



3.10x Forms WorkFlow Toolbar Installation Guide (Microsoft Word 2000-2003)



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System Requirements

- Operating System: Windows 7[®], Windows Vista[®], Windows XP[®]
- **Requirements:**
 - Microsoft[®] Office Word 2002, 2003
 - Administrative Rights
- **File Information:**
 - Name: Case_Profile.exe
 - File Size: 6.78 MB

Before you start:

- Have the following available
 - Activation key;
 - Name (this is may be different from the User name)
 - Username; and
 - Password.
- *If applicable*, uninstall all previous versions of the Forms WorkFlow.
- Close Microsoft[®] Word and Microsoft[®] Outlook.
- Read through this installation guide.

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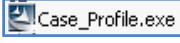
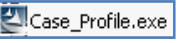


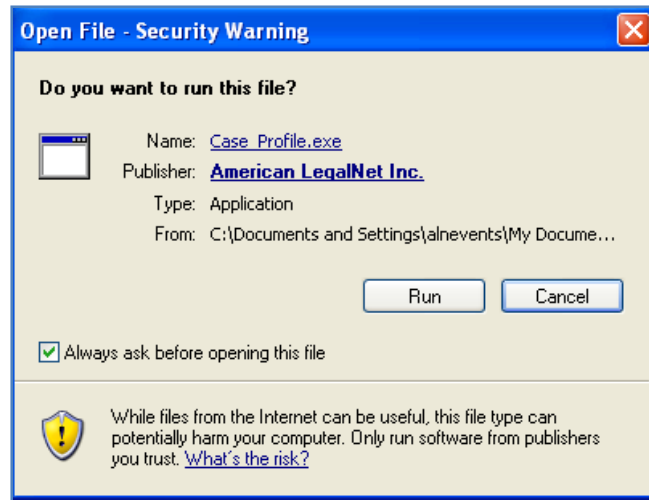
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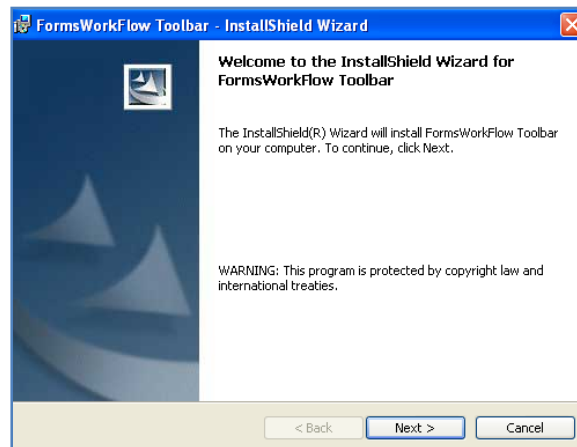


General Installation

- **Step 1:** Go to <http://www.formsworkflow.com/Resources.aspx>. (**Resources** tab). Under the *Forms WorkFlow Toolbar, Version 3.10.x* section, click the **Download Now** link.
- **Step 2:** Although you can select **Run** in the next window, we recommend you select **Save** to download executable file () to your desktop then run the file from there. (Note: *If you are downloading from Mozilla Firefox, you can only Save a File.*)
- **Step 3:** Double-click the  file then select **Run**. The *Install Shield* will run.



- **Step 4:** In the *Welcome* window, click **Next**.

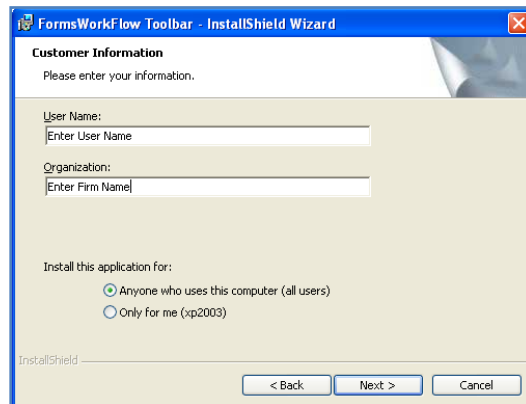




- **Step 5:** In the *License Agreement* window, select the **I accept...** radio button then click **Next**.

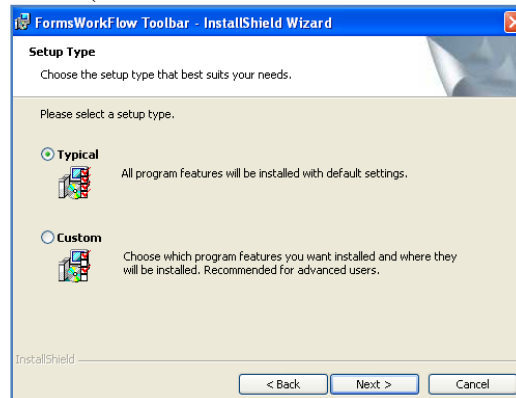


- **Step 6:** In the *Customer Information* window, enter the **User Name** and **Organization** then click **Next**.



- **Step 7:** Select the **Typical** or **Custom** radio buttons then click **Next**.

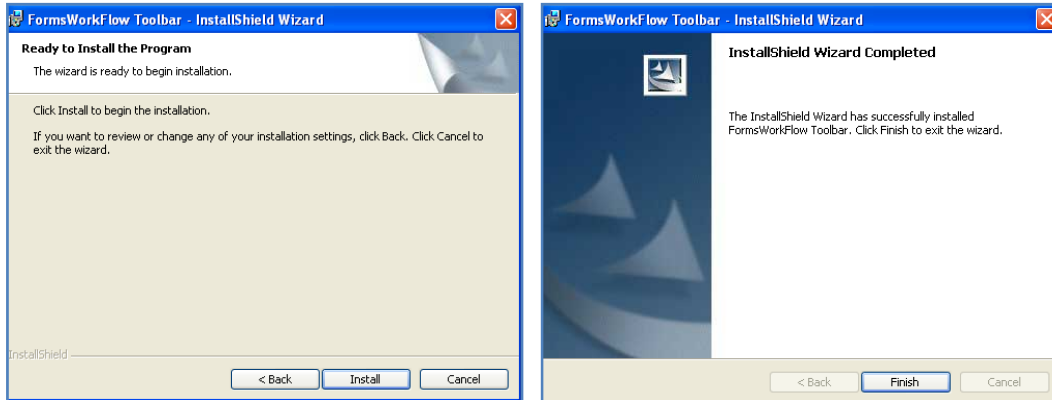
Note: If you select the **Typical** installation radio button, the **Profile** and **Favorites**¹ folders will install in *C:\ProgramData\FormsWorkFlow*. Selecting **Custom** will allow you to install the **Profile** and/or **Favorites** folder on a network drive. (see the *Custom Installation* section below)



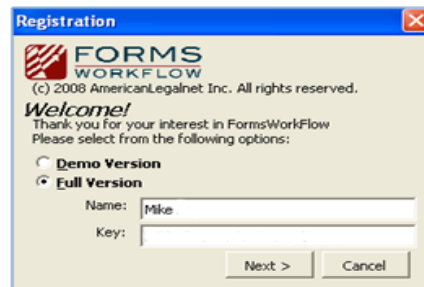
¹ This is the Forms WorkFlow Favorites folder not to be confused with your Internet Explorer Favorites.



- **Step 8:** In the *Ready to Install the Program* window, click **Install** then click **Finish** when done.



- **Step 9:** Open **Microsoft Word**.
- **Step 10:** Click **Locate Forms** on the Forms WorkFlow toolbar. In the *Registration* window, select **Full Version** then enter the **Name**² and **Key** provided when the toolbar was purchased.



Click **Next**. The message below will display.



- **Step 11:** Click the **Settings** button.
 - It is recommended **Bypass document properties check when using autofill and lock/unlock features** especially if the firm has a document management system (DMS).
 - You may select one of two **Profile Types**:
 - **Database (default):** A Microsoft Access database is provided with the Forms WorkFlow toolbar installation. The database is located in *My Documents\Case_Profile.mdb* or *C:\Users\[User Name]\Documents\Case_Profile.mdb*
- OR-**

² Enter the *Name* not the *User Name* in this field.



- **File System:** Profiles will be saved as Microsoft Word files. The default path is *C:\ProgramData\FormsWorkFlow\Profile*.
- Enter the **Username** and **Password** then check **Save Password** and **Login Automatically**.
- Click **OK**.

FormsWorkFlow Settings (3.10)

AutoFill

Bypass document properties check when using autofill and lock/unlock features.

Profile Type: File System Database

Profile Path: C:\Documents and Settings\All Users\Application Data\FormsWorkF

Check for Revisions

Enable

Locate Forms

Username: kinkinkin Password: *****

Save Password Login Automatically

Favorites Folder: C:\ProgramData\FormsWorkFlow\Favorites

Bill Track

Show Bill Track

Network Configurations

Automatically detect settings

Proxy Server

Use proxy server

Address: Port:

Username: Password:

Registration

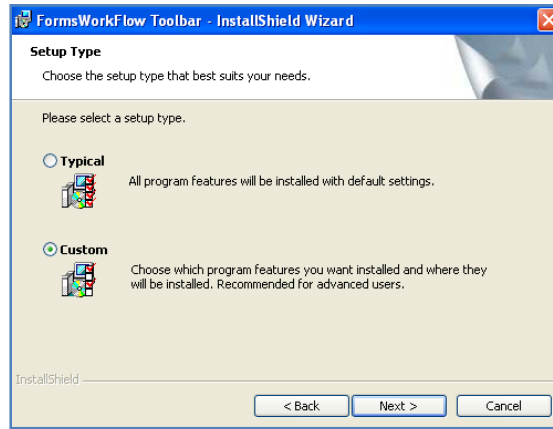
Register

OK Cancel



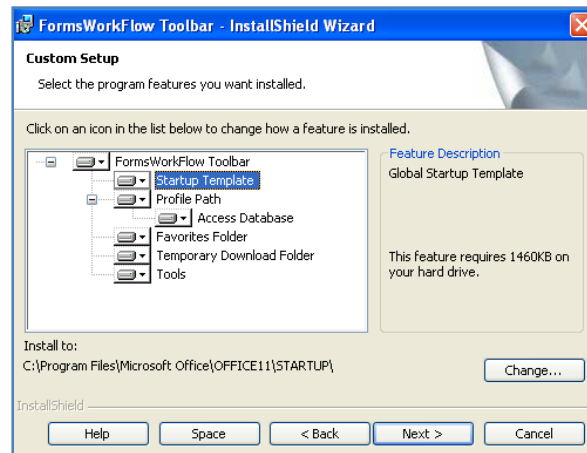
Custom Installation

- Perform Steps 1 through 7 in the *General Installation* section.
- In the *Setup Type* window, select the **Custom** radio button then click **Next**.



- Select the **Toolbar** option in the **Custom Setup** window then click the **Change** button.
- **Startup Template** is set to the Microsoft default location. Highlight **Startup Template** then click **Change** if your Microsoft Word startup path is different from the default.

(Note: The typical startup paths for Microsoft Word 2000-2003 are either *C:\Program Files\Microsoft Office\Office10* or *Office 11\STARTUP* or *C:\Documents and Settings\%UserName%\Application Data\Microsoft\Word\STARTUP*. To find the Word startup path select the Word **Tools** menu | **Options** | click **File Locations tab**. | highlight **Startup** then click **Modify** to view the path.)



Profiles Path

A Profile is template information (e.g., attorney, court, case) created by the user which can be used to fill multiple forms required for a case or a deal.

You may select one of two **Profile Types**:

- **Database**: A Microsoft Access database is provided with the Forms WorkFlow toolbar installation. The database is located in *My Documents\Case_Profile.mdb* or *C:\Users\[User Name]\Documents\Case_Profile.mdb*.

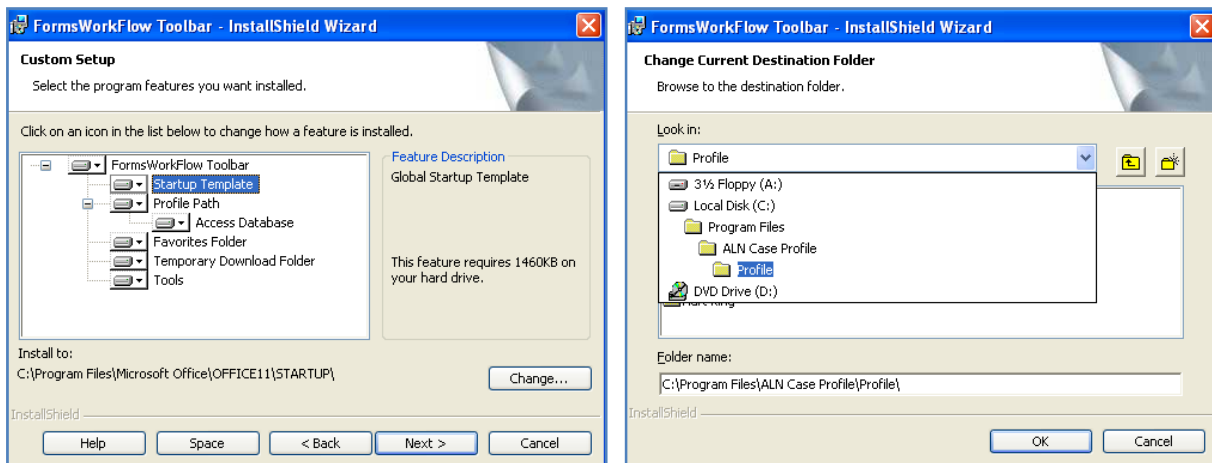


-OR-

- **File System:** Profiles will be saved as Microsoft Word files. The default installation path is *C:\ProgramData\FormsWorkFlow\Profile*.

Follow the instructions below if you would like to place the Profiles folder on a network drive to allow staff to share information and, optionally, to allow back up of the profile files or database.

- **Changing the File System Profile Path** (Before proceeding with the custom installation, a profile folder must be created on the network drive):
 - Click the **Change** button then browse to the folder's location.
 - Select the profile folder then click **OK**.



- **Changing the Microsoft Access Profile path:** (Before proceeding with the custom installation, copy the **Case_Profile.mdb** database (located in *My Documents\Case_Profile.mdb* or *C:\Users\[User Name]\Documents\Case_Profile.mdb*) to the network folder).
 - Click the **Change** button then browse to the **Case_Profile.mdb** location.
 - Select **Case_Profile.mdb** then click **OK**.

Favorites Folder

A *Favorite* is a link to a form saved by a user in the Favorites folder. The default installation path is *C:\ProgramData\FormsWorkFlow\Favorites*. Follow the instructions below if you would like to place the Favorites folder on a network drive. Note: Typically this folder is not shared unless the firm practices are limited to one or two types of law.

- **Changing the Favorites Folder Path:**
 - Create the folder on the target network drive.
 - Click the **Change** button then browse to the folder's location.
 - Select the folder then click **OK**.

Temporary Download Folder

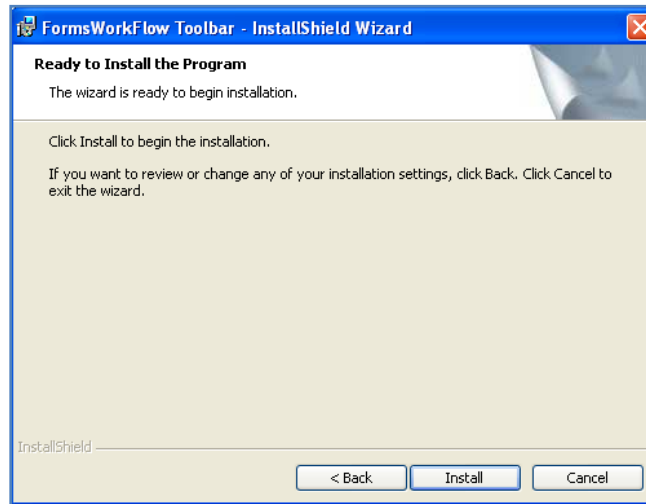
The Forms WorkFlow Temp folder install in the system or user temporary folder location (**Temp/FormsWorkFlow**). In most cases, this setting should not be changed.

- **Changing the Temp Folder Path:**
 - Create the folder on the target network drive.
 - Click the **Change** button then browse to the folder's location.

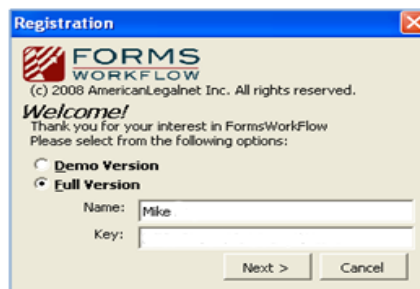
- Select the folder then click **OK**.



- When finished with the *Custom Setup*, click **Next** then **Install**.



- Click **Finish**.
- Open **Microsoft Word**.
 - Click **Locate Forms** on the Forms WorkFlow toolbar. In the *Registration* window, select **Full Version** then enter the **Name** and **Key** provided when the toolbar was purchased.



- Click **Next**. The message below will display.



- Click the **Settings** button.
 - It is recommended **Bypass document properties check when using autofill and lock/unlock features** especially if the firm has a document management system (DMS).



- Enter the **Username** and **Password** then check **Save Password** and **Login Automatically**.
- Click **OK**.

FormsWorkFlow Settings (3.10)

AutoFill

Bypass document properties check when using autofill and lock/unlock features.

Profile Type: File System Database

Profile Path: C:\Documents and Settings\All Users\Application Data\FormsWorkF

Check for Revisions

Enable

Locate Forms

Username: kinkinkin Password: *****

Save Password Login Automatically

Favorites Folder: C:\ProgramData\FormsWorkFlow\Favorites

Bill Track

Show Bill Track

Network Configurations

Automatically detect settings

Proxy Server

Use proxy server

Address: _____ Port: _____

Username: _____ Password: _____

Registration

Register

OK Cancel



Troubleshooting Installation

Error Run-time 75 Path/File Access Error

This error message indicates the users security settings on the Favorites and/or Profile folder are insufficient to save, delete, or write to a form. **Product users must have full rights to all folders associated with the Forms WorkFlow ribbon.**

- Go to C:\ProgramData\FormsWorkFlow
(Note: this is the general location -- some firms choose to place their profiles on a network share).
 - Right-click the Forms WorkFlow folder, Favorites folder and/or right-click the Profiles folder.
 - Select Properties.
 - Select the Security tab or Sharing tab (depending on the operating system).
 - The user's security must be set to full control of these folders.
-

Error - Run-time error 76: Path not found

Issue: This Run-time error occurs when the Profiles folder, as defined in the Profile Location key in the registry, does NOT exist.

Resolution:

To work around this issue, you can try one of the following methods:

- * Modify the Profile Location key in the registry to point to the correct location of the Templates folder.

WARNING: Serious problems might occur if you modify the registry incorrectly by using Registry Editor or by using another method. These problems might require that you reinstall your operating system. Modify the registry at your own risk.

Steps to modify the registry setting:

- Click the Start button, click Run, and type REGEDIT. Click OK.
 - Go to HKEY_LOCAL_MACHINE\SOFTWARE\American LegalNet\USCourtForms.
 - On the right pane, locate the Profile Location key, right click and select Modify
 - Type the correct value (Profile Path) in the field.
-

Error - Run-time error 76: Path not Found (Favorites)

Issue: This Run-time error occurs when the Favorites folder, as defined in the Favorites key in the registry, does NOT exist.

Resolution:

To work around this issue, you can try one of the following methods:

- * Modify the Favorites key in the registry to point to the correct location of the Favorites folder.

WARNING: Serious problems might occur if you modify the registry incorrectly by using Registry Editor or by using another method. These problems might require that you reinstall your operating system. Modify the registry at your own risk.

Steps to modify the registry setting:



-
- Click the Start button, click Run, and type REGEDIT. Click OK.
 - Go to HKEY_LOCAL_MACHINE\SOFTWARE\American LegalNet\USCourtForms. On the right pane, locate the Favorites key, right click and select Modify
 - Type the correct value (Favorites Path) in the field.
-

Toolbar: Does not load into Word

The toolbars will not load in MS Word if the ALN Case Profile.dot is not installed your Microsoft Word Startup path. Either the ALN Case Profile.dot does not exist in the startup folder of MS Word or the attribute of the file has been changed to hidden.

The following steps will guide you in troubleshooting the issue:

- Determine the Word Startup folder.
- Verify the ALN Case Profile.dot exists in the Startup folder
- If the ALN Case Profile.dot still does NOT exist, then you need to copy the file to this folder

You can determine where the Word Startup folder is located by using the following steps:

- In Word 2002/2003, select the **Tools** menu, click **Options**.
 - On the **File Locations** tab, under **File types**, select **Startup**.
 - Click **Modify** to view the entire **Startup** path.
-

Turn off Bill Track

Bill Track is a feature that must be purchased separately. **Bill Track** is on if the fields below appear in the Locate Forms | Search window or the Favorites window.

<input type="checkbox"/> Matter Number :	<input type="text"/>
User Name :	<input type="text"/>

To toggle it on or off:

- Click **Settings** button on the the Forms WorkFlow toolbar.
 - In the **Settings** window, check or uncheck **Bill Track** to turn the feature on or off.
 - Click **OK** to close the **Settings** window.
-