

ProDoc Tech Tip

Editing Case Answers

There is more than one way to change answers for case documents you previously generated in ProDoc. The most obvious is to go into the finished document and make any necessary changes. However, that does not change the answer saved in ProDoc's database for reuse the next time it is needed.

The better way to change answers is to do so in the ProDoc database. You can easily correct specific answers without reassembling case documents. This makes the change permanent and saves you time in the long run.

1. Use the Case Answers Feature

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

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

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

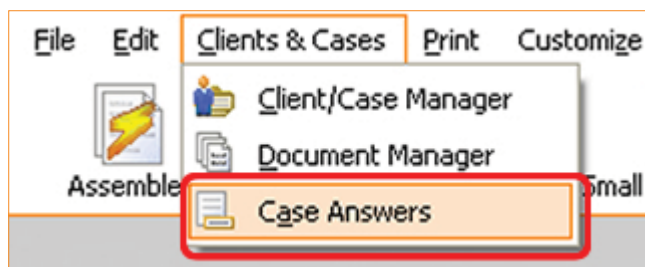


Figure 1 - Choose to Edit Case Answers

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

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

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

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

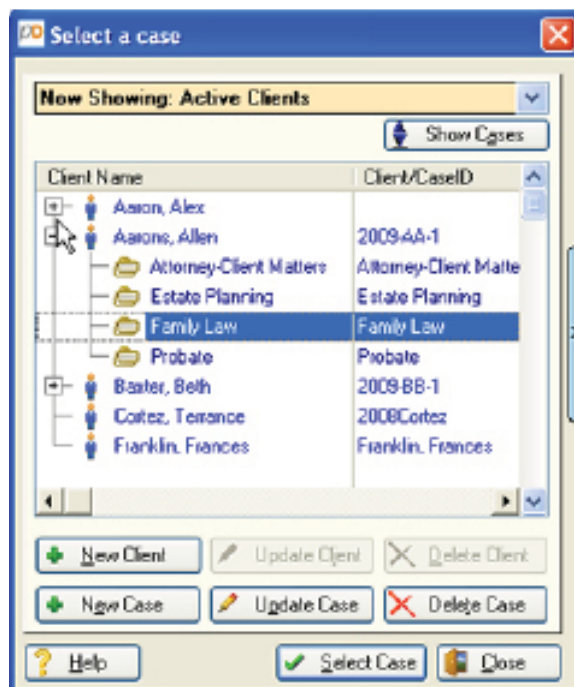


Figure 2 - Select the Client and Case

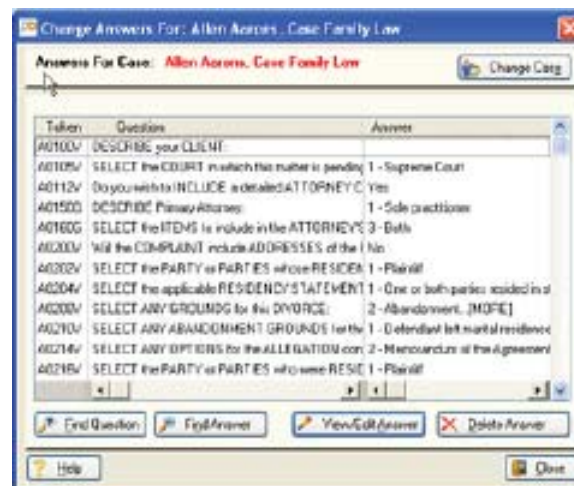


Figure 3 - View the Questions and Answers

The **Change Answers For** window lists all the questions and answers that have been used to complete case documents.

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

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

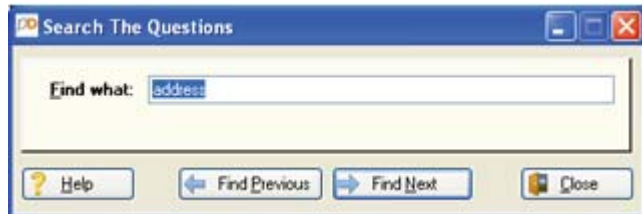


Figure 4 - Search Questions for Address

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

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



Figure 5 - Address Questions Display

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

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

question.

- Expand the **Question** column to see more of the question.

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

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

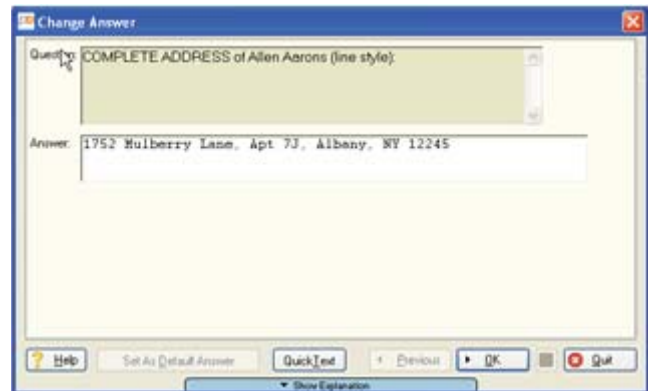


Figure 6 - Edit Case Answer

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

The **Delete Answer** button enables you to delete an answer. Click first on an answer and then click **Delete Answer**. You are not asked to verify that you wish to delete the answer so be certain you selected the correct answer.

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

Click **Yes** on the next window to confirm that you want to save your changed answers. Reassemble your documents using Method 1 (below) but elect not to review prior answers. You may still be asked additional questions if the answers you changed trigger new questions.

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

2. Assemble Again Using the Traditional Assembly Method (Method 1)

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

3. Reassemble from the Document Manager (Method 2)

This method is very similar to Method 1 but does provide the advantage of being able to determine up front whether you wish to (a) overwrite the prior document or (b) create a new document with a different name.

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



Figure 7 - The Document Icon

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



Figure 8 - Select Document to Reassemble

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

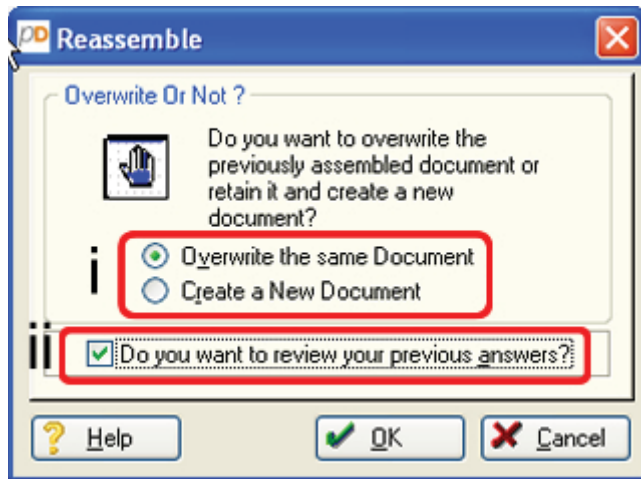


Figure 9 - Choose How to Reassemble the Document

- i. Choose **Overwrite the same document** or **Create a New Document**.
 - Click **Overwrite the same document** if you wish to replace the previous version.
 - Click to **Create a New Document** if you wish to preserve the previous version.
- ii. **Do you wish to review your previous answers?**
 - If yes, select to review, and change the previous answers where needed. After you click the OK button the document assembly process will begin for you.

4. Additional Resources

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

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