



Informs Setup Guide

Customise your System

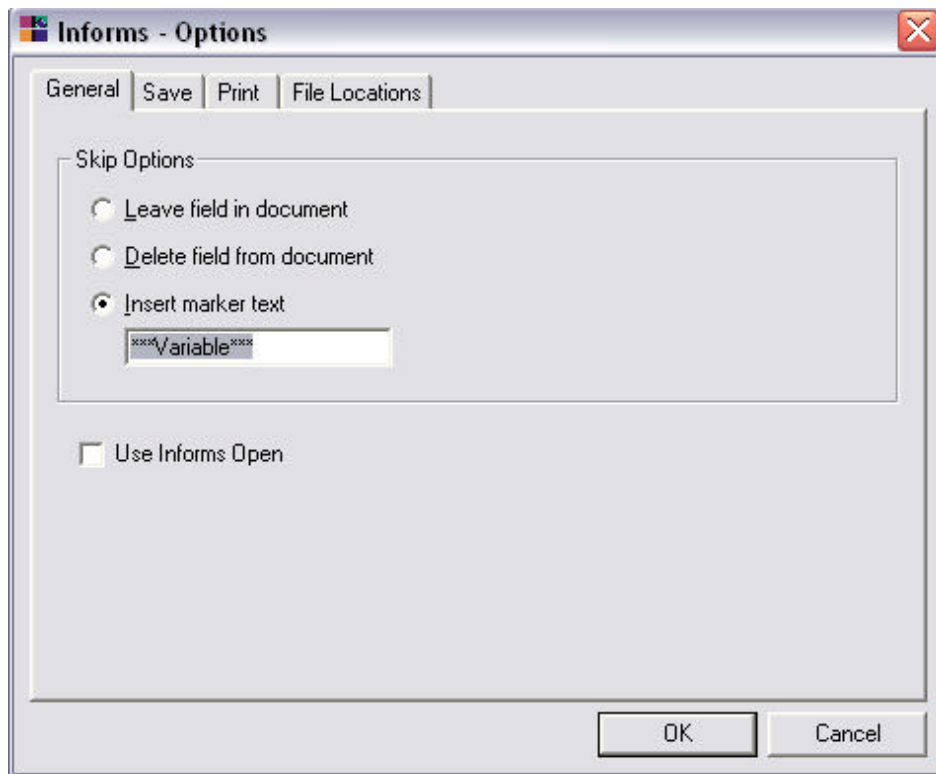
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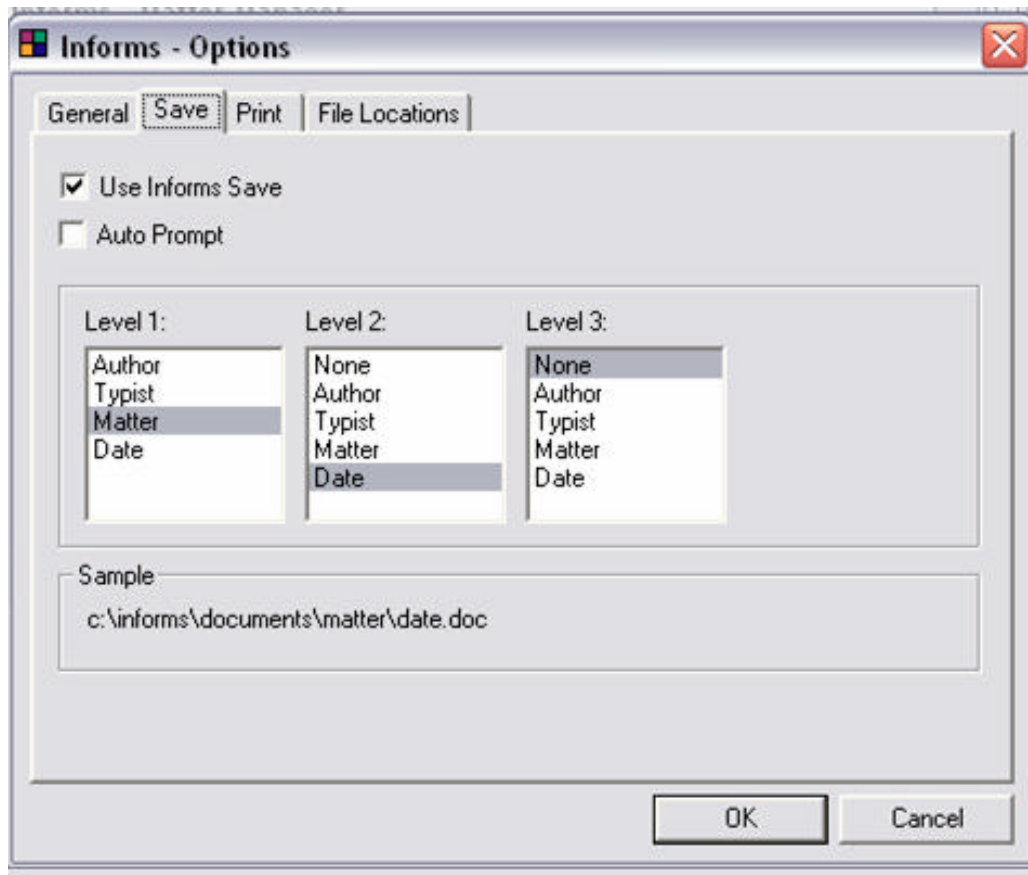
INFORMS SETUP OPTIONS

1. To use Informs software, start Microsoft Word. Click on the Informs button, select **Utilities, Matter Manager**, then select **Tools** and **Options**. The **Options** dialogue will be displayed:



Use this to customise Informs for your system.

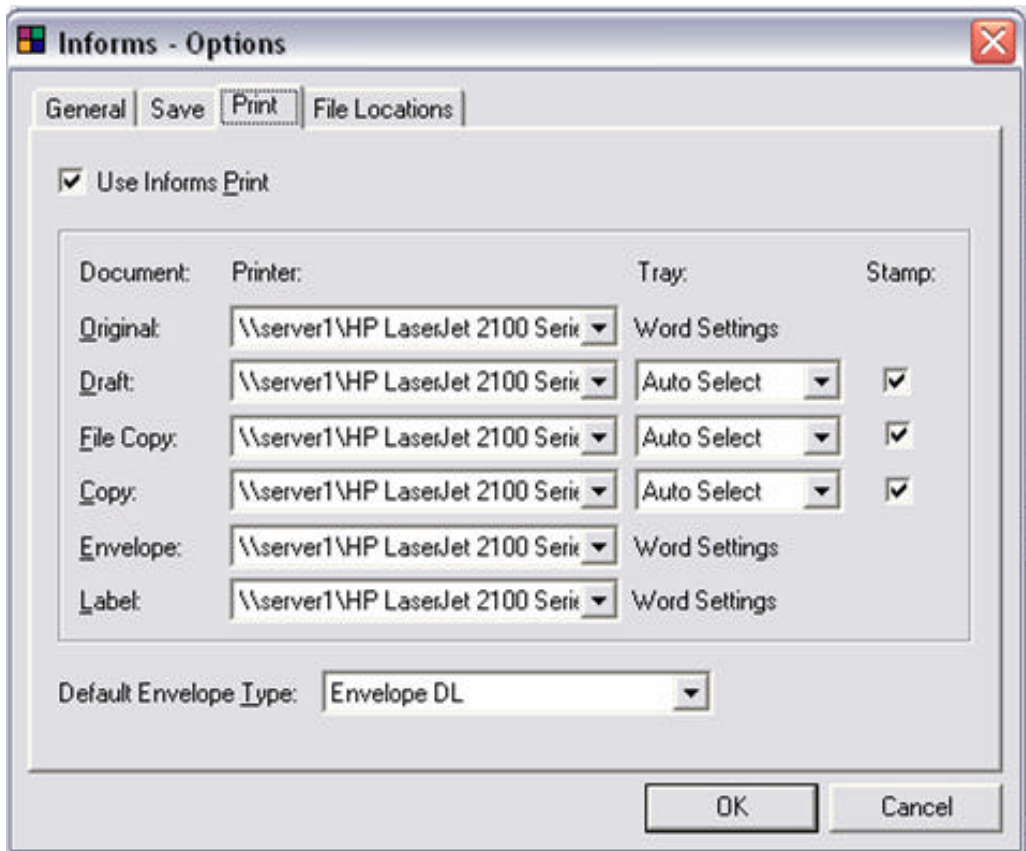
2. Select the **Save** tab from the *Informs - Options* dialog:



How would you like to save your documents:

- *Use Informs Save*: automatically names and saves documents. If this item is not selected, the standard Word save dialogue is used for saving documents.
- *Auto Prompt*: prompts you to save documents immediately after the **Select Matter** dialogue is displayed (before you begin typing the document).
- *Level 1, Level 2 and Level 3*: nominate the auto-name convention for your documents. As you make selections from these items, the sample document name will update to provide an example of how documents are saved. It is not necessary to choose an option from each level. Some examples are:
 - Level 1 – date, Level 2 – none, Level 3 – none:
C:\030922-xx.doc
 - Level 1 – author, Level 2 – matter, Level 3 – none:
C:\cjd\030001-xx.doc
 - Level 1 – author, Level 2 – matter, Level 3 – date:
C:\cjd\030001\030922-xx.doc

3. Select the **Print** tab:



What printer settings do you require:

- *Printer*: select the required printer for each document type.
- *Tray*: select the required tray for each document type.
 - Original documents print from the Paper Source set for each individual document. To change the paper tray for an original document, select **File** then **Page Setup** then **Paper Source** from within Word.
- *Stamp*: select to print a stamp (draft, file copy, etc) on the documents when they are printed.
- *Default Envelope Type*.

For more information on these ***Informs - Options*** settings, refer to the Informs User Guide.

CUSTOMISE YOUR SETUP DOCUMENTS

4. Informs contains a range of setup documents that are automatically inserted into Informs' precedents when you process a document.

You can change or reformat these documents to suit your firm's needs. For instance, alter *LtrHd.doc* (the first page header of the letterhead) to include your firm's own logo, address details etc.

As all Informs' precedents use the same setup documents you only need to change your letterhead (or first page footer etc) in the one document for the changes to flow through to all your precedents.

The setup documents are located in a folder called setup off your data folder (generally c:\informs\setup).

The complete list of setup documents are as follows:

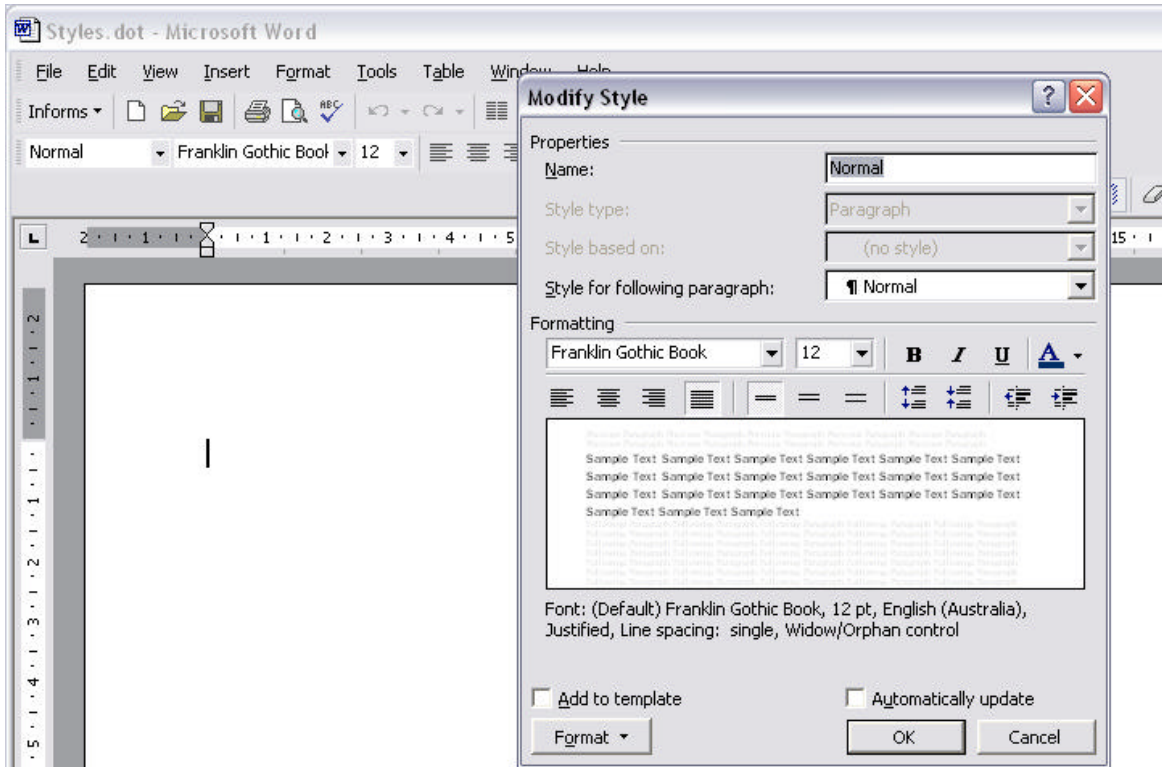
- ***AccHdr.doc***: format of account or tax invoice.
- ***FaxAB.doc***: fax header using the address book.
- ***FaxAgent.doc***: fax header to the agent.
- ***FaxClient.doc***: fax header to the client.
- ***FaxMgee.doc***: fax header to the mortgagee.
- ***FaxMgeeSol.doc***: fax header to the mortgagee's solicitor.
- ***FaxOS.doc***: fax header to the other party solicitors.
- ***LtrAB.doc***: letter header using the address book.
- ***LtrAgent.doc***: letter header to the agent.
- ***LtrClient.doc***: letter header to the client.
- ***LtrFt.doc***: first page footer of the letterhead.
- ***LtrFt2.doc***: second and subsequent page footer of the letterhead.
- ***LtrG.doc***: letter header for any document without an address.
- ***LtrHd.doc***: first page header of the letterhead.
- ***LtrHd2.doc***: second and subsequent page header of the letterhead.
- ***LtrMgee.doc***: letter header to the mortgagee.
- ***LtrMgeeSol.doc***: letter header to the mortgagee's solicitor.
- ***LtrOS.doc***: letter header to the other side.
- ***SignOff.doc***: letter signoff.
- ***Styles.dot***: contains document styles that are modified for example if you want letters in a font other than times new roman.

NB: By default, the header and footer setup documents are not included in the templates (to save processing time). To edit headers and footers simply do so within the respective template. If you wish to use the setup header and footer documents they need to be included in your templates. The following instructions show how to include the second page header in the letter template.

- Open up *Letter.doc* (generally from c:\Informs\Templates).
- Insert a page break at the beginning of *Letter.doc* so as to create a second page.
- Select View, Header and Footer to enter the edit mode for headers and footers.
- Modify the second page header by selecting all the text in the header (Ctrl+A or Edit, Select All) and deleting it.
- Press F8 and double-click on Include.
- Navigate within the Include dialog to the Setup folder (generally c:\Informs\Setup) by firstly double-clicking on the Informs folder, then double-clicking on the Setup folder.
- Select *Ltrhd2.doc* from the right-hand side of the dialog then click on the Insert Variable in Document button. The example in the dialog should be similar to «[INCLUDE|c:\informs\Setup\LtrHd2.doc](#)».
- Remember to delete the page break before saving the changes to *Letter.doc*.

5. To alter the font used in the body of your precedents you simply change the 'Normal' font in the *styles.dot* document.

Open *styles.dot* in Microsoft Word.



Select Format/Styles from the menu bar. Click modify, then format, then font and select your desired font. When done save these changes to *styles.dot*.

You are now ready to use Informs.