

ProDoc Tech Tip

Modifying Documents in the ProDoc Graphic-Forms Engine

ProDoc graphic forms look like fill-in-the-blank, government forms. Unlike ProDoc text-based forms, graphic forms are saved as PDF documents. Because graphic forms are so different from text-based forms, we created a powerful but easy to use features to enable you to extensively modify them to suit your needs.

You can use the features shown in **Figure 1** below to edit documents you are generating in ProDoc and also to edit completed and saved PDF documents. For more information about all the methods for editing ProDoc-generated documents, see our **Revising Finished ProDoc Documents** Tech Tip at <http://tinyurl.com/pd-revise-docs>.



Figure 1 - The ProDoc Graphic Engine Tool Bar

You can also use these features to make quick changes to a completed graphic form. This comes in handy when you have to make a quick change to the form and you do not have time to change the answer in the ProDoc database. For instance, you can overwrite an answer, add an answer to blank field, or add more information to a field. Remember that changes made this way are not saved in the database for re-use in future case documents you generate.

A. Formatting and Page Options in the Graphic Engine

You have many formatting and page options available as shown in Figure 1 when viewing the completed forms.

- 1. Page Navigator** – If the document has multiple pages, use this feature to go to a specific page.
- 2. Zoom** – The Zoom feature enables you to enlarge and later reduce the page view.
- 3. Add Blank Page** – Click this button (Available in California only) to add additional pages to the end of the document with these formatting options for the page: Additional Page (blank page with the short title and case number), attached declaration, attachment page, and pleading paper (no title or case number at the top).
- 4. Remove Current Page** – Use this feature to remove any pages you manually added with the Add Blank Page feature.
- 5. Print Document** – Click here to print the document.
- 6. Save Document to PDF** – Clicking here causes the

document to be saved and opened as a PDF document.

- 7. Font** – Use these two features to set the font type and size in the field in which you are working.
- 8. Squish** – The Squish feature compresses the font in the selected field closer together.
- 9. Bold/Indent/Underline** – Use these three features to make these special font attributes.
- 10. Applies Current Font to All Fields on Page** – Click here and the font settings you made in 7, 8, and/or 9 above are applied to the data in all fields on the current page.
- 11. Undo** – The Undo function reverses any changes you make. It works just like the Undo command in your word processor.
- 12. Explanation** – This feature shows you the question for that field as shown in **Figure 2**. It also shows you the question number (3)—the token number in ProDoc lingo—which enables you to more quickly locate the question and change the answer using the **Edit Case Answers** (tinyurl.com/pd-edit-answers) feature.



Figure 2 - View the Question and Token Number.

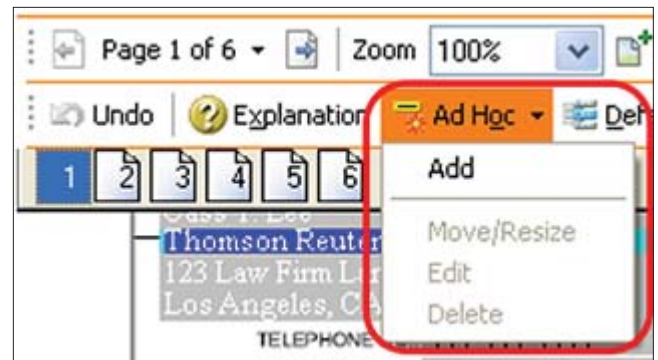


Figure 3 - Features Available Through the Ad Hoc Button

- 13. Ad Hoc** – This feature is covered in detail below in the next section.
- 14. Default** – Click this button after entering data in a field to make the data the default for this field. The default data is automatically suggested in that field for future documents.
- 15. QuickText** – ProDoc’s QuickText feature is a language library in which you can store your favorite clauses and other language. Learn more about using QuickText at <http://tinyurl.com/pd-quick-text>.
- 16. Save and Continue** – If you’ve made numerous changes with more to go, it’s sometimes a good idea to use this feature to save your work so you don’t lose it if something happens to your computer. After the save is complete you can continue working on the page.
- 17. Save and Close** – When you’re done you can save and close this page. This will generate the final document to a PDF for you to view and print.
- 18. Cancel** – This closes the document without saving the changes.
- 19. Page Navigator** – This is the second feature that enables you to navigate to a specific page of a multiple page document.

- 4. Delete** – Permanently removes the selected field.

C. Add an Ad Hoc Field

You can add an **Ad Hoc** field to quickly overwrite an answer in a field or to add additional information anywhere you wish on the page shown.

1. Click on the **Ad Hoc** button and then on **Add** as shown in *Figure 3*.
2. Your cursor will control the movement of a + (symbol) around the page. Place the center of the + in the bottom left corner of where you want to begin entering text. When you click the left mouse button a yellow text field will display as shown in *Figure 4*. Begin typing.



Figure 4 - The Yellow Text Field Appears

D. Resize an Ad Hoc Field

You can shorten or lengthen an Ad Hoc field to suit your needs. Remember that you also have the options of Squish and changing the font size of the text in the **Ad Hoc** field.

1. Click on an Ad Hoc field on the page and then click **Move/Resize** as shown in *Figure 5*. The **Move/Resize** feature will be grayed-out after clicking on an Ad Hoc field.

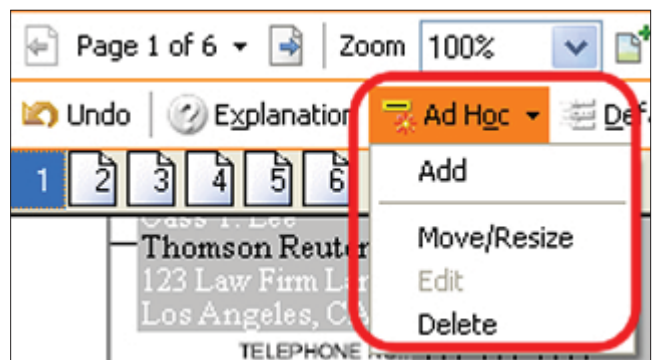


Figure 5 - Move/Resize/Delete Now Available

B. Creating, Moving, and Resizing Ad Hoc Fields

You can create ad hoc fields, move them around the page, and lengthen or shorten them using the **Ad Hoc** Button as shown in *Figure 3*. The field height automatically resizes based on the font size.

Click on the **Ad Hoc** button and view the drop down with the options to:

- 1. Add** – Create a field anywhere on the page shown,
- 2. Move/Resize** – Used to move the field around the page or shorten/lengthen the field,
- 3. Edit** – Enables you to edit the text when you have Move/Resize selected, and

- After clicking on **Move/Resize** you will see red buttons on each end of the field. Hover over either end and you will see a two-headed arrow as in **Figure 6**. Move the arrow in either direction to increase or decrease the length of the field.



Figure 6 - Resize a Field if Necessary

E. Move an Ad Hoc Field

You can move an **Ad Hoc** field anywhere on the page shown. You may want to use the **Zoom** feature to enlarge the page if you need to precisely place an **Ad Hoc** field somewhere on the page.

- Click on an **Ad Hoc** field on the page and then click **Move/Resize** as shown in **Figure 5**. The **Move/Resize** feature will be grayed-out after clicking on an **Ad Hoc** field.
- Click in the field and, while holding down the left mouse key, move your cursor. When you move the cursor you will see a four-direction arrow as shown in **Figure 7**. You can now move the field anywhere on the page.

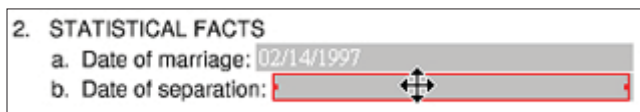


Figure 7 - Move the Field

F. Edit an Ad Hoc Field

The easiest method to edit an **Ad Hoc** field is simply to click on the field containing the text to be changed. When the field turns yellow as shown in **Figure 4**, simply left-click in the field and make changes just as you would in a word processor document.

However, you also have the option of using the **Ad Hoc** Edit feature. Just as described in **Step 1 of Move an Ad Hoc Field**, click on the field you wish to edit. When the field is outlined in red, click **Edit**. You can now change the text in that **Ad Hoc** field.

G. Delete an Ad Hoc Field

Click on the **Ad Hoc** field and then click on **Delete** as shown in **Figure 5**. After clicking on the **Ad Hoc** field, the **Delete** feature will no longer be grayed-out.

H. If You Used the Ad Hoc Feature to Make a Fast Change to a Form...

If you used the **Ad Hoc** method to make a fast change on the page, we strongly recommend that you make sure that the permanent change is made in the ProDoc database. Again, information about how to do so can be found at tinyurl.com/pd-edit-answers.

I. Getting Help

- Call our Technical Support team at 800-759-5418.
- Call our Training Team at 800-759-5418 for a personal training session on this topic.