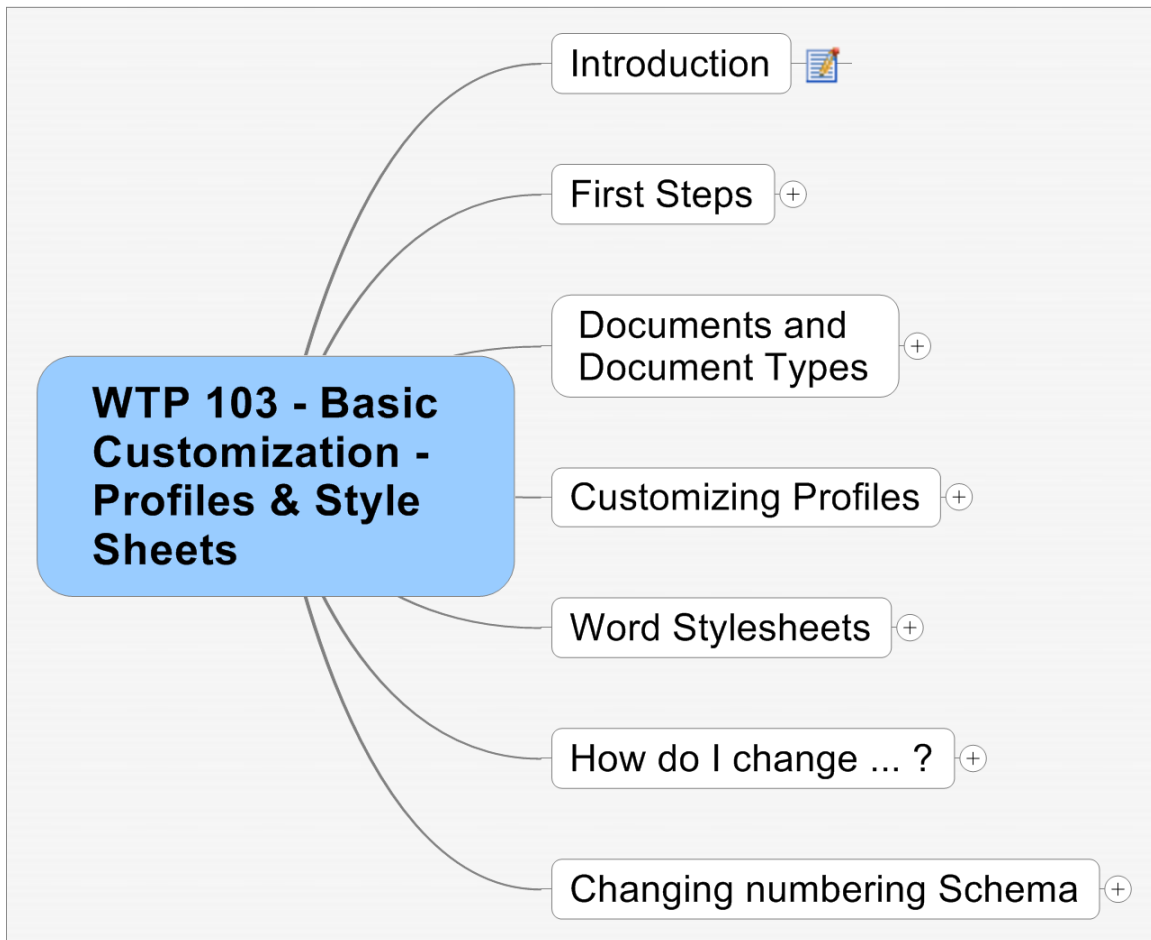


WTP 103 - Basic Customization - Profiles & Style Sheets



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1. Introduction

Course covers what happens BEFORE you (1) do a document interview, and (2) before you assemble a document. It covers setting up document answer profiles and Word Stylesheets.

2. First Steps

2.1. Granting Developer Rights

Administration -> Manage Users

Click Manage Users

Select "Maintain User"

Select the User to get Developer Rights

Check box "Assign Developer Rights to this User."

2.2. Switch to Development Mode

Click on box for SmartContent

Check box for Development Mode

First time, you may get a NULL error. Just exit and come back into WTP

2.3. Add a Client

For Testing and Development of Profiles, you need at least one client.

3. Documents and Document Types

3.1. Profile

Profile – is a collection of questions pertaining to a document type (i.e. a default set of answers).

3.2. StyleSheets

Style – defines what the document will look like: margins, font, tabs, etc. WTP installs a custom toolbar in Microsoft Word to enable users to change the style of their documents.

3.3. Templates

Template – is the language and rules that form the content of a document.

3.4. Element Templates

Element Template – is a sub- template embedded into a master template that control reusable blocks of material that appear in multiple master templates.

4. Customizing Profiles

4.1. How it works?

A Profile is a set of "pre-set answers"

Profiles are attached to particular document templates (either a master “authored” template or a custom template).

Profiles must be edited by running the Hot Docs interview for the profile on which it is based and changing the answers that were pre-selected by the authors.

Note: Additional questions cannot be added nor can the order of the questions be altered.

The main concern when developing customized profiles is selecting the best one to start with.

The base profile (often labeled “No default answers”) provides a blank slate. Other similar profiles will have questions already answered, meaning the developer must consider whether or not to modify the default answer.

Customized profiles are confined to Development Mode until the developer is satisfied that they work properly and chooses to publish them by clicking the Publish button.

If there is ever the need to restore a profile to its original condition, select the Restore function, which will overwrite your custom profile with the current authored profile.

4.2. Detailed Steps

From the Customization manager, click on Customize Profiles

Highlight the name of the profile under the applicable template type in the Profiles tree

Click the Copy button

Enter a name for the profile as you would like it to appear in the document selection tree (by default the program adds the word “Customized”)

Enter the name for the profile as you would like it to appear in the Smart Content list (by default the program adds the word “Customized”)

Select a template to assign the profile to. Note – A customized profile does not automatically have a template associated with it. The developer must select a template from the list provided to create a document type. Whether or not users can “see” the document type in the Add Document section depends on the status of the template it uses. If the template is either an authored template or a published template, the user will see the document type in the list.

Click OK and the HotDocs interview will launch. The developer can now modify the default answers in the interview and then click Finish to save those default answers.

The developer will be returned to the Customize Profiles tree and the custom profile will appear in red (indicating that it has not been published). When the developer is ready for the profile to be “live”, the developer should highlight the custom profile, click the Publish button and then the system will update and refresh the Custom Profile tree so that the profile will now appear in blue (indicating that it has been published).

5. Word Stylesheets

5.1. Toolbar

5.1.1. Stylesheet Templates

(a) Standard Numbering (S)

Standard Formatting Style (Buttons 4 – 6) allows the user to apply the “Standard” style sheet with either single, double or one and a half line spacing. The standard style uses the Times New Roman font type.

(b) Legal Numbering (L)

Legal Formatting Style (Buttons 1 – 3) allows the user to apply the “Military” numbering style sheet with either single, double or one and a half line spacing. The legal style uses the Times New Roman font type.

(c) Arial Font (C)

Custom Formatting Style (Buttons 7 – 9) allows the user to apply the “Custom” style sheet with either single, double or one and half line spacing. The custom style uses the Arial font type.

(d) Single Spacing

(e) 1.5 Spacing

(f) Double Spacing

5.1.2. Reveal Codes

(a) Document Map

Document Map (Button 10) enables an “outline” panel in the left margin of the document that allows you to quickly navigate to specific areas within the assembled document.

(b) Show/Hide Para

Show/Hide (Button 11) turns on various formatting markers in the document (e.g. spaces, paragraph marks, page and section breaks and hidden text).

(c) Reveal Formatting

Reveal Formatting (Button 12) like “Reveal Codes” in WordPerfect. Displays the font, paragraph (alignment, indentation and spacing) and section formatting for the selected text.

5.1.3. Word Styles

(a) Formatting Toolbar

If toolbar is not visible, Right-Click on Toolbar, and check FORMATTING.

Note how as your cursor enters each paragraph, the name of the style in the toolbar changes.

(b) Style Tags in Normal View

To expose the styles, make sure you are in Normal View (View -> Normal). Then set your style margins to 1" or 1.5" (Tools -> Options -> Outline and Normal Options -> Style Area Width).

(c) Taskpane Styles

Click on the Reveal Formatting button (Shift- F1). It will show you a list of Styles. As you scroll the list, the names of the styles are illustrated as they would appear in the document.

5.2. Opening the Stylesheet

The stylesheets are located in a folder titled "LocalStyles".

- Custom Single.rtf
- Custom 1.5.rtf
- Custom Double.rtf
- Legal Single.rtf
- Legal 1.5.rtf
- Legal Double.rtf
- Standard Single.rtf
- Standard 1.5.rtf
- Standard Double.rtf

5.3. Style Schema

WTP has a clearly defined style sheet. Everything starts at TR_Base. From there styles identify the function of the paragraph in the document.

5.3.1. The Base Style (TR_Base)

TR_Base is the base for ALL styles in the system. That means, that you can change the FONT of TR_Base, and the changes will ripple through the entire document.

5.3.2. Article Styles (TR_Art)

The Article Styles (TR_Art ...) govern the numbering and styles of Agreements. They are divided into Levels. TR_Art1, TR_Art2, TR_Art3, TR_Art3B, and TR_Art4B. The difference between TR_Art3 and TR_Art3B is the first is formatted as a Header and the second is formatted as body text.

5.3.3. Body Styles (TR_Body ...)

These are Body styles for how to handle plain text.

- TR_Body is justified with no indent.
- TR_Body1 adds a first-line indent.

5.3.4. Memo Styles (TR_Mem ...)

These styles are used for Memos. They address the header (TR_MemHeader1), the To/From (TR_MemAddr), the Body (TR_MemBody) and Bullets (TR_MemBullet).

5.3.5. Letter Styles (TR_Ltr...)

5.3.6. Signature Styles (TR_Sig...)

5.3.7. Footer Styles (TR_Footer...)

5.3.8. Character Styles (TR_Emphasis and TR_ParaHdr)

These are using to provide a consistent style for emphasis that can be "restyled" globally. TR_Emphasis is used in special places to handle Client Memos. TR_ParaHdr functions like TR_Emphasis, but is a special code that works in the Convert to 2-Level Table of Contents.

5.4. Outline Numbering

5.4.1. Apply automatically by using the appropriate Paragraph Style

5.4.2. Default Schema

The Standard Stylesheet is 1.5 spacing with no paragraph letting, except before Articles. Base schema starts with Article I, A., 1., a.

5.4.3. Alternate Military Schema

Base schema starts with Article I, 1.1, 1.1.1, 1.1.1.1. Spacing depends on the template selected.

5.4.4. Bullets and Numbering Wizard

CAUTION: Act at your own risk. Control-Z is your friend. Right click on the Text of Article I of the document and choose "Bullets and Numbering". Choose an alternate schema or click on Customize.

6. How do I change ... ?

- Change the Base Font
- Change Line Spacing
- Change Paragraph Letting
- Change Justification
- Add a Page Break before Articles.
- Change Indentation
- Adding a Hot-Key

7. Changing numbering Schema

- Call up the Outline Editor
 - Go to the first article.
 - Right-click and choose Bullets and Numbering.
 - Click on the Outline Tab
 - Outlines schemas are collection of Levels
- Editing a Level
- Advanced Tab - Linking Level to a Paragraph Style
- Understanding Indentation Rules
- Applying Number Style
- Nested/Legal Numbering