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Desktop User Guide

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Chapter 1

Introduction

This manual serves as a reference for Documaker Desktop. It contains information related to creating and maintaining customer documents such as loan applications, statements, policies, or corporate correspondence.

The system optimizes and maximizes forms processing procedures by letting you produce, print, store, and archive forms electronically. You no longer struggle with mountains of paper, lost forms, or lack of storage space.

This manual discusses all of the features you can use as you work with electronic forms. To help you get started, the help guide is available through OTN which contains brief tutorial illustrating the creation of an insurance policy and policy renewal.

See Oracle Documaker Desktop Tutorial to familiarize yourself with the system and its functionalities.

This chapter discusses...

- Overview on page 17
- System Directory Structure on page 21

OVERVIEW

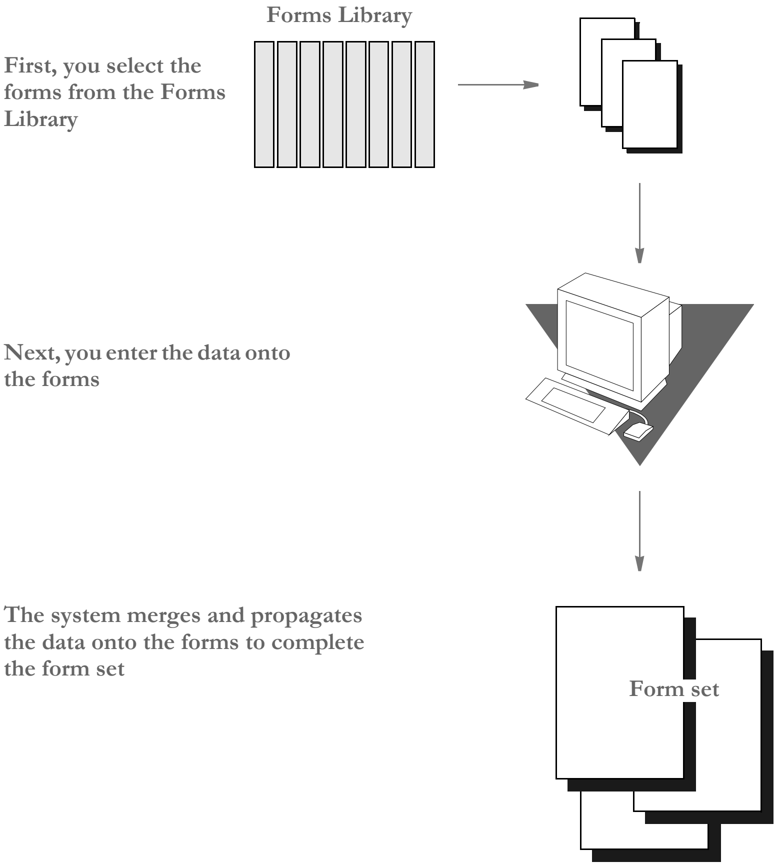
Documaker Desktop is the workstation-based form set entry and publishing piece of the Documaker system. Documaker is a total form set automation system which enables forms-intensive industries such as insurance, finance, utilities, and government to automate enterprise-wide forms and forms processing.

You collect the information you need for your form sets from various sources including manually entered data, system default data, archived data, and data extracted from external application systems. Documaker Desktop lets you enter that information and print complete, collated form sets on laser printers.

The system's unique data import and export feature enhances the data entry process. The system lets you import data files that automatically fill or propagate the data onto a form's fields. Exporting lets you extract data from Documaker Desktop for use in other applications or for import back into the system.

The system's user interface makes data entry and forms processing easy for non-technical users. You enter basic information and Documaker Desktop displays a list of applicable forms. You then select specific form sets in which to enter data.

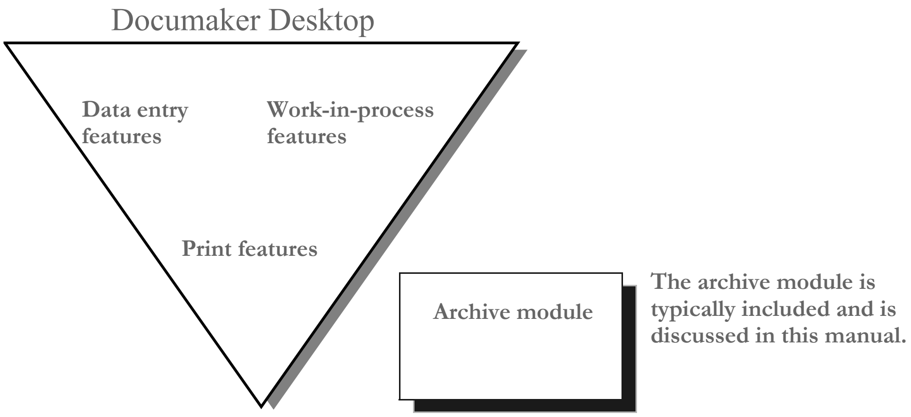
This illustration shows the process:


Forms Library
First, you select the forms from the Forms Library
Next, you enter the data onto the forms
The system merges and propagates the data onto the forms to complete the form set
Form set

The system lets you import data from an external or an internal source and apply the data to specific forms. You can also export data to use in other application systems or to import back into the system.

FEATURES AND BENEFITS

Documaker Desktop includes many features. Depending on your company's license, you may receive some or all of the following features:



The archive module is typically included and is discussed in this manual.

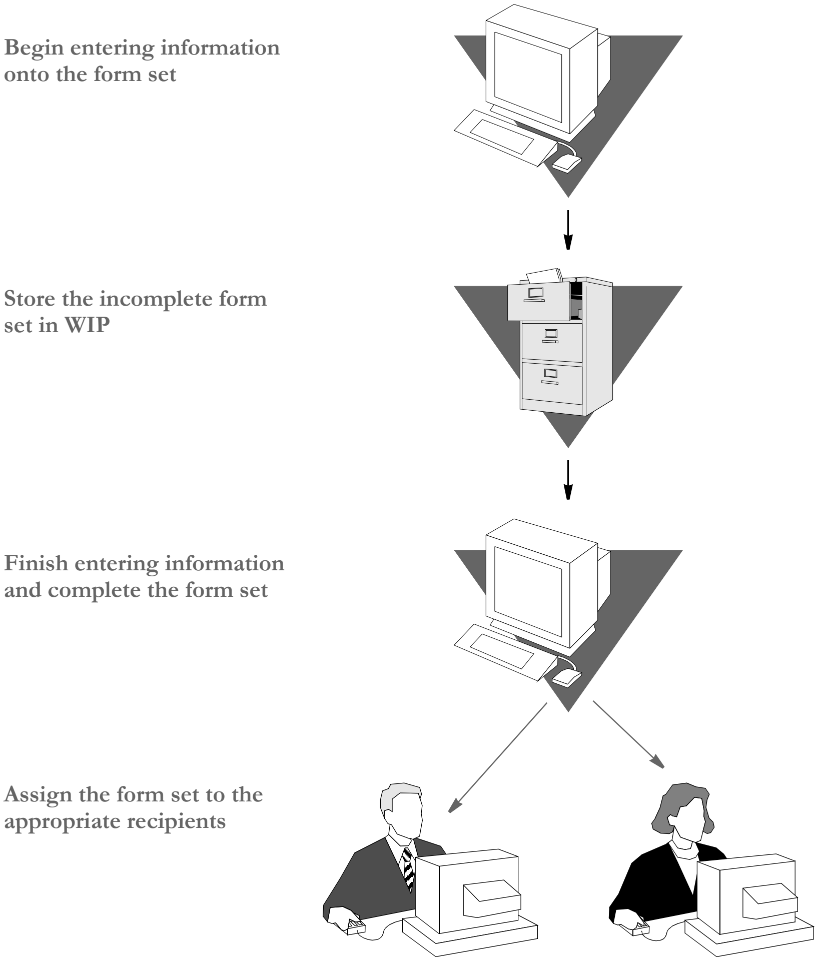
Data entry features

The entry features include these features and benefits.

- On-screen Data Entry - You can select specific forms in which to enter data, then enter the data on-line. The system stores forms and data separately, then merges them during the print function. This data collection method reduces errors, eliminates repetitive data entry, and increases productivity.
- Resource Libraries - Each company for which you process forms provides a resource library containing form sections, form set definitions, and control settings that define how you enter and process variable data. Using resource libraries affords flexibility among the resources without affecting the integrity of form, data, and library file organization and structure.
- Data Propagation - Data propagation makes it more efficient to enter data. The system automatically applies the same data to like fields containing the same field name. For example, assume you enter data into five different forms, all of which require a number such as an account or policy number. Once you enter this number on the first form, the system searches the remaining forms for the same variable field, and places the number in those fields. This feature eliminates repetitive data entry and reduces data entry errors.
- Data Importing and Exporting - The system offers data import and export options. You can import data from an external application source, or from a system export file, and the system automatically prefills the appropriate fields on the forms with the imported data. You can also export data to use in other applications or to import back into the system.

Work-in-process features

Work-in-Process (WIP) features automate various aspects of data storage and information sharing. Placing form sets and documents in WIP increases processing efficiency and reduces the costs associated with paper documents.


Begin entering information onto the form set
Store the incomplete form set in WIP
Finish entering information and complete the form set
Assign the form set to the appropriate recipients

NOTE: Your system supervisor can customize certain WIP features specifically for your company.

The WIP features provide these benefits:

- Fast and Easy Temporary Storage - WIP serves as a document holding area when you need a temporary storage area for data. You use this temporary storage area for a variety of reasons: to efficiently share information, to effectively link various applications, and to hold a document while you seek additional information necessary for its completion. Form sets and documents remain in WIP until manually retrieved by an operator or automatically retrieved during data merging.
- Assignment Capabilities - WIP provides rapid and efficient sharing of information between users. You can assign and route information in the manner most suitable for your unique departmental and enterprise needs. Electronic information sharing facilitates quick and efficient procedures for document approval within your business. This routing capability extends across Local Area Networks (LANs) and Wide Area Networks (WANs).

- Efficient Use of Time - WIP features make sure your time and personnel are used efficiently. An operator frequently needs information which is not immediately available to complete a form set or document. WIP allows an operator to complete as much of a document as possible, safely store the completed portion, and continue with other activities. When the information becomes available, WIP provides instant document retrieval for completion of the work.
- Efficient Use of Resources - WIP features help you use your business resources efficiently. Many companies merge data from other applications into form sets and documents. WIP ensures a smooth and efficient interface between various applications. Missing data and merge errors result in inefficient processing. Printing a flawed document wastes paper and print time and requires unnecessary sorting and reprinting. Printing an error also means the mistake may be undetected and repeated on subsequent documents. WIP eliminates these problems. Errors are identified and corrected prior to printing.

Print features

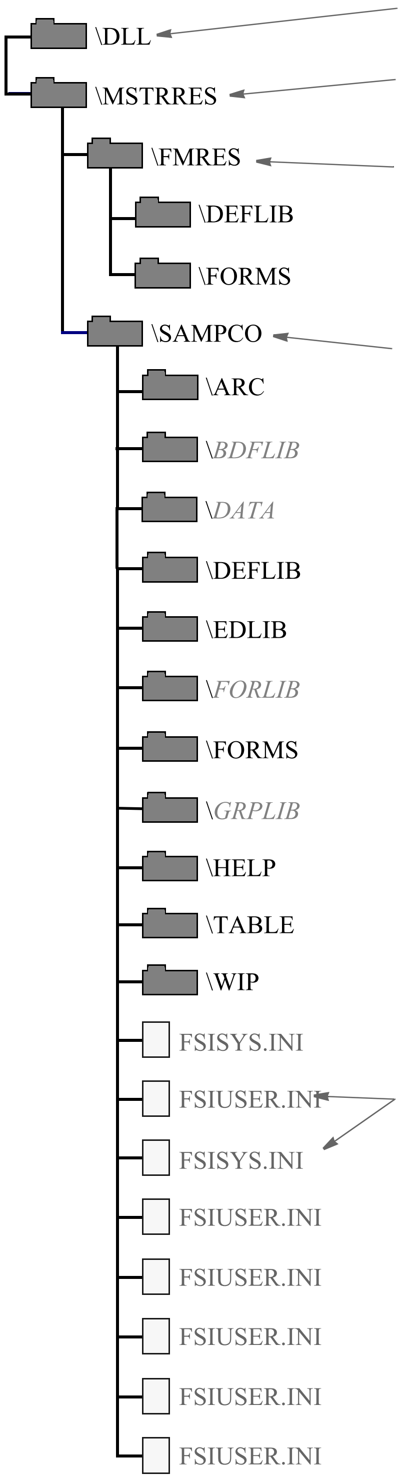
The system offers a variety of print options which let you print documents at any stage of completion. You can print document copies to check your work, and you can print archived documents for reference. You can also print documents to a file.

- Multi-Platform Operability - The print features integrate into your current system, which means you do not have to purchase new or proprietary equipment to print your form sets. These features work with both PC and mainframe computers and with single user workstations and networked systems.
- Data Merging - The system stores forms and data separately. The system merges data with the appropriate form or document when you print it. This technique saves space and time when routing, archiving, or printing documents because you store sections only once, not each time you work with the section.
- Downloading Fonts - Your forms and documents may contain fonts not resident in your printer. The system lets you download fonts from your documents or from a spool file to your printer. If you use a spool file, you download fonts only once—the first time you print documents containing those fonts. There is no need to repeat the downloading process each time you print a form. You can, however, download fonts specific to a single form and then immediately print that form.
- Supports Downloading Forms - In addition to downloading fonts, you can configure your system to download forms or sections to your printer during a system initiated batch print. This option is especially useful when you print large volumes of documents. Your system automatically downloads the form or section once, saving valuable processing time.
- Batch Queues - When you manually enter data into forms, you can send the form set to a print batch queue, a temporary print storage area. The queued form sets print in their batch order. At a later time, you can go to the print batch queue and print all form sets or selected form sets within the batch. The system organizes queued form sets by user ID. As a security feature, you cannot access or print another user's form set unless you are an authorized user (manager or supervisor) of the form set.

SYSTEM DIRECTORY STRUCTURE

The system's directory structure lends itself to customizing many of the subdirectories and files. Because the system lets you use external resources such as forms, your system supervisor can modify certain files to tailor menus, form set organization, and printing, and archiving functions.

The example below illustrates the system's directory and subdirectory structure:


\DLL
\MSTRRES
\FMRES
\DEFLIB
\FORMS
\SAMPCO
\ARC
\BDFLIB
\DATA
\DEFLIB
\EDLIB
\FORLIB
\FORMS
\GRPLIB
\HELP
\TABLE
\WIP
FSISYS.INI
FSIUSER.INI
FSISYS.INI
FSIUSER.INI
FSIUSER.INI
FSIUSER.INI
FSIUSER.INI
FSIUSER.INI

The \DLL directory contains the system programs and related files.

All resource libraries are stored under the \MSTRRES (master resource) directory.

The \FMRES directory contains fonts and font information for the system.

The \MSTRRES directory can contain several resource libraries with the same structure as \SAMPCO. The \HPINT resource library, not shown, is also included with the system.

Your system supervisor will set up additional resource libraries for your company's form sets.

If the resource library was created by Documaker Studio, it will also include the BDFLIB, FORLIB, and GRPLIB directories.

Keep in mind this is just an example. Some directories may be included or omitted, depending on the master resource library.

These initialization files control many system and user-level options. You can set these options for each resource library.

See the Documaker Desktop Administration Guide for more information about configuring files and the system's directory structure.

Chapter 2

Getting Started

This chapter contains information to get you started with the system. For information about installing the system, see your system supervisor.

This chapter discusses...

- Starting the System on page 24
- System Task Flow on page 25
- Working in the System on page 26
- Customizing the Views on page 28
- Using the Toolbar on page 35
- Using Menus and Shortcuts on page 36
- Working with Resource Libraries on page 40

STARTING THE SYSTEM

Typically, your system supervisor installs the system and sets up icons you can use to start the system. If you process information for multiple companies—a common scenario in the insurance industry—your system may display an icon for each company.

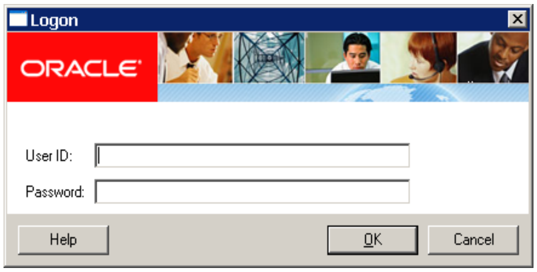
NOTE: See the Documaker Desktop Administration Guide specific information about creating icons or resetting locked IDs.

To start the system, you simply double-click the system icon.

LOGGING ON

Depending on your system configuration, you may be required to log on using your ID and password to access the system. Generally, when you log on to the system, your user ID and password are the same. If you do not know your ID and password, check with your system supervisor.

To log on to the system, double-click the system icon. The system displays the Logon window.



Type your user ID in the User ID field; then, press TAB.

Type your password in the Password field. The system displays asterisks (***) instead of the password characters. Press ENTER, or click Ok, to start the system.

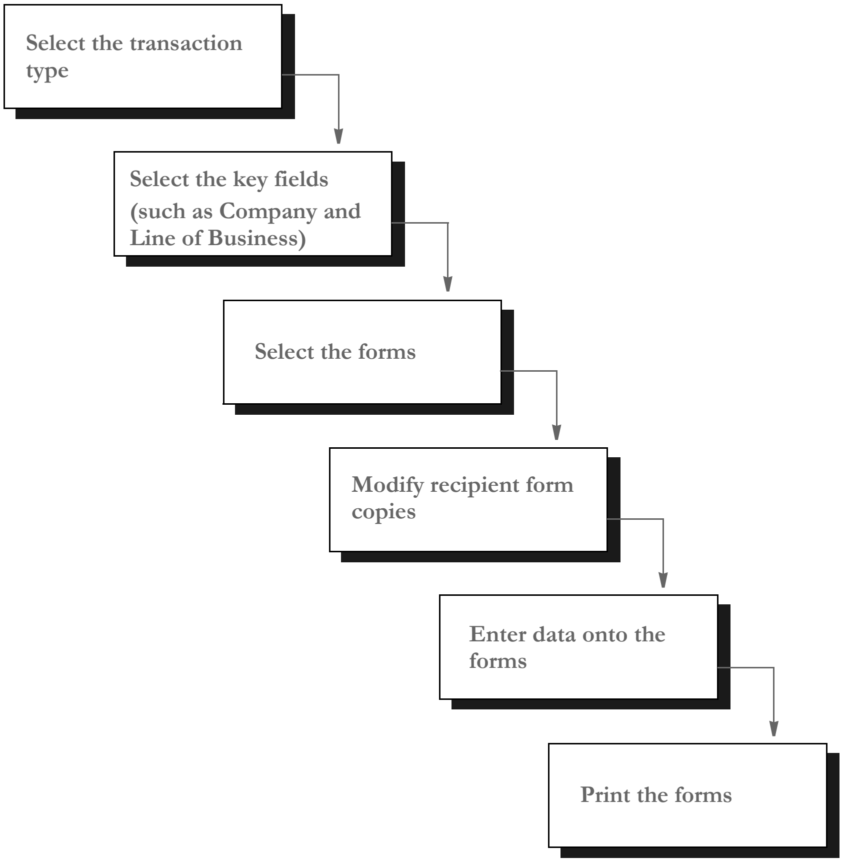
EXITING THE SYSTEM

To exit the system, first close any form sets you have open, saving your work if necessary, then use the File, Exit option to exit the system.

SYSTEM TASK FLOW

From the system’s main window, you choose File, New and select the key field information, such as selecting a company and corresponding lines of business, for a particular form set. The system displays the list of forms applicable for that key field data.

You can then change the number of recipient copies in the forms list. Next, you enter the required variable data into each form. If multiple forms require the same field data, the system automatically propagates the data into subsequent forms.


Select the transaction type
Select the key fields (such as Company and Line of Business)
Select the forms
Modify recipient form copies
Enter data onto the forms
Print the forms

You can print a form set once you complete data entry, or send a form set to a batch queue for printing later. When you print form sets, the system merges the data with the appropriate form *template* and prints the form set. The system then archives the data and the form set template separately.

With Documaker Desktop, you can automate the forms processing functions for all companies for which you write business and for all lines of business.

WORKING IN THE SYSTEM

The two main types of windows you use in the system are *entry* and *list* windows. It is important that you become familiar with the general window layout so you can work quickly and efficiently.

NOTE: Your system can be customized in many ways, such as by changing the titles of windows and by adding or removing options. This manual is based on the standard system, without customizations.

Using the Entry Window

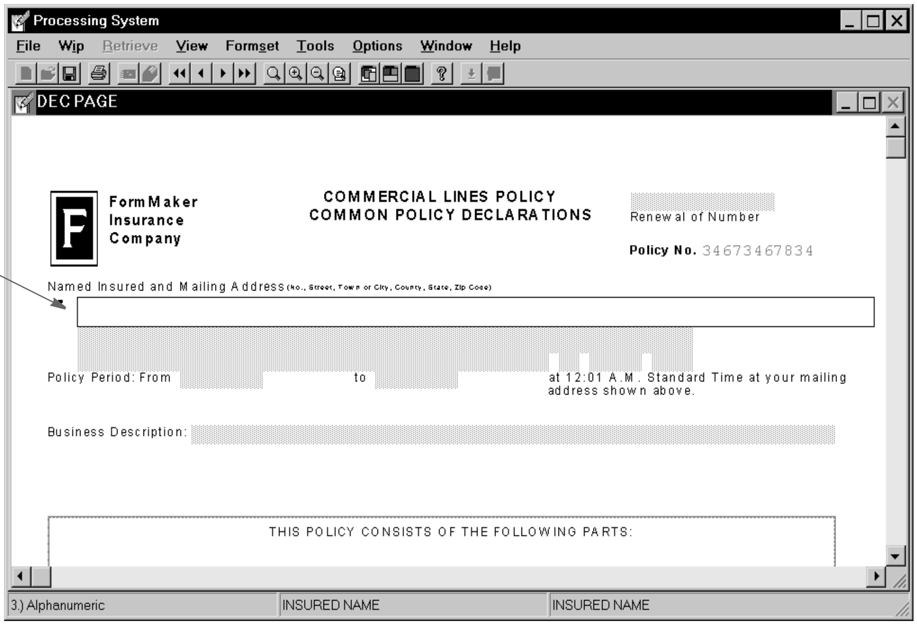
You perform most forms processing tasks using the Entry window. You use the Entry window when you enter data, retrieve form sets, and when you submit print jobs.

You enter data directly onto the form and then press Tab to move to the next entry field.

You can also use the Data Entry field (shown below) to enter data.

If you select the Options, Field Information option, the system displays information about what you should enter into the field here.

This includes the number assigned to the entry field, the field type, such as numeric or alphabetic, and the field prompt.



FormMaker
Insurance
Company

COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS

Renewal of Number

Policy No. 34673467834

Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code)

Policy Period: From to at 12:01 A.M. Standard Time at your mailing address shown above.

Business Description:

THIS POLICY CONSISTS OF THE FOLLOWING PARTS:

3.) Alphanumeric | INSURED NAME | INSURED NAME

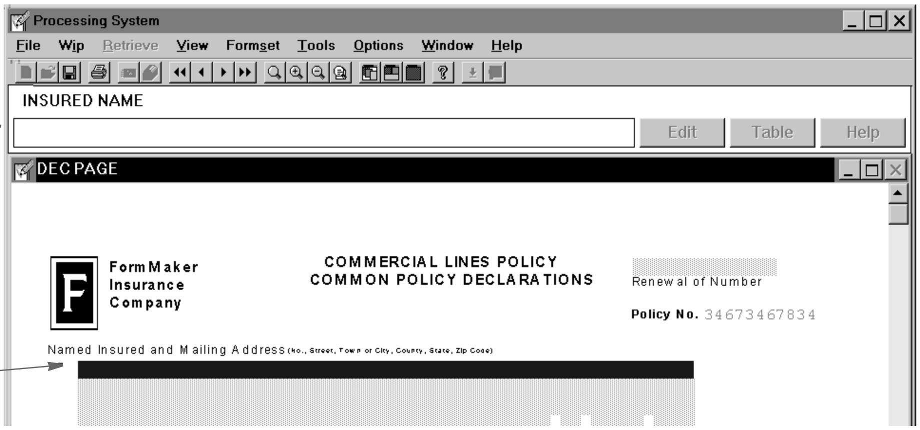
Here's an excerpt of the same form, with different view options selected:

If you select the Options, Fixed Edits option, the system displays the Data Entry field, as shown here.

You enter information here then press Tab to move the information to the form and go to the next field.

If you turn on the Options, Fixed Prompt option, the system also displays the field's prompt above the data entry field.

The field is highlighted for reference.



INSURED NAME

FormMaker
Insurance
Company

COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS

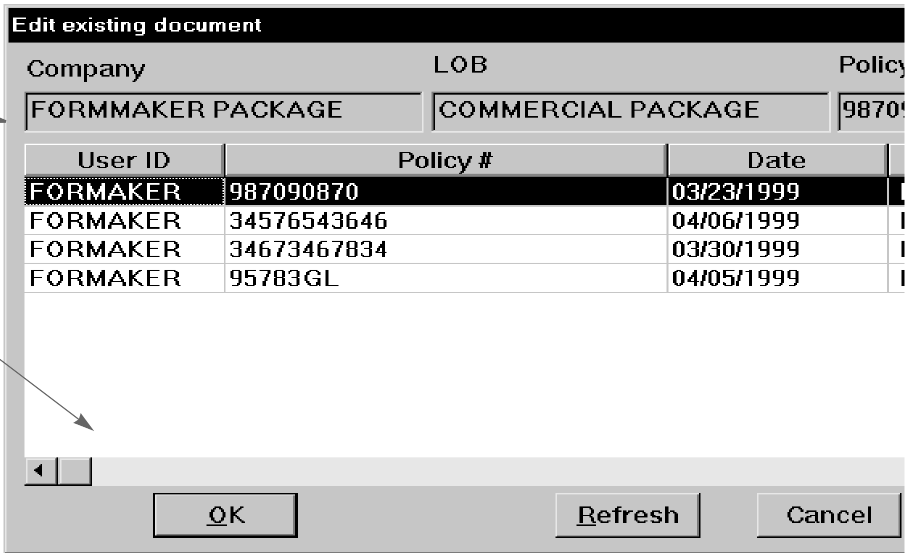
Renewal of Number

Policy No. 34673467834

Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code)

Using List Windows

List windows display all the forms or form sets that are available for processing. From a list window, you select a form or form set on which to perform an activity.



Edit existing document

Company: FORMMAKER PACKAGE

LOB: COMMERCIAL PACKAGE

Policy: 9870

User ID	Policy #	Date
FORMAKER	987090870	03/23/1999
FORMAKER	34576543646	04/06/1999
FORMAKER	34673467834	03/30/1999
FORMAKER	95783GL	04/05/1999

The system shows you information about the various forms sets.

You can double-click on these column headings to search for a specific form set.

Click on a form set to select it and then click Ok

There are several varieties of list windows in the system. Some list windows let you select forms to include during form set processing, while others list the form sets available for retrieving or sending to archive. List windows and the Entry window contain many of the same components.

CUSTOMIZING THE VIEWS

Whenever you open a form or form set, the forms appear in the Entry window.

In the Entry window you can customize your window view. If you selected multiple forms to view, the Entry window displays the forms simultaneously on the window.

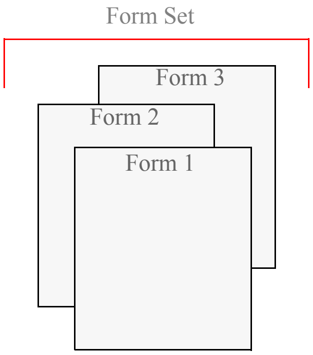
You can adjust how you view each form, by stacking, cascading, or tiling the forms. The system defaults to stacking forms on top of one another. You can also customize each section view within a form. The Entry window contains these menus you can use to customize the view:

- View. Options that control the size of the window display and which form or section is displayed.
- Formset. Options that control the duplication of forms, the display of forms by recipients, and let you close form sets.
- Options. Options that control the display of additional elements within the form or section.
- Window. Options that control how the form set appears on the window, such as stacked, cascaded, or tiled.

DISPLAYING FORM SETS

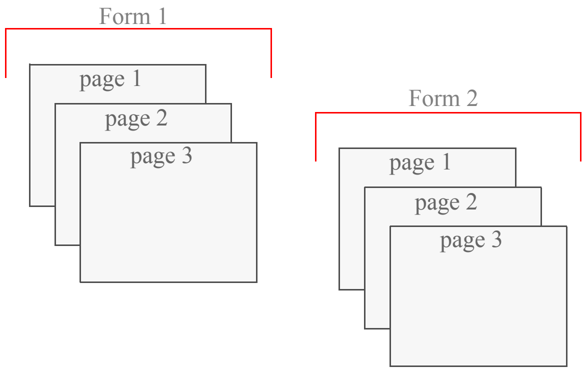
A form set is made up of all forms and copies of forms associated with a single transaction, such as an insurance policy or a loan application.

Form sets consist of one or more forms



Form display options let you control the display of a form and the sections that comprise it. A single form consists of one or more sections. Since you have multiple forms and sections within a form set, you can view and navigate through each form and section individually. When you display forms, the first section of each form displays as ordered in the Available Forms list on the Forms Selection window.

Forms can consist of one or more pages



Page display options let you easily navigate the pages that comprise the form.

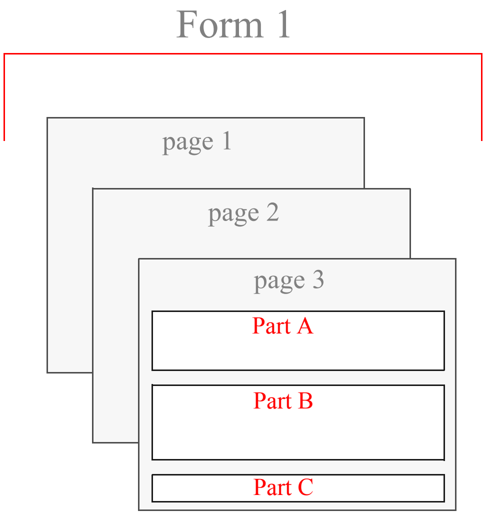
A page can contain one or more *field sections*. A field section is a group of fields on a page to which the form designer assigned a name. This gives you a way to easily jump to the beginning of that field section.

For example, suppose the first page of an automobile insurance application form contains three field sections:

- a section of fields in which you list the automobiles you want to insure
- a section of fields for recording household driver information
- a section of fields that let you select the type and amount of coverage you want for each vehicle.

If the form designer gives each of these field sections names like *Part A*, *Part B*, and *Part C*, then using the page display options you can go directly to the beginning of a field section by simply choosing the appropriate name.

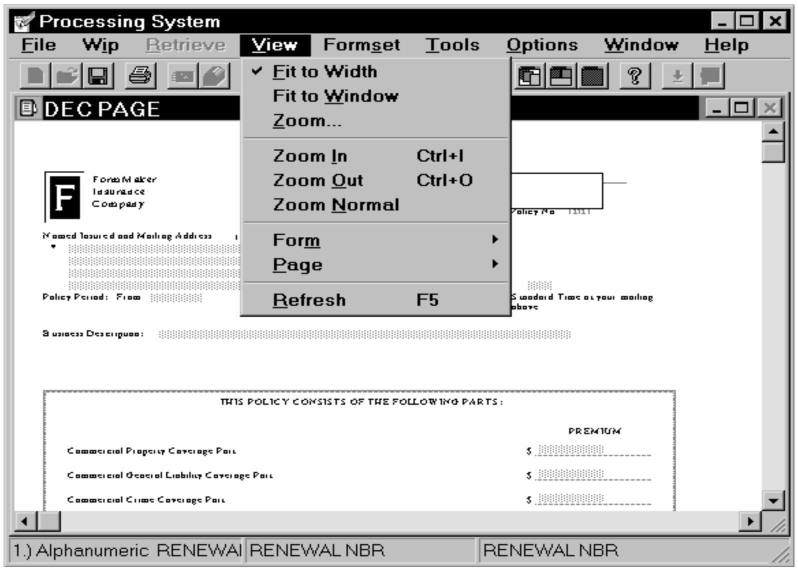
Pages can include field sections



USING THE VIEW MENU

View menu options let you change the display size, display and navigate through specific forms and sections, and refresh the window to reflect changes made during entry.

When you select View, this menu appears:


Processing System
File
Wip
Retrieve
View
Formset
Tools
Options
Window
Help
DEC PAGE
✓ Fit to Width
Fit to Window
Zoom...
Zoom In Ctrl+I
Zoom Out Ctrl+O
Zoom Normal
Form ▸
Page ▸
Refresh F5
1.) Alphanumeric RENEWAL
RENEWAL NBR
RENEWAL NBR

The following table contains a brief summary of each View option.

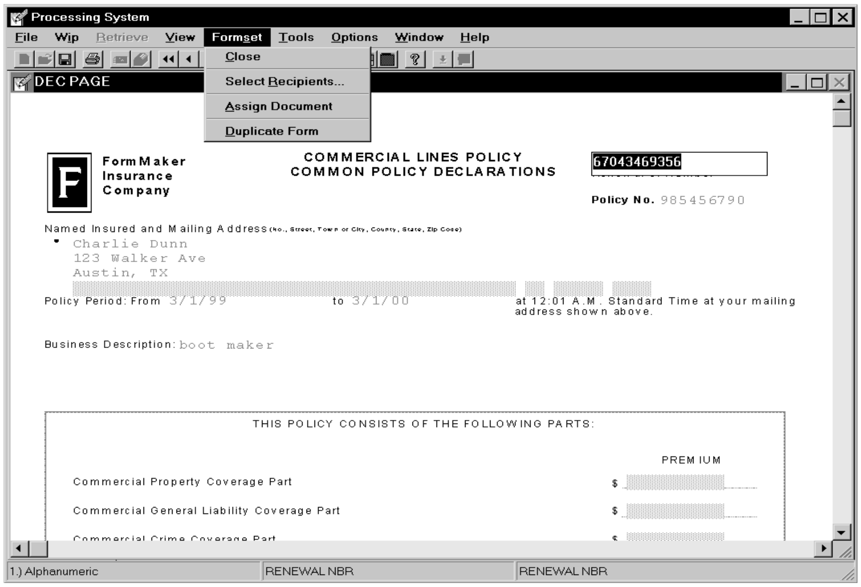
Choose…	To…
Fit to Width	Display the full width of the section in the active window. The entry window displays the complete horizontal width of the first section of your selected form.
Fit to Window	Display the entire section in the active window. You see your full section on one window.
Zoom	Magnify or reduce the size of the section display. You can use the preset Zoom scale, define your own scale, or use the slide bar to adjust the Zoom factor. Click OK in the Zoom window to return to the entry window. The section display will reflect the change in the Zoom factor.
Zoom In	Increase the magnification of your form display. The section will continue to increase in magnification each time you select the Zoom In option.
Zoom Out	Decrease the magnification of your form display. The section will continue to decrease in magnification each time you select the Zoom Out option.
Zoom Normal	Return your form to 100% display size.

Choose…	To…
Form	Display a specific form or to scroll through forms in the form set. On the Form menu, choose Select Form to display the Select Form window. Select the form you want to view and click OK. The system displays the first section of the form you selected. Choose Previous, from the Form menu to scroll backward through the forms in the form set. Choose Next to scroll forward through the forms in the form set. The system displays either the first page of the previous form or the first page of the next form, depending on your selection. If there are no previous or subsequent forms to display, the last form you displayed remains on the window.
Page	Display a specific section section or to scroll through the pages in the form set. On the Page menu, choose Select Section to display the Select Section window. Select the section you want to view and click OK. The system places your cursor in the first variable data field of the section you chose. If the Select Section window is blank, there are no sections set up. Choose Previous, from the Page menu to scroll backward through the pages in the form. Choose Next to scroll forward through the pages in the form. The system displays either the previous or next page of the form, depending on your selection. If there are no previous or subsequent pages to display, the last page you displayed remains on the window.
Refresh	Redisplay your form after making changes in the window. Refresh repaints the window to reflect your changes.

USING THE FORMSET MENU

Formset menu options let you select the forms you view by recipient, duplicate a form for entry, assign a form set to another user, or close the form set.

When you select Formset, this menu appears:



FormMaker
Insurance
Company

COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS

67043469356

Policy No. 985456790

Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code)
Charlie Dunn
123 Walker Ave
Austin, TX

Policy Period: From 3/1/99 to 3/1/00 at 12:01 A.M. Standard Time at your mailing address shown above.

Business Description: boot maker

THIS POLICY CONSISTS OF THE FOLLOWING PARTS:

	PREMIUM
Commercial Property Coverage Part	$
Commercial General Liability Coverage Part	$
Commercial Crime Coverage Part	$

1.) Alphanumeric | RENEWAL NBR | RENEWAL NBR

A brief summary of each Formset option appears below:

Choose…	To…
Close	Close the form set. The system displays a message asking if you want to save the entered data. Click Yes to save the data to WIP or No to exit Entry without saving your changes. The system can be configured to suppress the Confirm Save message and automatically save entered data to WIP. See your system supervisor for more information on this INI option.
Select Recipients	Display only a specific recipient’s forms. When you choose this option, the Select Recipients window appears. Click the recipient whose forms you want to view, then click OK to return to the Entry window. Only that recipient’s forms appear. Supervisors can customize the Formset Menu to let users choose a recipient view directly from the menu. See Customizing the Formset Menu on page 32 for more information on this feature.
Assign Document	Assign a form set to another user. For instance, you can assign a document to another user for approval or to have the other user finish completing the form set.
Duplicate Form	Duplicate a form. Before choosing this option, be sure the form you want to duplicate is selected in the Entry window. When you select this option, entry displays the duplicated form in the window with policy data and recipient copy information automatically propagated to the appropriate fields. Proceed with entering data. The system displays a message telling you that a form is not repeatable if it has not been designated as repeatable in the FORM.DAT file.

Customizing the Formset Menu

If you need to view a certain recipient’s forms repeatedly, your supervisor can customize the Formset menu to replace the Select Recipients option with the recipient’s name on the Formset menu. Multiple recipients (such as the INSURED recipient and the AGENT) can be placed on one menu option and more than one option may be added. Additionally, your supervisor can add a View Next Recipient option to the Formset menu which lets you switch to the next recipient’s form view.

USING THE OPTIONS MENU

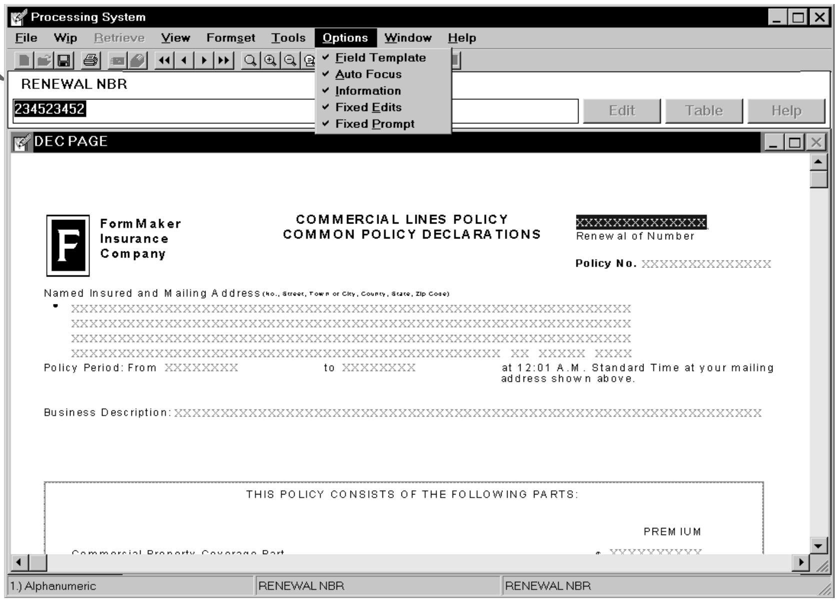
The display options on the Options menu let you show additional display elements on the window to enhance the window view, or they provide you with more information about the view. These options are toggle switches, or on/off options.

On/off options display a check mark (✓) when an option is *on* or *selected*. No check mark appears when an option is *off* or *deselected*.

When you select Options, this menu appears:

This illustration shows the screen with the Fixed Prompt and the Fixed Edits options turned on.

The Xs indicate the location of the variable fields. Use the Field Template option to turn on or off the display of Xs.


Processing System
File
Wip
Retrieve
View
Formset
Tools
Options
Window
Help
✓ Field Template
✓ Auto Focus
✓ Information
✓ Fixed Edits
✓ Fixed Prompt
RENEWAL NBR
234523452
Edit
Table
Help
DEC PAGE
FormMaker Insurance Company
COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS
Renewal of Number
Policy No.
Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code)
Policy Period: From
to
at 12:01 A.M. Standard Time at your mailing address shown above.
Business Description:
THIS POLICY CONSISTS OF THE FOLLOWING PARTS:
PREMIUM
1.) Alphanumeric
RENEWAL NBR
RENEWAL NBR

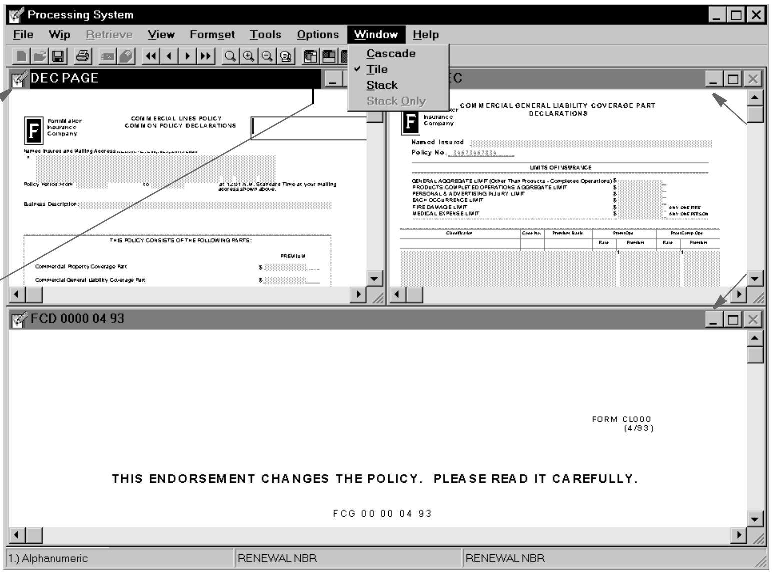
A brief summary of each option appears below:

Choose…	To…
Field Template	Show the location of variable fields using *X*s to indicate where you enter data. Each *X* represents a single character, which indicates the number of characters you can enter. Keep in mind that if there is data entered in the field, the data appears as a string of Xs.
Auto Focus	Have the system automatically shift focus to the next variable field when you press TAB in a field. With Auto Focus, you do not have to scroll through a section to display a particular variable field that extends beyond the initial display area.
Information	Display the field number and field type when you place your cursor in a variable field. The information appears at the bottom of the window.
Fixed Edits	Display a data entry field at the top of the screen (as shown above). You enter and edit data here. The system moves your entry to the highlighted variable field when you press TAB.
Fixed Prompt	Add a prompt for the current data entry field above the entry area, if you turned on the Fixed Edits option.

USING THE WINDOW MENU

Window menu options let you choose how forms or sections appear. When you select Window, this menu appears:

This illustration shows the screen with the Tile option selected.


Processing System
File
Wip
Retrieve
View
Formset
Tools
Options
Window
Help
Cascade
✓ Tile
Stack
Stack Only
DEC PAGE
COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS
COMMERCIAL GENERAL LIABILITY COVERAGE PART
DECLARATIONS
FCD 0000 04 93
1.) Alphanumeric
RENEWAL NBR
RENEWAL NBR

FORM CL000
(4/93)

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

FCG 00 00 04 93

Click on the title bar to select the form you want to work with. The system places the cursor in the first variable field.

You can also use these toolbar buttons to quickly switch between cascade, tile, or stack.

Click the maximize button to expand the form window to full screen.

This table describes the Window menu options, which you use to display multiple forms or sections. Try the various options to see which best fits the way you work.

Choose…	To display multiple form or section windows…
Cascade	In a layered fashion. The forms cascade one behind another so you can see and select the title bars of every form in the form set.
Tile	Each in a separate scrollable box on the window. If you tile a form set, each box displays the first section of each form within that form set. The more forms the form set contains, the smaller the tiles display on the window.
Stack	Stacked on top of one another. You close each top layer display window to reveal underlying windows.
Stack Only	Stacked on top of one another. Stack Only is the default display used when you retrieve archived forms. This option only applies to archived forms display. By displaying archived forms in Stack Only mode, you spend less time retrieving, and use fewer system resources. You can click the Stack Only option to deselect it after you retrieve the archived forms. For more information about retrieving archived forms, see Archiving and Retrieving Form Sets on page 152.

NOTE: To display the first form in the form set, press ALT+HOME. To display the last form in the form set, press ALT+END.

USING THE TOOLBAR

The system toolbar appears directly below the menu bar and gives you quick access to the most commonly performed processing tasks. In addition, the toolbar provides an easy method for scrolling through forms and form sets and for customizing the view.

The toolbar icons and their corresponding options appear below:

New Formset

Edit Formset

Save Formset

Print Formset

Send WIP

Receive WIP

Previous Form

Previous Page

Next Page

Next Form

Zoom

Zoom In

Zoom Out

Zoom Normal

Cascade Forms

Tile Forms

Stack Forms

Help Contents

Table - This option is only active during data entry if the form designer attached a table file to the variable field.

Help - This option is only active during data entry if the form designer attached a help file to the variable field.

USING MENUS AND SHORTCUTS

System menu options are explained within tasks throughout this manual. The following tables contain keyboard shortcuts for each menu in the system.

Here are the shortcuts for the File menu options:

To Choose:	Press:
New	ALT+F, N
Edit	ALT+F, E
Save	ALT+F, S
Complete	ALT+F, C
Print	ALT+F, P
Library Setup	ALT+F, L
Exit	ALT+F, X

WIP menu option shortcuts

To Choose:	Press:
WIP List	ALT+I, W
Save	ALT+I,S
Receive	ALT+I, R

Retrieve menu option shortcuts

To Choose:	Press:
Formset	ALT+R, F

View menu option shortcuts

To Choose:	Press:
Fit to Width	ALT+V, F
Fit to Window	ALT+V, W
Zoom	ALT+V, Z
Zoom In	ALT+V, I
Zoom Out	ALT+V, O
Zoom Normal	ALT+V, N

Form Previous Next Select Form	ALT+V, M ALT+V, M, P ALT+V, M, N ALT+V, M, S
Page Previous Next Select Section	ALT+V, P ALT+V, P, P ALT+V, P, N ALT+V, P, S
Refresh	ALT+V, R

Formset menu option shortcuts

To Choose:	Press:
Close	ALT+S, C
Select Recipients	ALT+S, R
Assign Document	ALT+S, A
Duplicate Form	ALT+S, D

Tools menu option shortcuts

These options are discussed in the Documaker Desktop Administration Guide and are unavailable to users with insufficient access rights.

To Choose:	Press:
User ID Maintenance	ALT+T, U
Routing Slips	ALT+T, R
Print Log File	ALT+T, L
DBF Maintenance Pack Database Delete Log Records Delete WIP Records	ALT+T, D ALT+T, D, P ALT+T, D, D ALT+T, D, D
Batch Import From File	ALT+T, B

Options menu option shortcuts

To Choose:	Press:
Field template	ALT+O, F
Auto Focus	ALT+O, A
Information	ALT+O, I

Fixed Edits	ALT+O, E
Fixed Prompt	ALT+O, P

Window menu option shortcuts

To Choose:	Press:
Cascade	ALT+W, C
Tile	ALT+W, T
Stack	ALT+W, S
Stack Only	ALT+W, O

Help menu option shortcuts

To Choose:	Press:
Contents	ALT+H, C
How to	ALT+H, H
Shortcuts	ALT+H, S
Glossary	ALT+H, G
Using Help	ALT+H, U
Product information	ALT+H, P

Option Button shortcuts

There are windows throughout the system which contain option buttons. You can use these keyboard shortcuts instead of clicking on the button:

Ok - ALT+O

Sort - ALT+S

Refresh - F5

Entry window shortcuts

When you enter data, you can move around the forms using keyboard shortcuts. Here are lists of the shortcuts available in the Entry window.

To:	Press:
Copy data in a variable field	CTRL+C
Cut data from a variable field	CTRL+X
Paste data into a variable field	CTRL+V

To Go To:	Press:
First form within the form set	ALT+HOME
Last form within the form set	ALT+END
First field within the displayed form	CTRL+HOME
Last field within the displayed form	CTRL+END

WORKING WITH RESOURCE LIBRARIES

The system uses forms, fonts, and graphics to create the form sets you see on your screen. These *resources* are stored in resource libraries. Typically, you have a resource library for each family of forms you work with.

Setting up and configuring your resource libraries lets you organize your files within specific directories, designate directory changes, and add or remove resource libraries. The File, Library Setup option is the file manager for your system resources.

This topic discusses the following tasks you can perform to organize system resources:

- Setting up a Library on page 40
- Selecting a Library on page 40
- Modifying Library Information on page 41
- Deleting a Library on page 45
- Control Path Error Checking on page 45
- Using System Supervisor Tools on page 46

SETTING UP A LIBRARY

The Library Setup option lets you customize the configuration file settings in your current master resource library. When you set up a resource library, you create links between the system and its resources. You must copy the resource files to the library directories. You can do this either before or after you set up or change your master resource library.

When you add or remove a library, or change the directory paths and file settings within a library, you update the links to the resources. Depending on the number of forms you work with, you may want to split your resource library into subdirectories so you can more quickly find the forms you need using the Setup Master Resource Library option. This option is only available when all transactions are closed.

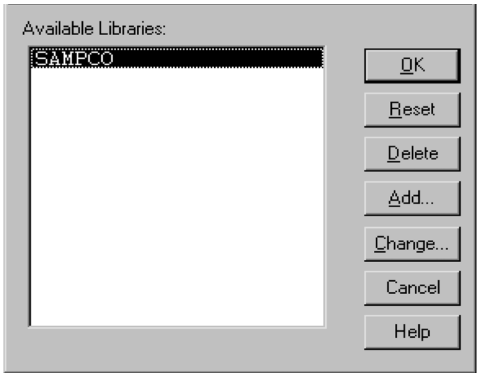
NOTE: Access to this menu option depends on your user security level, as defined by your company. Only users with system supervisor or a similar access level can set up resource libraries. Consult with your system supervisor to determine the most efficient way to group the resources you use.

SELECTING A LIBRARY

Selecting a master resource library lets you choose the resources you want to use. When you select a resource library, you tell the system to use the resources in that library. The default master resource library, SAMPCO, is available for download from Oracle Technology Network.

NOTE: Access to this menu option depends on your password level. See your system supervisor for more information.

To select a resource library, choose File, Library Setup. The Setup Master Resource Libraries window appears.


Available Libraries:
SAMPCO
OK
Reset
Delete
Add...
Change...
Cancel
Help

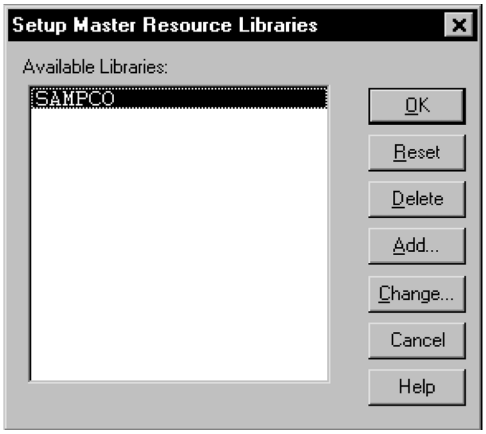
Click the library you want to work with; then, click Ok. You can now work with the resources in that library.

MODIFYING LIBRARY INFORMATION

Using the Library Setup options you can add a customized resource library or change the existing library path and file settings.

To add or change a library, follow these steps:

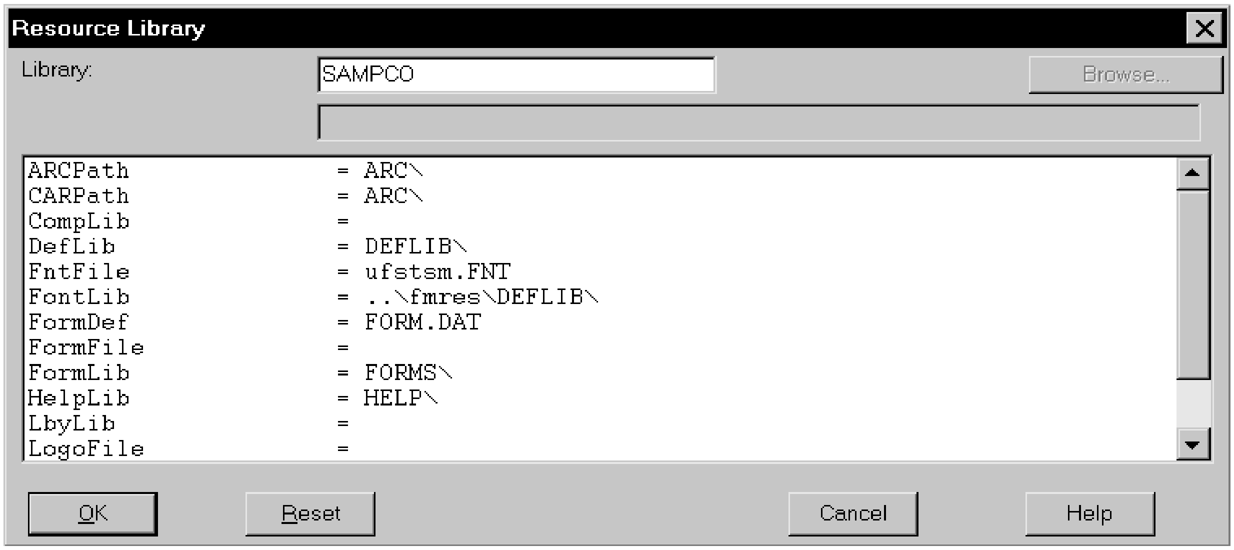
1 Choose File, Library Setup to open the Setup Master Resource Libraries window.


Setup Master Resource Libraries
Available Libraries:
SAMPCO
OK
Reset
Delete
Add...
Change...
Cancel
Help

2 Choose one of these options:

To...	Do this...
Create a new library	Click Add
Change a library	Click the library you want to change; then click Change.

The system displays the Resource Library window. Make sure the directories correspond with your selected library. If not, repeat the task of selecting a library. If you had previously chosen Add, the directories may be different than what you need.



Library: SAMPCO

```
ARCPath         = ARC\
CARPath         = ARC\
CompLib         =
DefLib          = DEFLIB\
FntFile         = ufstsm.FNT
FontLib         = ..\fmres\DEFLIB\
FormDef         = FORM.DAT
FormFile        =
FormLib         = FORMS\
HelpLib         = HELP\
LbyLib          =
LogoFile        =
```

NOTE: If you click Reset after you change or add library files and subdirectories, your settings revert to their prior status and *you lose all changes*. This is also true if you click Cancel.

The Resource Library window contains these fields and related information:

Field	Description
Library	Name of the library
ARCPath	Directory path of the archived files
CARPath	Directory path of the compressed archived files
CompLib	Directory path of compressed resource files
DefLib	Directory path of the library fonts, font definition files (FXR), and form definition files (FORMDEF). Depending on system customizations, your fonts may be located in the FontLib directory.
FntFile	Name of the downloadable font spool file
FontLib	Directory path of the specific font set. Depending on your system customization, your fonts may be located in the DefLib directory.
FormDef	Name of the FORM.DAT (*form set definition table*) file
FormFile	Name of the Library file (.LBY)

Field	Description
FormLib	Directory path of the library forms
HelpLib	Directory path of the form related help information
LbyLib	Directory path of the library files (*.LBY)
LogoFile	Name of the graphic library file (*.LBY)
TableLib	Directory path of the form related table information
WIPPath	Directory path of the work-in-process files
XrfFile	Name of the font cross-reference file

3 Type the name of your new library, or change the library name in the Library field if necessary.

NOTE: If you know the various directories and file names you want to change, you can click the applicable field and type the new path or file name. If you rename files or directories on this window, you must also rename the files in your operating system.

4 Click the library path or file you want to add or change; then, click Browse. The system displays either the Select Directory window or the Select File window, depending on your field selection.

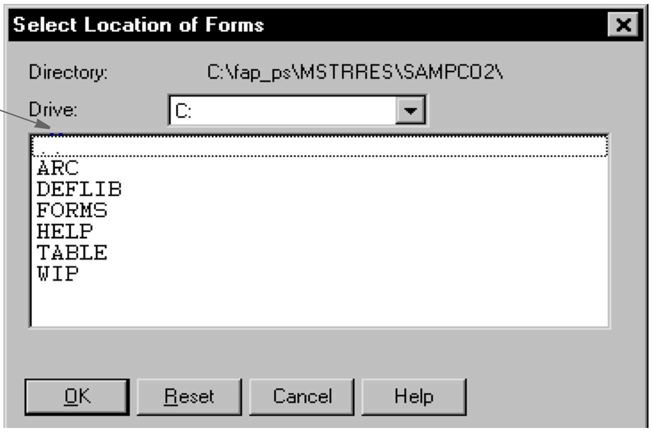
5 To add or change directory information, see Modifying Directory Information on page 43. If you are adding or changing file information, see Modifying File Information on page 44.

Modifying Directory Information

Follow these steps to add or change directory information:

1 Select the drive where the system stores the files you want to use or change.

Double-click these dots to go back to the parent directory



Directory: C:\fap_ps\MSTRRES\SAMPCO2\

..
ARC
DEFLIB
FORMS
HELP
TABLE
WIP

2 Double-click the dots in the window to display the previous subdirectory within the current directory path. Each double-click moves you one step back in the directory hierarchy.

3 Click the appropriate directory in the list; then, click Ok to accept your changes to the directory path. The system returns you to the Resource Library window.

NOTE: If you need to change your most recent unsaved settings to their prior status, click Reset in any Resource Library window. The Reset button lets you quickly revert your changes on a particular window to their prior settings.

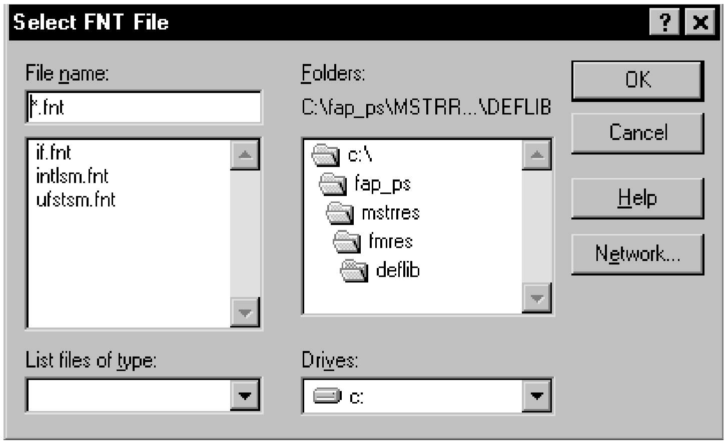
4 Click Ok in the Resource Library window to file your Master Resource Library changes. The system returns you to the Setup Master Resource Libraries window.

5 Click Ok in the Setup Master Resource Libraries window to save your additions or changes.

Modifying File Information

Follow these steps to add or change file information:

1 Select the drive where the system stores the files you want to use or change.



File name: *.fnt

if.fnt
intlsm.fnt
ufstsm.fnt

Folders: C:\fap_ps\MSTRR...\DEFLIB

c:\
fap_ps
mstrres
fmres
deflib

Drives: c:

2 Select a new directory in the Folders field if you want to store your master resource library in a different directory.

3 Enter the name of the file you want to include in your master resource library in the File Name field or select it from the File list.

4 Click Ok to make additions or changes to your master resource library. The system returns you to the Resource Library window.

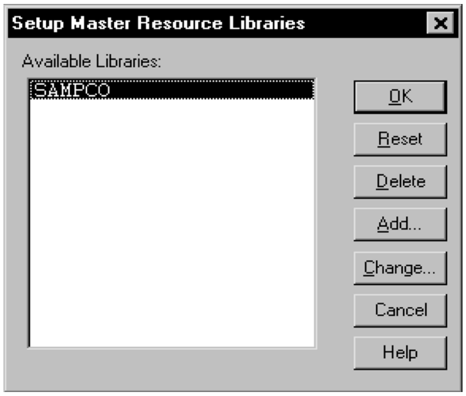
5 When you complete making changes or additions to your master resource library files, click Ok in the Resource Library window. The system returns you to the Setup Master Resource Libraries window.

6 Click Ok to save your changes and close the Setup Master Resource Libraries window.

DELETING A LIBRARY

The Delete option lets you delete a resource library from your list of available libraries. By deleting a library, you do not delete the library resources from the system; you merely remove those grouped resources from the option list.

1 To delete a library, choose File, Library Setup. The system displays the Setup Master Resource Libraries window.



2 Click the resource library you want to delete; then, click Delete. A confirmation window appears.

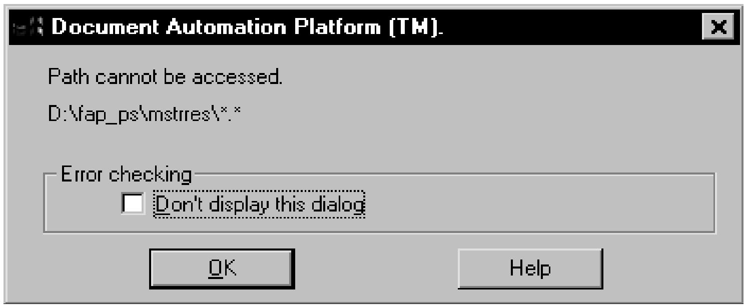
3 Click Yes to delete the resource library or No to cancel. The system returns you to the Setup Master Resource Libraries window.

4 Click the resource library you want to continue working with; then, click Ok. You can no longer use the resource library you removed.

NOTE: If you need to add a library that's been deleted from your available libraries list, see Modifying Library Information on page 41.

CONTROL PATH ERROR CHECKING

This option tells the system to recognize new paths during master resource setup, or to alert you if you define a path which does not exist. The system displays an error message with an option to discontinue the message display.


Document Automation Platform (TM).
Error checking
☐ Don't display this dialog
OK
Help

Path cannot be accessed.

D:\fap_ps\mstrres\*.*

Click Ok to continue displaying the error message when you add an undefined path to your master resource library. Click the check box; then, click Ok to disable the message and close the window. The system lets you define new paths during library setup without displaying the message.

You can make the directories for the new paths after you have set up the master resource library.

NOTE: The error window becomes active again after you exit the Resource Library window.

USING SYSTEM SUPERVISOR TOOLS

In the system you can also perform additional system set up and maintenance functions. These functions include setting up print and email drivers, tracking transactions, packing your database, and purging form sets, and transactions.

The ability to perform these functions depends on your security level as defined by your company. For specific steps for performing these tasks, see the Documaker Desktop Administration Guide.

Chapter 3

Selecting Forms

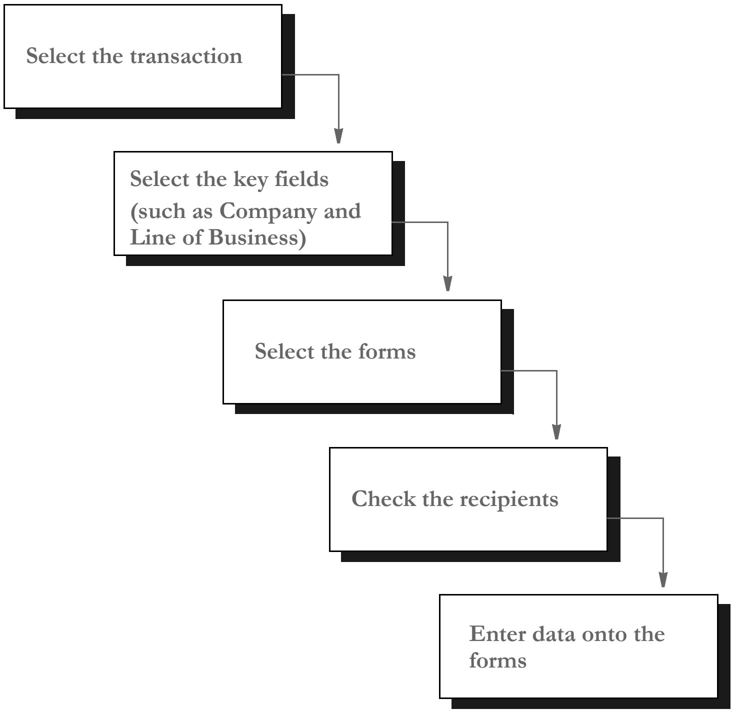
This chapter tells you how to open forms for data entry. When you choose File, New to open a new form, the Forms Selection window appears. From this window, you can perform a variety of tasks.

This chapter discusses the options you have while selecting forms:

- Form Selection Overview on page 48
- Using the Forms Selection Window on page 49
- Selecting a Form on page 51
- Importing Information on page 54
- Duplicating a Form on page 60
- Modifying Recipient Form Copies on page 61
- Exiting the Forms Selection Window on page 63

FORM SELECTION OVERVIEW

The illustration below shows the basic task flow for selecting forms and entering data:


Select the transaction
Select the key fields (such as Company and Line of Business)
Select the forms
Check the recipients
Enter data onto the forms

You select the transactions you want to work with and enter key field information, such as company name and line of business. Next, you select the forms you want to use, verify the recipients, and enter data.

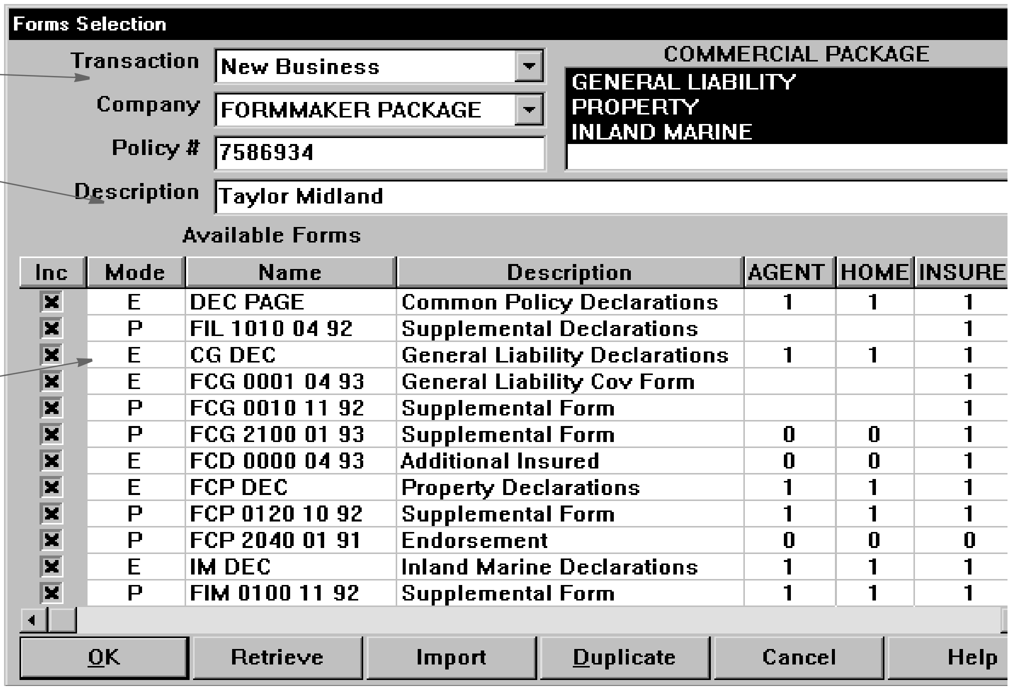
USING THE FORMS SELECTION WINDOW

The Forms Selection window collects the information necessary to begin the entry process for your forms. The window is set up as a control grid for easy data entry and selection. The following provides a practical illustration to explain the data on the sample Forms Selection window, using an insurance company as the example.

Here is an example:

You are an agent for a large insurance company. You need to complete forms for a new business transaction. Your client is purchasing a commercial package policy from FormMaker Insurance. You have assigned the policy number as 7586934 and described the policy using the insured's name, Taylor Midland.

Under Available Forms, you see all forms available for processing FormMaker's commercial package insurance. This information is stored in the *form set definition table*, which is named the FORM.DAT file.



Transaction: New Business

Company: FORMMAKER PACKAGE

Policy #: 7586934

Description: Taylor Midland

COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Available Forms

Inc	Mode	Name	Description	AGENT	HOME	INSURE
☒	E	DEC PAGE	Common Policy Declarations	1	1	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1
☒	E	FCP DEC	Property Declarations	1	1	1
☒	P	FCP 0120 10 92	Supplemental Form	1	1	1
☒	P	FCP 2040 01 91	Endorsement	0	0	0
☒	E	IM DEC	Inland Marine Declarations	1	1	1
☒	P	FIM 0100 11 92	Supplemental Form	1	1	1

Transaction information appears in the top half of the window.

Double-click here to select all or clear all forms.

Information about the individual forms appears in the bottom half of the window.

The Forms Selection window is divided into sections. The top section contains transaction information. The bottom section contains forms information. The following table defines each field in the Forms Selection window.

Field	Description
Transaction	The type of process or business transaction associated with a particular form set. Examples: New Insurance Policy, Policy Renewal, Endorsement.
Company	The company associated with a form set.
Line of Business	The specific business or industry associated with a form set. Examples: Automobile Insurance, Homeowner's Insurance, Commercial Property Insurance.

Field	Description
Policy Number	A user-defined identifier (alphanumeric) associated with a specific form set.
Description	A user-defined description which identifies a specific form set. The insured's name is one example of a transaction description.
Inc	This column lets you include or exclude a form in a form set.You can double-click the column heading to select all forms. double-click again to clear all forms.
Mode	Identifies the form type. *E* = Electronic. You can produce the form using the system. *P* = Pull Form. You cannot produce the form using the system. You must manually insert the hard copy form. Policy jackets are often designated as Pull forms.
Name	Name of the form. The form name usually appears on the bottom of the printed form.
Description	General description of the form that indicates the form type.
Agent, Home Office, Insured	Form recipient columns. The number beside a specific form within a recipient column indicates the number of form copies for that recipient (Agent, Home Office, Insured). A blank space indicates that the recipient is not designated as a form recipient in the FORM.DAT file. You cannot enter a value where the table contains a blank cell.

You can adjust the width of the columns by clicking and dragging the column divider lines.

The Forms Selection window also has options which let you work on specific forms before you begin entering data into the forms. The table below defines the options, and provides a page reference for the specific activity related to the option.

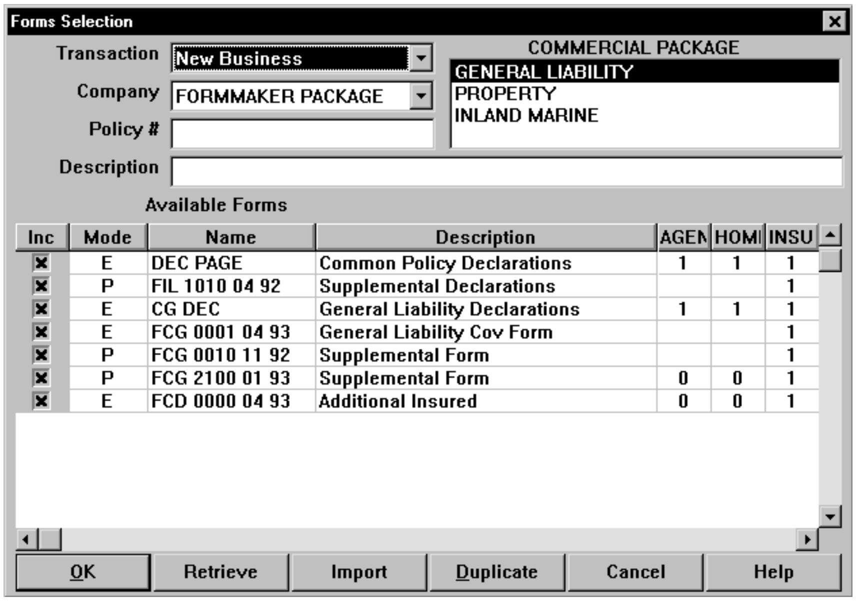
Option	Description	See
Retrieve	Lets you open the Archive module to create a copy of an archived form set, and to edit the copied data. The original form data remains intact in archive because you edit only the copied data.	Archiving and Retrieving Form Sets on page 152
Import	Lets you select specific import files containing common data to apply to a particular form set. When you Import data, the system automatically prefills designated variable fields within your selected form set. Once the system fills the variable fields with imported data, you cannot alter that data. You can, however, enter and manipulate data in the remaining variable fields.	Importing Information on page 54
Duplicate	Lets you include an additional copy of a form in the Available Forms list. This option only works if the section creator designated the form as repeatable.	Duplicating a Form on page 60

SELECTING A FORM

Selecting a form lets you choose the specific forms in which to enter data. The Forms Selection window groups forms by company and line of business. You must select both the company and line of business to open a particular form set.

To select a form for entry:

1 Choose File, New. The Forms Selection window appears.



Transaction: New Business
Company: FORMMAKER PACKAGE
Policy #:
Description:

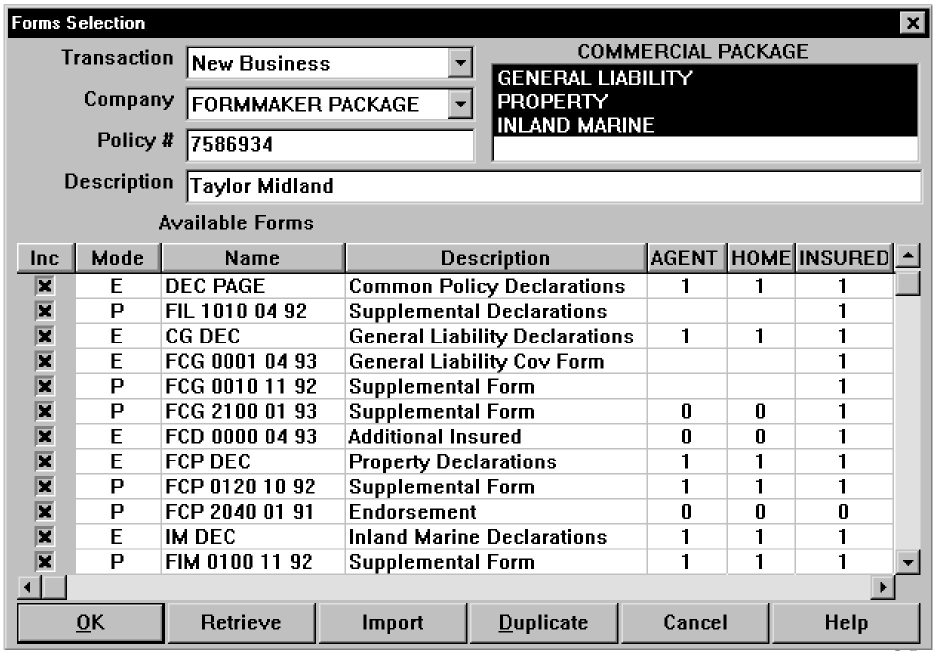
COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Available Forms

Inc	Mode	Name	Description	AGEN	HOMI	INSU
☒	E	DEC PAGE	Common Policy Declarations	1	1	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1

2 Select the transaction type of your form set in the Transaction field. If there is only one transaction type available, the system automatically positions the cursor past the Transaction field.

NOTE: To undo your selections and exit this window, click Cancel.



Transaction: New Business
Company: FORMMAKER PACKAGE
Policy #: 7586934
Description: Taylor Midland

COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Available Forms

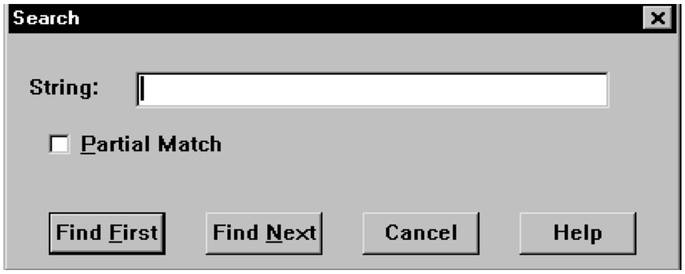
Inc	Mode	Name	Description	AGENT	HOME	INSURED
☒	E	DEC PAGE	Common Policy Declarations	1	1	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1
☒	E	FCP DEC	Property Declarations	1	1	1
☒	P	FCP 0120 10 92	Supplemental Form	1	1	1
☒	P	FCP 2040 01 91	Endorsement	0	0	0
☒	E	IM DEC	Inland Marine Declarations	1	1	1
☒	P	FIM 0100 11 92	Supplemental Form	1	1	1

3 Select the company associated with the form set in the Company field.

4 Select the line of business in the LOB field. When you select a line of business, all forms related to the specific Company/LOB appear in the Available Forms list. For a package policy, you can select multiple lines of business. The forms for each line of business are included in the Available Forms list. An *X* appears in the Inc (Include) column beside each selected form. By default, the system selects all required forms.

NOTE: The FORM.DAT file defines the forms required for a given line of business. Your system supervisor can modify this file if necessary.

5 If your selected Company/LOB displays a long list of available forms, you can use the Forms Selection window's Search option to find the specific form either by form name or by form description. To use Search, double-click the Name or Description column heading. The Search window appears.



6 You can enter the complete form name or form description; or, you can click the Partial Match field and enter a partial string of characters.

Click Find First to search for the first form whose name or description matches your entry. The form will be highlighted in the Forms Selection window. Click Find Next to continue the search. When the system reaches the end of the Available Forms list, the search complete message appears.

7 Click OK. Click the upper right corner, or Cancel, to close the Search window.

8 Type the numeric identifier for the form set in the Policy # field. You can enter up to 20 characters. Your entry must be unique.

NOTE: If your system has been configured to use automatic policy numbering, the policy number will display in the Policy # field automatically. See the Documaker Desktop Administration Guide for details on setting up automatic policy numbering.

9 If you are entering information onto a new form set, type a description of the form set in the Description field. You can enter up to 30 characters. For existing form sets, this information has usually already been entered. This field is optional.

10 In the Inc column, click each form you want to deselect, if applicable. Deselected forms do not display in the Entry window. (The *X* in the Inc column does not appear next to a deselected form.) Your system may be configured to allow form selection by clicking the form row. See your system supervisor for information on this INI option.

You are now ready to perform other form selection activities, such as importing information, entering information, duplicating forms, and changing form recipient copy counts. Refer to the pages that follow for specific information.

NOTE: You can use the mouse wheel to scroll up and down a page of a form. You cannot use the mouse wheel to go from one page to another.

IMPORTING INFORMATION

As part of your system customization, your system supervisor can create a series of import files. These import files contain common data which you apply to a particular form set. When you import data, the system automatically prefills designated fields in the form set. Importing information saves time, avoiding the need to type information which is common to certain form sets. The system offers these import options:

- Standard import
- Full Document import
- Selective import
- Import from archive

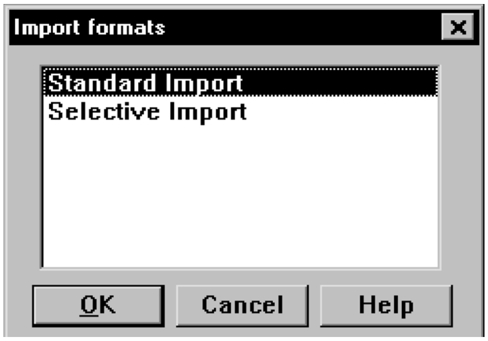
USING A STANDARD IMPORT

Your system supervisor can create numerous files, each of which applies to specific form sets in specific instances. When you perform a standard import, you select a particular import file from which to import data into your form set. Since there can be many import files, you must know the contents and functionality of each import file to ensure a successful import. Your system supervisor should inform you of each import file name and purpose before using the standard import option.

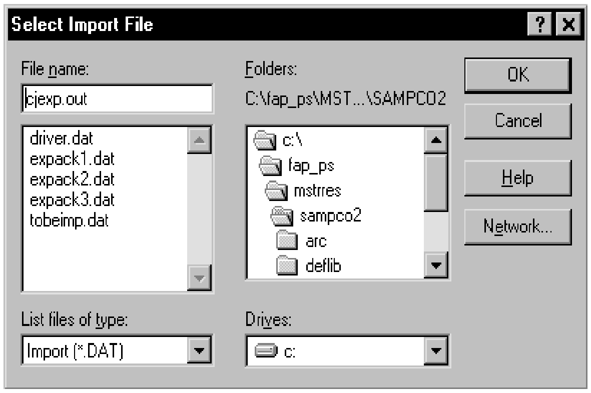
Using a standard import lets you import data into a form set. Follow these steps to perform a standard import:

1 Follow steps 1-7 for Selecting a Form on page 51, then proceed with step 2 below:

2 Click Import to import data onto your forms. The Import Formats window appears.



3 Click the Standard Import option and then click Ok. The Select Import File window appears.


Select Import File
File name:
cjexp.out
driver.dat
expack1.dat
expack2.dat
expack3.dat
tobeimp.dat
Folders:
C:\fap_ps\MST...\SAMPCO2
c:\
fap_ps
mstres
sampco2
arc
deflib
OK
Cancel
Help
Network...
List files of type:
Import (*.DAT)
Drives:
c:

4 Select the import data file. Change the drive and directory if necessary. Click Ok. When you open the forms, the system imports the data into the correct variable fields.

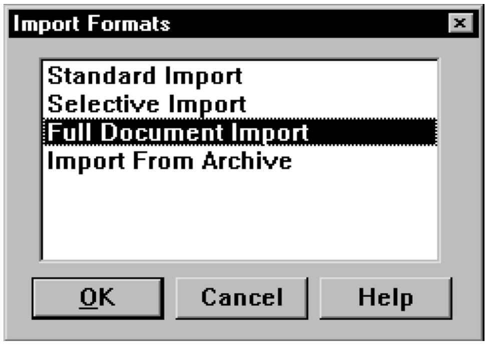
USING FULL DOCUMENT IMPORT

The Entry system offers an import/export format that combines WIP, NAFILE, and POLFILE information. Standard import does not contain a full document layout description of the document information and basically facilitates a field level interchange. Selecting Full Document import will import form, section and field information contained within a form set. Typically, this import option will not be available to the user since it performs the same function as emailing a form set in WIP. Its primary function is to export form sets from Entry for import into Documaker.

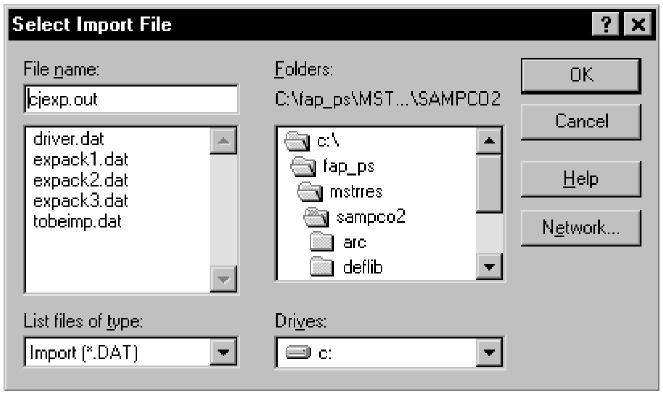
Follow these steps to perform a Full Document import:

1 Follow steps 1-7 for Selecting a Form on page 51, then proceed with step 2 below:

2 Click Import to import data onto your forms. The Import Formats window appears.


Import Formats
Standard Import
Selective Import
Full Document Import
Import From Archive
OK
Cancel
Help

3 Click the Full Document Import option and then click Ok. The Select Import File window appears.


Select Import File
File name:
cjexp.out
driver.dat
expack1.dat
expack2.dat
expack3.dat
tobeimp.dat
Folders:
C:\fap_ps\MST...\SAMPCO2
c:\
fap_ps
mstres
sampco2
arc
deflib
OK
Cancel
Help
Network...
List files of type:
Import (*.DAT)
Drives:
c:

4 Select the correct import data file. Your supervisor will tell you which import file contains WIP record information appended with standard NA and POL form set data. Change the drive and directory if necessary. Click Ok. When you open the forms, the system imports the form set with the correct data in the specified variable fields.

USING A SELECTIVE IMPORT

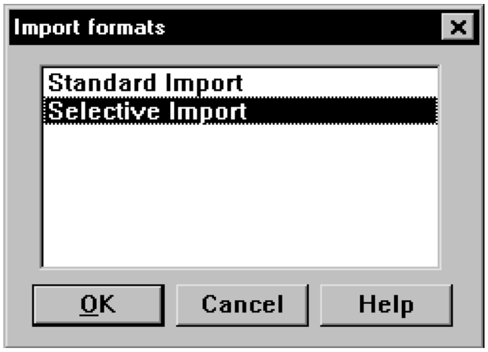
When you perform a selective import, you select an import driver file which defines the import process. This driver file recognizes the transaction type (such as new, renewal, or endorsement), your company, and your user access level.

The driver file automatically selects those import files which apply to you. If your company uses the selective import option, your system supervisor should tell you which driver file to use.

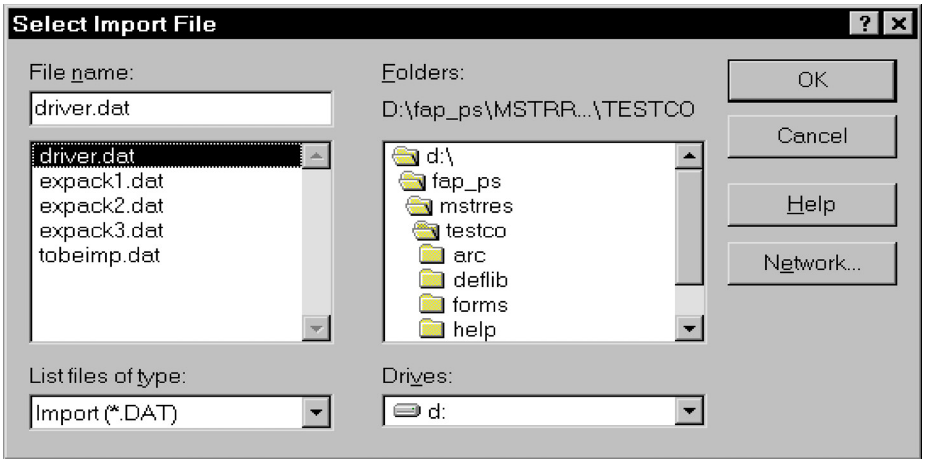
Follow these steps to perform a selective import:

1 Follow steps 1-7 for Selecting a Form on page 51, then proceed with step 2 below:

2 Click Import to import external data into your forms. The Import Formats window appears.


Import formats
Standard Import
Selective Import
OK
Cancel
Help

3 Click the Selective Import format option, and click OK. The Select Import File window appears.



File name: driver.dat

driver.dat
expack1.dat
expack2.dat
expack3.dat
tobeimp.dat

Folders: D:\fap_ps\MSTRR...\TESTCO

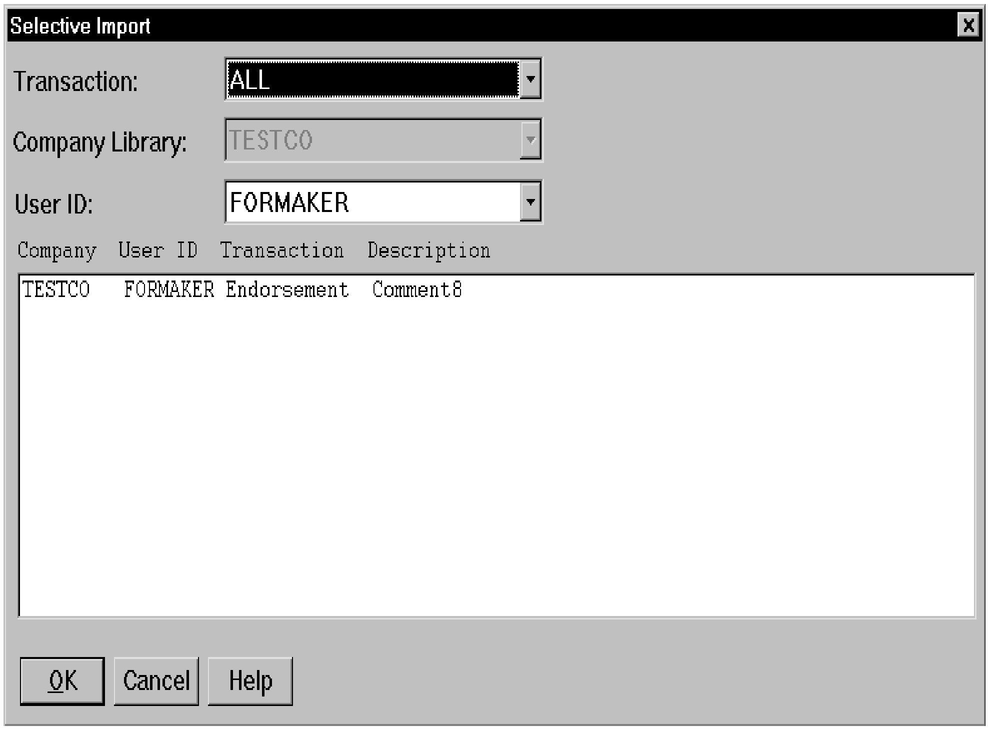
d:\
fap_ps
mstrres
testco
arc
deflib
forms
help

List files of type: Import (*.DAT)

Drives: d:

4 Select the import driver file. Change the drive and directory if required. You need to check with your system supervisor to get the name of this file.

5 Click Ok. The Selective Import window appears.



Transaction: ALL

Company Library: TESTCO

User ID: FORMAKER

Company	User ID	Transaction	Description
TESTCO	FORMAKER	Endorsement	Comment8

The Selective Import window lists the files which are available for import depending upon the key fields, such as transaction, company, and line of business. Each import file listing also contains a brief description of the import file.

You can change the files available for import by changing the transaction and user ID options in the window. The user IDs available in the list, include your user ID as well as the user IDs of those who report to you, as defined when the system is first set up.

6 Select an import file available from the current list and click Ok. When you open the forms, the system imports the data into the appropriate variable fields.

IMPORTING GLOBAL INFORMATION FROM ARCHIVE

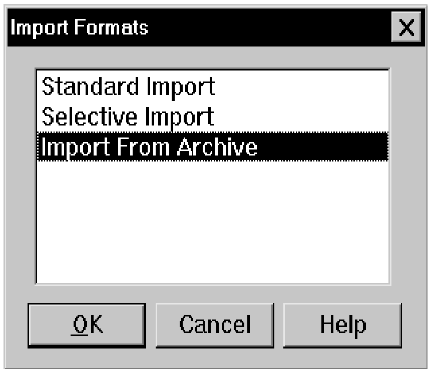
This option lets you select a form set from the Archive window and, instead of retrieving the entire original form set as it is done with Archive Retrieval, only import the global data from that form set. This data (without the forms) is then available for the new form set you are creating.

NOTE: This option must be set up by your system supervisor. If this option is unavailable, ask your system supervisor to set it up for you.

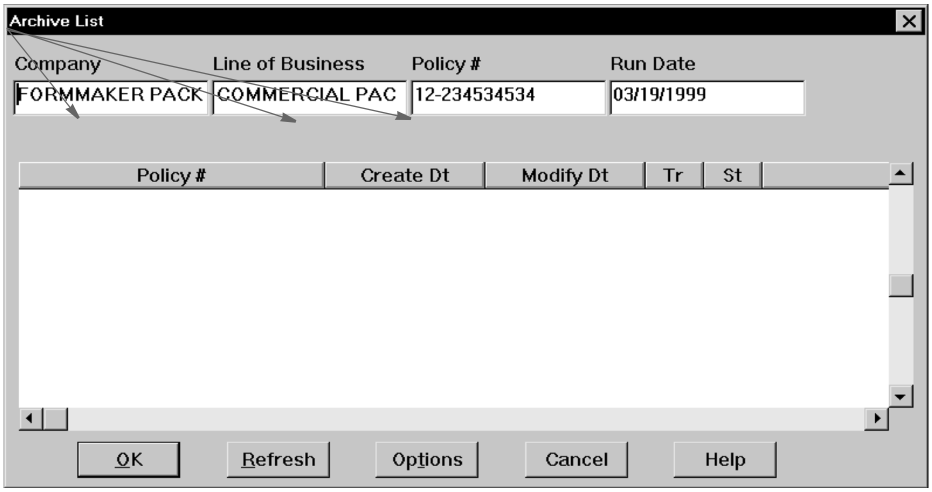
Follow these steps to import global information from archive:

1 Follow steps 1-7 for Selecting a Form on page 51, then proceed with step 2 below:

2 Click Import to import external data into your forms. The Import Formats window appears.



3 Click the Import from Archive option, and click OK. The Archive List window appears.



Company: FORMMAKER PACK
Line of Business: COMMERCIAL PAC
Policy #: 12-234534534
Run Date: 03/19/1999

Double-click on these column headings to display the Search window so you can search for the form set you want, based on that heading.

4 Use this window to select the archive form set from which you want to import global data. Highlight the form set you want and click Ok.

NOTE: The option does not select forms for you; it simply imports global data. Fields which contain global data are designated when the form is created.

Importing Data with Forms and Sections from Archive

Your system supervisor can configure the Import From Archive option to transfer data with forms and sections from archive if the form and section names match.

For instance, if the archived form set consists of *FORM_A* and *FORM_B* and you currently have *FORM_A* and *FORM_B_v2* selected, the system transfers the form data from *FORM_A*, plus any global fields set up for the entire form set. Since *FORM_B* does not match *FORM_B_v2*, no form or section level information is transferred between the form sets. Similar name matching is required at the section levels.

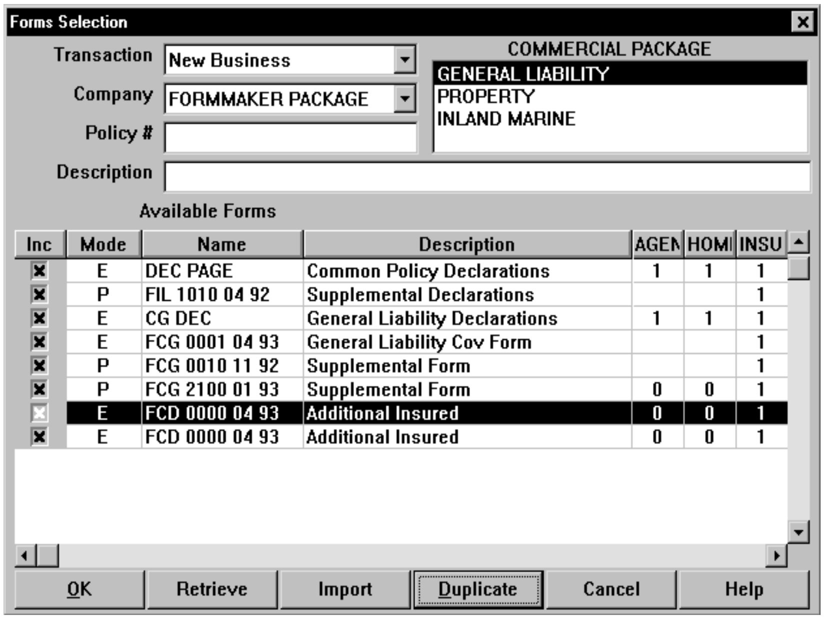
The import operation reselects the forms based upon those found in the archive. Any prior form selection made in the Forms Selection window is removed. The archive index record information is transferred to the WIP record information and the system updates the Form Selection window to show any changed values.

NOTE: Multi-line text fields will retain paragraph markers but will not retain any text formatting.

DUPLICATING A FORM

Duplicating a form lets you include an additional copy of a form in the Available Forms list. You can duplicate a form to accommodate *overflow* information such as multiple insurance schedules. You can duplicate only forms that are designated by the section creator as repeatable forms (this information is stored in the FORM.DAT file).

To duplicate a form, click the form you want to duplicate, then click the Duplicate button. The system lists the duplicated form on the line below the original form in the Available Forms list.



Transaction: New Business

Company: FORMMAKER PACKAGE

Policy #:

Description:

COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Available Forms

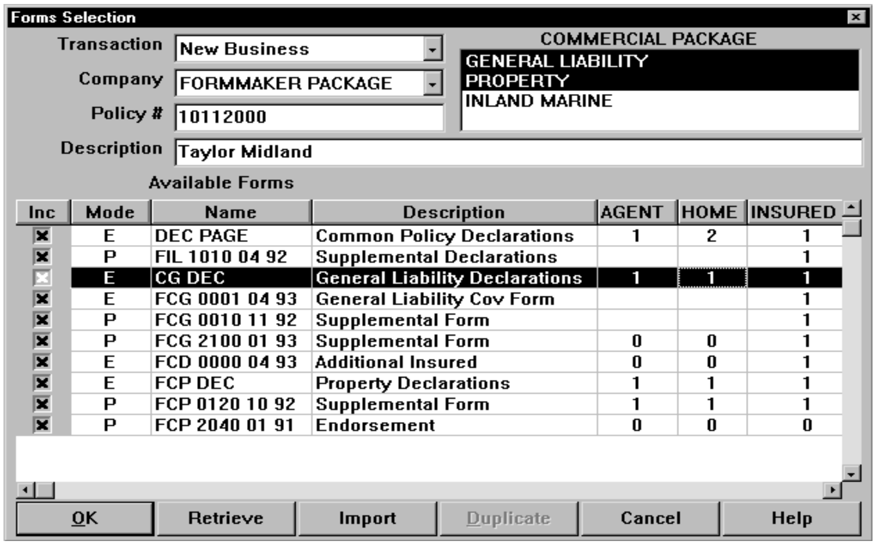
Inc	Mode	Name	Description	AGEN	HOMI	INSU
☒	E	DEC PAGE	Common Policy Declarations	1	1	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1

NOTE: You cannot duplicate more than one form at a time. You must select each form to duplicate individually.

MODIFYING RECIPIENT FORM COPIES

Modifying recipient form copies lets you change the number of form copies for any or all recipients. You cannot, however, change the assigned recipients of any form.

1 To modify recipient form copies, click the recipient copy count you want to change. The system highlights the cell when you select it.



Forms Selection

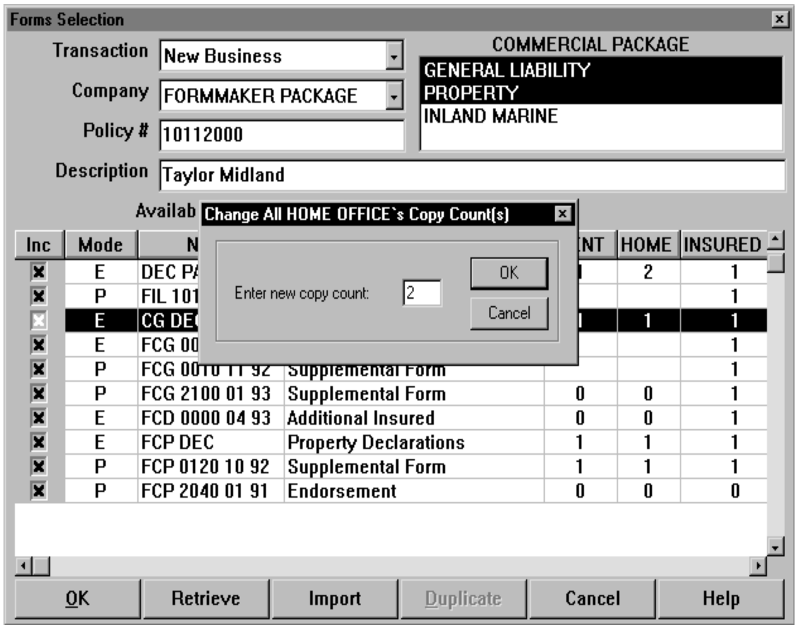
Transaction: New Business
Company: FORMMAKER PACKAGE
Policy #: 10112000
Description: Taylor Midland

COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Available Forms

Inc	Mode	Name	Description	AGENT	HOME	INSURED
☒	E	DEC PAGE	Common Policy Declarations	1	2	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1
☒	E	FCP DEC	Property Declarations	1	1	1
☒	P	FCP 0120 10 92	Supplemental Form	1	1	1
☒	P	FCP 2040 01 91	Endorsement	0	0	0

2 Type the new copy count in the cell. Your change takes effect immediately. To change the recipient copy count for the entire column, double click the recipient's column heading. The following window appears:



Forms Selection

Transaction: New Business
Company: FORMMAKER PACKAGE
Policy #: 10112000
Description: Taylor Midland

COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Change All HOME OFFICE's Copy Count(s)

Enter new copy count: 2

Inc	Mode	N		NT	HOME	INSURED
☒	E	DEC PA			2	1
☒	P	FIL 101				1
☒	E	CG DE			1	1
☒	E	FCG 00				1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1
☒	E	FCP DEC	Property Declarations	1	1	1
☒	P	FCP 0120 10 92	Supplemental Form	1	1	1
☒	P	FCP 2040 01 91	Endorsement	0	0	0

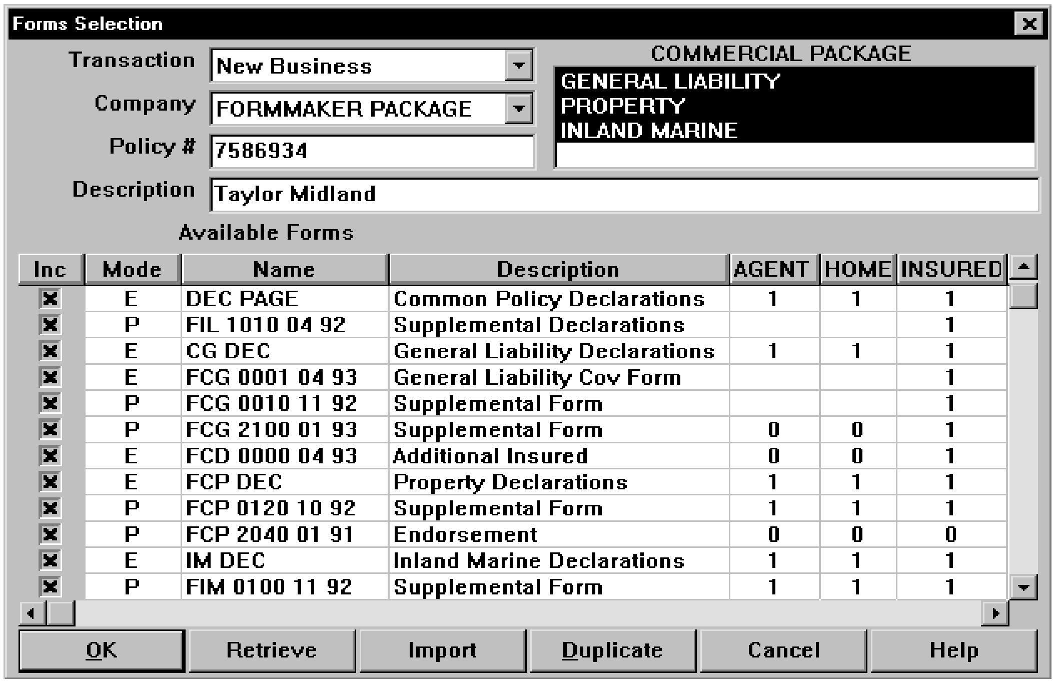
3 Enter the new copy count and click Ok. The recipient's copy count for all forms selected will be set to the new number.

4 Click Ok to display your selected forms in the Entry window. The forms you selected for entry display in the order in which they appeared in the Available Forms list. If you choose to import data, the data appears in the applicable fields.

EXITING THE FORMS SELECTION WINDOW

Exiting the Forms Selection window lets you exit the window without saving your forms configuration.

Click the upper right corner of the window, or Cancel, to exit the window. You return to the main window.



Transaction: New Business

Company: FORMMAKER PACKAGE

Policy #: 7586934

Description: Taylor Midland

COMMERCIAL PACKAGE

- GENERAL LIABILITY
- PROPERTY
- INLAND MARINE

Inc	Mode	Name	Description	AGENT	HOME	INSURED
☒	E	DEC PAGE	Common Policy Declarations	1	1	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1
☒	E	FCP DEC	Property Declarations	1	1	1
☒	P	FCP 0120 10 92	Supplemental Form	1	1	1
☒	P	FCP 2040 01 91	Endorsement	0	0	0
☒	E	IM DEC	Inland Marine Declarations	1	1	1
☒	P	FIM 0100 11 92	Supplemental Form	1	1	1

Chapter 4

Completing Forms

Documaker Desktop displays forms on your screen and lets you enter data directly into the form's fields. While entering data, you can select from tables, display field-specific Help information, and use Text Editor options. These additional capabilities are set up by the person who created the form set.

As you enter data, tables provide a list of valid field entries you can select. Help provides prompts, messages, and other information specific to the field in which you enter data. The Text Editor lets you enter and format multiple lines of text and other data. See Using the Text Editor on page 77, for more information on using the Text Editor.

This chapter discusses the following options:

- Entering Information on page 65
- Using Field Help on page 68
- Using Tables on page 69
- Using Microsoft Word For Text Entry on page 70
- Saving Your Work on page 71
- Completing a Form Set on page 73
- Exporting Information on page 74

ENTERING INFORMATION

You enter information into *variable fields*. These fields are set up when the form is created. If you selected the Import option on the Forms Selection window, the imported data appears in the appropriate fields when you display the form set.

You can enter information directly onto the form or use the Fixed Edits option to first enter the data in the Data Entry field. This topic discusses how to enter data directly onto the form. See Using the Data Entry Field on page 67 for more information about that option.

Follow these steps to enter information into a variable field:

1 Click a variable field. The system highlights the first variable field on the first form in the form set by default. The field type appears in the status bar at the bottom of the window. Field types include:

Type	Description
(Y)es or (N)o	Accepts *Y* or *N*.
Alphabetic	Accepts only alphabetic letters.
Alphanumeric	Accepts a combination of alphabetic letters and numbers.
Bar code	Displays bar-coded information.
Custom	Accepts data based on field type. A systems integrator can customize the field types.
Date format	Accepts dates in the format indicated. You can enter dates from 1800 to the year 3000.
Int'l Alphabetic	Accepts international alphabetic letters.
Int'l Alphanumeric	Accepts a combination of alphabetic letters and numbers, including international letters and numbers.
Int'l Uppercase Alphabetic	Accepts only capital letters (defaults text to all upper case), including international letters and numbers.
Int'l Uppercase Alphanumeric	Accepts a combination of international alphabetic letters and numbers (defaults text to all upper case).
Multiline text	Accepts multiple lines of text to which word processing options may be applied. The form's creator can configure the form to enter text using Microsoft Word (see Using Microsoft Word For Text Entry on page 70), or by using the Text Editor. (See Using the Text Editor on page 77 for more information.)
Numeric	Accepts only numbers.
Numeric/Text	Accepts numbers or text. If the field value is numeric, the numeric format is applied, otherwise the text is not changed. For example, with a format of $ZZ9.99, the value 10 would appear as $10.00, but a text value of N/A would appear unchanged by the format.
Table only	Accepts table selections.

Type	Description
Time Format	Accept time in the format indicated—also uses a separator.
Upper Alphabetic	Accepts only capital letters (defaults text to all upper case).
Upper Alphanumeric	Accepts a combination of alphabetic letters and numbers (defaults text to all upper case).
X or space	Accepts an *X* or blank space.

NOTE: The system displays the status bar by default. To hide the status bar, choose Options, Information.

2 Type the data in the appropriate format, and press TAB to accept the data and move to the next variable field. (You cannot edit imported data unless your system has been configured to do so in the INI file.)

If the section's creator has activated the spell check option for the variable field, the data you entered will be checked for accuracy when you press TAB. If the section's creator has not selected the spell check option, spell checking of variable fields is unavailable during entry unless you have had a spell check option added to your menu. For information on adding this menu option, see the Documaker Desktop Administration Guide.

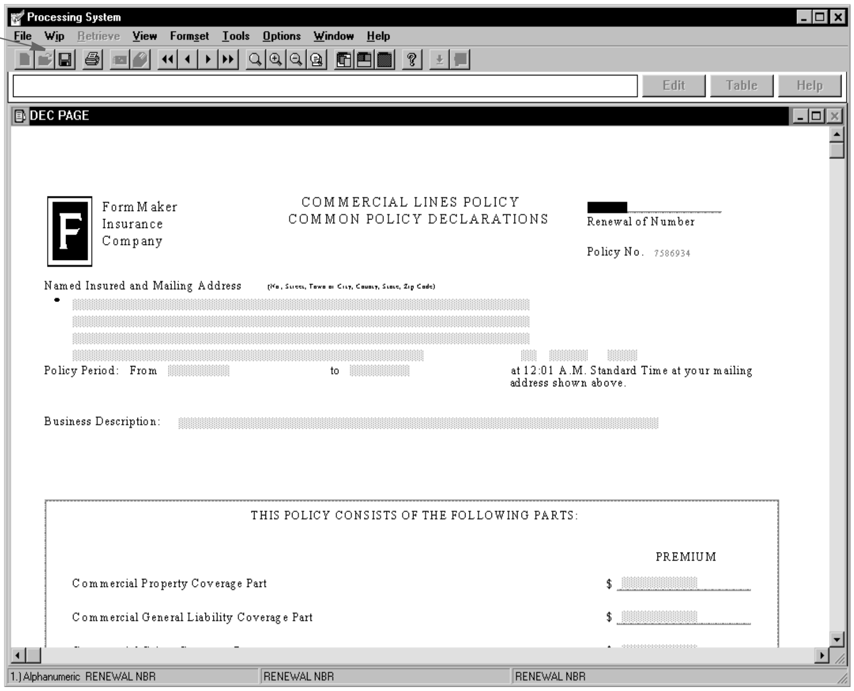
NOTE: If you receive an error message when entering data, retype data in the field and press TAB. If you cannot enter data, or you enter data that is inconsistent with the data type, check with the section creator or with your system supervisor to verify the correct data type.

USING THE DATA ENTRY FIELD

Entering variable field data using the Data Entry field lets you enter and edit data before you actually add it to the field on the form.

To enter data using the Data Entry field:

1 Select Options, Fixed Edits. The system displays the Data Entry field directly below the toolbar. The first variable field in the first section of the form set is highlighted by default. To select a different variable field, click it.



Form Maker
Insurance
Company

COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS

Renewal of Number

Policy No. 7586934

Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code)

Policy Period: From to at 12:01 A.M. Standard Time at your mailing address shown above.

Business Description:

THIS POLICY CONSISTS OF THE FOLLOWING PARTS:

PREMIUM

Commercial Property Coverage Part $

Commercial General Liability Coverage Part $

1.) Alphanumeric RENEWAL NBR | RENEWAL NBR | RENEWAL NBR

Data Entry Field, shown with the Fixed Prompt option turned off.

2 Type the data in the appropriate format; then, press TAB to apply the data to the section's variable field and move to the next variable field. For information about field formats, see Entering Information on page 65.

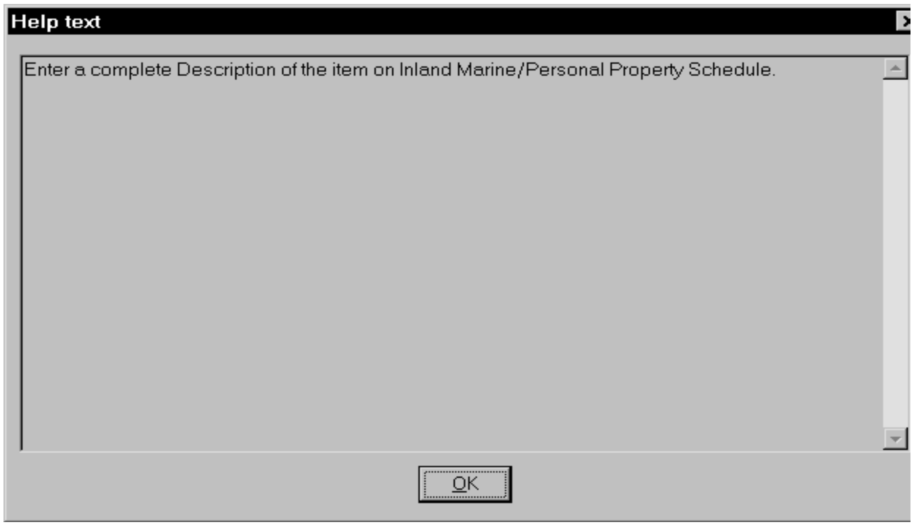
USING FIELD HELP

Using Field Help lets you display help messages the section creator has attached to variable fields. Help messages provide information to assist you in completing field entries. A variable field with a help message attached will activate the toolbar's Field Help icon when you click the variable field. For more information on toolbar icons, see Using the Toolbar on page 35.

To enter data using field help:

1 Click a variable field.

2 Click the Field Help icon to display the help message attached to the field.



Enter a complete Description of the item on Inland Marine/Personal Property Schedule.

3 Read the help message for information about the data you enter into the field. Click Ok to close the message.

USING TABLES

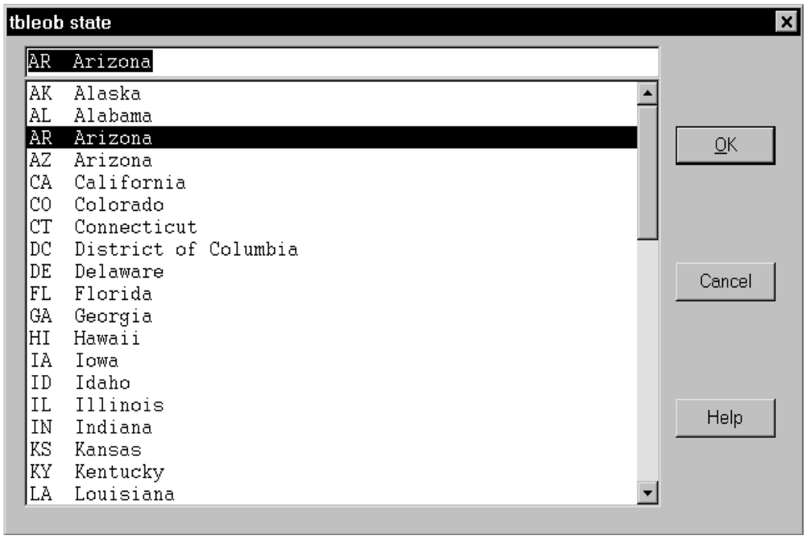
Tables contain lists of options you can choose from to fill in a field. A field which has a table attached will activate the Table icon on the toolbar when you click in the field.

NOTE: For more information on toolbar icons, see Using the Toolbar on page 35.

To enter data using a table:

1 Click in a field on the form.

2 Depending on how the form creator set up the field, the table may display automatically. If the table does not display automatically, click the Table icon.


This is the key

This is the description

tbleob state

```
AR  Arizona
```

```
AK  Alaska
AL  Alabama
AR  Arizona
AZ  Arizona
CA  California
CO  Colorado
CT  Connecticut
DC  District of Columbia
DE  Delaware
FL  Florida
GA  Georgia
HI  Hawaii
IA  Iowa
ID  Idaho
IL  Illinois
IN  Indiana
KS  Kansas
KY  Kentucky
LA  Louisiana
```

3 Click the entry you want in the table window. As shown in the example above, table entries appear in Key (Code) and Description format (Key/Code = *AR*, Description = *Arizona*).

4 Click Ok to enter your selection in the field. The field accepts either the Key, the Description, both, or no entry, depending on how the section creator set up the field. If you do not select a table entry, a default entry does not appear in the field. The field remains blank.

NOTE: Depending on how the form creator set up the form, you may be able to type in an entry if the table does not offer an option which meets your needs. For some fields, the form creator may require that you select an entry from the table. The system tells you if you must select an entry from the table.

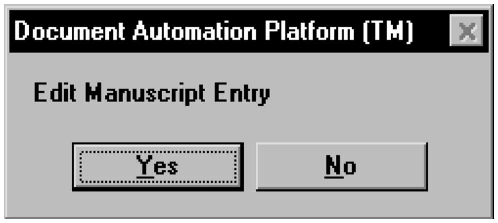
USING MICROSOFT WORD FOR TEXT ENTRY

Multiline text fields let you enter large blocks of information in free-form text which can be formatted using word processing features. Depending on how the form was designed, you may be able to enter this text using Microsoft Word instead of the system's Text Editor. The text is saved in RTF format which Documaker Desktop then incorporates into the form.

NOTE: This capability is added to the form by the person who designed the form and may not be available. For more information, talk to your system supervisor.

To use Word for text entry:

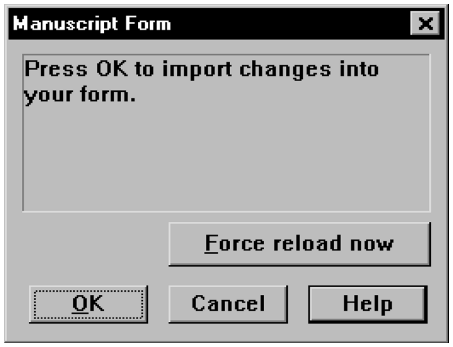
1 Click or tab to the multiline text field. The system displays the Edit Manuscript Entry window.



Document Automation Platform (TM)

Edit Manuscript Entry

2 Click Yes to open Microsoft Word and have the information that appears on the form sent to it. A status window is activated in Entry:



Manuscript Form

Press OK to import changes into your form.

3 While Word is open, only the Help and Force Reload Now buttons are available. The Force Reload Now button lets you force the loading of the file in case there is a communication error with Word.

When you have finished entering and formatting the text in Word, use the File, Save As option to save the text, accepting the default file name assigned by Word. Close Word to return to the entry window.

4 Click Ok in the Manuscript Form window to import the text. The Edit Manuscript Entry window appears. Click Yes to reopen Word and edit the text. Click No to accept the text and continue completing the form.

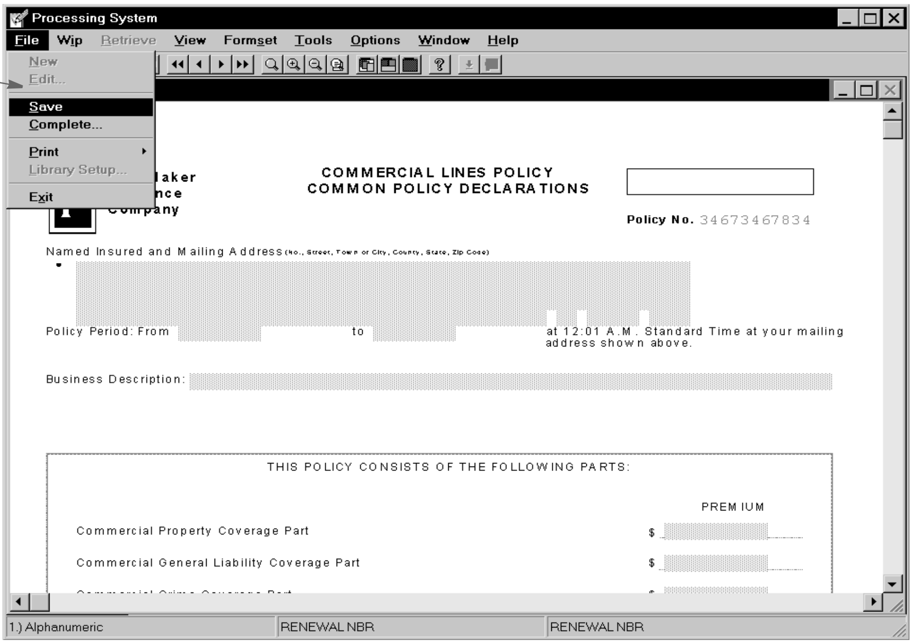
Information on the system's Text Editor appears in Chapter 5, Using the Text Editor on page 77.

SAVING YOUR WORK

The Save option lets you save changes to your form set without exiting the system. You should save your work at regular intervals.

To save form set data and continue to work on the form, choose File, Save; or, click the Save icon on the toolbar. The system saves your form set data changes.

To save you work and continue working on the form, choose the File, Save option.

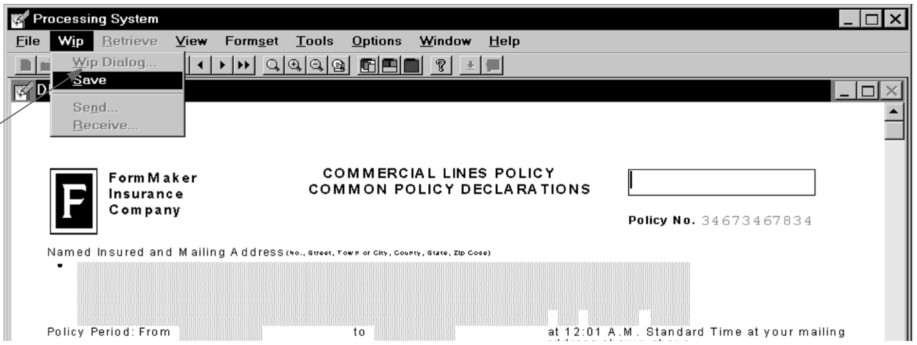

Processing System
File
Wip
Retrieve
View
Formset
Tools
Options
Window
Help
New
Edit...
Save
Complete...
Print
Library Setup...
Exit
COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS
Policy No. 34673467834
Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code)
Policy Period: From
to
at 12:01 A.M. Standard Time at your mailing address shown above.
Business Description:
THIS POLICY CONSISTS OF THE FOLLOWING PARTS:
PREMIUM
Commercial Property Coverage Part
$
Commercial General Liability Coverage Part
$
1.) Alphanumeric
RENEWAL NBR
RENEWAL NBR

When you exit the window, the system records all changes since your last save and stores the form set as WIP (work-in-process).

NOTE: The system can automatically save your work at specific intervals. This feature is set up by your system supervisor. Check with your system supervisor for more information.

To save the form set and have the system automatically close it, use the WIP, Save option, as shown in this excerpt:

To save you work and close the form, choose the WIP, Save option.

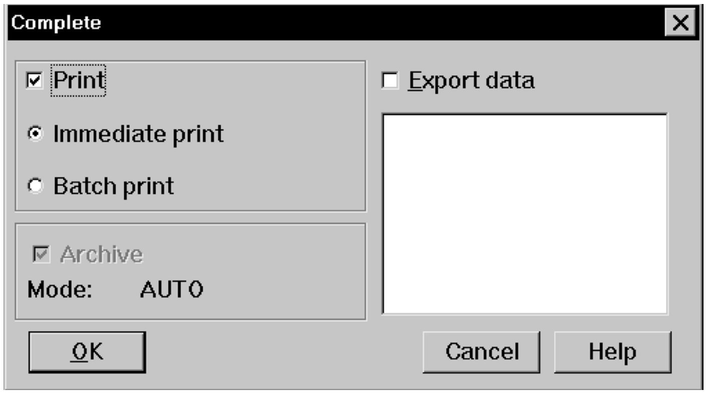

Processing System
File
Wip
Retrieve
View
Formset
Tools
Options
Window
Help
Wip Dialog...
Save
Send...
Receive...
FormMaker Insurance Company
COMMERCIAL LINES POLICY
COMMON POLICY DECLARATIONS
Policy No. 34673467834
Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code)
Policy Period: From
to
at 12:01 A.M. Standard Time at your mailing

Completing a Form Set

Complete lets you save your form set data entry changes and select various print and archive options upon data entry completion.

Follow these steps to complete a form set:

1 Choose File, Complete. The Complete window appears.



☑ Print
● Immediate print
○ Batch print
☑ Archive
Mode: AUTO
☐ Export data

2 Select the form set completion options. This table defines options available on the Complete window:

To…	Choose
Either print the form set immediately or send the form set to batch print.	Print
Send the print job to a batch queue so it can be printed at a later time.	Batch Print
Print a form set immediately. When you select the Immediate Print option, the system displays the Print window. See Printing Form Sets on page 115, for additional information.	Immediate Print
Archive a form set immediately upon completing data entry. If your system is set up to automatically archive form sets when you select Complete, the mode indicator below the Archive option displays *Auto*, and the Archive option is checked by default. If your system is configured for manual archive, the mode indicator displays *Manual*, and you must archive the form set after printing, using the WIP, Manual Archive option. Archive options are defined by the system supervisor. See Archiving and Retrieving Form Sets on page 152, for additional information.	Archive
Export data you entered in the system for use in other applications. The system lets you export data with a policy header to indicate the policy data origination point. You can export data without a header to get a file which contains only raw data. Export options, export data storage paths, and header/no header options are defined by your system supervisor.	Export Data

3 Click Ok. The system saves changes to your form set and performs whichever additional options you selected.

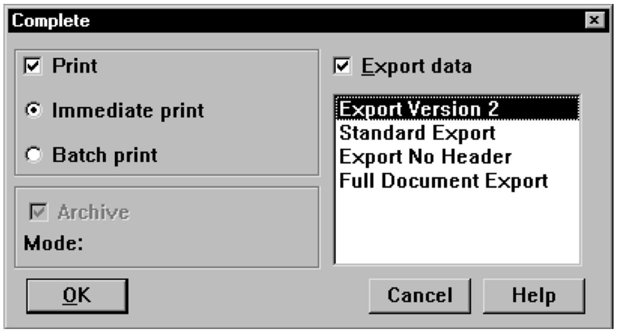
See Printing Form Sets on page 115, and Archiving and Retrieving Form Sets on page 152, for more information about print and archive options.

EXPORTING INFORMATION

You can export data when you complete a form set, or export data without printing or archiving (completing) the form set. Check with your system supervisor for specific information about export formats and file naming conventions before you export information.

NOTE: See the Documaker Desktop Administration Guide for more information about exporting information and additional options you can set up.

To export data, choose File, Complete. The Complete window appears.



☑ Print
● Immediate print
○ Batch print
☑ Archive
Mode:
☑ Export data

1 Select your print and archive options. If your system is configured for automatic archive, the Archive option is unavailable.

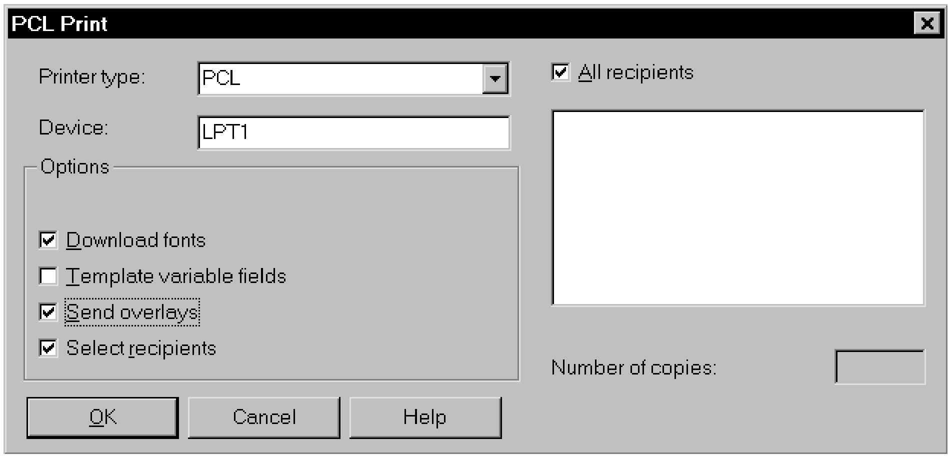
2 Click the Export Data field to export the form set data. The export formats you can choose appear below the field.

NOTE: This topic discusses exporting data and information from form sets. To export data from specific variable fields, see Using the Field-only Export Option on page 76.

3 Choose an export format. A brief description of your options appears below.

To export the data to a file that can be...	Choose
Imported by the system.	Export Version 2
Used in other applications. This type of export file contains form (or policy) information along with the data.	Standard Export
Used in other applications. This type of export file contains data only; there is no form (or policy) information included.	Export No Header
Imported into Documaker. This format combines WIP, NAFILE, and POLFILE information. This option must be installed by the system supervisor.	Full Document Export

4 Click Ok. If you choose to print, archive and export simultaneously, the system displays a print window.



Printer type: PCL

Device: LPT1

Options

☑ Download fonts

☐ Template variable fields

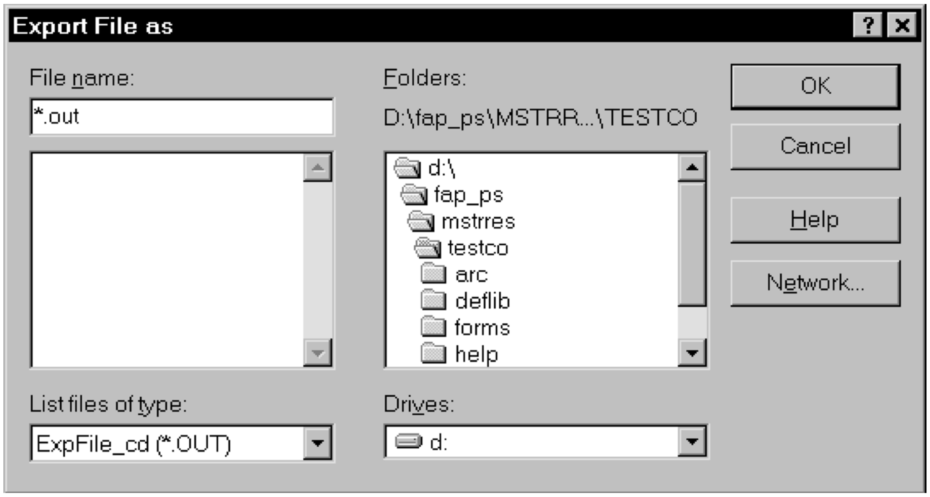
☑ Send overlays

☑ Select recipients

☑ All recipients

Number of copies:

5 Select the appropriate print options and click Ok. The Export File As window appears. See Printing Form Sets on page 115, for specific information on printing form sets.



File name: *.out

Folders: D:\fap_ps\MSTRR...\TESTCO

- d:\
  - fap_ps
    - mstrres
      - testco
        - arc
        - deflib
        - forms
        - help

List files of type: ExpFile_cd (*.OUT)

Drives: d:

6 Type or select the export data file in the File Name field. By default, the export file is placed in the working directory. In the appropriate fields, you can change the drive and directory, if required.

7 Click Ok. The system prints and archives the form set, based on your selections, and creates an export file containing the form set data.

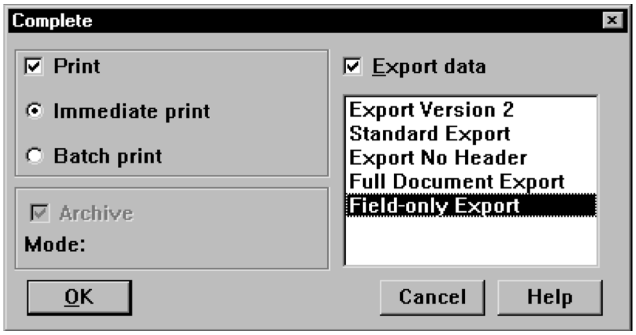
USING THE FIELD-ONLY EXPORT OPTION

The standard export feature outputs all form and field information contained in a form set. In some cases, you may want to extract only certain field information (like accounting data) from the form set without having to wade through all the field and header information included in the standard export. If installed, you can use the Field-only export option to limit the exported output to specific fields.

Your system supervisor must first install the Field-only export option onto your system. Once installed, you can create an export file which contains only the information you want. After your system supervisor installs this export method, the Field-only export option appears on the Complete Formset window, along with the other export options.

In general, this export method lets you specify which fields should be written to the export file. Each field is located by name, regardless of which form (or section) contains the information. Rather than output the same field and data numerous times, this export option only writes the first occurrence of any specified field in the form set.

Once installed, the option appears as a choice in the Export list, as shown below.



☑ Print
● Immediate print
○ Batch print
☑ Archive
Mode:
☑ Export data
Field-only Export

Choosing this option tells the system to write to the export file those fields specified in the ExportFields INI control group.

Chapter 5

Using the Text Editor

This chapter discusses using the Text Editor. The Text Editor appears when you enter or edit data in a *multi-line text field* on the Entry window.

A multi-line text field differs from other variable fields in that it lets you enter a large block of free-form text, and its content is limited only by the size of the area, which can optionally grow or shrink as necessary. The size of the text area is set up by the person who created the section.

Use the Text Editor to enter and format the text, find and replace text, check spelling, and insert text from another file. If you have worked with word processing packages, many Text Editor options will be familiar to you.

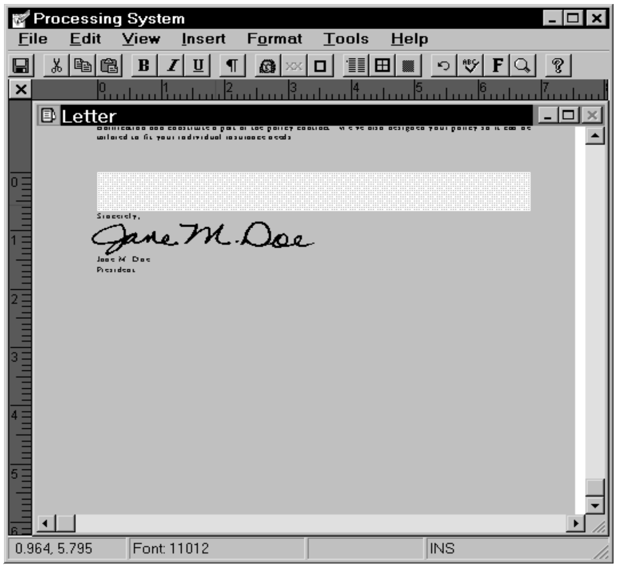
This chapter discusses...

- Using the Text Editor Menus on page 78
- Using Paragraph Assembly on page 82
- Inserting Breaks, Files, and Boxes on page 86
- Formatting Text on page 90
- Adding Color to Text on page 102
- Checking Your Entries on page 104
- Using the Find/Replace Option on page 111
- Using Help on page 112
- Shortcuts for Formatting Text on page 113

Remember, the Text Editor is available only for multi-line text fields. Additionally, you may have the option of using Microsoft Word to enter text. See Using Microsoft Word For Text Entry on page 70 for more information.

Using the Text Editor Menus

The system displays the Text Editor Entry window when you begin typing in a multi-line variable field or press F3. The Text Editor menu appears at the top of the window. This menu provides text entry and formatting options.


Processing System
File
Edit
View
Insert
Format
Tools
Help
Letter
Sincerely,
Jane M. Doe
President
0.964, 5.795
Font: 11012
INS

The following tables describe the Text Editor menu options.

NOTE: The system provides a way to customize Text Editor menus and toolbars. This manual discusses the default menus and toolbar. If your system differs, or if you want to customize this menu, contact your system supervisor.

File menu options

This option…	Lets you…
Exit	Return to the form. Changes are saved automatically.

Edit menu options

This option…	Lets you…
Undo	Cancel or reverse your last action or choice.
Copy	Make a copy of the highlighted section and place it on the clipboard. Use Paste to insert the selection.
Cut	Remove the highlighted selection and place it on the clipboard. Use Paste to insert the selection.
Paste	Insert the contents of the clipboard.
Paste RTF	Insert the contents (in RTF format) of the clipboard.
Delete	Delete selected text.

This option…	Lets you…
Select	Select and deselect text or columns. Click cHaracter, Word, Line, Paragraph, Column, or All to highlight the appropriate text, or click Deselect to remove highlighting from selected text.
Bold	**Bold** selected text.
Italic	*Italicize* selected text.
Underline	Underline selected text.
Strike-out	~~Strike-out~~ selected text.
Do Not Hyphenate	Tell the system not to hyphenate the selected text. You can use the Hyphenation option on the Paragraph window (Tools, Paragraph) to set hyphenation for a paragraph. Select this option again to deselect it.
Do Not Break	Tell the system not to break the text label or embedded field your cursor is in. Select this option again to deselect it.
Color	Add color to selected text. Highlight the text you want to color, then choose this option. If you select a color with no text highlighted, the text you enter next appears in the selected color. If you have a color printer and if you select the Print in Color option on the Color window, the text prints in the color you selected. See the Documaker Desktop Administration Guide for information about the correct INI setting.

View menu options

This option…	Lets you…
Zoom	Zoom in or out.
Status Line	Display or hide the status line. The status line tells you the X (horizontal) coordinate and baseline Y (vertical) coordinate of your cursor. The X coordinate is the location of your cursor in relation to the left-hand margin of the section. The baseline coordinate is the location of your cursor in relation to the top margin of the section, not the Text Editor entry window. The status line also shows you the current font ID. The system defaults this option to *on*.
Nonprinting Tokens	Display or hide formatting symbols such as paragraph markers and tab markers.
Rulers	Display or hide the horizontal and vertical rulers.
Title bar	Display or hide title bars for each form you display.
Toolbar	Display or hide the toolbar. The system defaults this option to *on*.

This option…	Lets you…
Refresh	Refresh the window to ensure that the current window shows all changes and additions.
Reformat	Reformat the text. Use after you have made significant formatting changes.
Level Columns	Balance the distribution of text in columns. You must first check the Automatic Column Leveling field in the Columns window (Format, Columns) to use this option.

Insert menu options

This option…	Lets you…
Break	Insert a line, page, or column in the text area at the point where you've placed your cursor. After you create columns, use the Column Break option to move to the next column.
File	Insert a file into the text area.
Logo	Add a graphic file, such as a logo or signature to the text area.
Box	Draw a box in the text area.

Format menu options

This option…	Lets you…
Font	Select or change fonts.
Paragraph	Set indentations, spacing, hyphenation, pagination, and justification for paragraphs.
Tab Stops	Set tab stops and select the type of tab leaders you want to use, such as periods, dashes, or underscores.
Border	Place a border around the selected paragraphs.
Shade	Place a shaded background behind the paragraphs.
Bullets and Numbering	Insert a bulleted or numbered list.
Columns	Split the text into newspaper style columns.

Tools menu options

This option…	Lets you…
Spell Check	Check spelling in the text area and add words to your user dictionary.
Spelling Options	Set spell check options such as language, whether or not to ignore capital letters, and so on.
Find/Replace	Locate words, phrases, or character strings in the text area and, if necessary, replace the text.

This option…	Lets you…
Grammar Check	Check grammar and for commonly misused words.
Grammar Options	Specify what you want the system to check for, such as syntax errors, misused words, cliches, and so on.
Language	Select the appropriate language for the spell checker.

Help menu options

This option…	Lets you…
Contents	View the contents of the help menu and jump directly to other help options.
How To	Quickly view instructions for performing user tasks.
Shortcuts	View keyboard shortcuts for menu options.
Glossary	View definitions of system terms.
Using Help	Get help finding the topic you need to view.
Product Information	View product information such as version and patch information.

USING PARAGRAPH ASSEMBLY

The system contains an automatic paragraph assembly option. The form creator can create paragraph blocks in a table, which you can use while entering information.

Paragraph blocks created for assembly are usually model or *stock* text appearing on a particular form, such as a disclaimer or general insurance information. You can select and assemble paragraphs in an order that is specific to the form set. After you assemble paragraphs, you can edit the text to meet your particular needs.

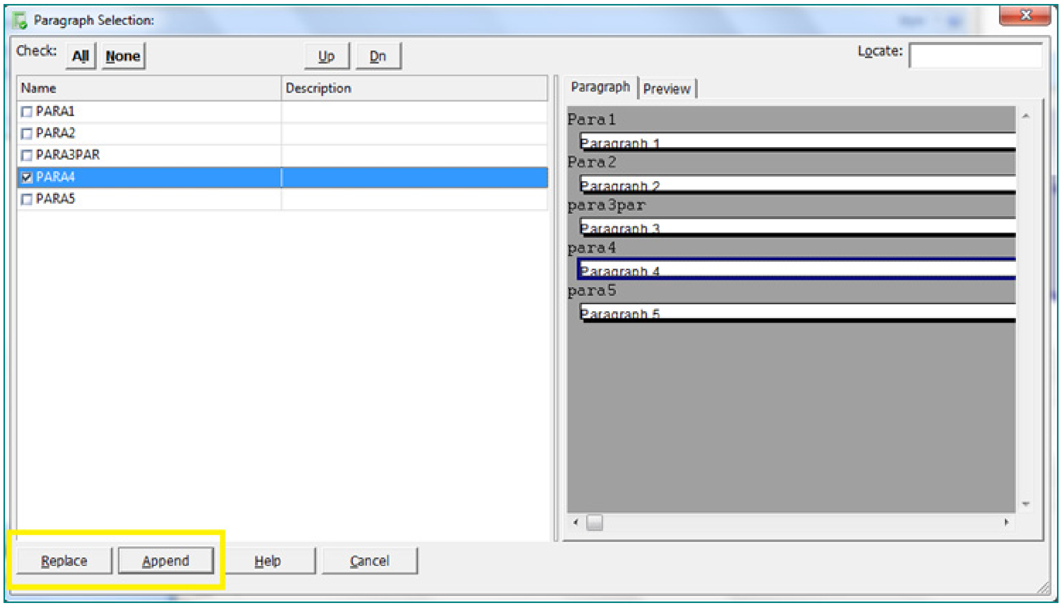
You get to the paragraph blocks from a multi-line text variable field.

NOTE: A section's creator can restrict paragraph selection to one item only. In that case, the user will only be able to select one paragraph from the list for insertion into the text area. Additionally, if the section's creator has marked a paragraph as No User Edit, the text is protected from any changes by the user during entry.

ASSEMBLING PARAGRAPHS

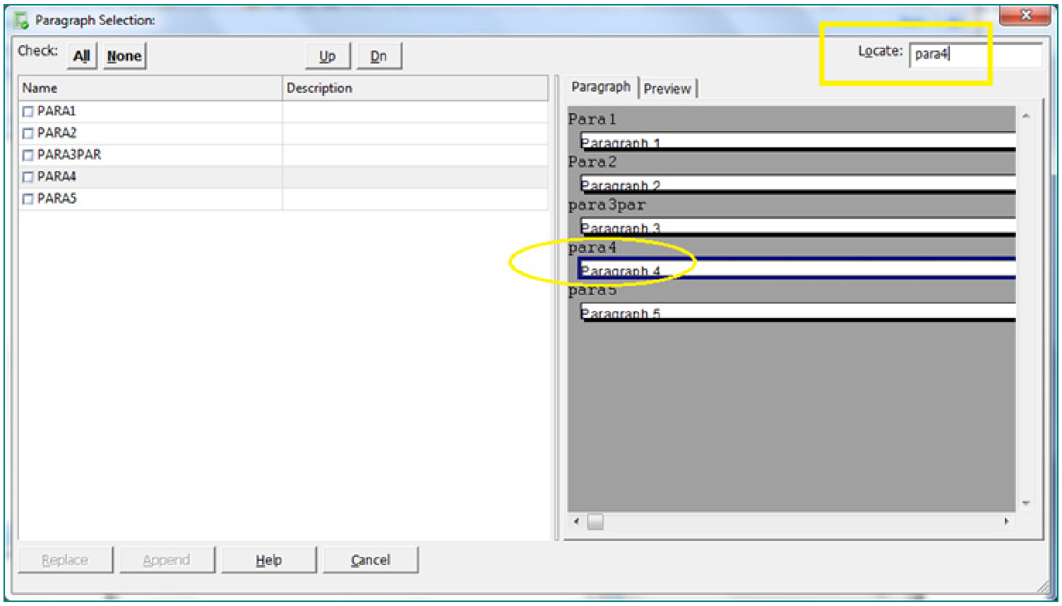
To assemble paragraphs:

1. Place your cursor in the multi-line text variable field from which paragraph assembly is available. The Paragraph Selection dialog appears. The Paragraph Selection dialog also displays when you tab into a multi-line text field defined for paragraph assembly. See Creating Paragraphs and Paragraph Lists in the Documaker Studio User Guide.
2. The creator of a section can control paragraph display in the Paragraph Selection window - by Name only (only the Paragraph Name is shown); by Description only (only the Paragraph Description is shown); by Description then Name or by Name then Description. Select the paragraph in the available Paragraph List that you want to associate to the multi-line text field.. You can select the desired paragraph(s) using the check boxes. You can also Select or Deselect all the paragraphs by clicking All or None buttons respectively. To organize the placement of the paragraphs within the multi-line text field, click the paragraph in the Selected Paragraphs List that you want to move, then click Up to place your selected paragraph before the paragraph above it, or Dn to place your selected paragraph after the paragraph below it.
3. Click the Append button to place or add your assembled paragraphs in the multi-line text field. Click the Replace button to replace the existing text with your assembled paragraphs in the multi-line text field. The system displays the assembled paragraphs in the multi-line text field.


Paragraph Selection:
Check: All None
Up Dn
Locate:
Name
Description
Paragraph
Preview
Para1
Paragraph 1
Para2
Paragraph 2
para3par
Paragraph 3
para4
Paragraph 4
para5
Paragraph 5
Replace
Append
Help
Cancel

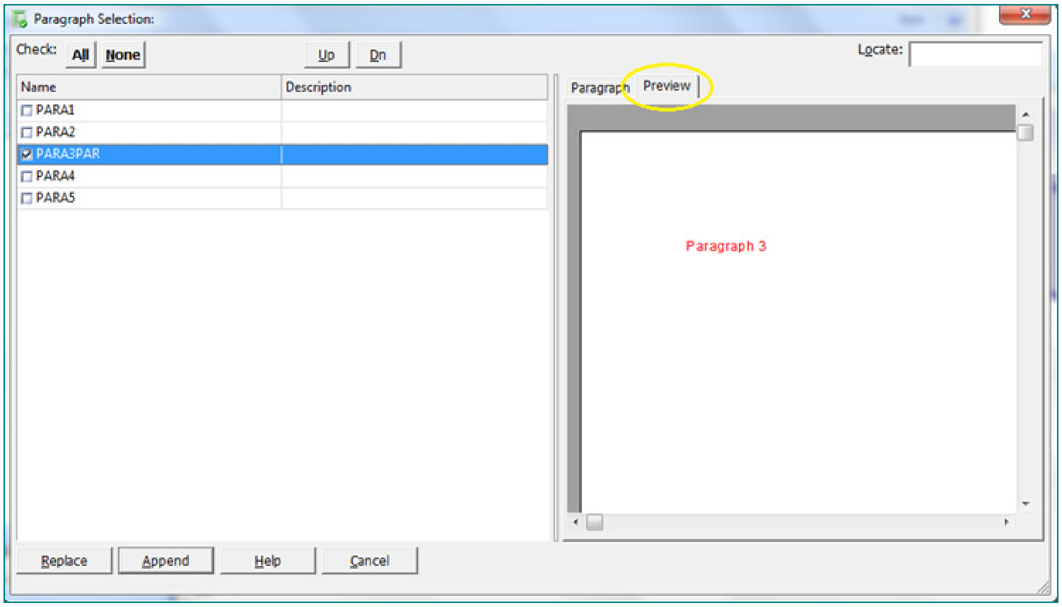
☐ PARA1
☐ PARA2
☐ PARA3PAR
☑ PARA4
☐ PARA5

4 To locate a paragraph quickly, enter the first few letters of the paragraph name in the Locate field. The paragraph is highlighted in the available Paragraphs List.

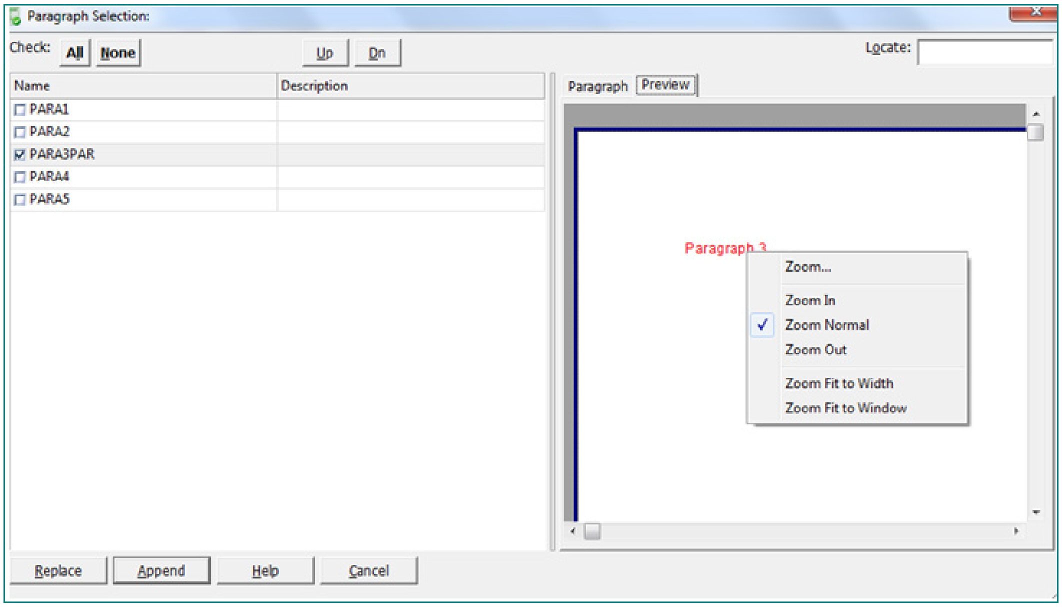

Paragraph Selection:
Check: All None
Up Dn
Name
Description
PARA1
PARA2
PARA3PAR
PARA4
PARA5
Paragraph
Preview
Para1
Paragraph 1
Para2
Paragraph 2
para3par
Paragraph 3
para4
Paragraph 4
para5
Paragraph 5
Replace
Append
Help
Cancel

Locate: para4

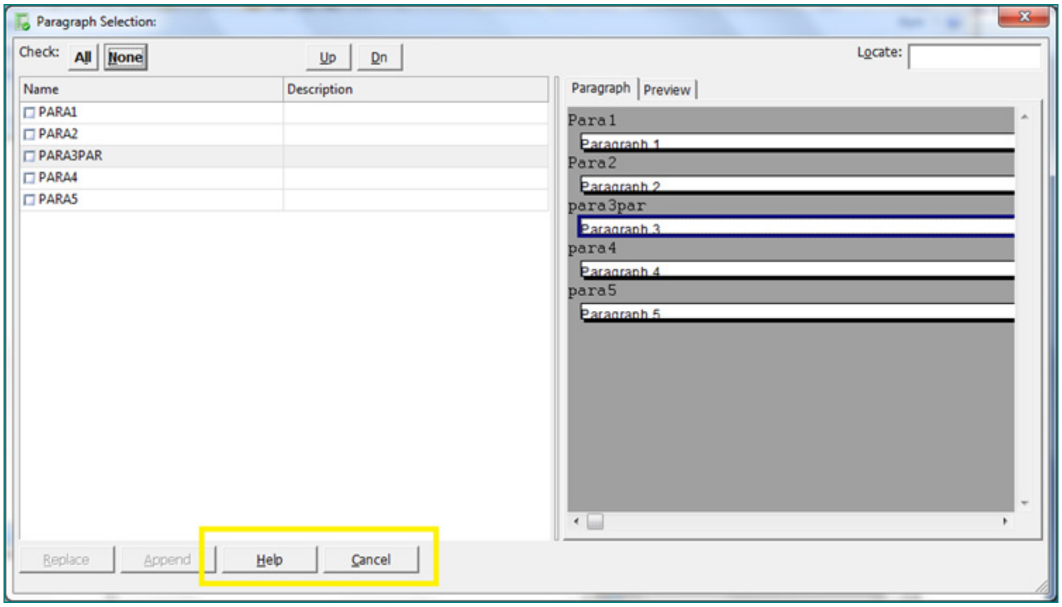
5 You can also preview the selection in the Preview pane.


Paragraph Selection:
Check: All None
Up Dn
Locate:
Name
Description
☐ PARA1
☐ PARA2
☑ PARA3PAR
☐ PARA4
☐ PARA5
Paragraph
Preview
Paragraph 3
Replace
Append
Help
Cancel

6 You can also Zoom In/Out and use various other zoom options in the Preview tab. Right-click on the paragraph text within the Preview tab to get the right click menu listing all the zoom options.


Paragraph Selection:
Check: All None
Up Dn
Locate:
Name
Description
☐ PARA1
☐ PARA2
☑ PARA3PAR
☐ PARA4
☐ PARA5
Paragraph
Preview
Paragraph 3
Zoom...
Zoom In
✓ Zoom Normal
Zoom Out
Zoom Fit to Width
Zoom Fit to Window
Replace
Append
Help
Cancel

7 To close the Paragraph Selection dialog you can click the Cancel button. To know more about Paragraph Selection dialog you can click the Help button.



Name	Description
☐ PARA1	
☐ PARA2	
☐ PARA3PAR	
☐ PARA4	
☐ PARA5	

Para1
Paragraph 1
Para2
Paragraph 2
para3par
Paragraph 3
para4
Paragraph 4
para5
Paragraph 5

Users are prevented from manually editing the multi-line text field beyond paragraph selection if the No Editing paragraph property has been enabled on the multi-line text field.

Keep in mind that you can -

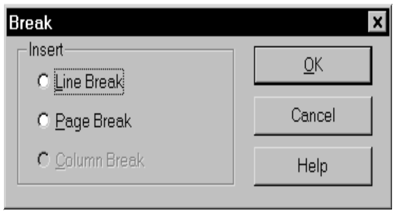
- Preview your selection(s) in the preview tab.
- Quickly jump to a paragraph by typing a few characters of the paragraph's name in the Locate field. The system will then highlight the closest match.
- Click All to select multiple paragraphs. Individual paragraphs can be selected by clicking the checkbox against the paragraph names. Click None to deselect all paragraphs. Click Up or Dn to move the paragraphs up or down respectively.
- The system remembers the changes made to the size and location of the Paragraph Selection window.
- Sort the paragraphs in the Available list. To change the sort order, click on the column heading. Initially, the system sorts the paragraphs by name, in ascending order. If you click on the Description column heading, the system then sorts the paragraphs by their description, in ascending order.

INSERTING BREAKS, FILES, AND BOXES

Insert options let you place text breaks, text files, graphics, and boxes in the text area. You choose the appropriate insertion point for these options. Insert page, column, or line breaks to change the formatting and flow of your text. Insert text files to save text entry time. You can insert graphics to help draw attention to specific information or as a way to add a signature. Insert boxes to highlight specific text.

INSERTING A BREAK

The Break option lets you insert a line, page, or column break at any point in the text area. To insert a break, place your cursor where you want to insert a break, then choose Insert, Break. The Break window appears:

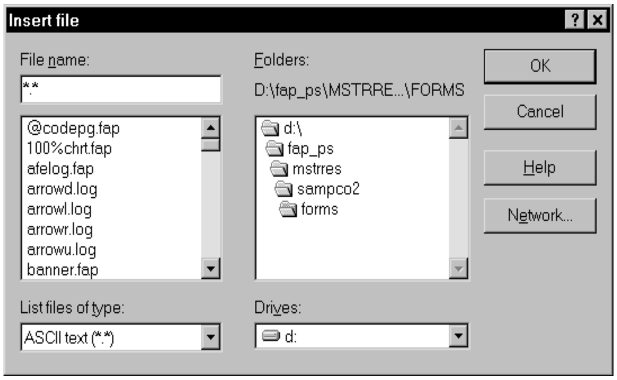

Break
Insert
○ Line Break
○ Page Break
○ Column Break
OK
Cancel
Help

Click Line, Page, or Column Break to insert the break in the text area. Click Ok. You return to the text area.

INSERTING A FILE

The File option lets you insert an entire file into the text area. By inserting a file, you eliminate the need to re-enter text and save time. You can insert a file in ASCII format into the text area.

To insert a file, place your cursor where you want to insert a file; then, choose Insert, File. The Insert File window appears:


File name: *.*

Folders: D:\fap_ps\MSTRRE...\FORMS

List files of type: ASCII text (*.*)

Drives: d:

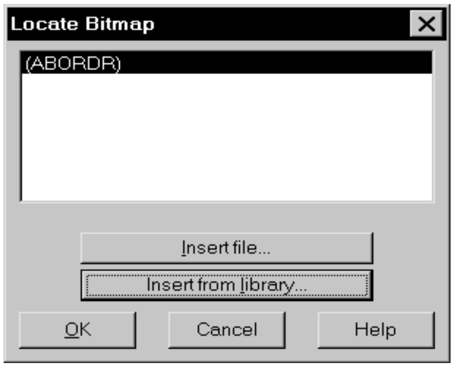
Insert file
?
@codepg.fap
100%chrt.fap
afelog.fap
arrowd.log
arrowl.log
arrowr.log
arrowu.log
banner.fap
d:\
fap_ps
mstrres
sampco2
forms
OK
Cancel
Help
Network...

The system defaults to the drive and directory where it stores your forms. Select the file you want to insert and click Ok. The file you selected is inserted at your cursor point.

INSERTING A GRAPHIC

The Logo option lets you insert a graphic (LOG file) into the text area. You insert graphics from a system bitmap file, which ends in a LOG extension.

To insert a graphic, place your cursor where you want to insert a graphic, choose Insert, Logo. The Locate Bitmap window appears:



Select the graphic you want, then click Ok. The graphic is inserted in the text area.

NOTE: The first time you select Insert, Logo the Locate Bitmap window is empty. See the following topic for information on how to insert LOG files in this window. After you add LOG files, they remain available throughout your work session.

Adding a Graphic to the Locate Bitmap Window

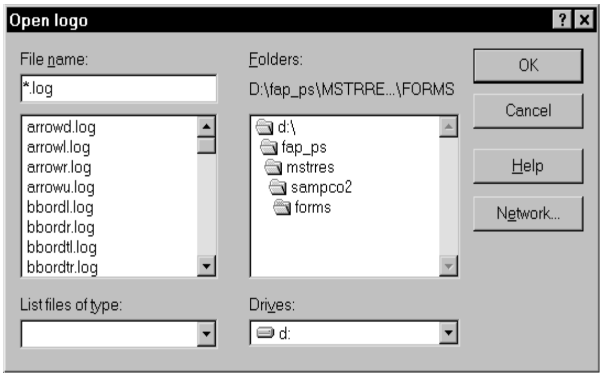
To add a graphic to the Locate Bitmap window, you can insert a file or you can insert from a library. When you insert a file, you are adding the original LOG file.

NOTE: You cannot insert a LOG file from a library if you have not set up Library Manager files.

Inserting a graphic

Follow these steps to insert a graphic (LOG file):

1. Click Insert File to display this Open Logo window:


Open logo
OK
Cancel
Help
Network...
arrowd.log
arrowl.log
arrowr.log
arrowu.log
bbordl.log
bbordr.log
bbordtl.log
bbordtr.log
d:\
fap_ps
mstrres
sampco2
forms
List files of type:

File name: *.log

Folders: D:\fap_ps\MSTRRE...\FORMS

Drives: d:

2 Type the file name in the File Name field or select a file from the list. Change the drive and directory if necessary.

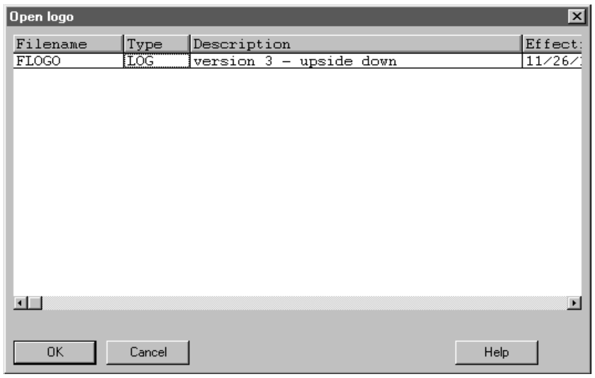
3 Click Ok. The file is inserted in the Locate Bitmap window. Any file you add to the Locate Bitmap window remains there and is available throughout your work session.

4 Within the Locate Bitmap window, select the graphic and then click Ok. The system inserts the graphic into the text area.

Inserting a graphic from a library

Follow these steps to insert a graphic (LOG file) from a library:

1 From the Locate Bitmap window, click Insert From Library. The Open Logo window appears:


Open logo
OK
Cancel
Help

Filename	Type	Description	Effect:
FLOGO	LOG	version 3 – upside down	11/26/

2 Select the graphic (LOG file) you want. Click Ok. The LOG file is inserted into the Locate Bitmap window. Once you add LOG files to this window, they remain available throughout your work session.

3 Repeat steps 1 and 2 for each LOG file version you want to list in the Locate Bitmap window.

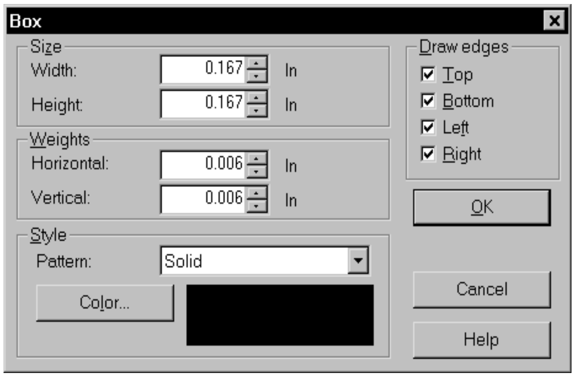
4 From the Locate Bitmap window, select the graphic you want to insert and click Ok. The system inserts the graphic into the text area.

INSERTING A BOX

The Box option lets you insert a box into the text area. You can place a box within the text area to emphasize specific text. You can use different line weights and patterns for the edges of the box.

Follow these steps to insert a box:

1 Place your cursor where you want to insert a box, then choose Insert, Box. The Box window appears:



Box
Size
Width: 0.167 In
Height: 0.167 In
Weights
Horizontal: 0.006 In
Vertical: 0.006 In
Style
Pattern: Solid
Draw edges
☑ Top
☑ Bottom
☑ Left
☑ Right

2 Type or select the width and height of the box in the Size field.

3 Type or select the weights for the horizontal and vertical box lines in the Weights field.

4 Select the line pattern in the Pattern field. Fifteen patterns are available. Click the drop down arrow to see the complete list of available patterns.

5 Click Color to display the color window. Click the line color and click Ok. You return to the Box window.

6 Click Top, Bottom, Left, or Right in the Draw Edges field to select the sides of the box you want to display. Click Ok. The box is inserted in the text area and you return to the Text Area Entry window.

FORMATTING TEXT

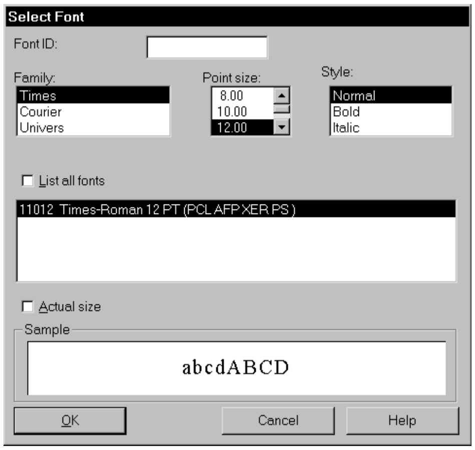
Format options let you assign a full range of fonts to the text within your multi-line text variable field. You can also format the text by using alignment and indentation options, borders and shading, or by creating columns.

CHOOSING A FONT

Font options let you apply various fonts to text within a multi-line text area. The creator of the section chooses the font set for the section and determines the available fonts. If you do not select a new font, the system applies the default font.

To choose a font:

1 Select Format, Font. The Select Font window appears.



11012 Times-Roman 12 PT (PCL AFP XER PS)

abcdABCD

2 Select the font you want to use. You can select a font several ways:

- Enter the font ID in the Font ID field
- Select the font family in the Family field and then select the size and style in the Point Size and Style fields.
- Click the font you want in the list of fonts. Click the List all fonts field to see all available fonts.

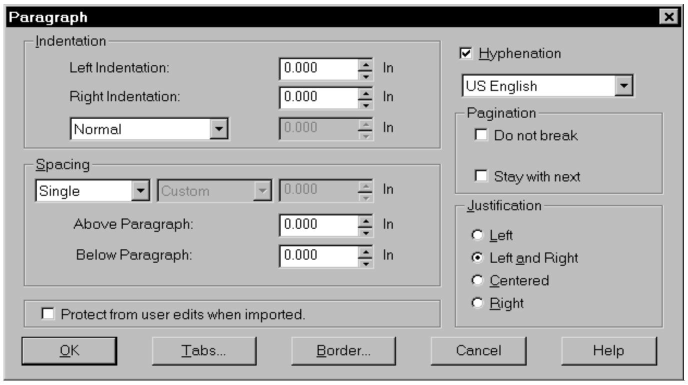
The system shows you a sample of the font in the Sample field. Click the Actual Size field to view the point size you selected.

3 Once you select the font you want, click Ok. You return to the Text Editor window.

FORMATTING A PARAGRAPH

The Paragraph option lets you format complete paragraphs or highlighted blocks of text within the text area. You can apply justification, indentation, and line spacing options. Justification and indentation options are relative to the left and right margins of the text area.

To apply Paragraph options, place your cursor within the paragraph you want to format or highlight a block of text, then choose Format, Paragraph. The Paragraph window appears:



Paragraph

Indentation

Left Indentation: 0.000 In

Right Indentation: 0.000 In

Normal 0.000 In

Spacing

Single Custom 0.000 In

Above Paragraph: 0.000 In

Below Paragraph: 0.000 In

☐ Protect from user edits when imported.

☑ Hyphenation

US English

Pagination

☐ Do not break

☐ Stay with next

Justification

○ Left

● Left and Right

○ Centered

○ Right

1 Type or select the indentation in the Left and Right Indentation fields. The minimum available indentation spacing is .01 inches.

2 Select one of the following indentation options in the Indentation field.

If you want the paragraph formatted so the...	Select...
Left margin is justified	Normal
First line hangs to the left of the remainder of the paragraph. *This is an example of a paragraph with* *hanging indentation.*	Hanging
First line is indented, the remainder of the paragraph is left justified. *This is an example of a paragraph with* *first line indentation.*	First Line

If you selected Hanging or First Line, type or select the indentation length in the Indentation Units Field to the right.

3 Use the Spacing field to determine how much space is placed between lines of text in the text area. For example, you can choose to single or double your text or you can set up a custom spacing setting if you like. Here is a summary of your options:

If you want	Choose
The line spacing to be determined by the font size.	Single
The line spacing to be determined by the font size with one blank line between each line of text.	Double

If you want	Choose
To specify the exact line spacing.	Exactly
The line spacing to be at least the value you enter. This means that the line spacing can be more than the entered value, but not less.	At least
The line spacing to be based on the multiple you enter in the Times field.	Multiple

NOTE: If you select Exactly or At least, you must specify the amount of spacing. You can choose from 6, 7, or 8 lines per inch (LPI) or select Custom and enter a specific value.

4 Type or select the amount of spacing you want to appear above and below the paragraph. This determines the amount of white space above the first line and below the last line of your paragraph.

5 Check the Hyphenation field if you want the system to hyphenate words for you. Remove this check if you do not want the system to split words. You can specify a language for hyphenation rules if necessary.

6 Use the Pagination options to specify whether or not you want the system to break this paragraph if nears the end of the page or if you want to keep this paragraph with the next paragraph.

7 Click the Left, Left and Right, Centered, or Right option to select the justification.

8 If you want to set tabs or add a border, use the following buttons:

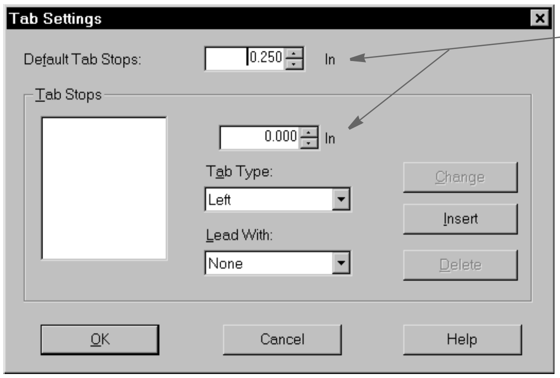
Click...	Then...
Tabs	On the Tabs window, click the tab stops you want and click OK. You return to the Paragraph window. (See the topic below for a complete explanation of tab selections.)
Border	On the Border window, click the border you want and click OK. You return to the Paragraph window. (See the topic below for a complete explanation of border selections.)

Click Ok to apply your text paragraph formatting. You return to the Text Area Entry window.

SETTING TAB STOPS

The Tab Stops option lets you set the default tab stops for the text area. You can also define specific tab stops of varying lengths and select the type of leaders (periods, dashes, underscores, or none) for tabs.

To select tab stops, choose Format, Tab Stops. The Tab Settings window appears:



If you are using a different unit of measure, such as centimeters, the names of these fields will change accordingly.

Setting default tab stops

Follow these steps to set up default tab stops. You can later customize these tab stops as necessary.

1. Type or select the default length for tab stops in the Default Tab Stops field.
2. Click Ok. You return to the Text Area Entry window.

Setting custom tab stops

Follow these steps to set up custom tab stops.

1. Select a tab length in inches in the In (inches) Field. If you are using a different unit of measure, such as centimeters, this field will have a different name.
2. Select a tab type in the Tab Type field. You can choose a left, right, center, or decimal tab type.

   If desired, select a leader in the Lead With field. You can select periods, dashes, underscores, or none to precede the tab stop.
3. Click Insert. Your new tab stop appears in the Tab Stops list to the left. You can add as many tab stops as necessary. Click Ok to return to the Text Area Entry window.

Changing tab stops

Follow these steps to change tab settings:

1. Click the tab stop you want to change in the Tab Stops list.
2. Make the appropriate changes in the In (inches), Tab Type, and Lead With fields.
3. Click Change. The Tab Stops list shows you the new tab stop length.
4. Click Ok. You return to the Text Area Entry window.

Deleting tab stops

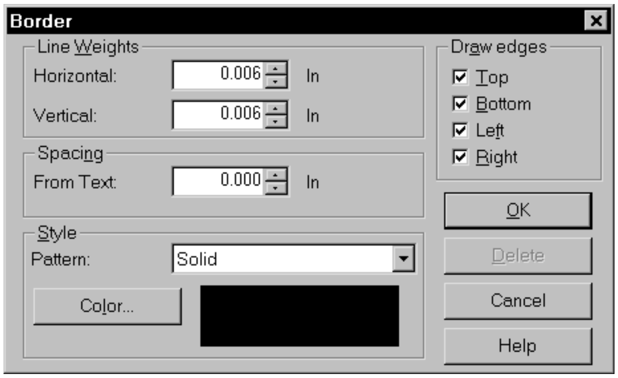
Follow these steps to delete tab stops:

1. Click the tab stop you want to delete in the Tab Stops list.
2. Click Delete. The tab stop is removed from the list.
3. Click Ok. You return to the Text Area Entry window.

ADDING BORDERS

Border lets you place a border around selected text. Use a border to draw attention to text or to segment specific information.

To place a border around text, place your cursor in the paragraph you want to format or highlight a block of text; then, choose Format, Border. The Border window appears:



Horizontal: 0.006 In
Vertical: 0.006 In
From Text: 0.000 In
Pattern: Solid
☑ Top
☑ Bottom
☑ Left
☑ Right

1 Type or select the line weights for the horizontal and vertical borders in the Line Weights field. Horizontal line weights can vary from vertical line weights.

2 Select Top, Bottom, Left, Right, or any combination thereof, in the Draw Edges field. Draw Edges determines where the border appears around the text.

3 Type or select a value in the From Text field to determine the distance between the border and the text.

4 Select a pattern in the Pattern field.

5 Click Color to select a color for the border. Select a color in the color field and click Ok. You return to the Border window.

6 Click Ok. You return to the text area.

Deleting a border

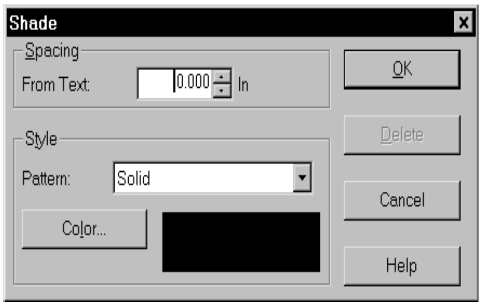
Follow these steps to delete a border:

1. Highlight the area from which you want to delete the border.
2. Open the Border window.
3. Click Delete.
4. Click Ok. The border is removed and you return to the text area.

ADDING SHADE

Shade lets you place shading behind selected text. You shade text to draw attention to it, to segment specific information, or to create contrast on your page.

To shade text, place your cursor within the paragraph you want to format or highlight a block of text, then choose Format, Shade. The Shade window appears:


Shade

Spacing

From Text: 0.000 In

Style

Pattern: Solid

1. Type or select a value in the From Text field to determine the vertical distance between the shading and the text.
2. Select a pattern in the Pattern field.
3. Click Color to select a color for the shading. Select a color in the color field and click Ok. You return to the Shade window.
4. Click Ok. You return to the Text Area Entry window.

Removing shading

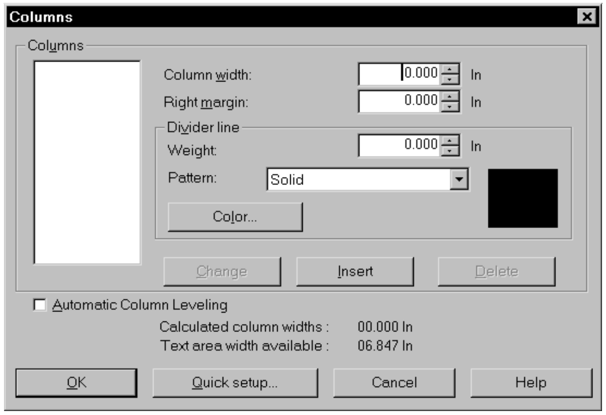
Follow these steps to remove shading:

1. Highlight the area from which you want to delete the shading.
2. Display the Shade window.
3. Click Delete.
4. Click Ok. You return to the Text Area Entry window.

ADDING COLUMNS

Columns lets you place columns in the text area. You can use newspaper style columns in your text area. Text flows from one column to another. Columns can be of equal or unequal widths. Use columns to create a professional and easy to read appearance for large amounts of text.

To create columns, choose Format, Columns. The Columns window appears:

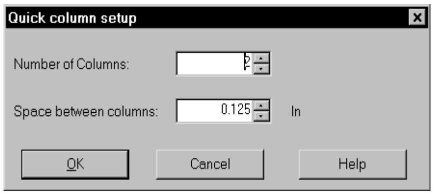


Column width: 0.000 In
Right margin: 0.000 In
Weight: 0.000 In
Pattern: Solid
☐ Automatic Column Leveling
Calculated column widths : 00.000 In
Text area width available : 06.847 In

Setting up columns using the Quick Setup option

Follow these steps to quickly set up columns:

1 Click Quick Setup. The Quick Column Setup window appears.



Number of Columns: 2
Space between columns: 0.125 In

2 Type or select the total number of columns you want in the text area in the Number of Columns field.

3 Type or select the distance between columns in the Space Between Columns field.

NOTE: You must enter a distance or the columns are positioned directly adjacent, with no space between them.

---

4 Click Ok. You return to the Columns window. To insert a line to the right of a column in the list, click the column, then enter the divider line weight in the Weight field.

5 Select the divider line pattern in the Pattern field. Fifteen patterns are available. Click the drop down arrow to see the complete list of available patterns.

6 Click Color to display the Color window. Click the Default check box to remove the check mark and then click the line color. Click Ok. You return to the Columns window.

7 Click Change to save the divider line selections.

8 Click Automatic Column Leveling to balance the text distribution between columns. Click OK. You return to the Text Area Entry window.

NOTE: Your calculated column widths and the text area's total available width appear at the bottom of the Columns window.

Setting up individual columns

Follow these steps to set up each individual column:

1 Enter the width for the first column in the Column Width field.

2 To insert spacing between this column and the next column, enter a value in the Right Margin field.

NOTE: The default is no spacing between columns. You must enter a spacing selection or the columns appear connected.

3 To insert a line to the right of this column, enter the divider line weight in the Weight field.

NOTE: You can place a divider line to the right of every column in the text area, except the last column.

4 Select the line pattern in the Pattern field. Fifteen patterns are available. Click the drop down arrow to see the complete list of available patterns.

5 Click Color to display the Color window. Click the Default check box to turn off the check mark, then click the line color. Click Ok; you return to the Columns window.

6 Click Insert. Your first column appears in the list window.

NOTE: Repeat steps 1-6 for each column you want to create in the text area.

7 Click Automatic Column Leveling to balance the text distribution between columns. Click Ok. You return to the Text Area Entry window.

Changing column settings

Follow these steps to change column settings:

1. In the Columns list, click the column you want to change.
2. Make the changes in the Column Width, Space to Right, and Divider Line Weight fields.
3. Click Change.
4. Click Ok. You return to the Text Area Entry window.

Deleting columns

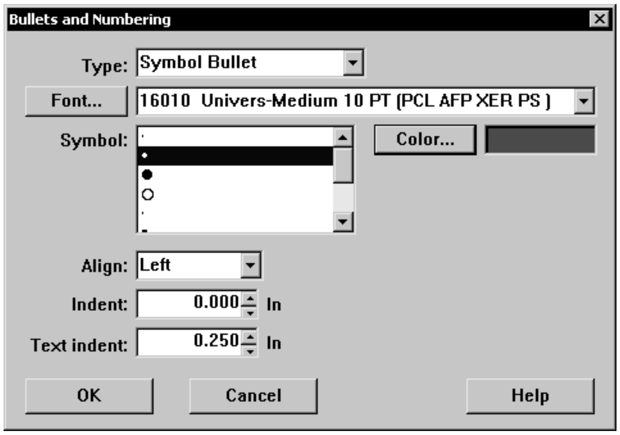
Follow these steps to delete columns:

1. In the Columns list, click the column you want to delete.
2. Click Delete.
3. Click Ok. You return to the Text Area Entry window.

CREATING A BULLETED LIST

To create a bulleted list, follow these steps:

1. Place the cursor where you want the bulleted list to begin, then choose the Format, Bullets and Numbering option. The Bullets and Numbering window appears.



Type: Symbol Bullet
16010 Univers-Medium 10 PT (PCL AFP XER PS)
Align: Left
Indent: 0.000 In
Text indent: 0.250 In

2. Select the type of bullet you want. You can choose from these bullet options:

To use a	Choose
Specific character in a font as the bullet	Font bullet
Symbol character as the bullet	Symbol bullet
Bitmap (graphic) as the bullet	Logo

If you chose a symbol or font bullet, make the appropriate selection in the Character or Font field, respectively. If you chose Logo, click the Logo button to specify the graphic (LOG file) you want to use.

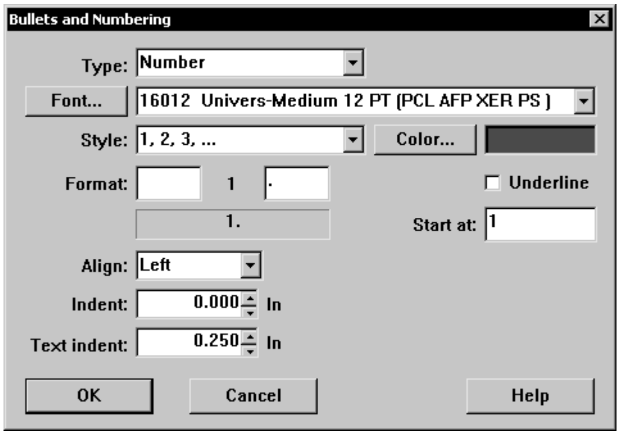
3. Click Color to select the color you want.
4. Use the Align field to specify how you want the bullet positioned along the left margin.
5. Use the Indent field to specify how much the system should indent the bullet from the left margin.
6. In the Text Indent field, specify the distance between the bullet and the text. Your entry here must exceed your entry in the Indent field. When finished, click Ok.
7. Type the text you want for the first item in the list and press ENTER. Continue until you complete the list.

NOTE: To end the bulleted list, choose the Format, Bullets and Numbering option, then select None in the Type field and click Ok.

CREATING A NUMBERED LIST

To create a numbered list, follow these steps:

1. Place the cursor where you want the numbered list to begin, then choose the Format, Bullets and Numbering option. The Bullets and Numbering window appears.



Bullets and Numbering

Type: Number

Font... 16012 Univers-Medium 12 PT (PCL AFP XER PS)

Style: 1, 2, 3, ...

Format: 1 .

1.

☐ Underline

Start at: 1

Align: Left

Indent: 0.000 In

Text indent: 0.250 In

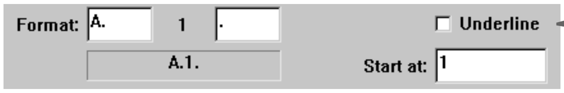
2. In the Type field, choose the Number option. Then choose the font you want in the Font field.
3. In the Style field, select the numbering style. You can choose from these options:
   - 1, 2, 3
   - A, B, C
   - I, II, III
   - a, b, c
   - i, ii, iii

4 Click Color to select the color you want.

5 In the Format field, you can specify a character to precede the number and a character to follow the number (or letter if you chose that style). For instance, to use a style such as

A.1.
A.2.

you would enter:



Format: A. 1 .
A.1.
☐ Underline
Start at: 1

Click here to underline the numbers

6 Use the Align field to specify how you want the number positioned along the left margin. This field is typically used when you are using Roman numerals. For instance, this demonstrates left alignment:

I. Text...

II. Text...

III. Text...

If you right align the same paragraphs, this would be the result:

I. Text...

II. Text...

III. Text...

7 Use the Indent field to specify how much the system should indent the number from the left margin.

8 In the Text Indent field, specify the distance between the number and the character that follows it, if applicable, and the text. Your entry here must exceed your entry in the Indent field. When finished, click Ok.

9 Type the text you want for the first item in the list and press ENTER. Continue until you complete the numbered list.

NOTE: To end the numbered list, choose the Format, Bullets and Numbering option, then select None in the Type field and click Ok.

USING SUPERSCRIPT AND SUBSCRIPT

You can use superscript and subscript fonts in text labels, text areas, and variable fields. The system will automatically:

- Use a point size that is one-half of the current point size
- Position the superscript text above a mid-point line for the current font
- Position the subscript text below the mid-point line for the current font

NOTE: The superscript or subscript font you choose must be in your FXR file.

Select the text you want to superscript or subscript, then choose the appropriate option from the Edit menu. The system tries to choose a smaller font from the FXR using the family name. If a smaller font is not available, the current font is used.

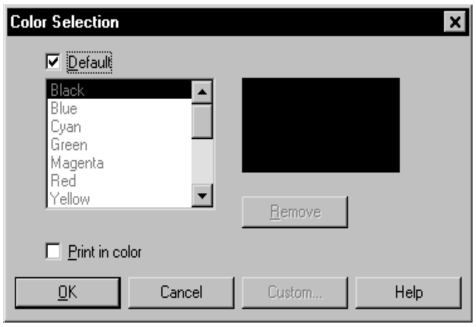
ADDING COLOR TO TEXT

Color lets you add color to selected text. Use a variety of colors to highlight specific words and important information within the text. Color can also be used to segment areas of text.

From the Color window you choose from 16 default palette colors or you create your own color. You can create up to 48 additional colors and add them to the palette. You can remove and replace colors you create. The 16 original colors cannot be removed or replaced.

To color text, follow these steps:

1 Highlight the block of text you want to color; then, choose Edit, Color. The Color Selection window appears:



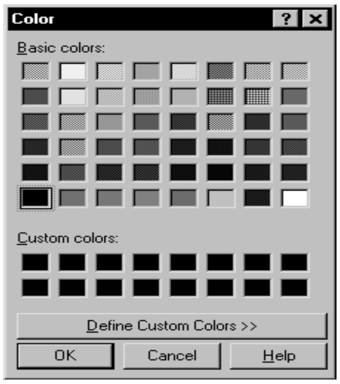
☑ Default

☐ Print in color

Color Selection
Black
Blue
Cyan
Green
Magenta
Red
Yellow
Remove
OK
Cancel
Custom...
Help

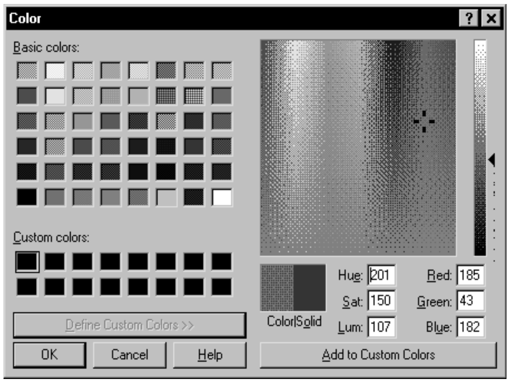
2 To change a color, click the Default field to remove the check mark. This activates the list of available colors and the Custom button.

3 Select a color from the list and click Ok. Or, to choose a custom color, click Custom. The Color window appears.



Color
?
Basic colors:
Custom colors:
Define Custom Colors >>
OK
Cancel
Help

4 If you want a color that is not displayed, click an undefined custom color (usually black); then, click Define Custom Colors. The window extends to a palette where you can create any color you want.



Hue: 201
Sat: 150
Lum: 107
Red: 185
Green: 43
Blue: 182

5 Use your mouse to select the custom color from the color palette and to adjust the slide bar until you achieve your color mix; or, enter the numbers that define the color in the Hue, Sat, Lum, Red, Green, and Blue fields.

6 Double click the solid color to change the split field to a solid color; then, click Add To Custom Colors. Your custom color appears in the custom color box you highlighted earlier.

7 Click Ok. You return to the Color Selection window.

8 Your custom color appears in the sample color field. Click Ok. You return to the Text Editor Entry window.

NOTE: If you make a color selection with no text highlighted, the next text you enter appears in the selected color. If you have a color printer, you can click the Print in Color field in the Color Selection window. Contact your system supervisor for the correct INI setting.

Removing a Custom Color

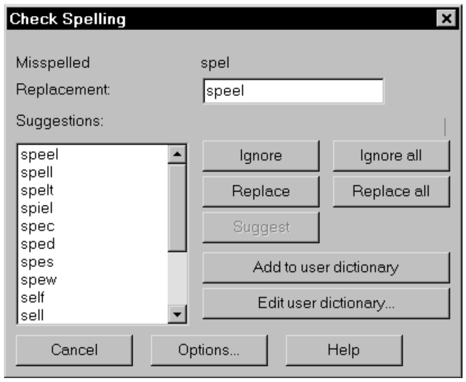
To remove a custom color you defined, click the color to select it; then, click Remove.

CHECKING YOUR ENTRIES

Use the Tools, Spell Check option to check spelling. The Spell Check option offers the ability to add words to the user dictionary which you can apply to any multi-line text area within any section. If you find terms or phrases you want to change, you can use the Tools, Find/Replace option to quickly search and replace text.

CHECKING SPELLING

To check spelling, choose Tools, Spell Check. If the system finds a misspelled word, the Check Spelling window appears:



Misspelled spel
Replacement: speel
Suggestions:
- speel
- spell
- spelt
- spiel
- spec
- sped
- spes
- spew
- self
- sell

To correct the spelling of a word, select the correct spelling from the Suggestions field or click in the Replacement field and type in your own spelling. Then click Replace. You have these other options:

To...	Select...
Skip this word and continue	Ignore
Skip every occurrence of this word	Ignore All
Replace this occurrence of the misspelled word	Replace
Replace every occurrence of the misspelled word	Replace All
Add this word to your custom user dictionary	Add To User Dictionary
Edit your custom user dictionary	Edit User Dictionary
Set spell check options	Options
Return to the Text Editor window	Cancel

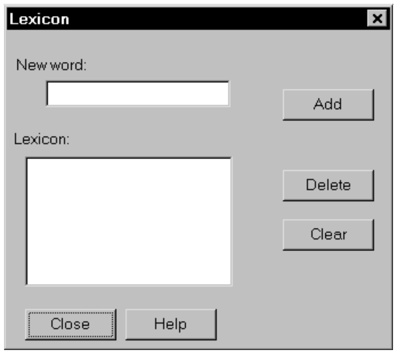
Setting Spell Check Options

From the Check Spelling window, click Options. The Spelling Options window appears. Click any or all of the following:

To...	Select...
Select the language.	Your language in the Language field. The system includes dictionaries for several languages including Afrikaans, Canadian English, Czech, Danish, Dutch, Finnish, French, German, Greek, Italian, Norwegian, Polish, Portuguese, Brazilian Portuguese, Russian, Slovak, Spanish, Swedish, US English, UK English, and Welsh.
Skip capitalized words during spell checks.	Ignore Capitalized Words
Skip words containing numbers during spell checks. For example, the word "Sea2Land" is skipped when this option is active.	Ignore Words with Numbers
Skip words with both upper- and lowercase during spell checks.	Ignore Words with Mixed Case
Locate words with both upper- and lowercase letters during spell checks.	Report Words with Mixed Case
Check letters on both sides of an apostrophe as single words during spell checks.	Treat Apostrophe as Word Separator
Check letters on both sides of a hyphen as separate words during spell checks.	Treat Hyphen as Word Separator
Check for improper capitalization.	Case Sensitive
Check spelling of compound words.	Accept Compound Words
Suggest splitting compound words.	Suggest Splitting Compound Words
Make suggestions based on how the misspelled word sounds when spoken.	Phonetic Suggestions
Make suggestions based on how the word is typed.	Typographical Suggestions
Receive suggestions for each misspelled word during spell checks.	Always Suggest

Editing Your User Dictionary

From the Check Spelling window, click Edit User Dictionary. The Lexicon window appears.


Lexicon
New word:
Add
Lexicon:
Delete
Clear
Close
Help

You have these options:

To...	Click...
Add a word to your dictionary, type the word in the New Word field and	Add
Delete a word from your dictionary, click the word in the Lexicon field and	Delete
Remove all words from the dictionary Warning: Use this selection with care. If you select Clear, you delete *all* words in your user dictionary.	Clear
Exit the Lexicon window	Close

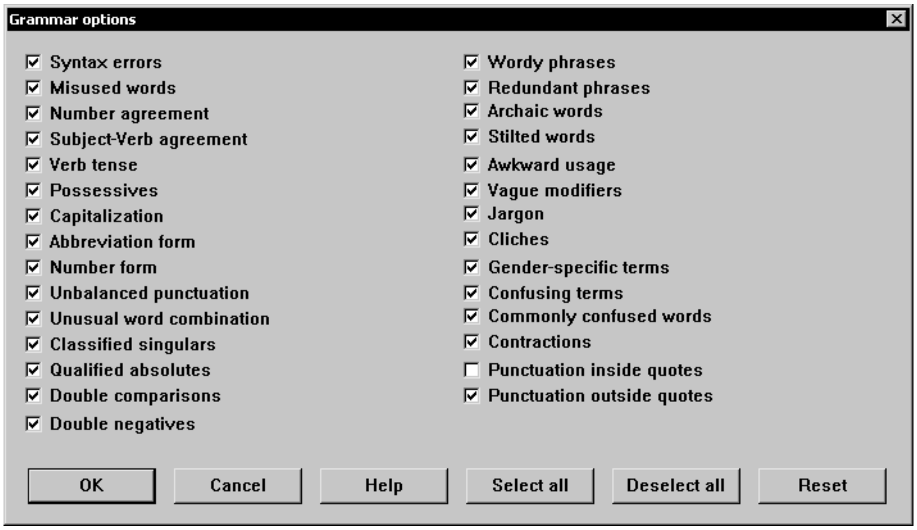
USING THE GRAMMAR CHECKER

When entering or editing text using the Text Editor, you can use the Tools, Grammar Check option to check for common grammatical errors.

NOTE: Because of the complexity of the English language, no grammar checker can find every possible problem or even agree on what is or is not a problem. This tool can help you spot potential errors, but you should always carefully review the text you add to your forms.

The Grammar Check option only applies to U.S. English.

To customize what types of errors the system looks for, select Tools, Grammar Options. You can use this window to specify the types of problems you want the Grammar Check option to look for:



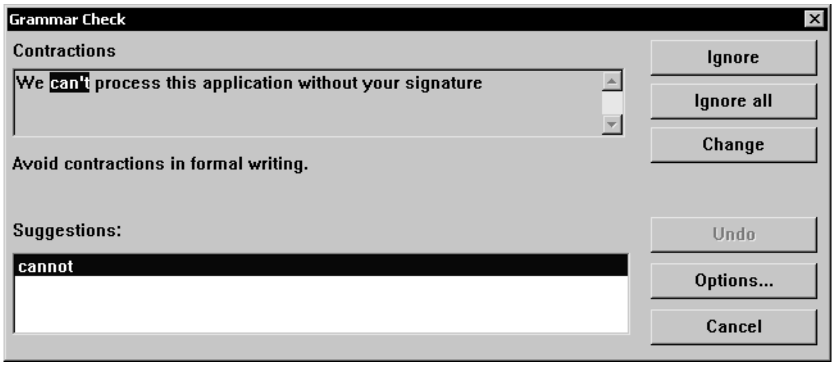
☑ Syntax errors
☑ Misused words
☑ Number agreement
☑ Subject-Verb agreement
☑ Verb tense
☑ Possessives
☑ Capitalization
☑ Abbreviation form
☑ Number form
☑ Unbalanced punctuation
☑ Unusual word combination
☑ Classified singulars
☑ Qualified absolutes
☑ Double comparisons
☑ Double negatives
☑ Wordy phrases
☑ Redundant phrases
☑ Archaic words
☑ Stilted words
☑ Awkward usage
☑ Vague modifiers
☑ Jargon
☑ Cliches
☑ Gender-specific terms
☑ Confusing terms
☑ Commonly confused words
☑ Contractions
☐ Punctuation inside quotes
☑ Punctuation outside quotes

Usage	Description
Syntax errors	Errors in the combination of words that may be caused by missing or extra words, use of the wrong word, or words out of sequence.
Misused words	Problems where a word has been used incorrectly, probably because it has been confused with another word. This includes words such as *your* and *you're*; *it's* and *its*; and *there* and *their*.
Number agreement	Conflicts between the number of items and the modifiers which refer to them, such as *these apple or a dogs*.
Subject-verb agreement	Conflicts between the number (plurality) of a subject and the verb which it acts on, such as *the employees wants longer lunch breaks*.
Verb tense	Conflicts with the tense of a verb and surrounding auxiliary verbs, such as *I have get my raincoat*. This category also includes mixed verb tenses.

Usage	Description
Possessives	Potentially incorrect use of a possessive form, such as *girls's* instead of *girls'*, or incorrectly using a possessive form in place of a plural.
Capitalization	Failure to capitalize certain words or failure to capitalize the first word of a sentence.
Abbreviation form	Missing or unnecessary punctuation in abbreviations.
Number form	Problems with the form or style of numbers, such as spelling out large numbers or using numerals for small numbers.
Unbalanced punctuation	Finds missing punctuation, such as *"("* without a corresponding *")"*.
Classified singulars	Phrases that turn a single object into a class of objects, such as *this kind of a car is the one I'm looking for.*
Qualified absolutes	Absolute adjectives and adverbs that are modified with comparative or superlative adverbs, such as *more perfect* or *very unique.*
Double comparisons	Comparative and superlative adjectives and adverbs that are modified with comparative adverbs, such as *more quicker* and *most fastest.*
Double negatives	Negative adjectives joined with a negative modifier, such as *not uncommon*, which can be expressed more clearly in a positive form.
Wordy phrases	Phrases containing superfluous words that can be rewritten more concisely, such as *in a large number of cases.*
Redundant phrases	Where the meaning of one word implies the meaning of another word, such as *connect together* or *repeat again.*
Archaic words	Words that are no longer in common use, such as *betwixt* and *perchance.*
Stilted words	Long, overblown words and phrases that can be expressed in simpler terms for clarity.
Awkward usage	Words and phrases that are too informal or do not read well, such as *ain't* and *that there.*
Vague modifiers	Use of adjectives and adverbs that convey little meaning, such as *nice* and *very.*
Jargon	Words with a technical meaning applied in non-technical writing.
Cliches	Overworked phrases that can be rewritten to avoid triteness.
Gender-specific terms	Terms which some consider sexist, such as *chairman* or *waitress.*
Confusing terms	Terms which may confuse the reader because several possible interpretations exists or because the word's form suggests an alternate meaning.
Commonly confused words	Words people often mistakenly use in place of correct words, usually because the words look or sound similar, such as *accept* and *except*, *allusion* and *illusion.*

Usage	Description
Contractions	Contracted words such as *can't* and *should've* that should be expanded in formal writing.
Punctuation inside quotes	Terminal punctuation placed inside quotation marks (*"This is the end," she said*) is the preferred form in North America. The system will report instances of punctuation inside quotation marks.
Punctuation outside quotes	Terminal punctuation placed outside quotation marks (*"This is the end", she said*) is generally considered incorrect in North America.The system reports instances of punctuation outside quotation marks.
Unusual word combinations	A pattern of words that seems unusual and may indicate a problem such as a missing, extra, or out of sequence word.

If the system finds an error, it presents suggestions in the Grammar Check window:



We can't process this application without your signature

Avoid contractions in formal writing.

Suggestions: cannot

You can choose to ignore this suggestion, ignore all similar suggestions, or make the change. You can also go to the Grammar Options window or cancel the grammar check.

GENERATING READABILITY STATISTICS

You can generate readability statistics, including Flesch scoring, when you are working in Documaker Desktop or the WIP Edit plug-in. In generating readability statistics, the system considers multi-line text fields that contain text.

Flesch/Flesch–Kincaid Readability tests are designed to indicate how difficult a reading passage is to understand. Readability is based on factors such as the number of words in sentences and the number of letters or syllables per word.

Higher scores indicate material that is easier to read; lower numbers indicate harder-to-read passages. Here is the formula for the Flesch Reading Ease Score test:

$$206.835 - 1.015\left(\frac{\text{total words}}{\text{total sentences}}\right) - 84.6\left(\frac{\text{total syllables}}{\text{total words}}\right)$$

where total syllables/total words = average number of syllables per word (ASW) and total words/total sentences = average sentence length (ASL).

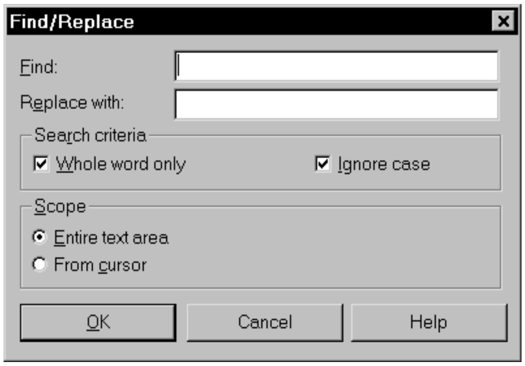
NOTE: This test is designed for English. The scores may not be valid when you run the test on non-English text.

The system generates and displays readability statistics when you check grammar. You can choose the option to check grammar from the Tools menu when you are working in the Text Editor.

USING THE FIND/REPLACE OPTION

Find/Replace lets you locate specific words, phrases, or character strings within the text area and quickly replace them if necessary.

To find text, choose Tools, Find/Replace. The Find/Replace window appears:



Find/Replace

Find:

Replace with:

Search criteria

☑ Whole word only ☑ Ignore case

Scope

● Entire text area

○ From cursor

1. Type the word or phrase you want to find in the Find field.
2. If you want to replace text you searched for with new text, enter the new text in the Replace With field.
3. Click either or both of the following Search Criteria options.

To locate search items...	Select...
Only when they appear as complete words.	Whole Word Only
Regardless of upper and lower case lettering.	Ignore Case

4. Click one of the following Scope options:

To find search items...	Select...
Anywhere in the text area.	Entire Text Area
Only from the cursor position forward.	From Cursor

5. Click Ok to begin the search. The system highlights the first appearance of your search word or phrase. Follow the prompts to replace text and continue the search.

USING HELP

From the Help menu, you can choose from Contents, How To, Shortcuts, Glossary, Using Help, or Product Information. You can also display Help while working in the system by pressing F1 or clicking the Help buttons that appear on windows.

See Help menu options on page 81 for more information about the Help options.

SHORTCUTS FOR FORMATTING TEXT

If you need to further format the text, use these options:

To…	Select…	Or press...
Balance the amount of text in columns	View, Level Columns	
Bold the text	Edit, Bold	CTRL+B
Change the color of the text	Edit, Color	
Change the font	Format, Font	CTRL+F
Change line spacing for a paragraph	Format, Paragraph	CTRL+P
Change the space above or below a paragraph	Format, Paragraph	CTRL+P
Change the justification of a paragraph	Format, Paragraph	CTRL+P
Cut text	Edit, Cut	CTRL+X or SHIFT+DELETE
Copy text	Edit, Copy	CTRL+C or CTRL+INSERT
Edit a paragraph's format	Format, Paragraph	CTRL+P
Indent a paragraph	Format, Paragraph	CTRL+P
Insert a box	Insert, Box	
Insert a graphic file	Insert, Logo	
Insert a new line	Insert, Break	SHIFT+ENTER
Insert a new paragraph		ENTER
Italicize the text	Edit, Italic	CTRL+I
Paste text	Edit, Paste	CTRL+V or SHIFT+INSERT
Place a border around a paragraph	Format, Border	
Place a shaded background behind the paragraph	Format, Shade	
Reformat the text	View, Reformat	F6
Refresh the window	View, Refresh	F5
Save your changes	File, Exit	
Select a word	Edit, Select	CTRL+SPACEBAR
Select all text (deselect text)	Edit, Select	CTRL+/ (CTRL+\)
Set tabs for a paragraph	Format, Tab Stops	CTRL+T

To…	Select…	Or press...
Set up or modify columns	Format, Columns	
Strike through the text	Edit, Strike-out	
Underline the text	Edit, Underline	CTRL+U
Undo your changes	Edit, Undo	ALT+BACKSPACE

Chapter 6

Printing Form Sets

This chapter provides information on how to print single form sets, how to print form sets in a batch queue, and how to batch print form sets.

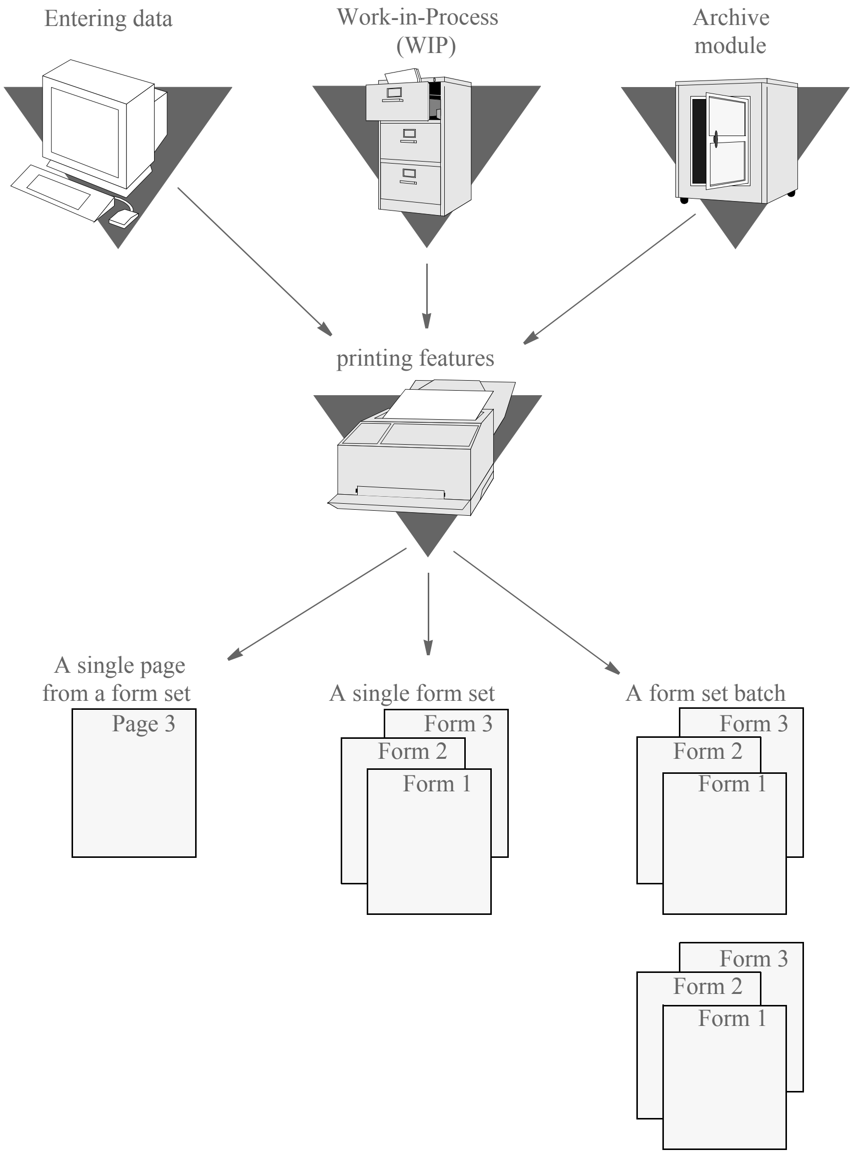
This chapter discusses...

- Printing Overview on page 116
- Printing Form Sets on page 118
- Faxing a Document on page 121
- Working with Print Batches on page 123
- Viewing the Batch Queue on page 124
- Printing Batched Form Sets on page 125

PRINTING OVERVIEW

You can print form sets directly from the Entry window, from WIP, or from the Archive module. The print features include various print options and printers, based on your company's printing needs.

The illustration below shows the stages from which you can print forms and form sets. If your system has been customized specifically for your company, your task flow may differ from the one presented in this chapter.


Entering data
Work-in-Process (WIP)
Archive module
printing features
A single page from a form set
Page 3
A single form set
Form 3
Form 2
Form 1
A form set batch
Form 3
Form 2
Form 1
Form 3
Form 2
Form 1

You can print a specific page of a form set or an entire form set. You can also batch one or more form sets together and print them all at once, or you can print selected form sets in a batch. When you print documents and forms, the system includes a copy for each recipient you specify.

The system includes data safety flags. If the system detects errors in a batched form set it will not print it. Instead, the system transfers the form set to WIP where you can open it for editing and then printing.

Batch printing in large companies which generate many forms may be a continual process. To handle these situations, the system lets you set up system-initiated batch print functions so you can more effectively use company resources and personnel.

System-initiated batch printing functions take place behind the scenes. You do not directly use the print features if your company has set up a system-initiated deferred batch print. Your computer system generates a batch print by following routines and procedures defined in the INI files, the sort routine files, and the rules. A system-initiated batch print requires transaction initiation, which is usually done by your system supervisor or other department personnel.

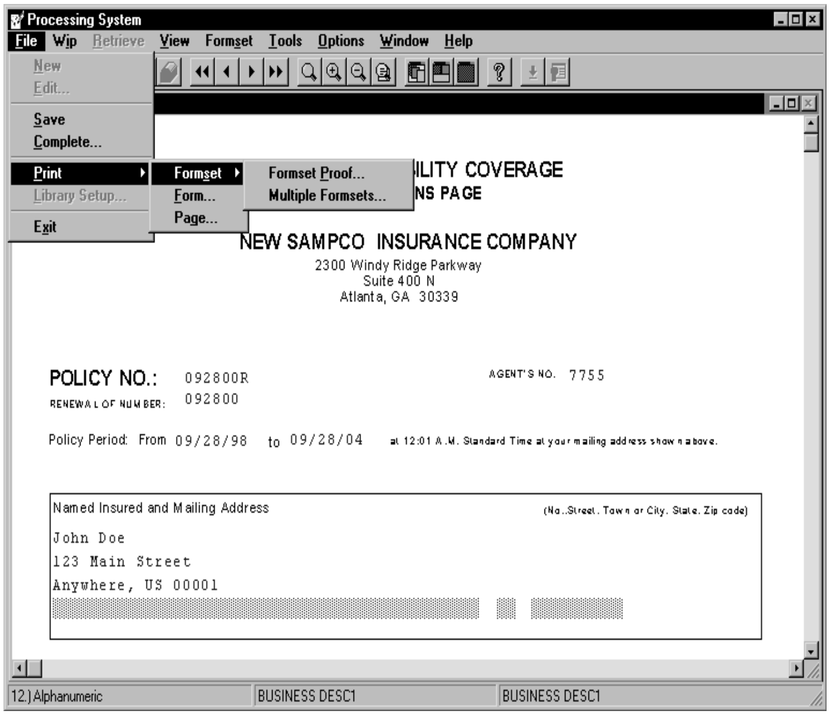
NOTE: For the purpose of presenting examples, insurance forms appear throughout the user steps in this chapter. If your INI files and menus are custom configured, your system menu options and forms may differ from those appearing in this guide.

PRINTING FORM SETS

Your form set printing options include printing entire form sets (policies), printing a specific form, or printing a specific page (section) within a form. The system lets you download fonts that are not resident in the printer and print form sets with or without field templates. You can print form sets on demand or send a form set to a batch print queue for printing later.

If your system has been customized, the Print window may display an option for sending the print job with overlays. Overlays are generic section files that have been custom created and compiled for your specific print environment. Printing form sets with overlays enhances print performance, especially for batch printing. If the print menus or windows display an option for printing with overlays, check with your system supervisor for more information.

Print options are available from the Print option on the File menu:


Processing System
File
Wip
Retrieve
View
Formset
Tools
Options
Window
Help
New
Edit...
Save
Complete...
Print
Library Setup...
Exit
Formset
Form...
Page...
Formset Proof...
Multiple Formsets...
12.) Alphanumeric
BUSINESS DESC1
BUSINESS DESC1

ILITY COVERAGE
NS PAGE

NEW SAMPCO INSURANCE COMPANY
2300 Windy Ridge Parkway
Suite 400 N
Atlanta, GA 30339

POLICY NO.: 092800R
AGENT'S NO. 7755
RENEWAL OF NUMBER: 092800

Policy Period: From 09/28/98 to 09/28/04 at 12:01 A.M. Standard Time at your mailing address shown above.

Named Insured and Mailing Address (No., Street, Town or City, State, Zip code)
John Doe
123 Main Street
Anywhere, US 00001

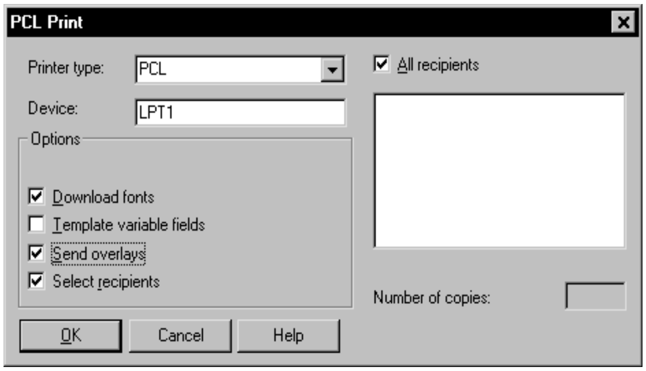
PRINTING A FORM SET, FORM, OR PAGE

Print lets you print a specific form set, form, or page, and all the associated copies.

To Print, select the form set, form, or page you want to print in the Entry window; then, choose File, Print to display the Print menu. Choose the appropriate Print option. Print options are described in the table below:

To print a…	Choose
Form Set	File, Print, Formset Proof. To print multiple copies of a form set, choose Multiple Formsets and enter the copy count on the Print Multiple Formset window.
Form	File, Print, Form
Page	File, Print, Page

The system displays the Print window with the default settings.



PCL Print

Printer type: PCL

Device: LPT1

Options

☑ Download fonts
☐ Template variable fields
☑ Send overlays
☑ Select recipients

☑ All recipients

Number of copies:

Follow these steps:

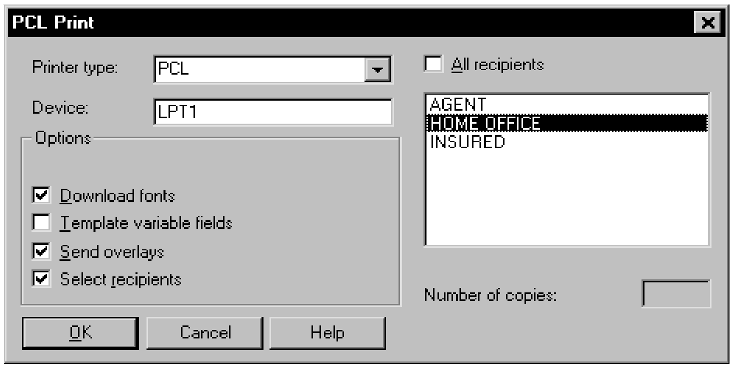
1 You can change your printer type and printer port (device) if necessary.

2 Depending on your system configuration, the Print window may display some or all of the following options.

To...	Choose
Download to the printer, the fonts needed to correctly print the form	Download Fonts
Display *Xs* in place of actual variable field data on printed policy	Template Variable Fields
Send sections compiled into HP printer language. Sending overlays enhances print speed. Usually, this option is automatically selected.	Send Overlays

3 All recipient copies print by default. To print only selected recipient copies, click the Select Recipients field, then *deselect* the All Recipients field. The policy recipients display in the Recipients field.

NOTE: You can only select recipients when printing a form set. This option is not available when printing a form or page.



Printer type: PCL

Device: LPT1

☑ Download fonts
☐ Template variable fields
☑ Send overlays
☑ Select recipients

☐ All recipients

AGENT
HOME OFFICE
INSURED

Number of copies:

4 Select the recipients for which you want to print copies.

5 If your system has been configured to let you increase the number of copies printed for each recipient, highlight and change the number in the Number of Copies field or use the arrow keys to change the copy count for each selected recipient. The number you enter multiplies the number of copies by the copy count initially set up for the recipient. For example, if you enter 2 for the number of copies for a recipient in the Print window, and the initial recipient copy count is 2, you print a total of 4 copies for the recipient.

NOTE: You cannot increase the recipient copy count when printing form sets, forms or pages unless your system has been configured to do so in the INI file. Check with your system supervisor regarding this option.

6 Click Ok to print all copies of your selected object, or Cancel to cancel the print job. If you selected GDI as your printer type, you may have the option to select a specific printer. Check with your system supervisor regarding which printer you should choose.

The system displays a print status window while it prints the form set. If you want to stop the print job in process, click Cancel.

Your system may be configured to automatically print *Draft* on form sets which have not been completed or to print *Reprinted* on form sets printed from Archive. If so, the system will add *Draft* to the SendCopyTo field instead of the recipient name during normal WIP printing. Form sets printed from archive will include *Reprinted* in the SendCopyTo field.

NOTE: The system always uses the actual page number (X of Y) even when you only print a single page of the form set.

FAXING A DOCUMENT

Faxing a document lets you fax a copy of any policy or document to any recipient set up in your fax application. Currently, you can fax a document; however, you cannot automatically import a document you receive via fax into the system.

When faxing policies, the majority of window responses are generated by Windows or your fax software. Refer to the appropriate fax system documentation for specific information regarding selecting fax recipients and fax numbers.

Before you fax any policies, check with your system supervisor to ensure that the software is properly installed and configured, and that fax recipients are defined in the application.

Follow these steps to fax a document:

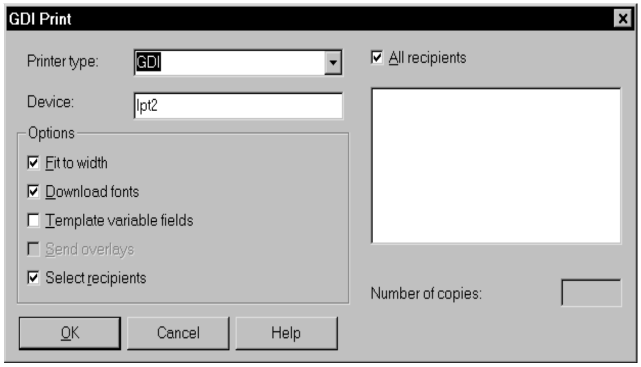
1 Select the form set you want to fax.

2 Choose one of the following:

To fax...	Choose
An entire form set	File, Print, Formset Proof
A specific form	File, Print, Form
A specific page of a form	File, Print, Page

NOTE: To fax the document to selected form recipients, choose File, Print, Formset Proof. Otherwise, the system automatically faxes the document to all recipients specified for each form.

The system displays the Print window.



GDI Print

Printer type: GDI

Device: lpt2

Options

☑ Fit to width

☑ Download fonts

☐ Template variable fields

☐ Send overlays

☑ Select recipients

☑ All recipients

Number of copies:

3 Select the GDI printer type in the Printer Type field.

4 If applicable, select the recipients to whom you want to send the fax; then, click Ok. Documaker Desktop calls the operating system’s print window or another window containing your fax software selection.

5 Select the appropriate fax application and/or driver printer as outlined in your fax software documentation. The system calls your fax application recipient selection window. Select your fax recipients; then, send the fax following the steps outlined in your fax software documentation.

Once the fax is sent, you return to the Entry window.

WORKING WITH PRINT BATCHES

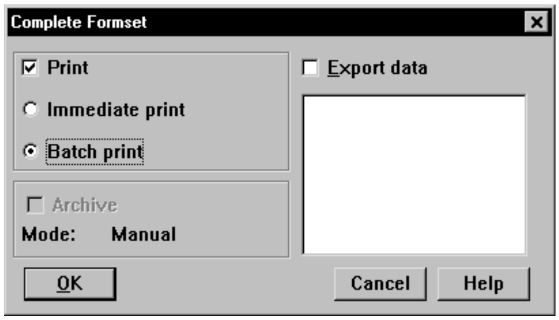
The system lets you send a form set to a batch queue for printing at a later time. The batch queue stores the form sets indefinitely, until you print or delete them. You can view your batch queue and print a single batched form set, or print all batched form sets.

SENDING A FORM SET TO BATCH

Sending a form set to batch lets you defer printing until a later time by placing form sets in a temporary queue. You can send form sets to the batch queue any time after you complete entering the data. You cannot batch print archived form sets.

To send a form set to batch, make sure you have entered all of the necessary information and then follow these steps:

1. Open the form set you want to send to batch.
2. Choose File, Complete. The Complete Formset window appears.



Complete Formset

☑ Print

○ Immediate print

● Batch print

☐ Archive

Mode: Manual

☐ Export data

3. Click the Batch Print option to send the form set to the batch print queue.
4. Click Ok. You are now ready to batch print form sets.

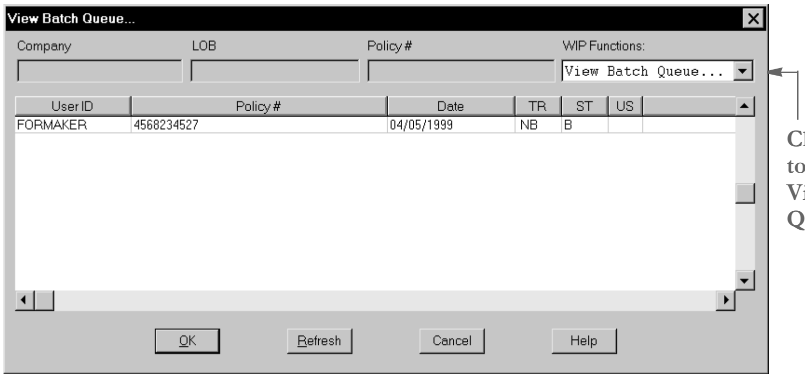
The system sends the form set to archive only after it has been batch printed.

NOTE: See Archiving and Retrieving Form Sets on page 152, and Completing Forms on page 64, for specific information about archive and export options in the window.

VIEWING THE BATCH QUEUE

Viewing the batch queue lets you view the form sets within the batch queue without printing the form sets. You can view either the list of batched form sets or view individual form sets in *view-only* mode.

To view the batch queue, choose View Batch Queue from the WIP List. The View Batch Queue window appears.



WIP Functions: View Batch Queue...

User ID	Policy #	Date	TR	ST	US
FORMAKER	4568234527	04/05/1999	NB	B	

Click here to choose View Batch Queue.

The window lists each form set that has been sent to batch.

VIEWING A FORM SET IN VIEW-ONLY MODE

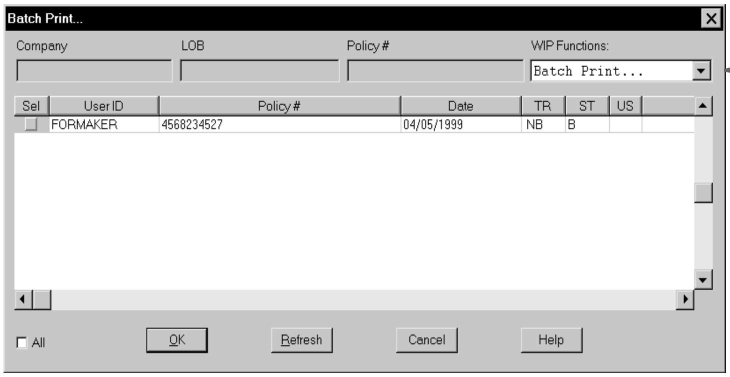
To view a form set in view-only mode, double click the form set in the View Batch Queue window, or select the form set, and click Ok. The system displays the form set in view-only mode. See Understanding Archive Views on page 156, for information about specific view options.

PRINTING BATCHED FORM SETS

Printing a batched form set lets you print form sets that you have placed in a batch queue. You can print the entire batch (all form sets) or selected form sets within the batch. Batch print menus can be custom configured; therefore, where and how you select batch printing options depends on your specific menu configuration. See your system administrator for additional information.

Follow these steps to print batched form sets:

1 After you have batched all form sets, choose the WIP, WIP List option from the main menu. This option is available only after you have closed all form sets. Then select Batch Print in the Task field. The system displays the Batch Print window. This window lists only the form sets sent to the batch print queue (*B* appears in the Status column).



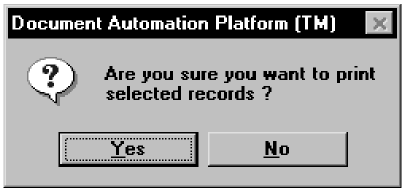
WIP Functions: Batch Print...

Sel	User ID	Policy #	Date	TR	ST	US
☐	FORMAKER	4568234527	04/05/1999	NB	B	

Click here to choose batch print.

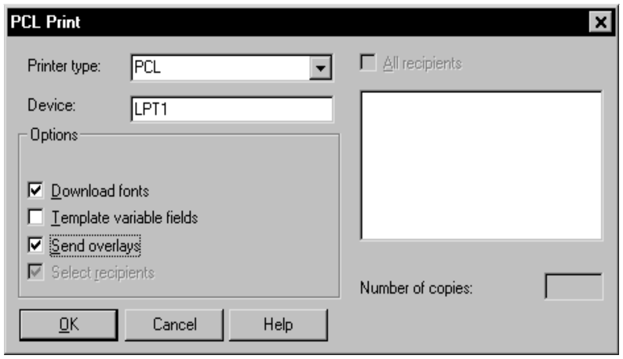
2 Select the form sets you want to print by clicking the Sel (Select) column. If your system has been set up to do so (in the INI file), you can select all to print the entire list.

3 Click Ok. A confirmation window appears.



Are you sure you want to print selected records ?

4 Click Yes to print the form sets or No to cancel. The Print window appears.



Printer type: PCL

Device: LPT1

☐ All recipients

☑ Download fonts
☐ Template variable fields
☑ Send overlays
☑ Select recipients

Number of copies:

5. You can change your printer type or printer port (device) if necessary.
6. Select the appropriate print options. Your system configuration will determine the options displayed in the Print window. See Printing a Form Set, Form, or Page on page 118 for more information about print options.
7. Click Ok. The Print Status window appears. Click Cancel if you want to cancel the print job.

Chapter 7

Using Work-In-Process

This chapter provides information on how to use the work-in-process (WIP) features. WIP provides a place to store unfinished form sets until you decide to work with them again.

For example, you might retrieve a document to make changes and additions, or you might send a document to another user for approval or input.

This chapter discusses...

- Work-in-Process Overview on page 128
- Working with WIP on page 130
- Viewing/Changing Form Set Status on page 134
- Assigning Form Sets on page 137
- Emailing Form Sets on page 139
- Setting Up Routing Slips on page 143
- Working with Form Sets on page 149

WORK-IN-PROCESS OVERVIEW

WIP serves as a temporary storage area for electronic forms, documents, and data. Consider WIP as a *pending* or *active* file cabinet. The system stores form sets and documents in WIP until you are ready to work with them again.

WIP also serves as a repository for data imported or exported to or from another application. WIP lets you route the data to other users within your organization. If you want to edit or correct data stored in WIP, you can easily do so using the same features you used when you initially entered the data onto the form.

This topic discusses how you normally use WIP. Normally, you open WIP from the system's main menu.

NOTE: Depending on your system's configuration, your task flow and menus may differ.

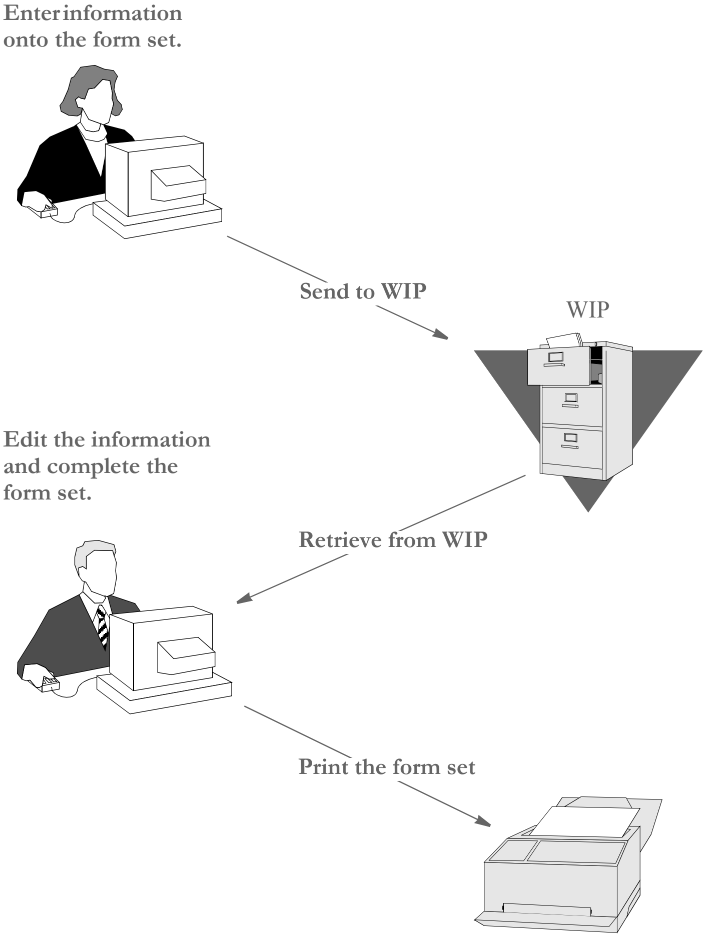
The following illustration depicts a task flow beginning with sending a form set to WIP. This task flow assumes a simple and typical business situation:

9:00 AM	You are entering data onto a form set. You discover that you need additional information to complete a portion of the form set. You call the client who has the information, but she is not available.
9:10 AM	You place the form set in WIP while you continue with other office business.
2:00 PM	Your client returns your phone call and provides the information.
2:10 PM	You open WIP, sort the form sets, retrieve the form set you need, enter the information, and print the documents.

NOTE: The system provides two ways to store WIP: standard mode and compressed mode. Storing WIP in compressed mode saves disk space. Choosing how WIP will be stored is a task performed by your system supervisor.

If you are using compressed mode, you can work with compressed and non-compressed form sets. In standard mode, you can only work with non-compressed form sets.

Your system supervisor can, however, switch modes at any time.


Enter information onto the form set.
Send to WIP
WIP
Edit the information and complete the form set.
Retrieve from WIP
Print the form set

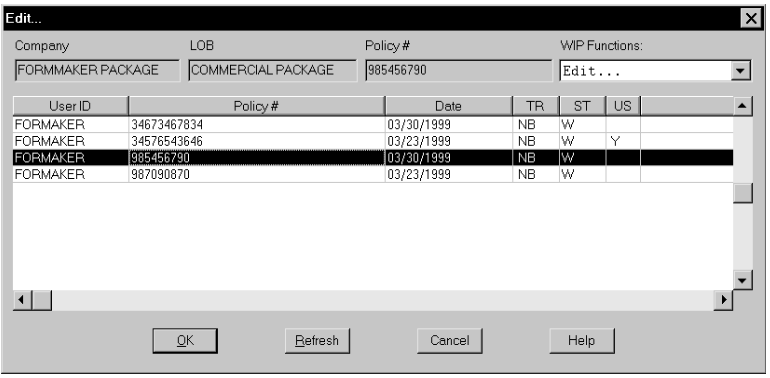
In other situations you might use additional WIP options, such as assigning the form set to another user for review or update and purging the WIP list of obsolete form sets.

WORKING WITH WIP

When you choose the WIP List option from the WIP menu, the Edit window appears, as shown below. From this window you retrieve and edit form sets. Form sets remain in WIP until you select the Complete or Manual Archive option (assuming your system includes the Archive module). Depending on your system configuration, the system may automatically archive form sets when you print.

NOTE: Normally, form sets archived using the Complete option are automatically deleted from the WIP list; however, your system can be configured to retain these form sets in the WIP list and assign them a status code indicating the form set is complete and archived. Your system supervisor must configure this option and designate the status code in the INI file. If your system retains a record of archived form sets in WIP, you must periodically delete these records either manually or through a timed service function.

When you archive form sets, you can no longer edit the data. See Archiving and Retrieving Form Sets on page 152, for more information about archive activities. See Printing Form Sets on page 115, for more information about print activities.



Company: FORMMAKER PACKAGE
LOB: COMMERCIAL PACKAGE
Policy #: 985456790

User ID	Policy #	Date	TR	ST	US
FORMAKER	34673467834	03/30/1999	NB	W	
FORMAKER	34576543646	03/23/1999	NB	W	Y
FORMAKER	985456790	03/30/1999	NB	W	
FORMAKER	987090870	03/23/1999	NB	W	

The Key fields, which identify a form set, are shown here when you click on a form set in the list.

The table below defines these fields. Remember that your menus and options may be set up differently, so the fields on the window shown here and discussed below may differ from your own. This example shows a typical insurance industry setup.

Field	Description
User ID	The unique identification of the user assigned to the form set.
Policy #	The user defined policy number of the form set.
Date	The date the form set was sent to WIP.
TR (Transaction)	A one- or two-character code associated with the form set type. Codes are predefined in the system INI file and cannot be altered. Transactions include New Business (*NB*), Endorsement (*EN*), and Policy Renewals (*RN*).

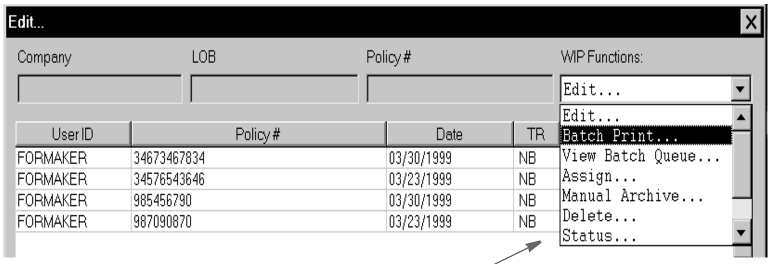
Field	Description
ST (Status)	A one- or two-character code associated with the current status of the form set type. Codes are configured in the INI file. Examples: W = Work-in-Process Q = Quote U = Underwritten AR = Archived P = Printed A = Assign (to another user)
US (In Use)	A one-character code indicating whether the form set is in use or if the form set is available for editing. Y = In use R = Read only A blank space in the column indicates the form set is not in use.
Description	The user-defined description identifying a specific form set.

PERFORMING WIP TASKS

From the WIP List option you can perform a variety of tasks including:

- Assigning WIP to other users
- Batch printing WIP
- Changing the In Use flag
- Changing the status of WIP
- Deleting WIP
- Sending WIP (via email)
- Editing WIP
- Manually archiving WIP
- Viewing the batch print queue

To select the task you want to perform, use the Task field, as shown in this screen excerpt:



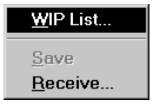
User ID	Policy #	Date	TR
FORMAKER	34673467834	03/30/1999	NB
FORMAKER	34576543646	03/23/1999	NB
FORMAKER	985456790	03/30/1999	NB
FORMAKER	987090870	03/23/1999	NB

You can choose from these tasks.

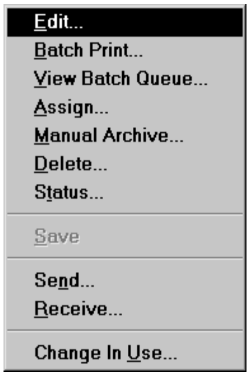
Click here to select the task you want to perform.

With version 10.0, the system includes the WIP List option. In earlier versions, there was no WIP List option. Instead, all of the tasks you can select from the Task field were listed on the WIP menu as options. The system performed the same tasks—you just selected those tasks from a menu instead of a field.

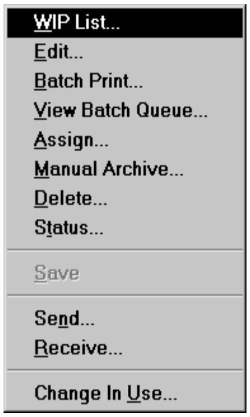
For instance, here are examples of how the WIP menu options can appear:


WIP List...
Save
Receive...

This is the default menu. You choose the WIP List option and then choose from the various tasks listed in the Task field.


Edit...
Batch Print...
View Batch Queue...
Assign...
Manual Archive...
Delete...
Status...
Save
Send...
Receive...
Change In Use...

This menu lets you choose the various WIP tasks directly from the menu.

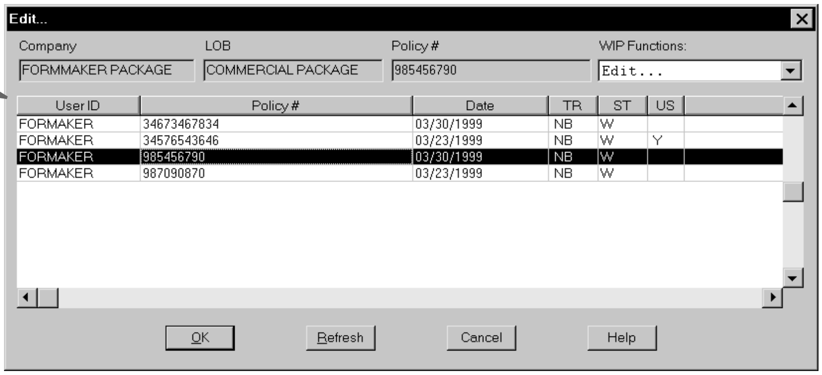

WIP List...
Edit...
Batch Print...
View Batch Queue...
Assign...
Manual Archive...
Delete...
Status...
Save
Send...
Receive...
Change In Use...

This menu lets you use the WIP List or choose the various WIP tasks directly from the menu.

If your system is set up so the various WIP tasks appear as menu items, keep in mind that the only difference is how you select the task. If you would prefer to choose WIP tasks from the WIP menu instead of a field, or vice versa, or use both approaches, ask your system supervisor to customize your system.

SEARCHING FOR A FORM SET

You can quickly find a specific form set by searching for text in the columns displayed on your screen.

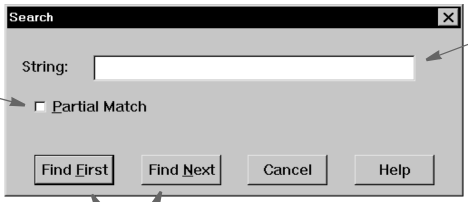

Edit...
OK
Refresh
Cancel
Help

Company: FORMMAKER PACKAGE
LOB: COMMERCIAL PACKAGE
Policy #: 985456790
WIP Functions: Edit...

User ID	Policy #	Date	TR	ST	US
FORMAKER	34673467834	03/30/1999	NB	W	
FORMAKER	34576543646	03/23/1999	NB	W	Y
FORMAKER	985456790	03/30/1999	NB	W	
FORMAKER	987090870	03/23/1999	NB	W	

Double-click one of these column headings to display the Search window.

Just double-click the heading of the column you want to search. A window appears which lets you enter the text you want to search for, as shown here:



Click here to tell the system you are entering only part of the text which may appear in the field.

For instance, if you want to browse through the form sets last modified in a certain month, such as April, enter 04 here and click this field.

Enter the text you want to search for here.

Use these buttons to move through the records found by the search.

You can choose to do a partial match rather than matching the entire field. Use the buttons to scroll through the list.

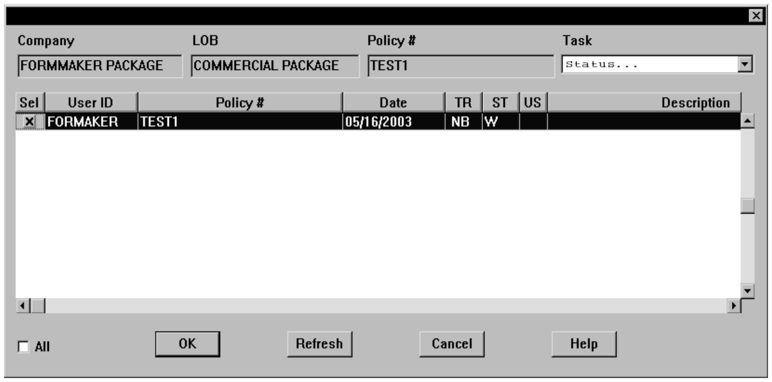
NOTE: If your system was set up to use the various WIP options, such as Edit, Batch Print, and so on, instead of using the WIP List option, your WIP windows may include a Sort button. If you have a Sort button on your windows, the search feature is unavailable. Contact your system supervisor for more information.

VIEWING/ CHANGING FORM SET STATUS

Viewing and changing form set status lets you view the status of all form sets in WIP and change a form set's status. A form set's status changes when you perform different actions upon it, such as printing or archiving the form set.

You can manually change the form set's status, or you can change the form set's designated type. Form set types include underwritten insurance policies and various quotes and proposals. Form set status codes can vary depending on a company's specific industry.

1 To view form set status codes, choose WIP, WIP List. Then choose Status in the Task field. The system displays the Status window which shows the form sets in WIP and their associated status.

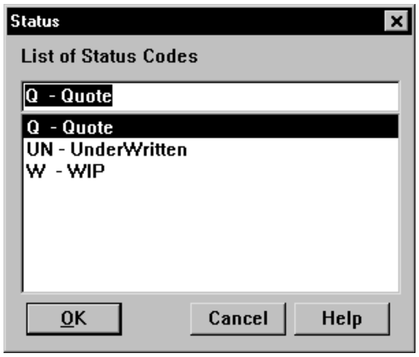


Company: FORMMAKER PACKAGE
LOB: COMMERCIAL PACKAGE
Policy #: TEST1
Task: Status...

Sel	User ID	Policy #	Date	TR	ST	US	Description
X	FORMAKER	TEST1	05/16/2003	NB	W		

2 To change a form set status code, select the form set in the Sel column. You can select multiple form sets and change their status simultaneously. Click Ok. The following window appears.

NOTE: You can double-click on a column heading, such as User ID, to search for a specific form set. See Searching for a Form Set on page 132 for more information.



Status

List of Status Codes

Q - Quote

Q - Quote
UN - UnderWritten
W - WIP

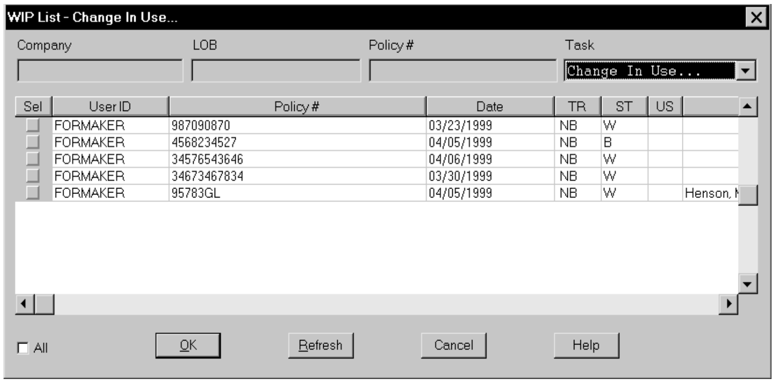
3 Select a new status for your form sets, and click Ok. The system displays the new status for the form sets in the WIP List. Click Cancel, to close the window.

NOTE: Status options are typically customized to meet individual company's needs. If you need to add or remove a status option, contact your system supervisor.

CHANGING THE IN USE STATUS

Changing a form set's In Use status lets you unlock a document and make it available for editing in the WIP list. You must have a system supervisor access level to perform this task.

1 To view In Use status codes, choose WIP, WIP List. Then choose Change In Use in the Task field. The Change In Use window appears.



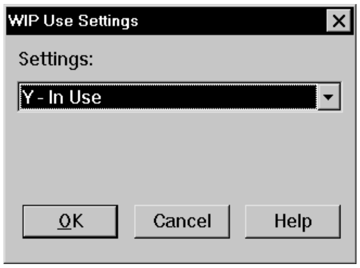
WIP List - Change In Use...

Company:
LOB:
Policy #:
Task: Change In Use...

Sel	User ID	Policy #	Date	TR	ST	US	
☐	FORMAKER	987090870	03/23/1999	NB	W		
☐	FORMAKER	4568234527	04/05/1999	NB	B		
☐	FORMAKER	34576543646	04/06/1999	NB	W		
☐	FORMAKER	34673467834	03/30/1999	NB	W		
☐	FORMAKER	95783GL	04/05/1999	NB	W		Henson,

2 Click the document whose In Use status you want to change; then, click Ok. The WIP Use Settings window appears.

NOTE: You can double-click on a column heading, such as User ID, to search for a specific form set. See Searching for a Form Set on page 132 for more information.



WIP Use Settings

Settings: Y - In Use

Click here to select a new In Use setting.

3 Click the In Use setting you want for the document and then click Ok. The system returns to the Change In Use window and displays the new In Use status.

NOTE: A blank space in the In Use column indicates a document is not in use; therefore, choosing *Not in Use* will leave the column blank.

4 Click Cancel to close the window.

After changing the In Use status, you may need to change the form set's status to place it back in the WIP List for editing. See Viewing/Changing Form Set Status on page 134 for more information.

ASSIGNING FORM SETS

The system lets you assign form sets to other users within your organization. Managers may choose to transfer form sets to various users for administration and data entry purposes.

Assigning documents provides an excellent means of communication between users who need to confer concerning form sets. It also provides a way to set up an approval system for form sets. Several users can view a form set at the same time and make modifications as required.

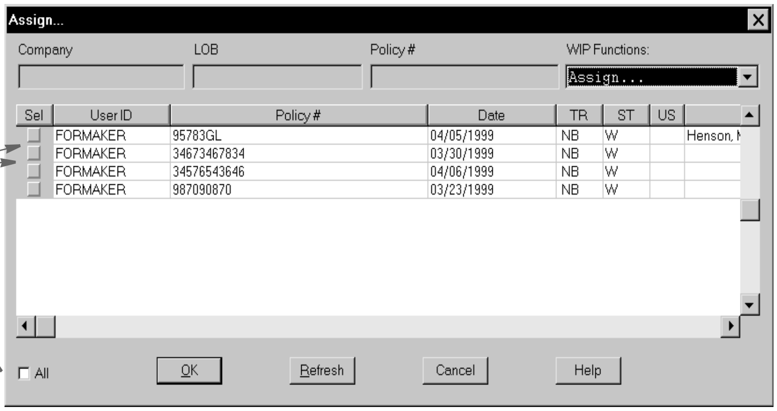
You assign form sets based on user IDs. See the Documaker Desktop Administration Guide for more information about setting up user IDs, passwords, and related security levels.

NOTE: Depending on the extent to which your system has been customized, assigning form sets can be done automatically or by selecting menu options. In any case, all assignments are made based on user IDs.

These additional capabilities are set up and controlled by your system supervisor. The following steps discusses the standard procedure for assigning a form set.

Follow these instructions to assign a form set:

1 Choose WIP, WIP List. Then choose Assign in the Task field. The Assign window appears.



WIP Functions: Assign...

Sel	User ID	Policy #	Date	TR	ST	US	
☐	FORMAKER	95783GL	04/05/1999	NB	W		Henson,
☐	FORMAKER	34673467834	03/30/1999	NB	W		
☐	FORMAKER	34576543646	04/06/1999	NB	W		
☐	FORMAKER	987090870	03/23/1999	NB	W		

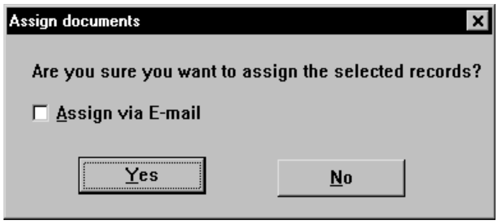
Click these buttons to select an individual form set.

Click here to select all form sets.

2 Click the form set you want to assign to another user in the Sel (Select) column. You can select multiple form sets or, if your system has been set up to do so (in the INI file), you can click the All field to select all form sets in the list.

NOTE: You can double-click on a column heading, such as User ID, to search for a specific form set. See Searching for a Form Set on page 132 for more information.

3 Click Ok. A confirmation window appears.

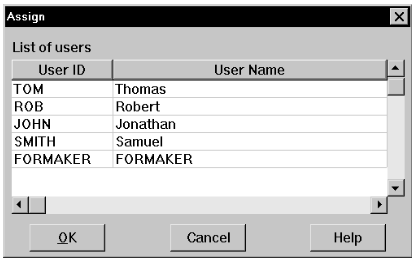


Are you sure you want to assign the selected records?

☐ Assign via E-mail

4 If you want to assign the document using email, click the Assign Via E-Mail field. See Assigning a Form Set Using Email on page 138 for instructions on using email.

5 Click Yes to assign a new user or No to retain the original user. The following window appears.



List of users

User ID	User Name
TOM	Thomas
ROB	Robert
JOHN	Jonathan
SMITH	Samuel
FORMAKER	FORMAKER

Depending on how your system is set up, all users will appear or only applicable users will appear.

If you need to assign a form set to a user not shown on this window, contact your system supervisor.

6 Select the user to whom you want to assign the form set and click Ok.

The system displays the newly-assigned user ID for the form set in the Assign window.

Assigning a Form Set Using Email

To assign a form set using email, follow steps 1-3 on the previous page and then follow the steps below:

1 Click Assign via E-Mail in the Assign Documents window. The E-Mail Login window appears.

2 Enter your user ID and password. The Address Selection window appears.

3 Select the user to whom you want to email the document and then click Ok.

4 The system displays a message confirming that the document has been sent. Click Ok. The system returns to the Assign window. The form set no longer appears in the document list.

5 To close the window click Cancel.

EMAILING FORM SETS

The system offers various email options so you can email documents to individuals, or set up a routing slip to send documents to multiple recipients. Routing slips let you group recipients and organize your email lists.

Using email, you can send form sets without having to *assign* them to another user. Assigning form sets requires that you indicate a hierarchy for the document, which limits document access.

NOTE: See also Assigning a Form Set Using Email on page 138.

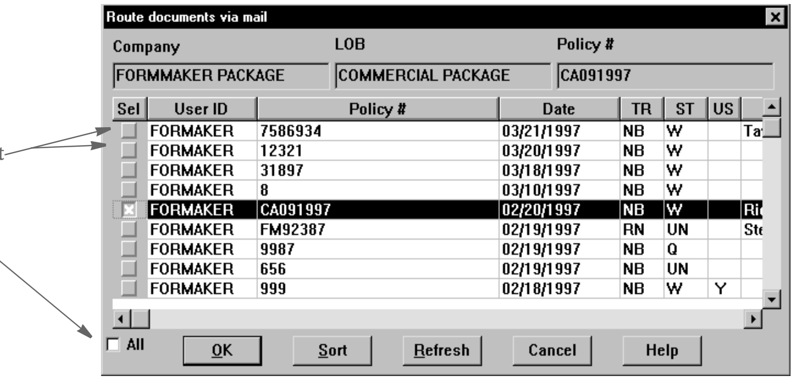
You can email any form set you can select from the WIP list. Most form sets that do not have an *AR* (Archived) status are accessible through the WIP list. Depending on how your email system is configured, you may be able to select multiple recipients of a form set. You may also be able to attach a memo to the document.

The system lets you email forms with data. The forms you send include many items defined when the form set was created, such as lines, boxes, fixed text, variable field attributes, scripts, operator prompts, and navigation instructions.

Items such as graphics, fonts, tables, and help text, which are imported for use during form entry, are not sent with the form. These items are assumed to be available in the master resource library used by the recipient. If the recipient of a form has an existing version of the FAP file in their current master resource forms directory, the form will not be copied.

To email a form set, follow these steps:

1. Choose WIP, WIP List and then select the Send option in the Task field—or simply click the Send toolbar icon. The system displays the WIP list in the Route Documents Via Mail window.



Click these buttons to select an individual form set.

Click here to select all form sets.

Company	LOB	Policy #
FORMMAKER PACKAGE	COMMERCIAL PACKAGE	CA091997

Sel	User ID	Policy #	Date	TR	ST	US	
☐	FORMAKER	7586934	03/21/1997	NB	W		Ta
☐	FORMAKER	12321	03/20/1997	NB	W		
☐	FORMAKER	31897	03/18/1997	NB	W		
☐	FORMAKER	8	03/10/1997	NB	W		
☒	FORMAKER	CA091997	02/20/1997	NB	W		Ri
☐	FORMAKER	FM92387	02/19/1997	RN	UN		Ste
☐	FORMAKER	9987	02/19/1997	NB	Q		
☐	FORMAKER	656	02/19/1997	NB	UN		
☐	FORMAKER	999	02/18/1997	NB	W	Y	

2. Select the form sets you want to send, then, click Ok. Click the All field if you want to send the entire list.

NOTE: You cannot select the All field unless this option has been set up for you in the INI files.

You can double-click on a column heading, such as User ID, to search for a specific form set. See Searching for a Form Set on page 132 for more information.

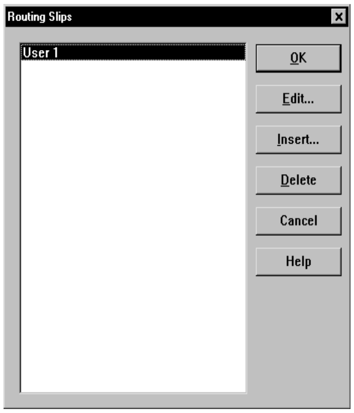
The system displays a confirmation window. Depending on your system configuration, the email system may display a log-on window.

3 If applicable, enter your email user ID and password in the email window. Otherwise, go to Step 3.

4 Choose from the following options:

To…	Do This…
Send the selected form sets to the same recipient	Click Send All Records to Same User
Send the forms (FAP files) with the data	Click Send Forms

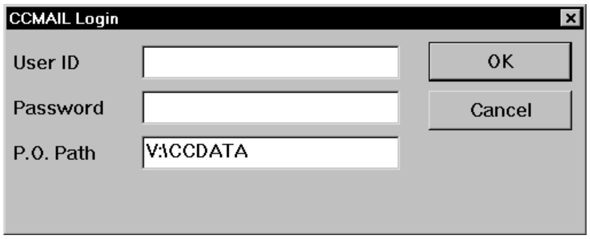
5 Click Yes to select your email recipients or No to cancel. If you select Yes, the Routing Slips window appears.



User 1

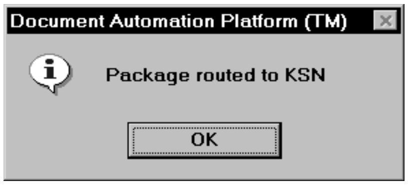
6 Select the routing slip containing the recipients to whom you want to email the document; then, click Ok. The first time you email a document, an email login window appears.

NOTE: If you have not set up email routing slips, see Setting Up Routing Slips on page 143 for specific steps for creating routing slips, and selecting recipient addresses.



User ID
Password
P.O. Path: V:\CCDATA

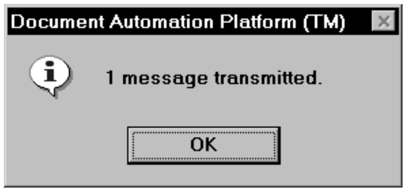
7 Type your email user ID and password in the appropriate fields and then click Ok. A confirmation window appears containing the recipients on the routing slip you selected.



Package routed to KSN

NOTE: Examples shown are for Lotus cc:Mail; other email systems display different windows.

8 Click Ok in the confirmation window. The following message appears:



1 message transmitted.

9 Click Ok to complete your email session. The transmitted document no longer appears in the Route Documents Via Mail window. To close the window, click Cancel.

NOTE: If you selected multiple form sets to be sent to different users, the system will redisplay the Routing Slips window after each form set is routed. When all form sets have been routed, the system confirms the transmittals.

RECEIVING EMAILED FORM SETS

Receiving emailed form sets lets you open a form set sent by another user. Depending on your system configuration, you can manually receive a form set into your WIP list or bypass the manual receive option. When you bypass the manual receive option, you are not required to sign on to the email system.

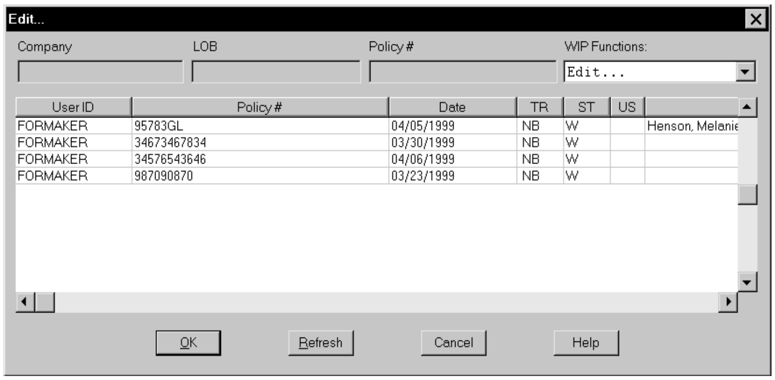
To receive a form set, follow these steps:

1 Choose WIP, Receive, or click the Receive toolbar icon.

If your system is configured to manually receive email, the E-Mail Login window appears. If applicable, enter your email user ID and password.

2 Depending on your system configuration, the system may display a received mail confirmation message. Click Ok to close the message.

3 Open your WIP list to display the document you received. Click Refresh to repaint the WIP list. The form set you received appears in the WIP list with a status code of *W* (Work-in-Process).



Company:
LOB:
Policy #:
WIP Functions: Edit...

User ID	Policy #	Date	TR	ST	US	
FORMAKER	95783GL	04/05/1999	NB	W		Henson, Melanie
FORMAKER	34673467834	03/30/1999	NB	W		
FORMAKER	34576543646	04/06/1999	NB	W		
FORMAKER	987090870	03/23/1999	NB	W		

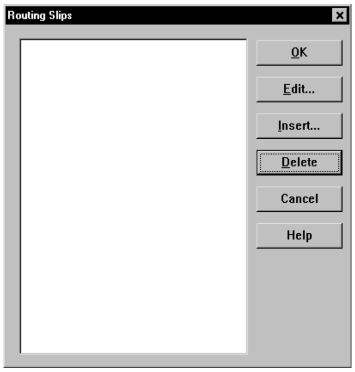
SETTING UP ROUTING SLIPS

Setting up routing slips lets you set up an on-line email directory for sending documents. You can group recipients by department, or organize them in any way. When you send documents using routing slips, the system sends a document to each individual in the order they appear on your list. The system then routes the document back to you.

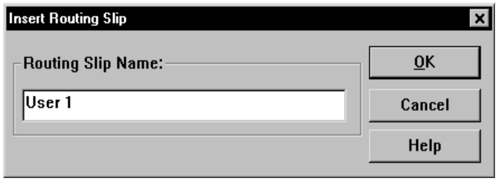
Follow these steps to set up a routing slip:

1 Choose Tools, Routing Slips. The Routing Slips window appears.

NOTE: Unless your system has been modified, you must have a system supervisor access level to perform this task, and all documents must be closed before you set up a routing slip.

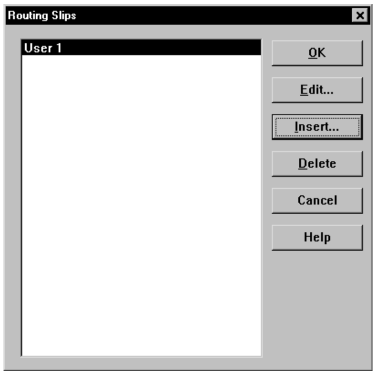

Routing Slips
OK
Edit...
Insert...
Delete
Cancel
Help

2 Click Insert to display the Insert Routing Slip window.


Insert Routing Slip
OK
Cancel
Help

Routing Slip Name: User 1

3 Type the title of the Routing Slip in the Routing Slip Name field; then, click Ok. The name appears in the Routing Slip list.


Routing Slips
User 1
OK
Edit...
Insert...
Delete
Cancel
Help

NOTE: The system limits the number of characters in the Routing Slip name to eight, including spaces.

You can now add recipient names to your routing slip. See the next section for more information.

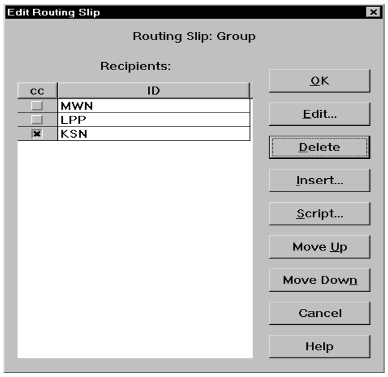
Adding Routing Slip Recipients

Adding routing slip recipients lets you designate and group individuals to whom you email documents. You can use the routing slip recipient list to direct the flow of work and to provide *read-only* copies of documents at chosen stages in the work flow.

NOTE: You can also insert a DAL script in the routing slip recipient list to direct the work flow based on values in a certain field of the document.

You must first set up a routing slip before you can add recipients. See the previous task for information about setting up routing slips. Follow these steps to add routing slip recipients:

1 In the Routing Slips window, click the Routing Slip to which you want to add recipients; then, click Edit. The Edit Routing Slip window appears.

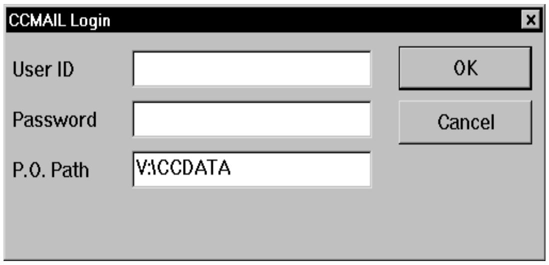


Routing Slip: Group

Recipients:

cc	ID
☐	MWN
☐	LPP
☒	KSN

2 In the Edit Routing Slip window click Insert. The first time you add a recipient, the system displays your E-Mail Login window.

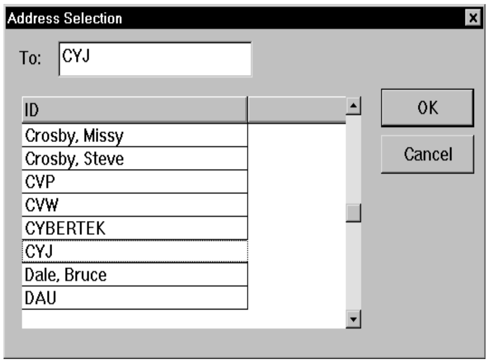


User ID

Password

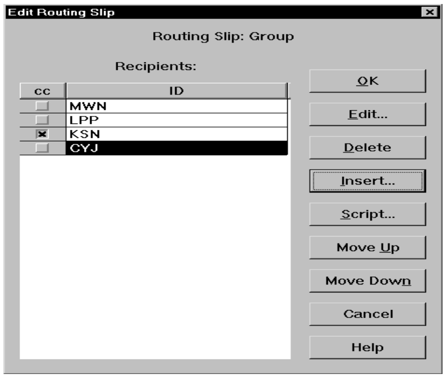
P.O. Path V:\CCDATA

3 Type your email user ID and password; then, click Ok. The Address Selection window appears.


Address Selection
ID
Crosby, Missy
Crosby, Steve
CVP
CVW
CYBERTEK
CYJ
Dale, Bruce
DAU
OK
Cancel

To: CYJ

4 Type or select your first routing slip recipient; then, click Ok to add the recipient to your list. The Edit Routing Slip window displays your recipients.


Edit Routing Slip
Recipients:
OK
Edit...
Delete
Insert...
Script...
Move Up
Move Down
Cancel
Help

Routing Slip: Group

CC	ID
☐	MWN
☐	LPP
☒	KSN
☐	CYJ

5 Repeat Steps 2 and 4 for each recipient you want to add. If you are using Microsoft Outlook's address book, you can select multiple recipients and click Ok to add them all at once.

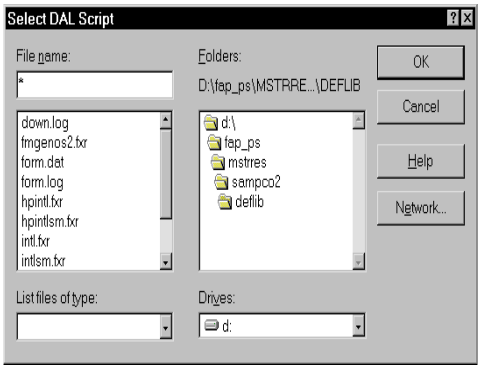
NOTE: The system routes the documents in the order in which they appear in the recipient list. To change the order, click the recipient you want to change; then, click Move Up or Move Down. Click Cancel to exit the window.

6 To provide a *read-only* copy of the form set to a recipient, click the CC column next to the recipient's name. Read-only copies cannot have data added or modified; the recipient can only view and/or print the document. Recipients with the CC column checked receive a copy of the document the linear recipient above received. When the first recipient completes work on the document, it is routed to the next linear recipient in the list. The following table shows a typical work situation:

CC	ID	Receives
	First Person	The document and completes his work. The document is then routed to Second Person.
	Second Person	First Person's completed document and enters data in his portion of the document. The package is then routed to Third Person.

CC	ID	Receives
X	John Doe	A read-only copy of the same document Second Person received, with Second Person's data.
X	Jane Doe	A read-only copy of the same document Second Person received, with Second Person's data.
	Third Person	Second Person's completed work and enters data in his portion of the document. The package can then be routed back to the originator of the package.

7 If you want to add a DAL script to the recipient list, click Script. DAL scripts can be written and inserted in the recipient list to route the document according to values entered in certain variable fields. When the recipient above the DAL script completes work on the document, the script reads the values returned in the specified fields and routes the document to the recipient designated by the returned values. When you click Script, the Select DAL Script window appears.



File name: *

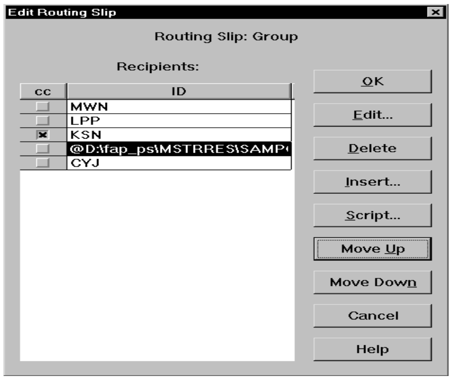
down.log
fmgenos2.fxr
form.dat
form.log
hpintl.fxr
hpintlsm.fxr
intl.fxr
intlsm.fxr

Folders: D:\fap_ps\MSTRRE...\DEFLIB

d:\
fap_ps
mstrres
sampco2
deflib

Drives: d:

8 Enter the DAL script in the File Name field, or select the script from the file list. Change the drive and directory if necessary. Click Ok; the system returns to the Edit Routing Slip window.



Routing Slip: Group

Recipients:

cc	ID
☐	MWN
☐	LPP
☒	KSN
☐	@D:\fap_ps\MSTRRES\SAMP
☐	CYJ

9 The DAL script appears in the recipient list. When the previous recipient completes work on the document, the system reads the DAL script and routes the document accordingly. To change the DAL script's position in the recipient list, select the script; then, click Move Up or Move Down.

NOTE: The DAL script is not copied and sent with the document. The script must already be present in the recipient's files to execute. For information on DAL scripts, see the DAL Reference.

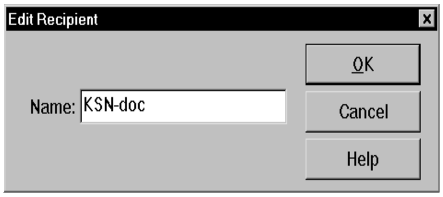
10 When you have completed adding recipients to your Routing Slip, click Ok to return to the Routing Slips window.

11 Click Ok in the Routing Slips window to return to the main window. When you email documents, you can send them using your routing slips.

Editing Routing Slip Recipients

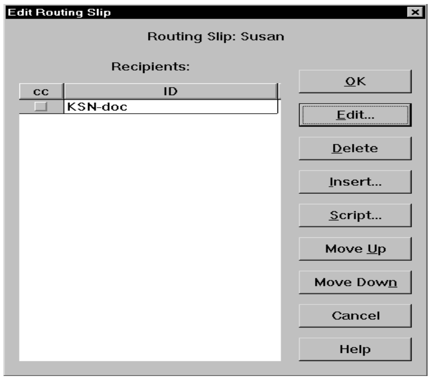
You can edit the data associated with a routing slip recipient. You may want to edit a recipient if the email address is incorrect, or to add information related to the recipient.

1 To edit a recipient, click the recipient in the Edit Routing Slip window; then, click Edit. The Edit Recipient window appears.



Name: KSN-doc

2 Edit the recipient data as necessary; then, click Ok. Your changes appear in the Edit Routing Slip window.



Routing Slip: Susan

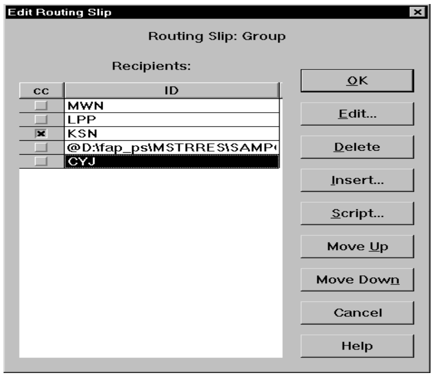
Recipients:

cc	ID
☐	KSN-doc

Deleting Routing Slip Recipients

You can delete routing slip recipients to allow for personnel changes and transfers.

1 To delete a routing slip recipient, open the Routing Slip window and click the routing slip containing the recipients you want to delete. Click Edit to display the Edit Routing Slip window.


Edit Routing Slip
Routing Slip: Group
Recipients:
OK
Edit...
Delete
Insert...
Script...
Move Up
Move Down
Cancel
Help

cc	ID
☐	MWN
☐	LPP
☒	KSN
☐	@D:\fap_ps\MSTRRES\SAMP
☐	CYJ

2 Click the recipient you want to delete; then, click Delete. The system removes the recipient from the routing slip.

Deleting Routing Slips

Deleting routing slips lets you remove a complete routing slip from your list. When you delete a routing slip, you delete all recipients' names on that routing slip.

1 To delete a routing slip, choose Tools, Routing Slips. The Routing Slips window appears.

2 Click the routing slip you want to delete; then, click Delete. The system removes the routing slip from the Routing Slips window and you can no longer use it.

WORKING WITH FORM SETS

You retrieve documents from the WIP list window. After you retrieve a form set, you can enter and edit the information on that form set. You can also delete outdated form sets from WIP. A form set remains in WIP until you archive or delete it.

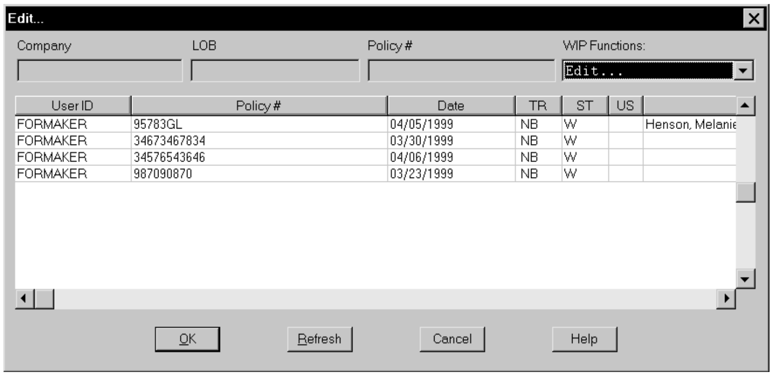
The Edit option lets you retrieve the form set with which you want to work. Using the Library Manager, users can create multiple versions of forms and documents. Library Manager files document versions via the effective date of the form.

When you retrieve form sets from WIP, you open the same form version you saved to WIP. Therefore, if there are multiple versions of a particular form, you open the version effective when you last worked with the form. You cannot open a more recent version of the form.

To edit a form set, follow these steps:

Follow these instructions to assign a form set:

1 Choose WIP, WIP List. The Edit window appears. You can also click the Edit toolbar icon.



WIP Functions: Edit...

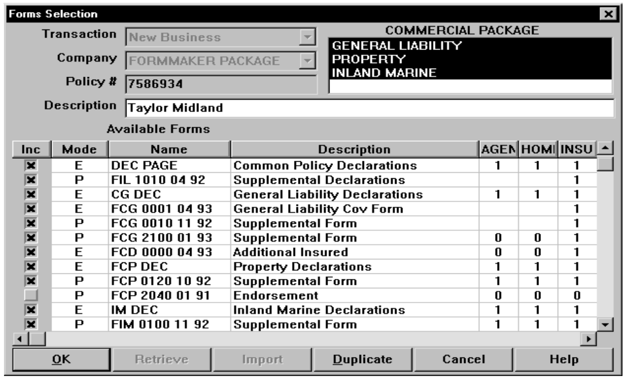
User ID	Policy #	Date	TR	ST	US	
FORMAKER	95783GL	04/05/1999	NB	W		Henson, Melanie
FORMAKER	34673467834	03/30/1999	NB	W		
FORMAKER	34576543646	04/06/1999	NB	W		
FORMAKER	987090870	03/23/1999	NB	W		

1 Select the form set you want to edit. The key field information, such as company name, line of business (LOB), and policy number (Policy #) appear in the appropriate fields as you click different form sets.

NOTE: You can double-click on a column heading, such as User ID, to search for a specific form set. See Searching for a Form Set on page 132 for more information.

---

2 Click Ok. The system displays your form set in the Forms Selection window.



Transaction: New Business
Company: FORMMAKER PACKAGE
Policy #: 7586934
Description: Taylor Midland

COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Available Forms

Inc	Mode	Name	Description	AGEN	HOMI	INSU
☒	E	DEC PAGE	Common Policy Declarations	1	1	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1
☒	E	FCP DEC	Property Declarations	1	1	1
☒	P	FCP 0120 10 92	Supplemental Form	1	1	1
☐	P	FCP 2040 01 91	Endorsement	0	0	0
☒	E	IM DEC	Inland Marine Declarations	1	1	1
☒	P	FIM 0100 11 92	Supplemental Form	1	1	1

NOTE: While in WIP, you can add or remove Lines of Business (LOB), select or deselect forms, or modify the recipient copy counts within the Forms Selection window. See Selecting a Form on page 51, for specific information.

3 Click Ok in the Forms Selection window to open the form set.

NOTE: After you retrieve the form set, you can use the system's window customization, data editing, and print options. For more information, see Completing Forms on page 64; Customizing the Views on page 28; and Printing Form Sets on page 118.

SAVING A FORM SET TO WIP

Saving a form set to WIP lets you save a form set as work-in-process and exit the Entry window. You can save your work intermittently using the File, Save option. Using the Save option under WIP, you save your *final* changes to work-in-process.

To save a form set in WIP, choose WIP, Save. The system saves your changes, places the form set in WIP, and returns you to the main menu.

CLOSING A FORM SET

Closing a form set lets you close a form set and return to the main window.

To close a form set, choose Formset, Close. The system asks if you want to save the entered data. To save the data to WIP, click Yes. Click No to exit the Entry window without saving the form set. Click Cancel to remain in the Entry window.

NOTE: The system can be configured to suppress the Confirm Save message and automatically save data to WIP before closing a form set. See you system supervisor for more information about this INI option.

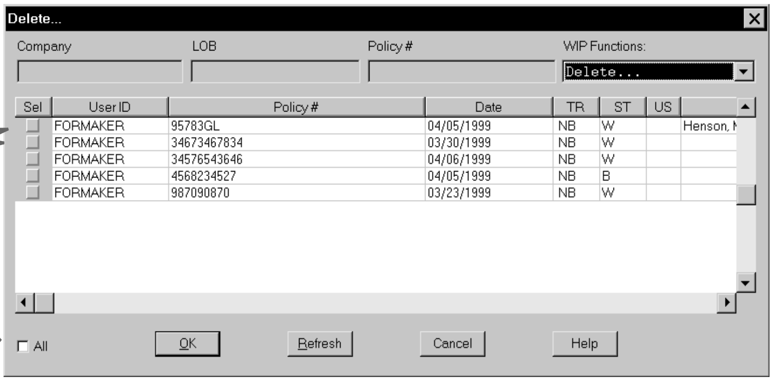
DELETING A FORM SET

Deleting a form set lets you remove form sets from WIP. You may delete form sets if you discover you entered incorrect information or if you no longer need the form set.

To delete a form set, follow these steps:

Follow these instructions to assign a form set:

1 Choose WIP, WIP List. Then choose Delete in the Task field. The Delete window appears.



Delete...

Company

LOB

Policy #

WIP Functions: Delete...

Sel	User ID	Policy #	Date	TR	ST	US	
☐	FORMAKER	95783GL	04/05/1999	NB	W		Henson,
☐	FORMAKER	34673467834	03/30/1999	NB	W		
☐	FORMAKER	34576543646	04/06/1999	NB	W		
☐	FORMAKER	4568234527	04/05/1999	NB	B		
☐	FORMAKER	987090870	03/23/1999	NB	W		

Click these buttons to select an individual form set.

Click here to select all form sets.

2 Select the form set you want to delete, and click Ok. You can delete multiple form sets at one time. You cannot delete archived form sets.

3 The system displays a confirmation message. Click Yes to delete the form sets or No to cancel.

When you delete a form set, the system deletes it from the system and you can no longer retrieve it.

Chapter 8

Archiving and Retrieving Form Sets

This chapter provides information on how to archive form sets for future reference and how to retrieve and view them.

To archive and retrieve form sets from Documaker Desktop, you use the Archive module.

This chapter discusses...

- Archive Module Overview on page 153
- Understanding Archive Views on page 156
- Archiving Form Sets on page 158
- Retrieving Form Sets on page 160

ARCHIVE MODULE OVERVIEW

The Archive module is often included with Documaker Desktop so you can store and retrieve electronic forms and documents for future reference.

The Archive module stores forms and data separately; therefore, you can permanently store your source documents which include only the sections or forms. You can also store your output documents, which combine a section, plus the applicable data. The Archive module makes archiving and retrieving form sets and documents straightforward and easy.

NOTE: The same options for customizing the view in Documaker Desktop are available in the Archive module. See Customizing the Views on page 28, for specific steps.

FEATURES AND BENEFITS

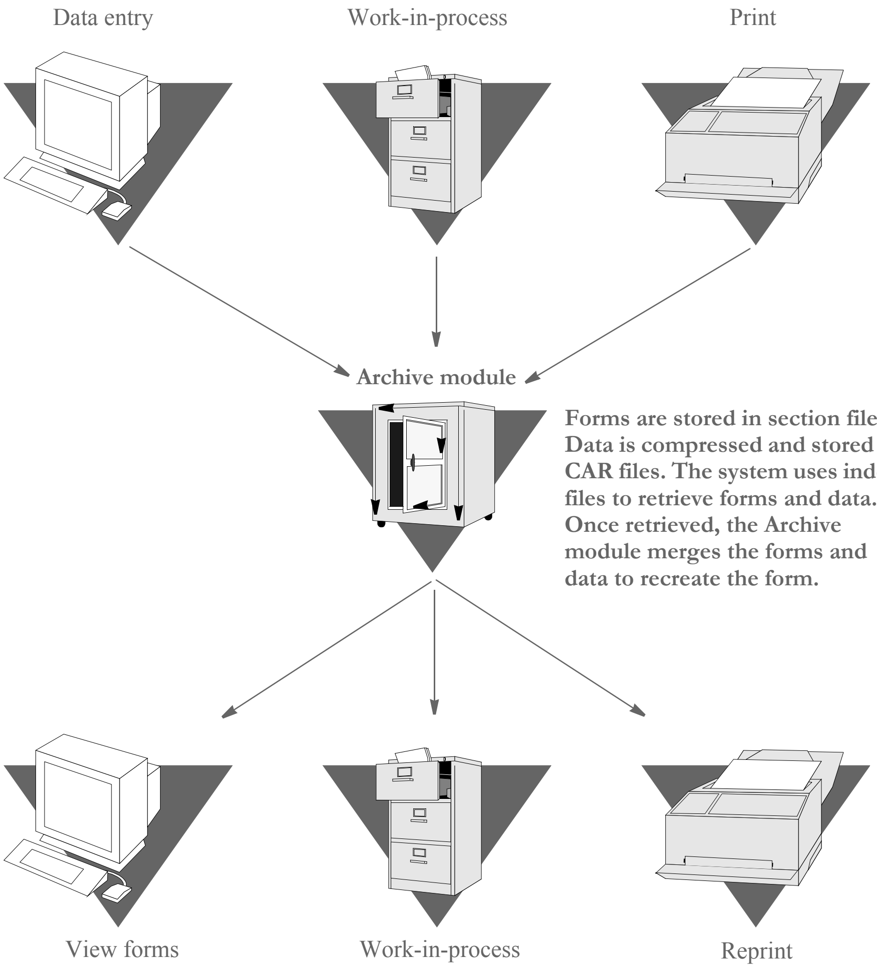
Integrating the Archive module into your organization benefits you and your company by automating archiving and retrieving processes. By archiving and retrieving forms and documents electronically, you increase form processing efficiency and reduce the costs associated with paper documents.

The Archive module especially benefits companies, such as banks, accounting firms, and insurance companies, whose document storage policies are regulated by industry or government.

- Provides Fast, Easy Archiving - By implementing the Archive module you can archive form sets and documents *on-the-fly*. As soon as you complete data entry, you can immediately archive (and/or print) the form set to make sure you maintain the integrity of the form set and the data it contains.
- Supports Organizational Productivity - You store documents electronically, eliminating paper filing, retrieval, storage space, and printing costs. The Archive module stores the document or form set separately from the data so you store the form set only once, saving storage space. Additionally, the Archive module compresses archived files, which also reduces storage space and costs.
- Offers Retrieval Indexing - Your system supervisor can configure your INI file so you can sort and retrieve documents and data according to specific criteria. Indexing criteria must be added before you implement the Archive module.
- Enhances Workflow - Documaker Desktop offers integration with most current system applications. Using the Archive module, you have immediate access to historical forms and data. The module's customized indexing enables fast document search capability. Immediate access to documents lets you reprint them quickly. If your system includes an internal fax, you can retrieve and then immediately forward documents without first printing them.
- Supports Multiple Media Storage - You can store archived form sets and data on various media.
- Expands Access - By setting up the Archive module on a file server of a networked system, multiple users can use the system to view and print archived form sets. This gives you remote retrieval and access.

INTEGRATION WITH OTHER MODULES

The Archive module's standard functions and programs are essential to the overall system and therefore cannot be altered. However, certain components can be customized specifically for your company. This illustration shows how it works.



Forms are stored in section files. Data is compressed and stored in CAR files. The system uses index files to retrieve forms and data. Once retrieved, the Archive module merges the forms and data to recreate the form.

When you archive form sets, the system separates data from the forms or sections and stores the data separately. The system automatically compresses and stores your data in CAR files. It stores forms in section files.

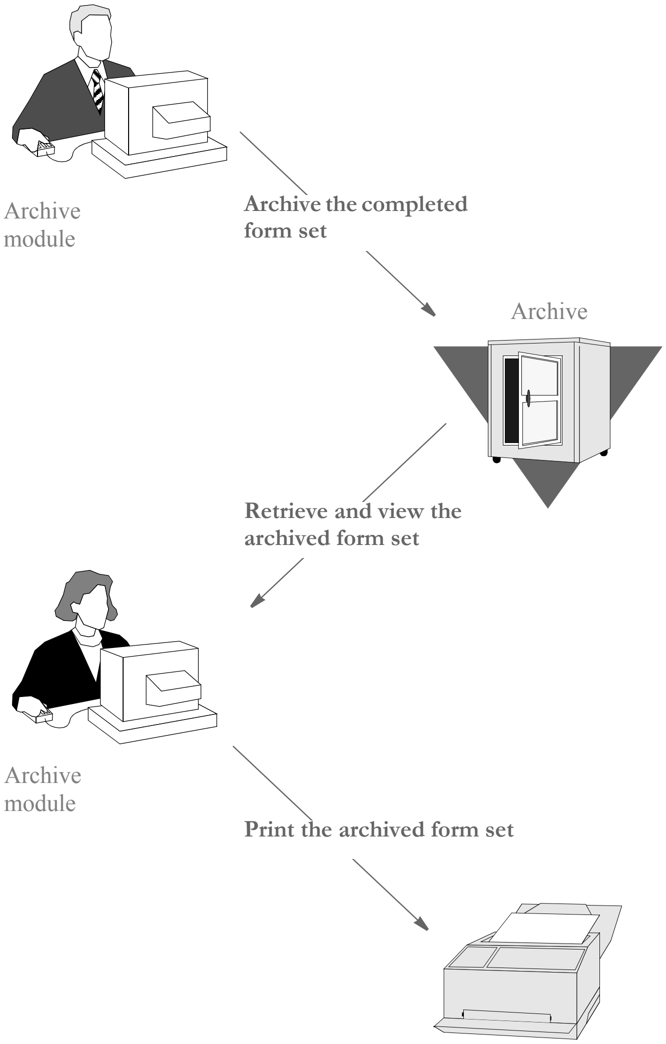
When you retrieve a form, the system searches your user index file to determine the indexing criteria of your form sets. You can customize the user index. After searching the user index file, the system searches your media index file to determine where in your system (hard drive, CD-ROM, and so on) the CAR files exist. Once it locates the CAR files, the workstation module retrieves both the form and the applicable data and displays the document in view mode.

TASK FLOW

Generally, when you complete data entry and print, the system automatically archives the form set. If your system configuration specifies manual archiving, you must manually archive the form set after completing data entry and printing. You can do this using the Archive module.

You can also retrieve a form set directly, or retrieve only archived data to use as the basis for a new form set, such as for a renewal or endorsement. When you retrieve a form set, you retrieve it in *view mode*. You can customize the display of the retrieved form set, but you cannot change any data.

The illustration below shows a typical task flow, beginning with a user archiving a completed form set.


Archive module
Archive the completed form set
Archive
Retrieve and view the archived form set
Archive module
Print the archived form set

UNDERSTANDING ARCHIVE VIEWS

When you retrieve an archived form set, you select a form set from a list, then display the form set in *view mode*. The Retrieve Document window lets you sort archived form sets according to criteria defined in the INI file. From the Retrieve Document window, you can choose various data retrieval options as specified by your system configuration.

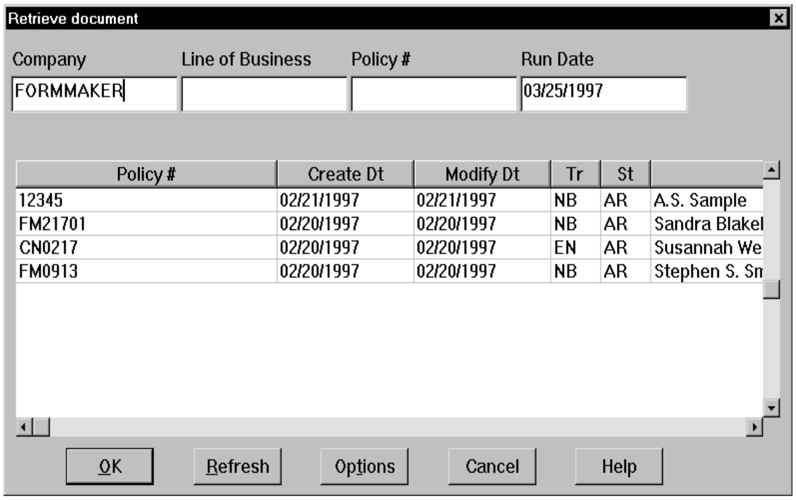
NOTE: For more information on customizing your windows, see Customizing the Views on page 28.

When you manually archive a form set, the Archive module displays the WIP/Archive list in the Manual Archive window. You select a form set to archive. Sort options are available on the WIP/Archive list.

USING THE ARCHIVE LIST WINDOW

The Archive module organizes and sorts archived form sets in the Retrieve Document window. The archive sort order, which is determined by the INI file, is defined in the table which follows.

When you retrieve a form set, the Archive module displays the Retrieve Document window. The window shows each form set currently archived based on the data you enter in one of the key fields, such as Company, LOB, or Policy #. See Retrieving Form Sets on page 160 for more information on entering data in the key fields. Customized windows may display additional options for archiving and retrieving form sets.



Company: FORMMAKER
Line of Business:
Policy #:
Run Date: 03/25/1997

Policy #	Create Dt	Modify Dt	Tr	St	
12345	02/21/1997	02/21/1997	NB	AR	A.S. Sample
FM21701	02/20/1997	02/20/1997	NB	AR	Sandra Blakel
CN0217	02/20/1997	02/20/1997	EN	AR	Susannah We
FM0913	02/20/1997	02/20/1997	NB	AR	Stephen S. Sn

This table defines form set sort information shown on the Retrieve Document window.

Field	Description
Policy #	The user defined policy number of the archived form set.
Create Dt	The date the form set was created.
Modify Dt	The date the form set data was created or the date on which it was last changed.

Field	Description
TR (Transaction Code)	A one- or two-character code associated with the form set type. Codes are predefined in the system INI file and cannot be altered. Transaction codes include *NB* (New Business), *EN* (Endorsement), and *RN* (Policy Renewals).
ST (Status Code)	A one- or two-character code associated with the current status of the form set. Codes are set up in the INI file. In the Retrieve Document window, the status is always: *AR* = Archived
Description	The user defined description of the form set.

USING ARCHIVE VIEW MODE

The view mode in which you display retrieved form sets includes the same customization options as the Entry window, including print options. You can print an archived form set for review, but you cannot alter the original data.

See Customizing the Views on page 28, for specific information about arranging your screen view. See Printing Form Sets on page 118, for specific information about printing archived form sets.

ARCHIVING FORM SETS

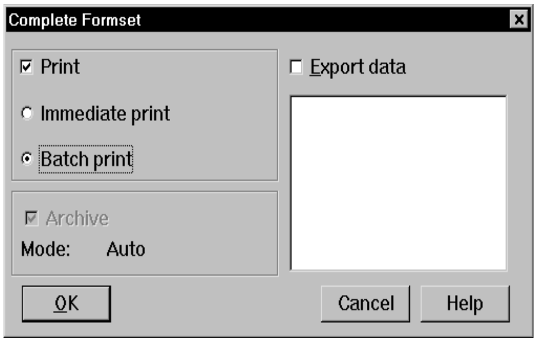
Archiving form sets lets you store the form set with completed data for future reference. The system offers two archiving options: automatic and manual. Archiving functions are predefined in your INI file. Only your system supervisor can change the INI settings.

Automatic Archive

Automatic archive lets the system archive form sets when you print a document. The File, Complete option starts an automatic archive, if specified by your system configuration. Make sure you complete the form entry before you archive the form set. Once you archive a form set, you *cannot* edit the data.

Follow these steps to automatically archive a form set:

1 Choose File, Complete. The Complete Formset window appears. If your system is configured for automatic archive, the Archive option will be selected and the Mode will display *Auto*.



Complete Formset

☑ Print

○ Immediate print

● Batch print

☐ Export data

☑ Archive

Mode: Auto

2 Select the print options.

- Immediate Print - sends current print job to the printer for immediate printing.
- Batch Print - sends current print job to the batch print queue for printing at a later time. This option is useful when printing numerous form sets.

3 Click Ok to print and archive the form set. The Print window appears (see Printing Form Sets on page 115, for specific printing information). The system automatically archives the form set when you print it.

NOTE: You can archive a form set only by selecting the File, Complete option. If you print your form set using the File, Print, Formset Proof option, the system does not archive your form set.

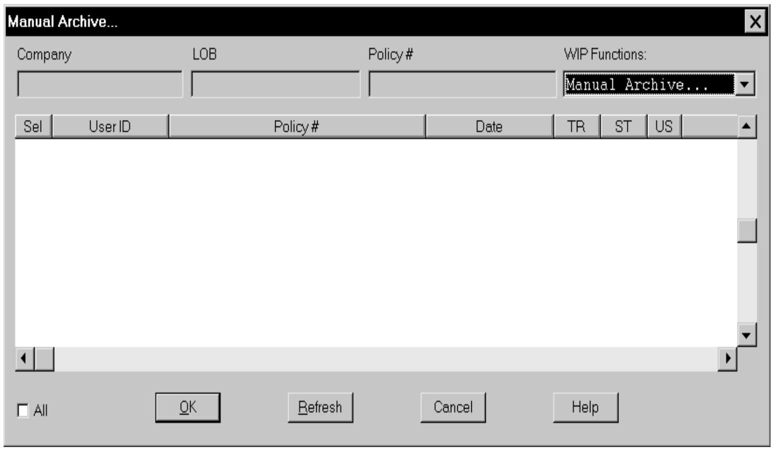
Manual Archive

Manual archive lets you archive a form set as a separate step after completing data entry and printing the form set. You select manual archive options from the WIP menu. Before you initiate a manual archive, you must first complete data entry, save, and print your form set. Choose File, Complete to save and print your form set prior to manual archiving.

On occasion, you might need to edit your form set after printing and before performing the manual archive. Check with your system supervisor for the procedures.

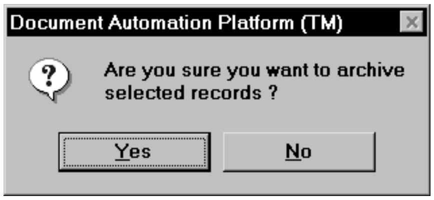
Follow these steps to manually archive a form set:

1 Choose WIP, WIP List. Choose Manual Archive in the Task field. The Manual Archive window appears.


Manual Archive...
Company
LOB
Policy #
WIP Functions:
Manual Archive...
Sel
User ID
Policy #
Date
TR
ST
US
☐ All
OK
Refresh
Cancel
Help

2 Click the form set you want to archive in the Sel column. The Company, Line of Business (LOB), and Policy # display in the appropriate fields on the window. You can select multiple form sets to archive.

3 Click Ok to archive the form set. A confirmation message appears.


Document Automation Platform (TM)

Are you sure you want to archive selected records ?

4 Click Yes to archive the form set or No to return to the Manual Archive window.

5 After you complete archiving form sets, click Cancel to close the Manual Archive window.

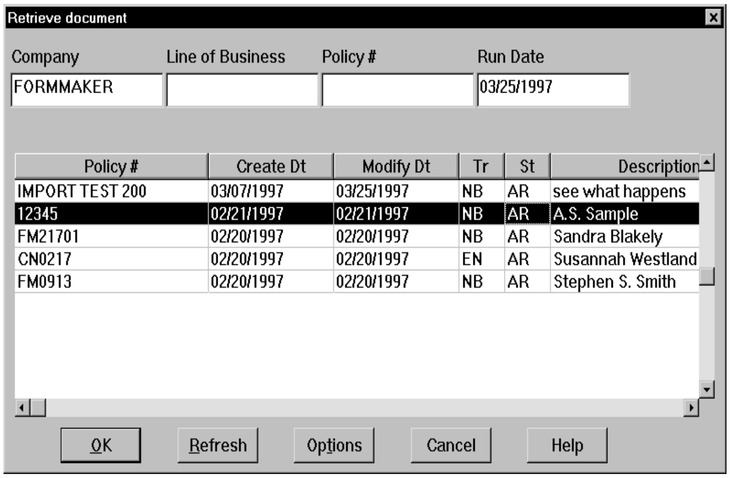
RETRIEVING FORM SETS

Retrieving form sets lets you retrieve archived data to review or re-use. You can retrieve a form set directly from archive to review past data history. You can also retrieve data while creating a new form set and use the retrieved data for insurance policy renewals or endorsements. You cannot edit an archived form set; you can only create new form sets using the archived data.

RETRIEVING FROM ARCHIVE

Retrieving a form set lets you open and view an archived form set. When you retrieve a form set, you open the form set in Archive View mode. You cannot change any data in the form set.

To retrieve a form set from archive, select Retrieve, Formset to display the Retrieve Document window.



Company	Line of Business	Policy #	Run Date
FORMMAKER			03/25/1997

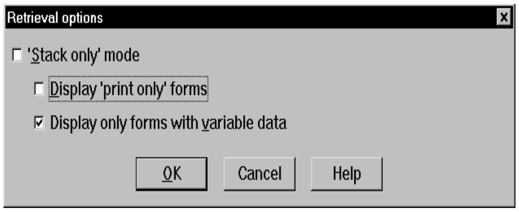
Policy #	Create Dt	Modify Dt	Tr	St	Description
IMPORT TEST 200	03/07/1997	03/25/1997	NB	AR	see what happens
12345	02/21/1997	02/21/1997	NB	AR	A.S. Sample
FM21701	02/20/1997	02/20/1997	NB	AR	Sandra Blakely
CN0217	02/20/1997	02/20/1997	EN	AR	Susannah Westland
FM0913	02/20/1997	02/20/1997	NB	AR	Stephen S. Smith

1. Enter data in one or more of the key fields (Company, LOB, or Policy #) as sort criteria, and press ENTER to display the archived form sets associated with the key data you entered.

Key Field	Description
Company	The company associated with a form set.
Line of Business	The specific business or industry associated with a form set. Examples: Automobile Insurance, Homeowner's Insurance, Commercial Property Insurance.
Policy Number	A user-defined identifier (alphanumeric) associated with a specific form set.

NOTE: You can enter incomplete data for a broad sort. For example, to select all companies beginning with *F*, type **F** in the Company field.

2. If you want to refine your search of archived policies after the initial display, you add or change the data in one or more of the key fields (Company, LOB, or Policy #), then click Refresh. The system redisplays a list of available archived policies based on your new search parameters.
3. Click Options to display the Retrieval Options window.



☐ 'Stack only' mode
☐ Display 'print only' forms
☑ Display only forms with variable data

4. Click one of the following retrieval options; then, click Ok. Stack Only mode is the default mode, and you must deselect this option to choose a different retrieval option.

Option	Description
Stack Only Mode	Displays all forms in the form set, stacked one on top of another.
Display Print Only Forms	Display includes the forms within the form set that are defined as Print Only. Print Only forms do not contain manually entered data, although general data may have been propagated into the form variable fields.
Display Only Forms with Variable Data	Displays only forms containing variable data. Does not include reference forms, or other informational forms.

5. Click the form set you want to retrieve; then, click Ok to display the form set in the Archive View mode.

You can navigate through the variable fields to view the data. Press TAB to place your cursor in the next variable field in the sequence. If you would prefer to use the TAB key to move from page to page rather than field to field in the Archive View mode, your system supervisor can configure that option in the INI file for you.

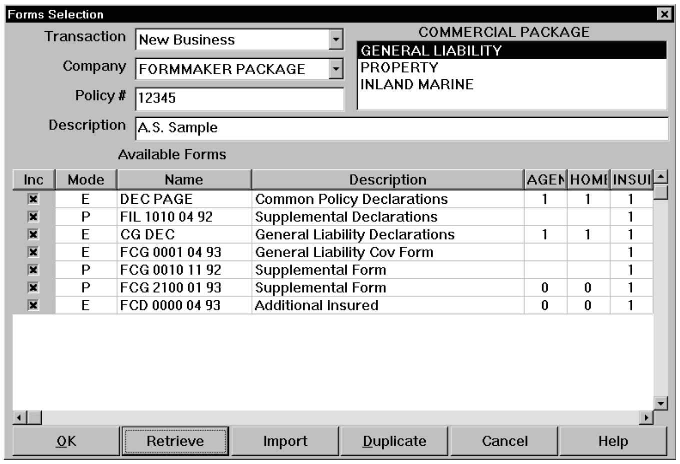
When you retrieve a form set, screen customization and print options are available to you. See Customizing the Views on page 28, and Printing Form Sets on page 118, for specific information.

RETRIEVING FROM THE FORM SELECTION WINDOW

You can retrieve form set data from the Forms Selection window if you want to copy and re-use archived data for a policy renewal or endorsement.

Follow these steps to retrieve form set data from the Form Selection window:

1. Select File, New to display the Forms Selection window.



Transaction: New Business
Company: FORMMAKER PACKAGE
Policy #: 12345
Description: A.S. Sample

COMMERCIAL PACKAGE
GENERAL LIABILITY
PROPERTY
INLAND MARINE

Inc	Mode	Name	Description	AGEN	HOMI	INSUI
☒	E	DEC PAGE	Common Policy Declarations	1	1	1
☒	P	FIL 1010 04 92	Supplemental Declarations			1
☒	E	CG DEC	General Liability Declarations	1	1	1
☒	E	FCG 0001 04 93	General Liability Cov Form			1
☒	P	FCG 0010 11 92	Supplemental Form			1
☒	P	FCG 2100 01 93	Supplemental Form	0	0	1
☒	E	FCD 0000 04 93	Additional Insured	0	0	1

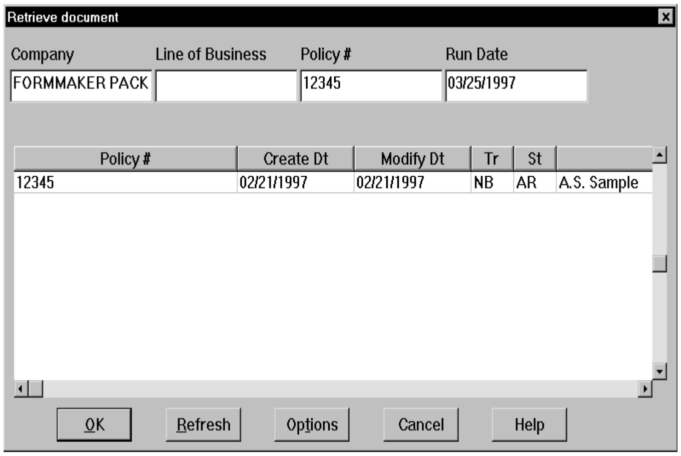
2 Select the Transaction, Company, and Line of Business (LOB) for the policy.

3 Type the Policy # and a policy Description in the appropriate fields.

4 Click Retrieve to display the Retrieve Document list window.

If you enter a Company, LOB, or Policy # which does not match existing policies, the system displays a message to warn you of the discrepancy. Click Ok to close the message. Enter a new Company, LOB, or Policy # in the Retrieve Document window and click Refresh to display the related archived form sets.

NOTE: The Retrieve button displays <Retrieve> after you retrieve data. Click the button again to undo the retrieve and clear the brackets (< >).



Company	Line of Business	Policy #	Run Date
FORMMAKER PACK		12345	03/25/1997

Policy #	Create Dt	Modify Dt	Tr	St	
12345	02/21/1997	02/21/1997	NB	AR	A.S. Sample

5 If you want to refine your search of archived policies after the initial display, add or change the data in one or more of the key fields (Company, LOB, or Policy #). Then, click Refresh. The system redisplays a list of available archived policies based on your new search parameters.

6 Click Options to display the Retrieval Options window. For information on retrieval options, see Retrieving from Archive on page 160.

7 Click the form set containing the data you want to retrieve; then, click Ok. The system creates a copy of the archived form set and displays the form set in the Forms Selection window.

8 Enter a new policy number and click Ok. See Completing Forms on page 64, for information about entering new data.

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