



Informs Setup Guide

Installing the Software

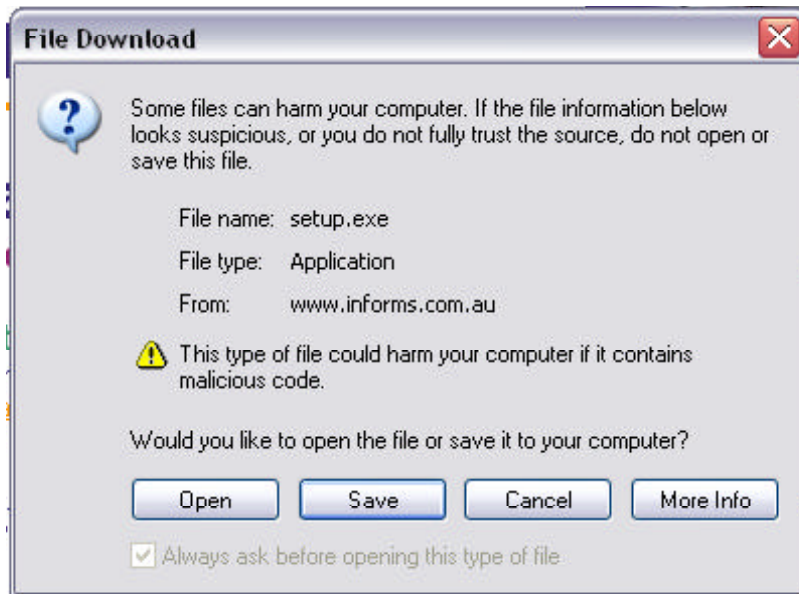
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**Support:
help@informs.com.au**

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DOWNLOAD SETUP PROGRAM

1. Click on the “Download setup.exe” button on the Free Trial page of the Informs website.
2. The **File Download** dialogue is displayed:



You will be prompted with choices of: Open, Save, Cancel or More Info.

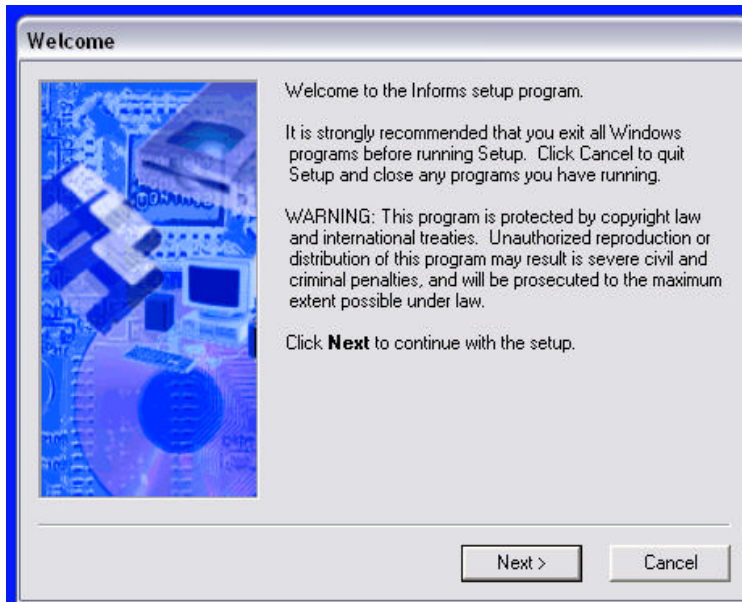
3. Select the ‘Save’ button and save the setup.exe document in a folder or directory that you can locate easily after you have finished.
4. This document should take around 5 minutes to download.

RUN SETUP PROGRAM

5. Locate where you have saved the setup.exe file from the download using Windows explorer and double click on or open the document.

It is strongly recommended that you exit all Windows programs before running Setup.

6. The **Welcome** dialogue will be displayed:



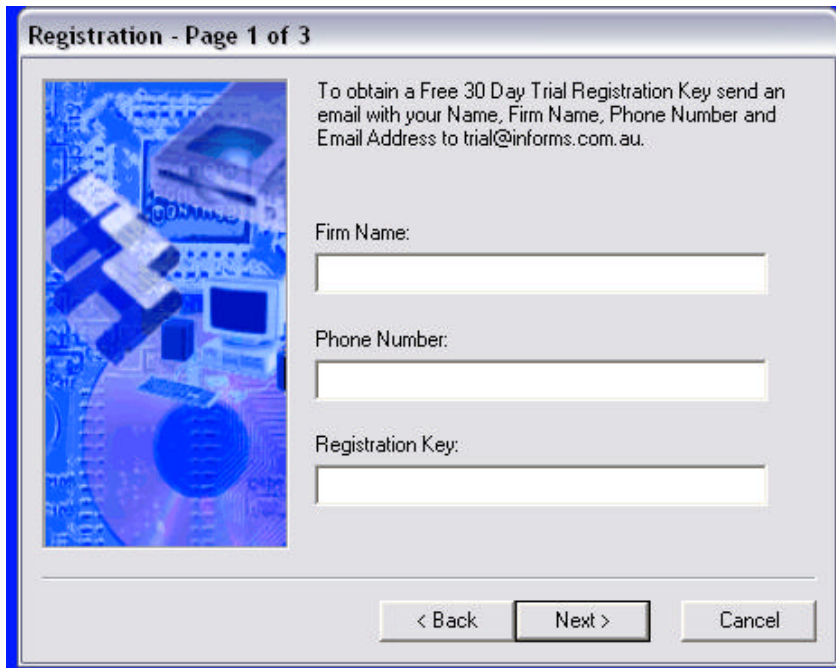
Click [**Next**] or press <**Enter**>.

7. The Informs **Software Copyright & Licence Agreement** dialogue:



Click [**Accept**] or press <**Enter**>.

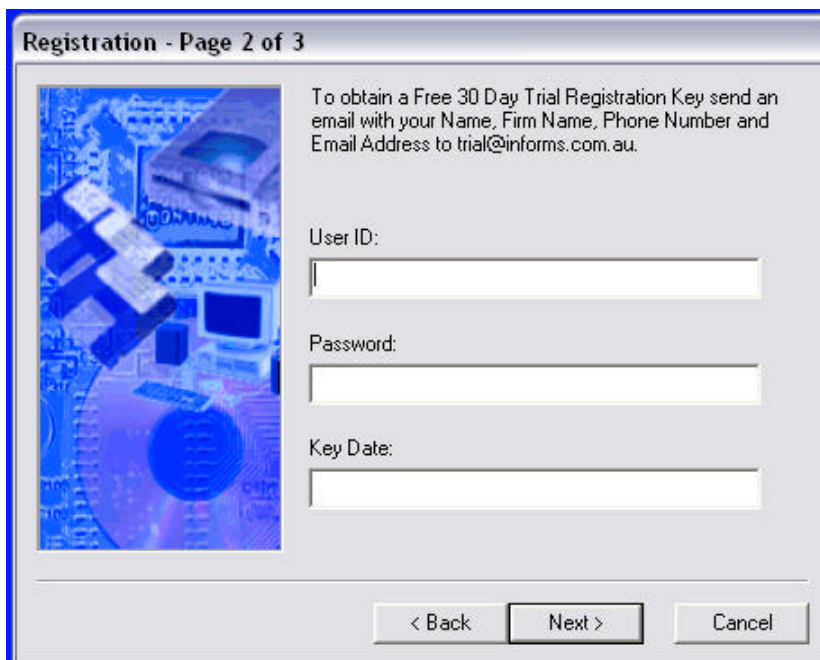
8. The **Registration – Page 1 of 3** dialogue is displayed:



The dialog box titled "Registration - Page 1 of 3" features a blue-tinted image of computer hardware on the left. The main text reads: "To obtain a Free 30 Day Trial Registration Key send an email with your Name, Firm Name, Phone Number and Email Address to trial@informs.com.au." Below this, there are three input fields: "Firm Name:", "Phone Number:", and "Registration Key:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Enter your Firm Name, Phone Number and the Registration Key provided by Informs and click **[Next]** or press **<Enter>** (entries are case sensitive).

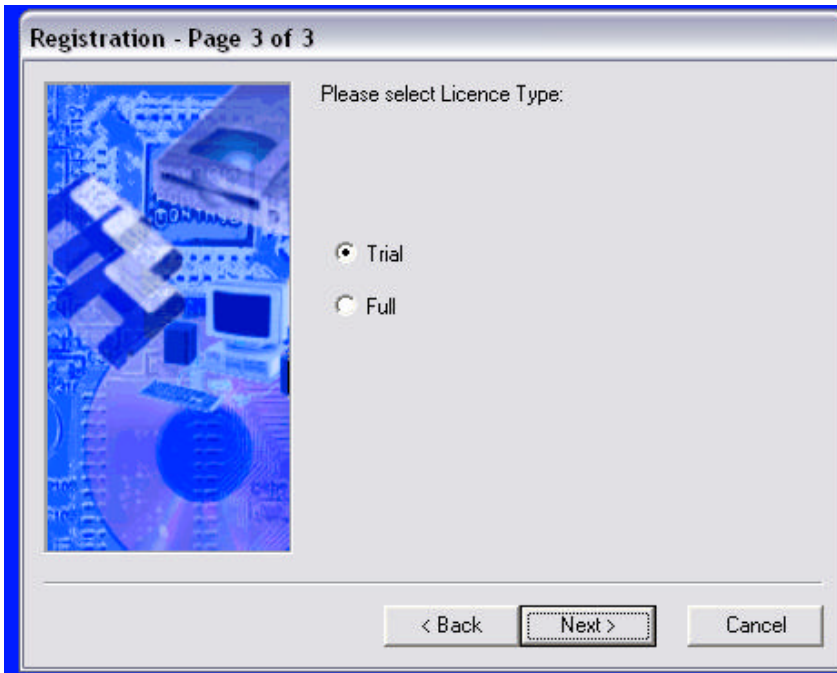
9. The **Registration – Page 2 of 3** dialog is displayed:



The dialog box titled "Registration - Page 2 of 3" features the same blue-tinted image of computer hardware on the left. The main text reads: "To obtain a Free 30 Day Trial Registration Key send an email with your Name, Firm Name, Phone Number and Email Address to trial@informs.com.au." Below this, there are three input fields: "User ID:", "Password:", and "Key Date:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

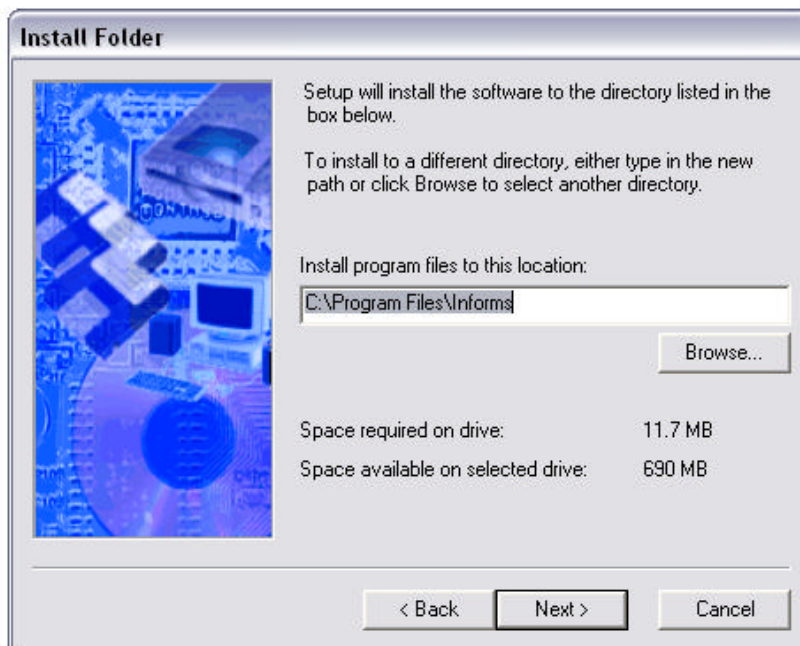
Enter your User ID, Password and the Key Date Key provided by Informs and click **[Next]** or press **<Enter>** (entries are case sensitive).

10. The **Registration – Page 3 of 3** dialog is displayed:



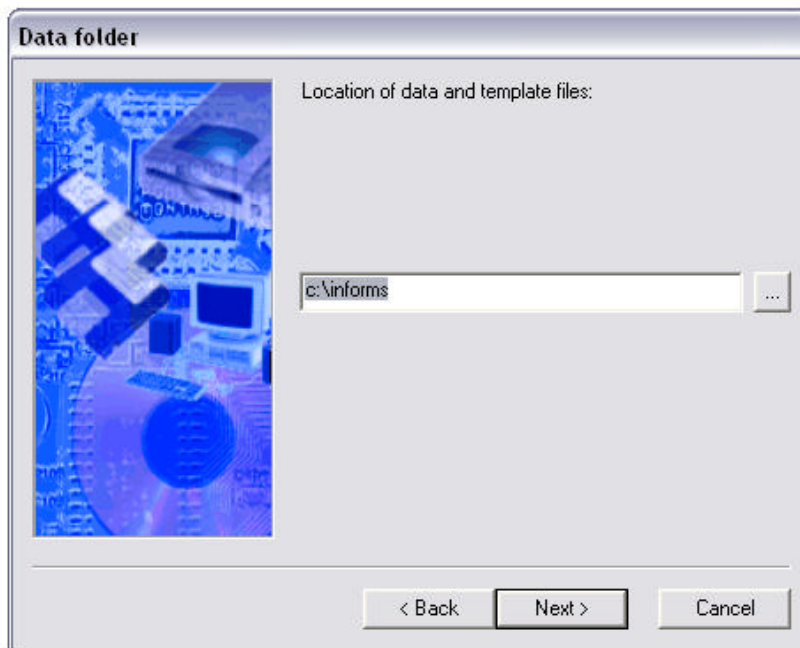
Select your Licence Type and click **[Next]** or press **<Enter>**.

11. The **Install Folder** dialogue prompts for the location in which the program files should be installed. The default location is:



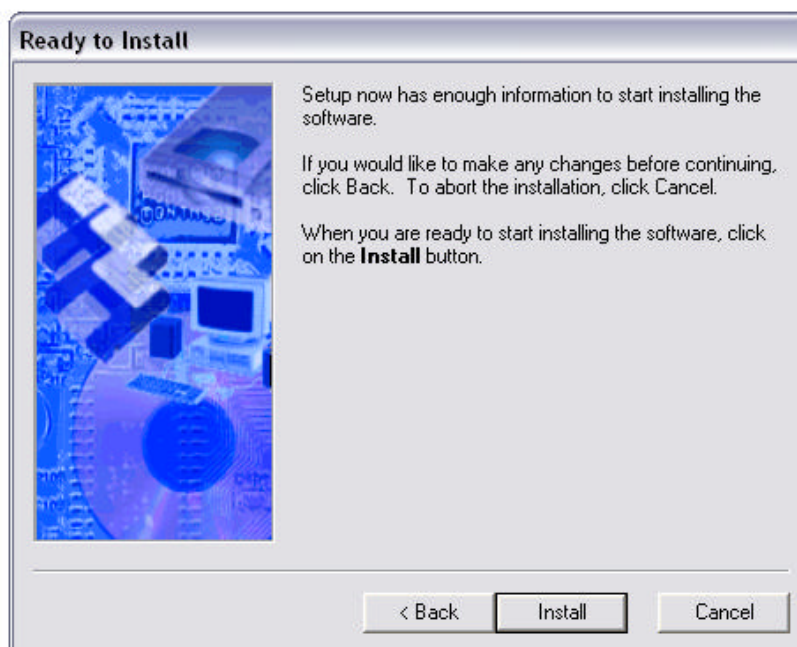
Accept the default and click **[Next]** or press **<Enter>**.

12. The **Data Folder** dialogue is displayed:



Accept the default location and click **[Next]** or press **<Enter>**.

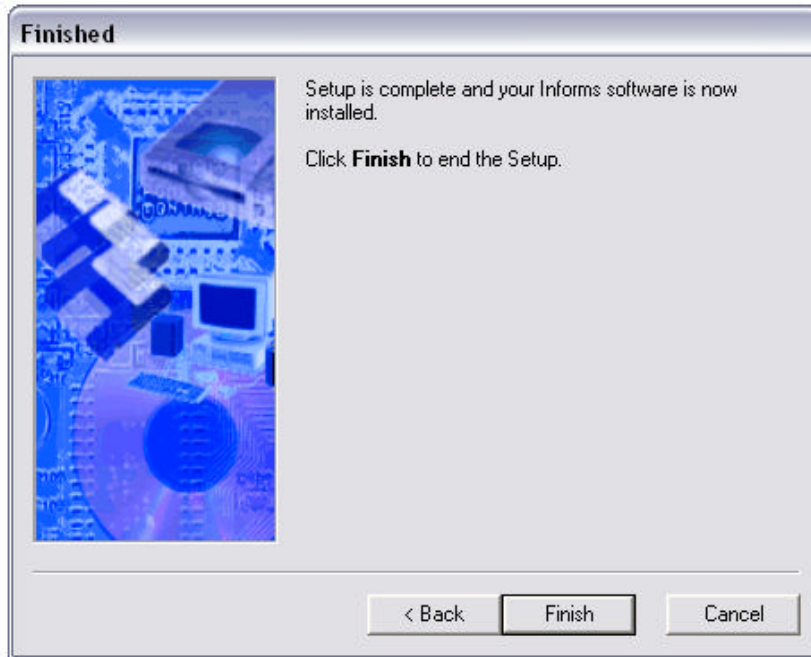
13. The **Ready to Install** dialogue is displayed:



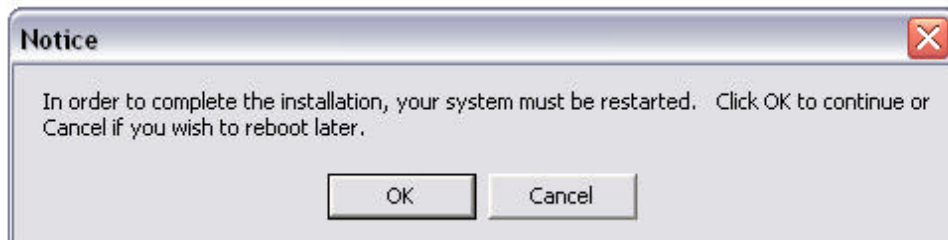
When you are ready to begin installing the software, click on **[Install]** or press **<Enter>**.

The installation should take around two to three minutes.

14. The **Finished** dialogue will be displayed:



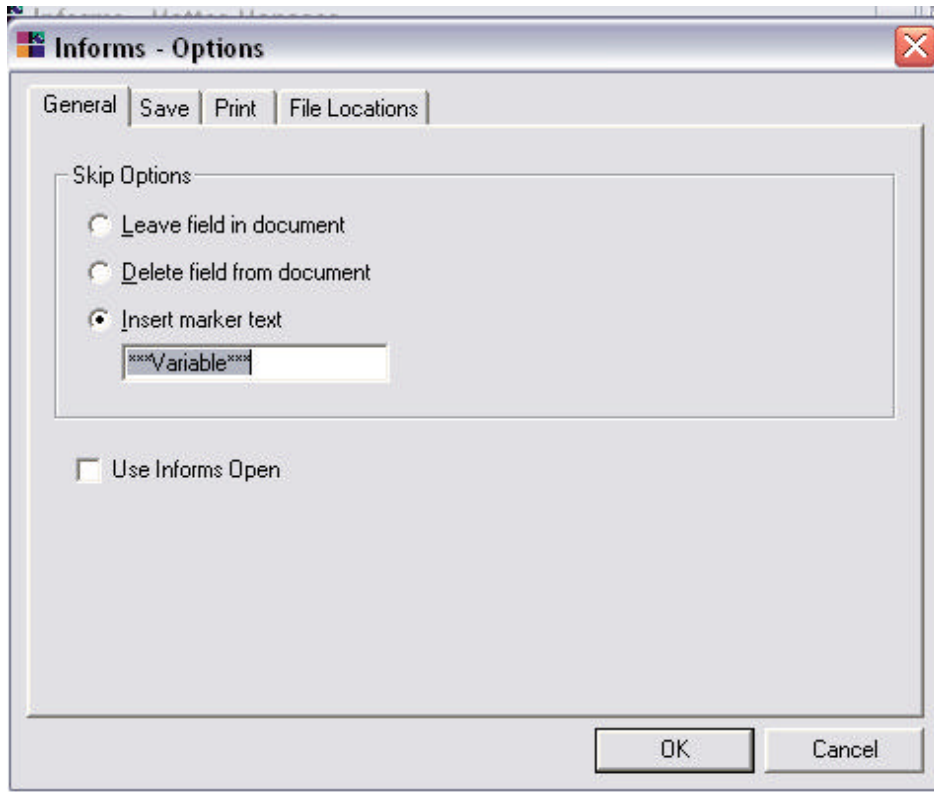
Click on **[Finish]**. You will be prompted by a dialogue:



Click on OK to reboot the computer.

INFORMS SETUP OPTIONS

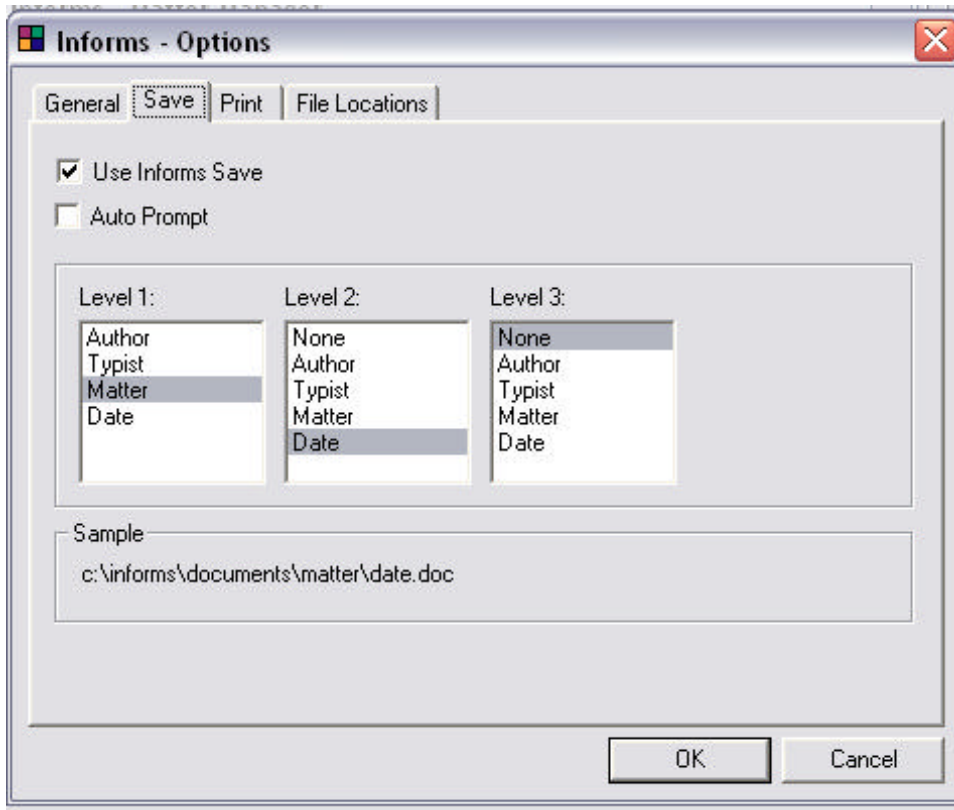
15. Once rebooted, start Microsoft Word. Click on the Informs button, select **Utilities, Matter Manager**, then select **Tools** and **Options**. The **Options** dialogue will be displayed:



Select the required procedure to be carried out when skipping fields (prompts) whilst processing an Informs document:

- ? *Leave field in document* (enables reprocessing if that field is skipped). The field (prompt) remains in the document and is asked again next time you start processing.
- ? *Delete field from document* (leaves a blank). The field is removed from the document and you will not be asked for this information again in this document.
- ? *Insert marker text* (inserts specified text such as `***Variable***`). The field is removed from the document and the 'market text' is inserted. You will not be asked for this information again in this document.

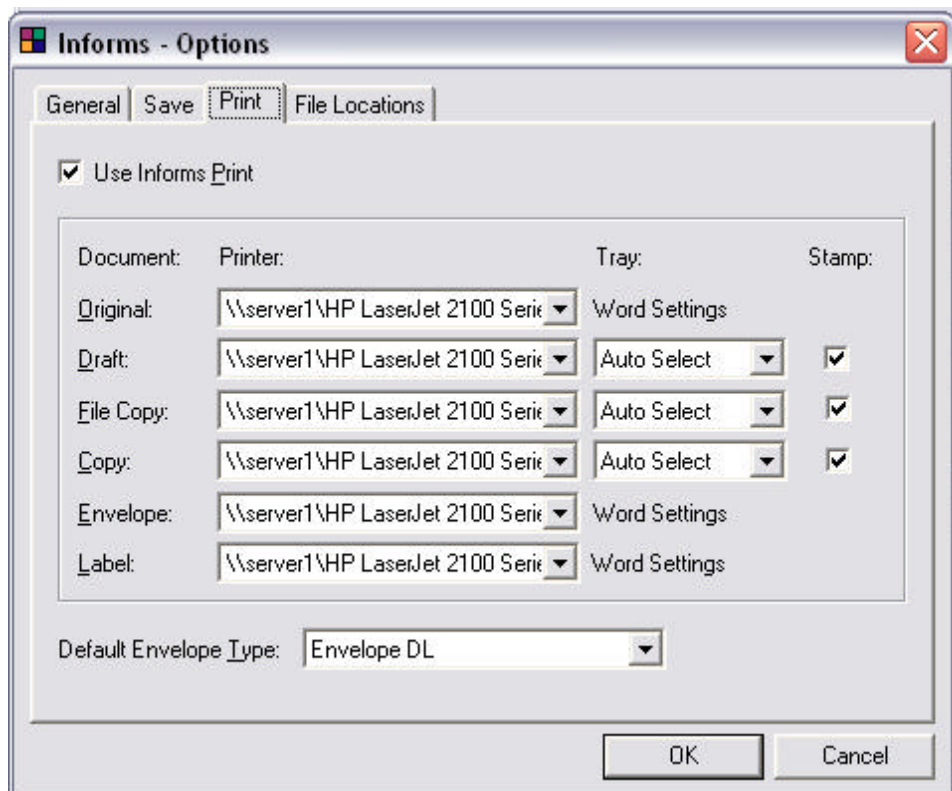
16. Select the **Save** tab from the *Informs - Options* dialog:



Enter the required saving options:

- ? *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:
 - o Level 1 – date, Level 2 – none, Level 3 – none:
C:\030922-xx.doc
 - o Level 1 – author, Level 2 – matter, Level 3 – none:
C:\cjd\030001-xx.doc
 - o Level 1 – author, Level 2 – matter, Level 3 – date:
C:\cjd\030001\030922-xx.doc

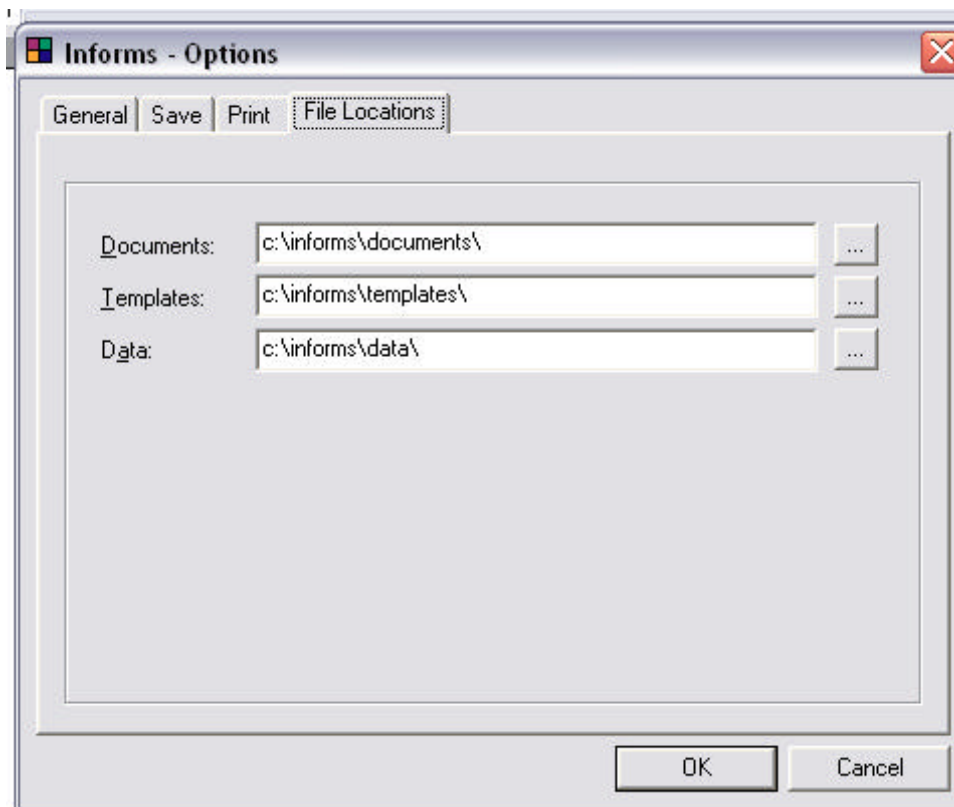
17. Select the **Print** tab:



Enter the required printing options:

- ? *Printer:* select the required printer for each document type.
- ? *Tray:* select the required tray for each document type.
 - o 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.*

18. Select **File Locations**:



Enter the location of files for:

- ? *Documents*: the location where created documents are saved using Informs save eg. letters to clients.
- ? *Templates*: the location of internal template documents used in **Precedents** dialogue.
- ? *Data*: where data is stored eg. Address Book data.

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

CUSTOMISING SETUP DOCUMENTS

19. Informs contains a range of setup documents which enable the user to set their preferred formatting for every document once only. These documents are as follows:

- ? **AccHdr.doc** is the document which provides the formatting preferences for the account or tax invoice.
- ? **FaxAB.doc** is the document providing formatting preferences for the fax header using the address book.
- ? **FaxAgent.doc** is the document providing formatting preferences for the fax header to the agent.
- ? **FaxClient.doc** is the document providing formatting preferences for the fax header to the client.
- ? **FaxMgee.doc** is the document providing formatting preferences for the fax header to the mortgagee.
- ? **FaxMgeeSol.doc** is the document providing formatting preferences for the fax header to the mortgagee's solicitor.
- ? **FaxOS.doc** is the document providing formatting preferences for the fax header to the other party solicitors.
- ? **LtrAB.doc** is the document providing formatting preferences for the letter header using the address book.
- ? **LtrAgent.doc** is the document providing formatting preferences for the letter header to the agent.
- ? **LtrClient.doc** is the document providing formatting preferences for the letter header to the client.
- ? **LtrFt.doc** is the document providing formatting preferences for the document containing the formatting for the first page footer of the letterhead.
- ? **LtrFt2.doc** is the document containing the formatting for the second and subsequent pages' footer of the letterhead.
- ? **LtrG.doc** is the document providing formatting preferences for the letter header for any document without an address.
- ? **LtrHd.doc** is the document containing the formatting for the first page header of the letterhead.
- ? **LtrHd2.doc** is the document containing the formatting for the second and subsequent pages' header of the letterhead.
- ? **LtrMgee.doc** is the document providing formatting preferences for the letter header to the mortgagee.
- ? **LtrMgeeSol.doc** is the document providing formatting preferences for the letter header to the mortgagee's solicitor.

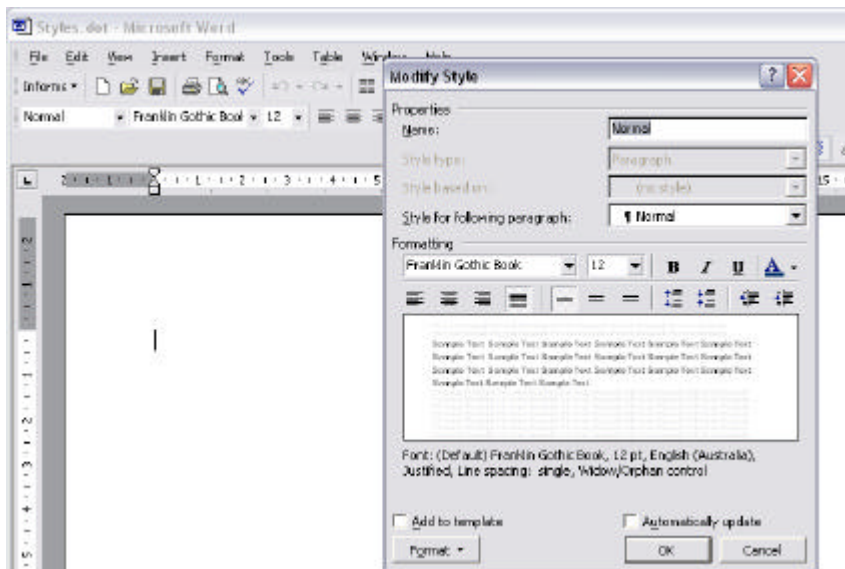
- ? **LtrOS.doc** is the document providing formatting preferences for the letter header to the other side.
- ? **SignOff.doc** is the document providing formatting preferences for the letter signoff.
- ? **Styles.dot** contains document styles that are modified for example if a client wants letters in a font other than times new roman.

20. Unless you want particular formatting for your letters, faxes, accounts and envelopes, you can simply just change the header and footer for each document. The documents required to be edited for this are *LtrFt*, *LtrFt2*, *LtrHd* and *LtrHd2*. Simply:

- ? Open the required document in Microsoft Word (in this example we will use *LtrHd.doc*). The setup documents are located at C:\Informs\Setup.
- ? The changes are made to the actual document, not the header. Make your preferred changes using your firm's logo and formatting.
- ? Save and close the document over the old copy.
- ? Editing any of the above mentioned documents is similar to the above.

21. To alter the *Styles.dot* document template:

- ? Open the required document in Microsoft Word. The *Styles.dot* document template is located at C:\Informs\Setup.



- ? To make changes to the default Font, simply select **Format**, then **Style** and select the **Normal** font. You can then select **Modify** to make your required changes.

You are now ready to use Informs.