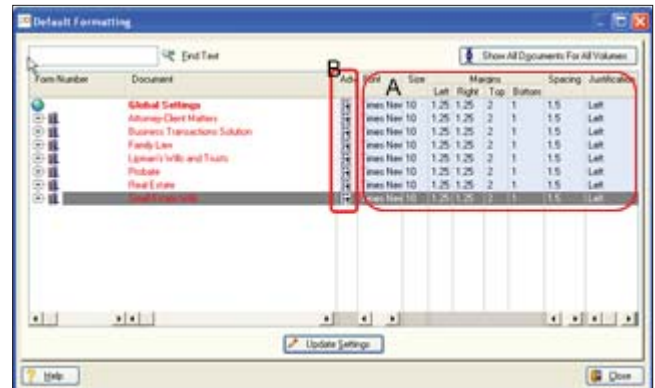


Figure 5 - The Default Formatting Choices Now Displayed

## 2. Understanding ProDoc Configuration Files

Configuration files let you customize your documents in ways not possible through the Formatting Options windows. Configuration files can contain headers, footers, page numbers, fonts, or any other feature you would normally put at the beginning of a document. Refer to your particular word processor's documentation to determine how to create a file containing headers, footers, etc.

When a document is assembled, ProDoc checks for a configuration file. If one or more configuration files that apply to the document exist, ProDoc inserts the highest priority configuration file into the document.

If the configuration file sets the value of one of the Formatting Options items, e.g. left margin, that value will override any value set in the Formatting Options window.

There are three types of configuration files:

**A. Global** - The global configuration file applies to all documents and has the highest priority. It is stored as **GLOBAL.CIF** in the ProDoc home directory.

**B. Volume** - A volume configuration file applies to all documents in one volume. Each file is stored as **VOLUME.CIF** in the subdirectory of the volume to which applies.

**C. Document** - A specific document configuration file applies to a single document. Each is stored as **DOCNAME.CIF**, where "DOCNAME" is the filename of the form from which the document is generated, in the subdirectory of the volume containing the form.

Configuration files enable you to customize your work product with complex and very specific formatting options.

### 3. Creating Advanced Formatting Defaults

In this example we will create a default for headers and footers in all documents we draft in ProDoc - a Global configuration file. We can use the same steps to set defaults for other options such as page numbering, watermarking, etc. in that same configuration file. And, of course, we can also make the defaults specific to a volume or document(s).

A. Follow Steps 1. through 1. D. above.

**Global Settings** will be highlighted in the **Default Formatting** window.

B. Click the **Advanced** tab.

C. Click the **Create** button. A blank *GLOBAL/VOLUME/DOCUMENT.CIF* document (depending on your choice of the type of default to set) opens in your word processor.

D. Using your standard word processor methods, create the headers, footers, page numbering or other formatting items to include in your documents.

E. You can also set up letterhead styles in a .cif file but this might best be reserved for specific documents.

F. Use the **Save As** feature of your word processor to save the file as *GLOBAL.CIF*.

**NOTE:** Microsoft Word users must place quotation marks around the filename, as, "*GLOBAL.CIF*". These marks prevent Microsoft Word from attaching its .doc or .docx filename extension.

G. Save the document. The **Global Formatting Options** window now displays that **A global configuration file exists** (Figure 6, A).

H. You can revise this configuration file at any time by returning to this window, clicking the **Update** button (Figure 6, B), and making any necessary changes.

I. You can also delete this configuration file by clicking the **Delete** button.

J. Click the **OK** button.

Now, the **Default Formatting** window displays a formatting symbol in the **Adv** column on the **Global Settings** line (Figure 5, B), and all word processor documents you produce will include the items you added.

K. To create a configuration file for all documents in a volume, move the highlight from **Global Settings** to the desired volume title before clicking the **Update Settings** button.

L. Do the same for any individual documents.

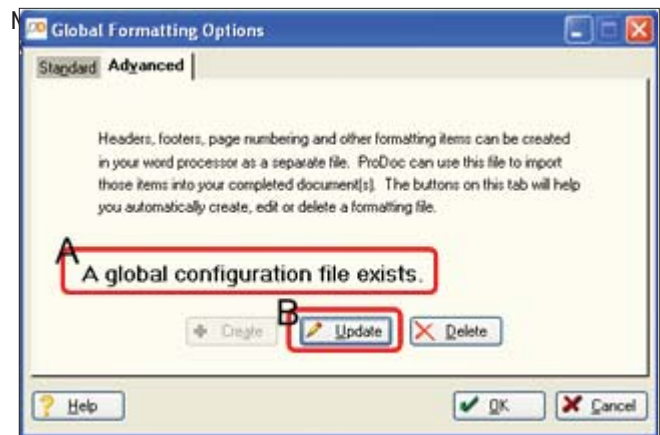


Figure 6- A Global Configuration File Exists

configuration files apply to all documents in the selected volume. Individual document formatting only appears in the specified document.

N. If you regularly backup your ProDoc files, be sure to include your configuration files in your backup scheme. For more information about backing up ProDoc files, visit: <http://tinyurl.com/pd-backup-files>.

### 4. Creating the Configuration Files for Other Users

Configuration files apply only for the user who created the files. This is good for tailoring the settings to a particular user, but you may want all users to use the same formatting. To apply this formatting for other users, you must copy the applicable *XXXCFG.CIF* or *XXXGCFG.CIF* files for other users. "XXX" represents your user login.

A. Open your ProDoc installation directory (the default is **C:\ProDoc**) and locate any files named *XXXCFG.CIF* or *XXXGCFG.CIF*. The Windows search function is useful for this.

B. Copy these files to a thumb-drive, or similar device, for copying to other user's computers (non-networked installations only).

C. At the user's system, copy the *XXXCfg.CIF* and *XXXGCFG.CIF* files to the **C:\ProDoc** installation directory, then rename each file, replacing your login initials or name with the new user's login initials or name. This will tailor the newly copied configuration files for that user.

D. If ProDoc is installed on a network server, the installation directory will be different. However, all of the .cif files will be contained in that same directory but with different names for each user.

- E. The new recipients can now login and make any necessary tweaks to the configuration file.

## 5. Customizing Formatting in Graphic Forms

ProDoc graphic forms are forms that resemble fillable preprinted government forms. You cannot modify the text in the forms but you have options for modifying the default font for the answers you fill into the form. And, ProDoc also gives you several options for customizing the print output of the forms.

Use the following procedure to modify the defaults for graphic forms. **Figure 7** shows an alternative method for accessing the options for customizing ProDoc.

- A. On the **Quick Click Menu (Figure 7)**, click the **Customize ProDoc** button (**Figure 7, A**) and click on the just revealed **Firm Information** button (**Figure 7, B**).

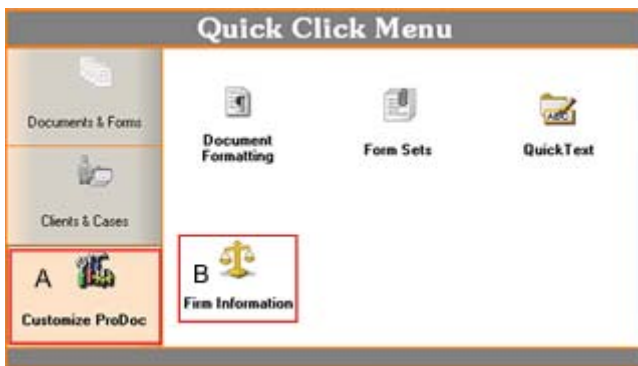


Figure 7- Firm Information Button on the Quick Click Menu

- B. The **Options and Settings** window opens (**Figure 8**). Click on the **Graphic Forms** link (**Figure 8, A**) to reveal the **Graphic Forms** options area.

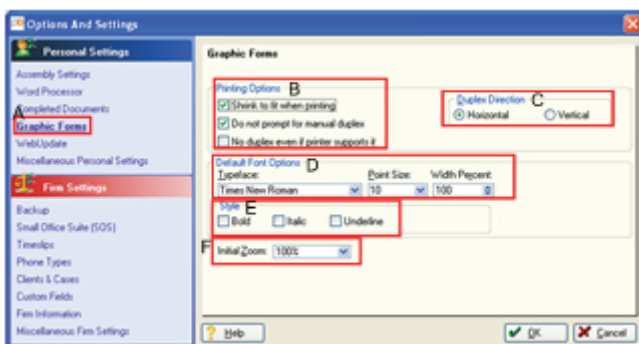


Figure 8- The Options and Settings Window

- C. Select the appropriate settings using the following guidelines:

### a. Printing Options (**Figure 8, B**)

- i. **Shrink to fit when printing** - this ensures that graphic forms designed for one page actually print on one page without border breaks to a second page.

- ii. **Do not prompt for manual duplex** - when this is checked, the prompt which normally asks if you want to print on both sides of the paper is disabled and your printer will automatically duplex print your graphic forms.
- iii. **No duplex even if printer supports it** - when checked, this disables printing on both sides of a page.

### b. Duplex Direction (**Figure 8, C**)

- i. **Horizontal** - this results in a two-sided printed page that you can pick up from the bottom to read the back.
- ii. **Vertical** - will print the back so that you can flip the right edge and read the back.

### c. Default Font Options (**Figure 8, D**)

- i. **Typeface** - identifies the default typeface for filling a form.
- ii. **Point size** - change the font size by manually typing the entry in the field.
- iii. **Width percent (squish)** - the relative size of the form's width as it is displayed in ProDoc. You can change this with the spin button or by typing the percentage you want in the field.

### d. Style (**Figure 8, E**) - set any default font characteristics.

- e. **Initial Zoom (**Figure 8, F**)** - sets the relative size of the entire form as it is displayed in ProDoc. You can change this by using the drop-down arrow and selecting the percentage you want from the choices displayed.

## 6. Additional Resources

For more help with modifying your default document formatting, you can:

- a. Use the training videos available at our web site at <http://tinyurl.com/pd-adv-training>
- b. Read the ProDoc Software Manual, Chapter 3, Customize Menu, in the Document Formatting Menu section. You can download the manual from: <http://tinyurl.com/pd-manuals>
- c. Call our Technical Support team at 800 759-5418
- d. Call our Training Team at 800-759-5418 for a personal training session on this topic