

ProDoc Tech Tip

How to Modify ProDoc Master Forms

If you find yourself making the same edits to a document each time you generate it, you are wasting time. A faster way to accomplish the same thing is to modify the master form template to contain those changes you routinely make in the form. After modifying the master template, the changed language or other modifications you make to the form are incorporated into each new document you generate from that master form.

The following shows you how to modify the master template.

Note: WordPerfect® users have no problems if they save their modified master forms in WordPerfect 5.x format. However, if you are using Microsoft Word 2003 or 2007 you probably will need to install converter files in order to open the master templates. You will find instructions for installing the converter files at <http://tinyurl.com/msconverter>.

1. Click **Customize►Edit Forms** (figure 1).

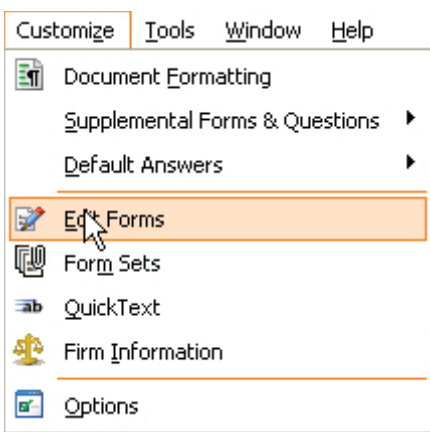


Figure 1 - Edit Forms

2. The **Select a Form to Open** (figure 2) window appears.

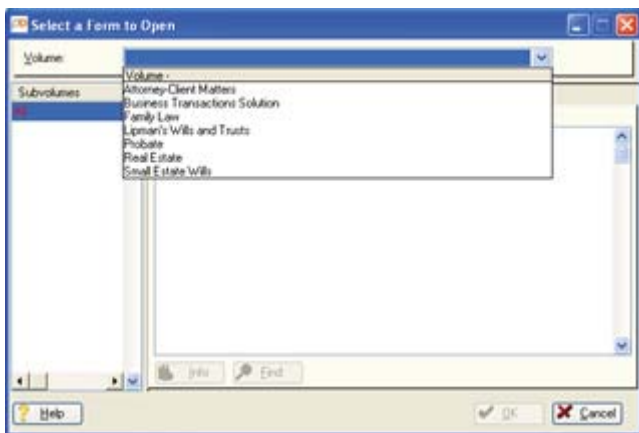


Figure 2 - Select a Form to Open Window

3. For example, click the **Attorney-Client Matters** volume.
4. Highlight the form title **Letter to Confirm Appointment and Directions to Office**. Click **OK**.

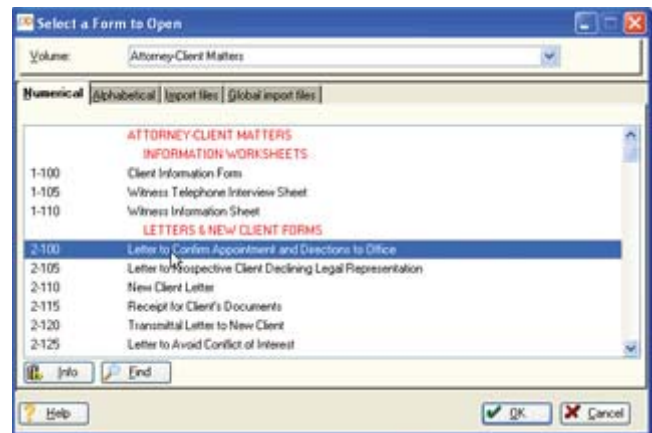


Figure 3 - Select Forms

5. A window appears asking if you want to make a backup copy of the master form. Click the **Yes** button. You can elect to use the unchanged master form in the future if you wish.
6. The master form opens in your word processor (Figure 4). If the master form does not open in your word processor the problem most likely is that you are using Microsoft® Word 2003 or 2007. See the instructions in the introduction for installing the necessary file converters.
7. Notice the token codes denoted by a tilde (~). Do not change these codes without advanced training. These are used for data production and/or questions. The form will not assemble properly if these are incorrectly changed.
8. Make any edits you wish to the form (but not to tokens). You can change formatting, add a header or footer, add paragraphs, revise language, make paragraph headings bold, etc.

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Figure 4 - The Form Opens in Your Word Processor

9. After making the changes you want, save the form by clicking **File** ► **Save As** (Figure 5).
 - a. If you are using Word, click the **Save as type** field and select WordPerfect 5.X for Windows.
 - b. If you are using Corel® WordPerfect®, click the **Save as type** drop down selector and choose WordPerfect 5.1/5.2.
 - c. By default, the file will be saved with a **.wp** extension, i.e. *modified form.wp*.
 - d. If you use Corel WordPerfect, change the extension from **.wp** to **.wpd**.
 - e. If you use Microsoft Word, change the extension from **.wp** to **.doc**.

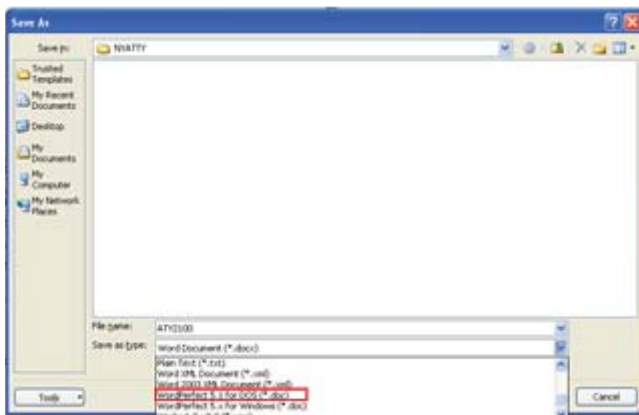


Figure 5 - Select the File Type in which to Save the Form

10. Click **Save**. Test your changes by assembling the document. If you need to make more changes, open the form you saved, make the needed changes, and save it

again as described above.

Additional Information:

1. If you modify a master form, you should include it as part of your backup routine for important data files. If you don't yet regularly backup your important files, you should start today!
2. Here is how your revised form is handled when we update that form:

When you customize a form, we assume that it will be saved with an extension from your word processor (most commonly .doc or .wpd). Our Install Program is coded to recognize any forms with these extensions and it internally compares those forms against a list of forms that have been updated for the shipment. If there is a match between the list of updated master forms and a modified form in the user's volume subdirectory, then you receive a message asking if you want to keep the modified form or take the updated form.

If you choose to take the updated form, ProDoc moves your modified form to a new subdirectory within a volume subdirectory called "OldForms". You still have access to this file so you can review your original changes and make those same changes to the new form. Unfortunately, ProDoc is not able to compare the changes and mirror them in the updated form for you. This is something that must do manually.

If you choose to keep your modified form, ProDoc still installs the new form. However, the modified form remains in the volume subdirectory and ProDoc will continue to use it instead of the newly updated form.

This feature is also available with our WebUpdate functionality. The only difference is that the WebUpdate program creates one master "OldForms" subdirectory within ProDoc instead of within each volume.

3. For more help with creating Supplemental Forms, you can:
 - i. Use the training videos available at our web site at <http://tinyurl.com/pd-adv-training>,
 - ii. Read Appendix D of the ProDoc Software Manual for more information on creating more complex supplemental forms. You can download the manual from: <http://tinyurl.com/pd-manuals>,
 - iii. Call our Technical Support team at 800 759-5418
 - iv. Call our Training Team at 800-759-5418 for a personal training session on this topic.
4. If your changes are extensive, or no existing ProDoc form is close to the form you need, you may elect to add your own form to ProDoc. Visit <http://tinyurl.com/pd-supplemental-forms> for information about this feature.