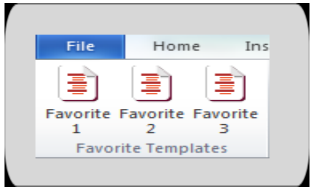
CREATE A NEW DOCUMENT

A quick start guide to creating a document with the APPS FOR OFFICE wizard.

CONTENTS

TIP – Favorite template is not the right template
If you don’t have the template mapped to your Favorites buttons, click File > New > My Templates and select the template. Alternatively, see the Setup Favorite Templates instruction under the Help menu.

1. Start the template



- Click the Favourites button that maps to your template.

  A new document based on the selected template will open.

apps Products
- apps Engine

Microsoft Word
- MS Word 2007
- MS Word 2010 (32bit)

Windows
- Windows XP
- Windows 7

Before these steps
- Install apps Engine

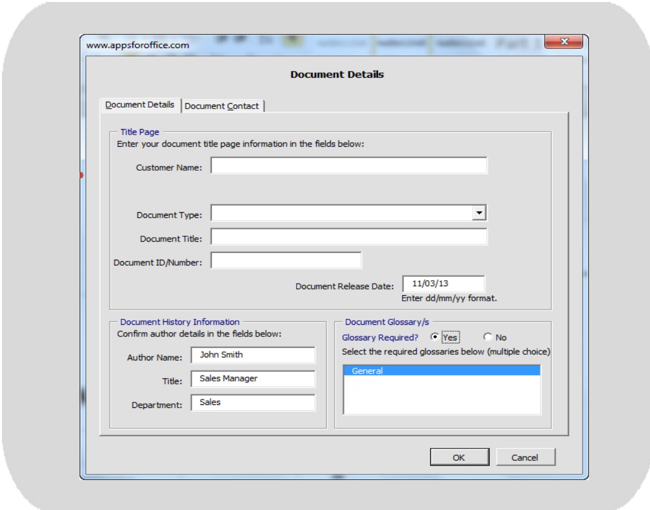
Next steps
- Apps Report Wizard

CREATE A NEW DOCUMENT

CONTENTS

TIP – The Document Detail Screen does not display!
See your Administrator if this screen does display – they may not have connected the template to the apps Engine.

- The Document Details screen is displayed.



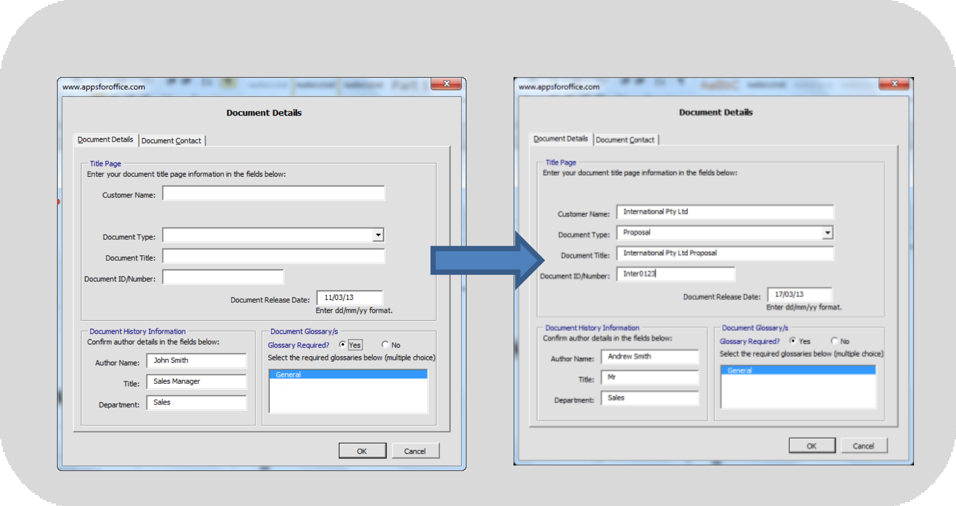
CREATE A NEW DOCUMENT

CONTENTS

NOTE – Fields or panels do not display
See your Administrator if fields or panels you require, like the Glossary panel, or the Department field are not displayed. Your template will need to be updated for these information types.

2. Add the Document Details

Complete the document details screen.



CREATE A NEW DOCUMENT

CONTENTS

TIP – I don't know all this information yet.
If you do not enter, the information in this screen, you can locate the placeholder fields in the document and type the information in manually.

Update the Cover page details.

- Customer Name

  The name of the customer receiving the document
- Department Name

  The name of the department receiving the document,
- Document Type

  Select the document type, such as, "Report" or "Proposal", from the drop-down menu or type a new one.
- Document Title

  The name of the document, such as, "A Great Solution".
- Document ID/Number

  The reference number for the document. If you do not enter a number, the macro will assume you do not need to add this and remove the field.

  If you need to find this information later, add something here and replace it.
- Document Release Date

  The date the document will be sent to the recipient.

CONTENTS

TIP – Add your contact details to the AuthorInfo spreadsheet.
The Author details, by default, are retrieved from the AuthorInfo spreadsheet – To upate select **apps Efficiency > Admin** button

CREATE A NEW DOCUMENT

Complete the Author fields for the version history table, if required:

- Author Name

  The person writing or setting up the document
- Title

  The author's job title
- Department - the author's department within the organisation.

Choose to include a Glossary in your document.

- Yes

  Add one or more glossaries and then select the specific glossaries required from the list.
- No

  Remove the glossary section.

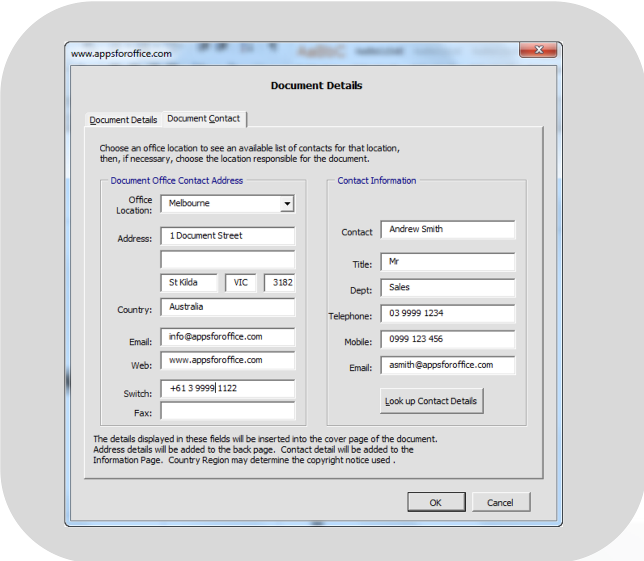
CREATE A NEW DOCUMENT

CONTENTS

TIP – Add your Address details to the AuthorInfo spreadsheet.
The Author and Office details, by default, are retrieved from the AuthorInfo spreadsheet – To update your details, select **apps Efficiency > Admin** button
They can also be found in the ...\Templates\[customer name]\apps Data Sources\Manager\apps Offices.xls

3. Update the document contact and office address details

Click the Document Contact tab, to display the default office and personal contact details.



CREATE A NEW DOCUMENT

CONTENTS

TIP – Office addresses are missing.
Regional office addresses are set up by your Administrator. Once you have been notified of an update, you may need to manually run the updater to update the Office addresses on your computer (see the Admin button). Alternative contact details must be updated by your IT department.

Confirm the default details are required for this document, or type new details if necessary.

You can also:

- Select a regional office from the Office Location drop-down menu.
  The information for the new office location replaces the default office details.
- Select an alternative contact person by clicking on the "Lookup Contact" button.
  The information for the new contact person replaces the default details.
- Click OK.
  The document is updated with the information from this screen.
- Click Cancel.
  The document is not updated, and the document will be displayed.
  You can now update and work with your document by typing your content manually.

CREATE A NEW DOCUMENT

CONTENTS

TIP – Wizard screens aren't displaying.
If the template is set up as a self generating report, the wizard, the next screen displays. The Wizard screen are defined by your Administrator, and will likely be different to the screens pictured.

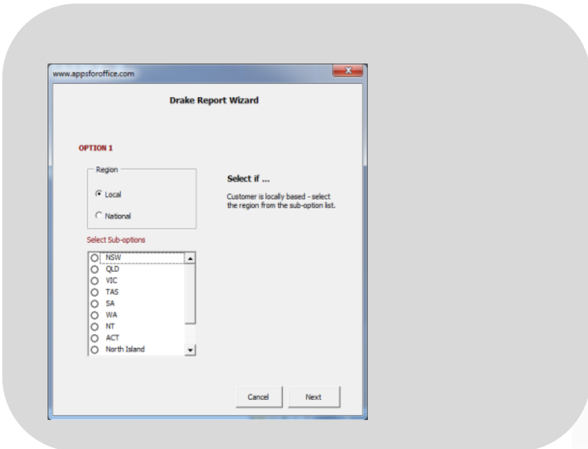
4. Complete the Report Wizard screens

A template can have up to six Wizard screens defined.

The Wizard screens give you with options to choose the content that you want included in your report.

There are two parts to each Wizard screen:

- One of each Primary Option, such as Region, must be chosen.
- Sub-options, listed below with squares, are selected if you require or can be ignored.



APPSFOROFFICE

CREATE A NEW DOCUMENT

CONTENTS

Tip: Single or Multi-Select
If an option is preceded by a circle, then you can only select one option.
If the option is preceded by a square, you can select multiple options.

TIP – Check your Document
After completing the wizard, review the document to ensure that all the details are correct.

Primary Option

- Select the option that is relevant to your document.
  Example: Is the document for a local or a national customer?
  Selecting an option, changes the sub-option list, and the tip.

Sub-Options

- Select the sub-option(s), if any, that are relevant to your document.
  If you do not select a sub-option the content marked for the sub-options will remain in the document.

Click Next

- The next Primary Option screen is displayed.
  Each template can have up to six Primary Option screens.

Click Finish

- The wizard generates the document according to your selections.
  The Finish button is displayed on the last Primary Option screen.
  The Wizard keeps the content associated with your selected options. For example, if you chose National, the paragraphs identified for local customers will be deleted.

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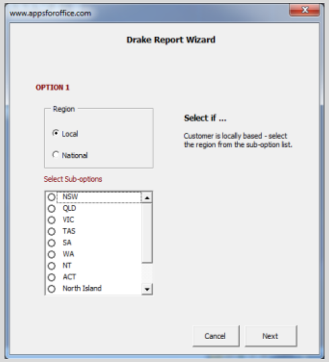
CREATE A NEW DOCUMENT

CONTENTS

Tip: Updating Cover page and Contact details
As long as you clicked OK on the first screen, the Cover page and contact details will be updated in the document.
Cancelling a Wizard screen will only cancel the operation which deletes content from your document according to the options you selected.

5. Cancel the Wizard

- Click Cancel on any screen with “Wizard” in the title.



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