

# ProDoc Tech Tip

## Revising Finished Documents

It can be frustrating to assemble several documents for a case, only to find out later that one or two of the answers were wrong. There are five ways to revise your finished ProDoc documents:

1. Use the Case Answers feature to find and change just the answer you want to change.
2. Assemble the document again using the traditional method of assembling a new document. Change the answer when you come to it during the reassembly process.
3. Use the Reassemble feature in the ProDoc Clients and Cases Document Manager.
4. Edit final text documents in your word processor.
5. Use the Ad Hoc feature in the ProDoc Graphic engine to make quick changes to graphic forms (fill-in-the-blank government-style forms). Use this feature to overwrite answers and/or to add more information.

### 1. Use the Case Answers Feature

You can easily correct specific answers without reassembling case documents. ProDoc keeps track of all the questions and answers for every document assembled for a particular case. This method permanently changes answers in the ProDoc database.

You can utilize this program feature by editing case answers. Here's how:

On ProDoc's main menu, click **Clients & Cases**►**Case Answers** as shown in *Figure 1*.

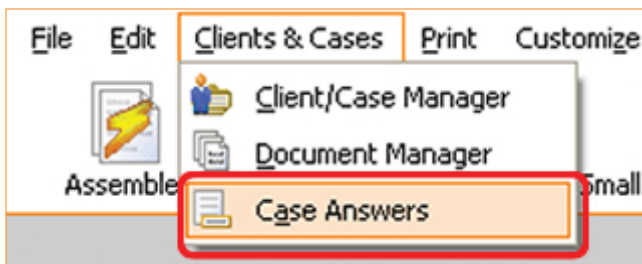


Figure 1 - Choose to Edit Case Answers

The **Select A Case** window appears as shown in *Figure 2*.

To select a case, (1) double-click a displayed case, or (2) click a displayed case, then press the **Enter** key or (3) click the **Select Case** button. You may need to click the Show Cases button to reveal the cases.

To find a client or case that's not displayed, use the keyboard locator. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the Backspace key on your keyboard.



Figure 2 - Select the Client and Case

When you select a case, the **Change Answers For:** window will appear with the case listed as shown in *Figure 3*.

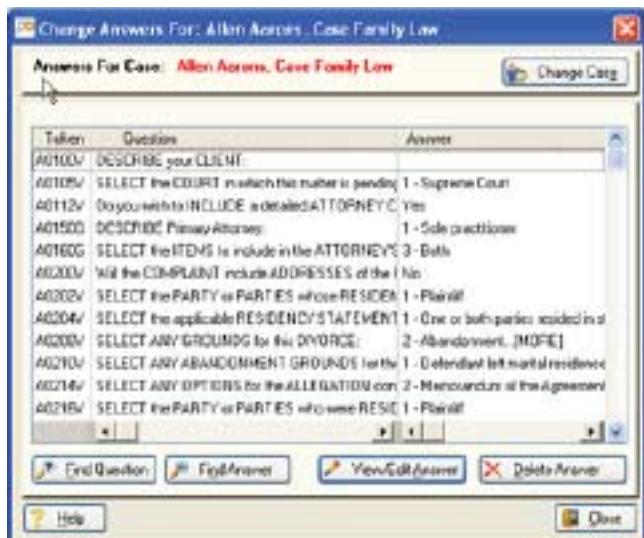


Figure 3 - View the Questions and Answers



Figure 5 - Address Questions Display

This window lists all the questions and answers that have been used to complete case documents.

The quickest way to find a question is to use the keyboard locator and type the token. This works in the same manner as case selection. For instance, typing "A2" will highlight the first question in the A200XX range. If you are working from a case data sheet and know the token number, simply type it to find the question and change the answer.

If you are searching for a particular question or answer and don't know the token, you can click the **Find Question** or **Find Answer** buttons. The process is the same for each. The appropriate search window appears as shown in *Figure 4*.



Figure 4 - Search Questions for Address

To search effectively, it's best to drag the search window to a position on your screen above or below the **Change Answers For** window. Click the top blue portion of the window, hold the left mouse button down, and move the window as desired. This allows you to see the results of your search and repeat the search easily.

If your client's home address changed, you could enter "address" into the Find what field to search for questions or answers that contain the word. The highlight moves to the next question on the **Change Answers For** window that contains the search string. See *Figure 5*.

There are several ways to see more of the question to decide if you need to change the answer.

- Click the **View/Edit Answer** button to see the question and answer in a separate window where you can change it.
- Resize the window to make more room to read the listed question.
- Expand the **Question** column to see more of the question.

The **Find Next** button moves the highlight to the next matching question. The **Find Previous** button moves the highlight to the previous matching question.

When you find a question and answer to change, click the **View/Edit Answer** button. The **Change Answer** window appears as shown in *Figure 6*.

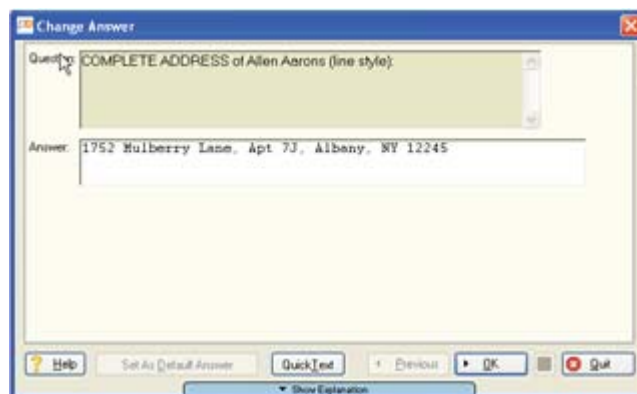


Figure 6 - Edit Case Answer

Change the answer and click **OK** to save it.

The **Delete Answer** button enables you to delete an answer. Click first on an answer and then click **Delete**

**Answer.** You are not asked to verify that you wish to delete the answer so be certain you selected the correct answer.

When you are finished changing answers, click the **Close** button on the **Change Answers For** window.

Click **Yes** on the next window to confirm that you want to save your changed answers. Reassemble your documents using Method 2, below, but elect not to review prior answers. You may still be asked additional questions if the answers you changed trigger new questions.

When you are finished assembling your documents, your new answers will appear instead of the incorrect answers.

### 2. Assemble Again Using the Traditional Assembly Method

Open ProDoc, click on the **Assemble Document** icon. Then simply select the form to assemble all over again—be sure to review previous answers by checking the box to review previous answers. However the faster method to reassemble the document is to...

### 3. Reassemble from the Document Manager

This method is very similar to Method 2 above but does provide the advantage of being able to determine up front whether you wish to (a) overwrite the prior document or (b) create a new document with a different name.

A. Open ProDoc and click on the Document icon as shown in **Figure 7**.



Figure 7 - The Document Icon

B. Select the client and case (1), select the form to change (2), and click the **Reassemble** button (3) as shown in **Figure 8**.

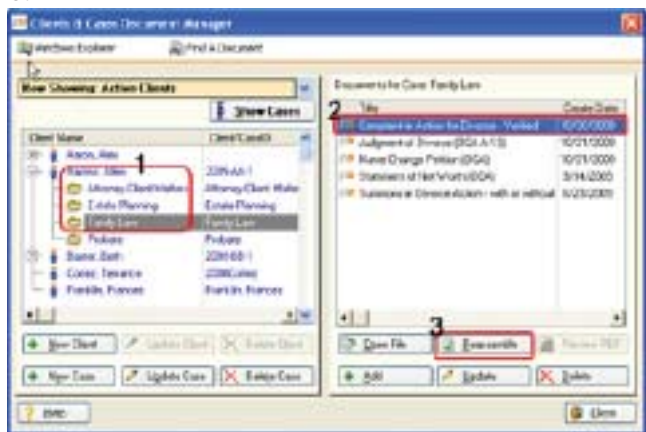


Figure 8 - Select Document to Reassemble

C. Choose how to reassemble the completed document as shown in **Figure 9**:

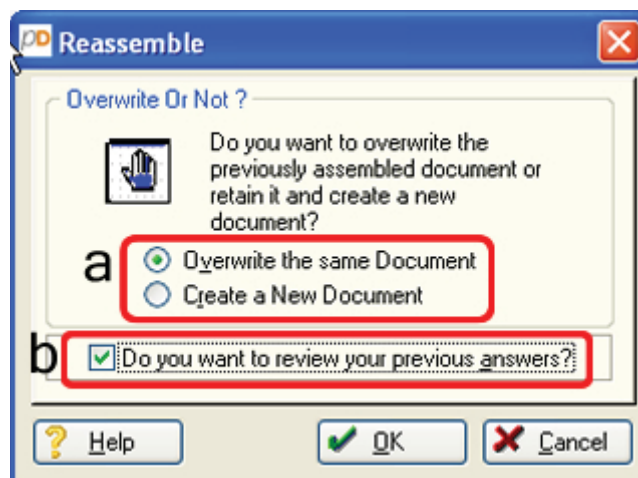


Figure 9 - Choose How to Draft and Save the Document

a. Do you want to **Overwrite the same Document** or to leave it as is and **Create a New Document**?

- Choose to **Create a New Document** if you want to preserve the previous version.

b. **Do you want to review your previous answers?**

- Click the check box to review and change the previously entered case answers as needed.

D. Click **OK** to begin your document assembly session.

### 4. Edit in Your Word Processor

Click on the Document icon as shown in **Figure 7**.

Select the client and case as shown in **Figure 8**.

Next, click on the **Open File** button as shown in **Figure 10**.



Figure 10 - Open the Form in Your Word Processor for Editing

The text document opens in your word processor for any editing you wish to perform. This method does not work with ProDoc graphic forms. It also does not change case answers stored in the ProDoc database.

## 5. Use the Ad Hoc Feature in the Graphic Engine

If you do not have the time to change an answer in the ProDoc database using the methods shown above, and the document is a graphic form in PDF format, you can use the Ad Hoc feature. This feature enables you to overwrite an existing answer or add new text to the page. For more information about using this feature go to <http://tinyurl.com/pd-graphic-engine>.

## 6. Ask for Assistance

For assistance on any of these methods, call for our free tech support at 800-759-5418.

## 7. Additional Resources

For more help with editing case answers and revising finished documents, you can:

- a. Use the training videos available at our web site at <http://tinyurl.com/pd-basic-training>
- b. Call our Technical Support team at 800 759-5418
- c. Call our Training Team at 800-759-5418 for a personal training session on this topic