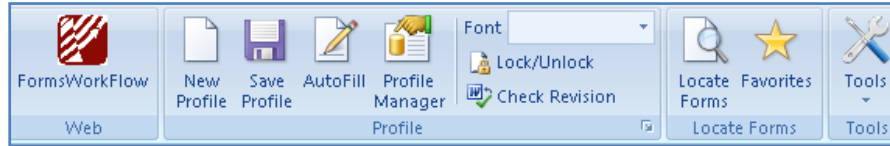




4.2.x Forms WorkFlow Ribbon Installation Guide (Microsoft Word 2007)



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System Requirements

- **Operating Systems:** Windows 7[®], Windows Vista[®], Windows XP[®]
- **Requirements:**
 - Microsoft[®] Office Word 2007,
 - Administrative Rights
- **File Information:**
 - Name: CaseProfile2007.exe
 - File Size: 7.41 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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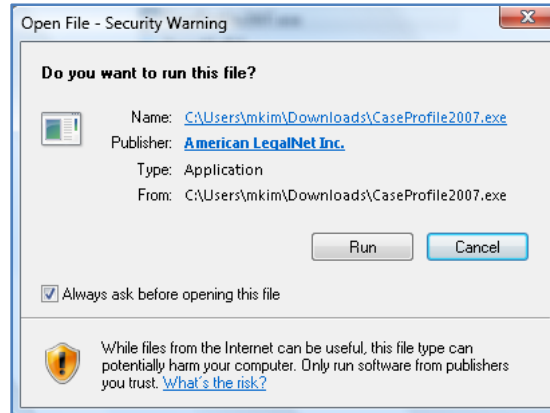
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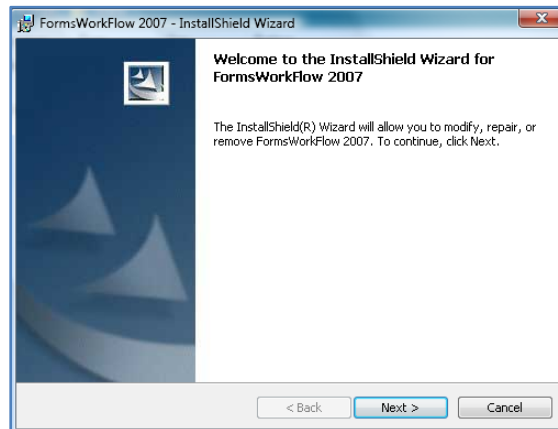


General Installation

- **Step 1:** Go to <http://www.formsworkflow.com/Resources.aspx>. (**Resources** tab). Under the *Forms WorkFlow Ribbon Add-in Version 4.0* 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**.

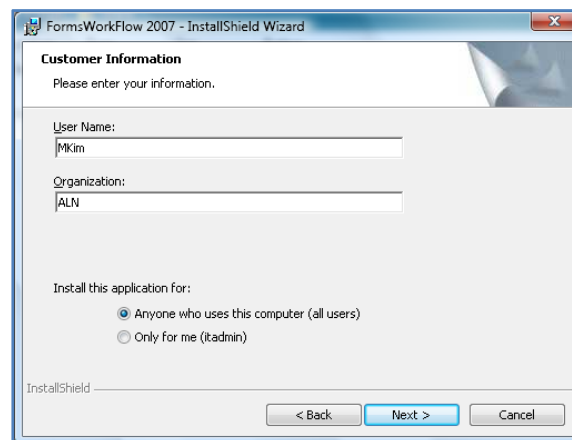




- **Step 5:** In the *License Agreement* window, select the **I accept...** radio button then click **Next**.



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



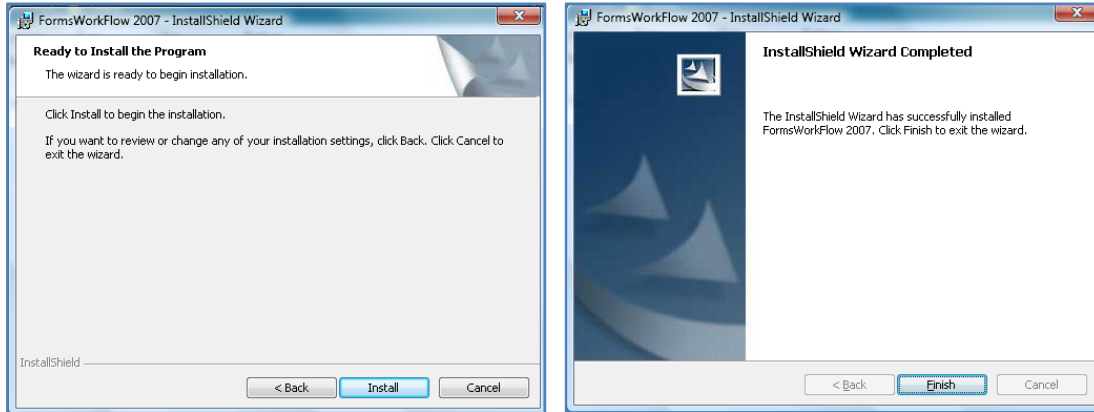
- **Step 7:** Select the **Typical** or **Custom** radio buttons then click **Next**.



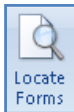


Note: If you select the **Typical** installation radio button, the **Profile** and **Favorites**¹ folders will install in *C:\ProgramData\Forms WorkFlow*. Selecting **Custom** will allow you to install the **Profile** and/or **Favorites** folder on a network drive although you can also adjust the **Profile** and **Favorites** folder in the **Settings** window once the ribbon is installed. (see the *Custom Installation* section below)

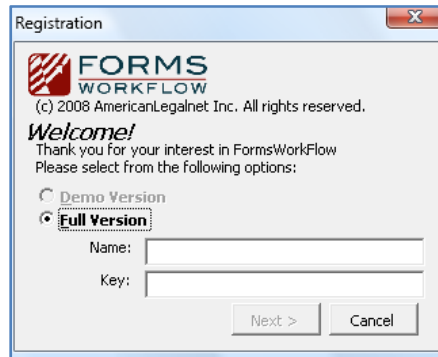
➤ **Step 8:** In the *Ready to Install the Program* window, click **Install** then click **Finish** when done.



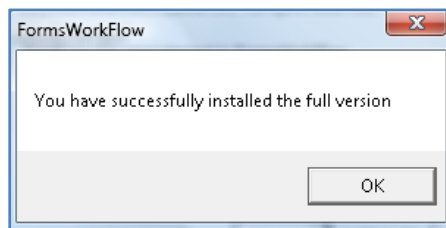
➤ **Step 9:** Open **Microsoft Word**.



➤ **Step 10:** Click **Locate Forms** on the Forms WorkFlow ribbon. 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.

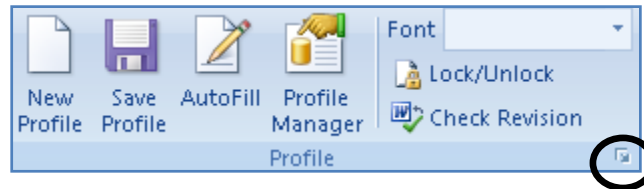


¹ This is the Forms WorkFlow Favorites folder not to be confused with your Internet Explorer Favorites.

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



- **Step 11:** Click  on the **Profile** section of the Forms WorkFlow ribbon to open the **Forms WorkFlow Settings** window.



- It is recommended **Bypass document properties check when using autofill and lock/unlock features** is checked 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 ribbon 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 path is *C:\ProgramData\FormsWorkFlow\Profiles*.
- Enter the **Username** and **Password** then check **Save Password** and **Login Automatically**.
- Click **OK**.

The screenshot shows the 'FormsWorkFlow Settings (4.2)' dialog box with the following sections and options:

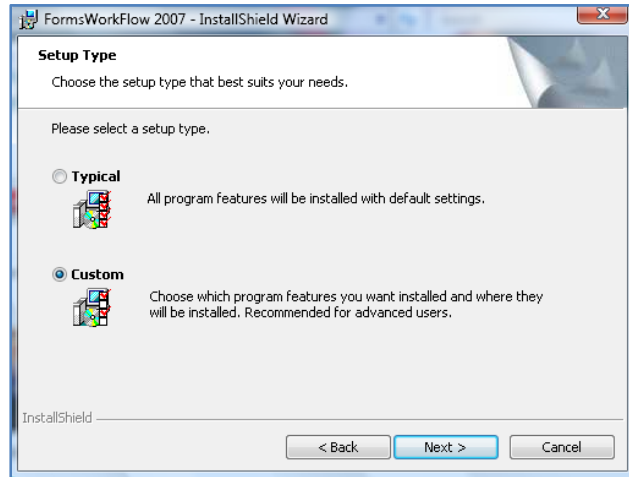
- AutoFill**:
 - Bypass document properties check when using autofill and lock/unlock features.
 - Profile Type: File System Database
 - Connection String:
- Check for Revisions**:
 - Enable
- Locate Forms**:
 - Username: Password:
 - Save Password Login Automatically
 - Favorites Folder:
- Bill Track**:
 - Show Bill Track
- Network Configurations**:
 - Automatically detect settings
- Proxy Server**:
 - Use proxy server
 - Address: Port:
 - Username: Password:
- Registration**:
 -

At the bottom are and .




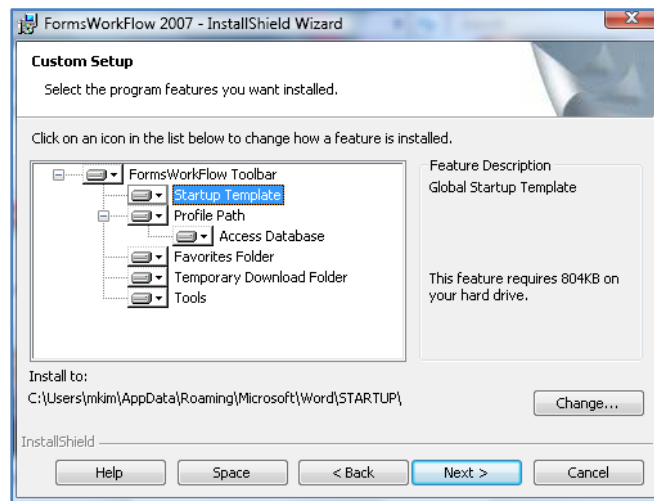
Custom Installation

- 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 ribbon 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 2007 are *C:\Users\[UserName]\AppData\Roaming\Microsoft\Word\STARTUP* or *C:\Program Files\Microsoft Office\Office12\STARTUP*. To find the Word startup path select the Microsoft Office button  | **Word Option** | click the **Advanced** link | scroll to **General** section then click **File Locations**.)



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.

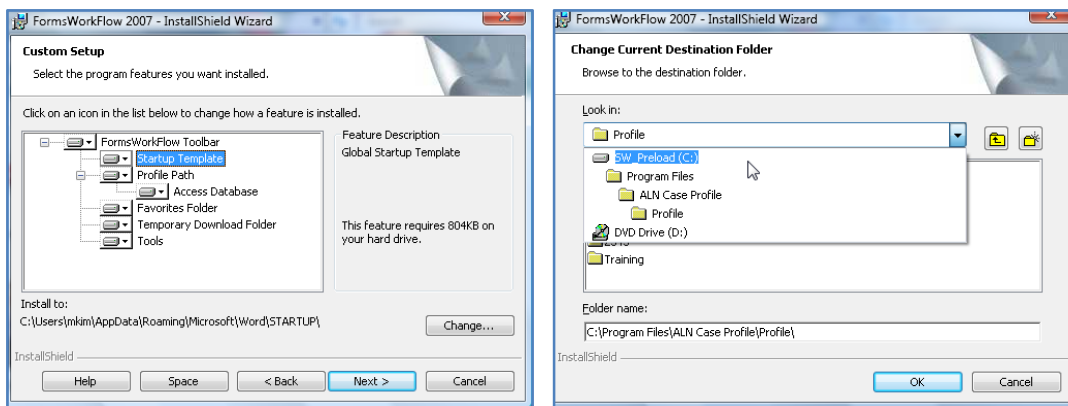
You may select one of two **Profile Types**:



- **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 *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 areas 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

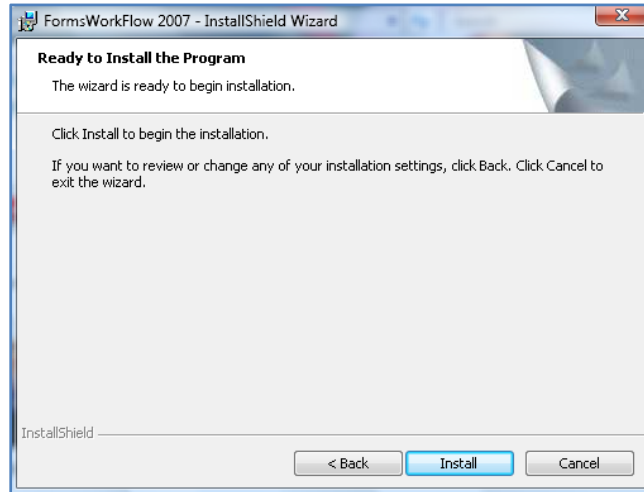
The Forms WorkFlow Temp folder install in the system or user temporary folder location (*Temp\FormsWorkFlow*). In most cases, this setting should not be changed.

- **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**.

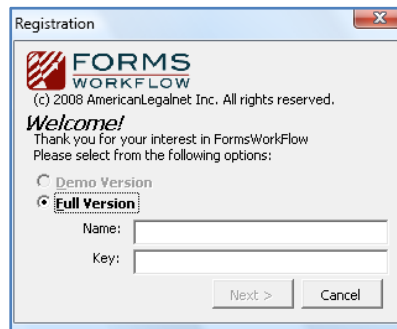
➤ When finished with the *Custom Setup*, click **Next** then **Install**.



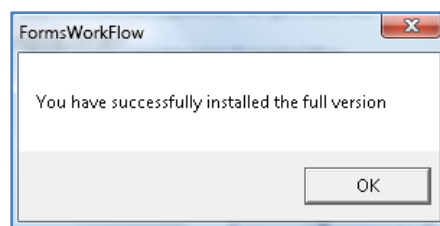
➤ Open **Microsoft Word**.



- 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.

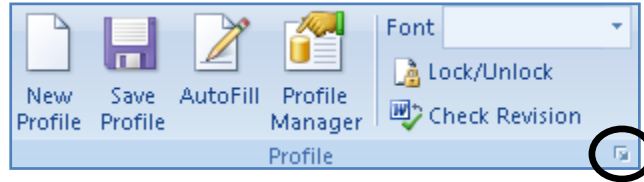


- If the **Name** and **Key** are accepted, the following window displays.





- Click  on the **Profile** section of the Forms WorkFlow ribbon to open the **Settings** window.



- 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**.

The screenshot shows the 'FormsWorkFlow Settings (4.2)' dialog box. It is organized into several sections:

- AutoFill:** Includes a checkbox for 'Bypass document properties check when using autofill and lock/unlock features.' Below it, 'Profile Type' is set to 'Database' (selected over 'File System'). The 'Connection String' is 'Driver={Microsoft Access Driver (*.mdb)};Dbq=C:\Users\mkim\Doc'.
- Check for Revisions:** The 'Enable' checkbox is checked.
- Locate Forms:** 'Username' is 'kinkinkin' and 'Password' is masked with asterisks. 'Save Password' and 'Login Automatically' checkboxes are checked. 'Favorites Folder' is 'C:\ProgramData\FormsWorkFlow\Favorites\'. There is a 'Register' button at the bottom of this section.
- Bill Track:** The 'Show Bill Track' checkbox is checked.
- Network Configurations:** The 'Automatically detect settings' checkbox is unchecked.
- Proxy Server:** The 'Use proxy server' checkbox is unchecked. There are input fields for 'Address', 'Port', 'Username', and 'Password'.
- Registration:** A 'Register' button is present.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.



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\Forms WorkFlow
(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:

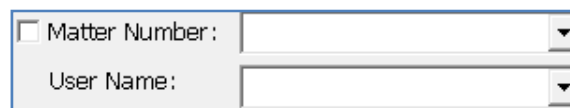
- ➔ Determine the Word Startup folder.
- ➔ Verify the ALN Case Profile.dot exists in the Startup folder
- ➔ If the ALN Case Profile.dot still does NOT exist, then you need to copy the file to this folder.

You can determine the Word Startup folder location by using the following steps:

- ➔ In Word 2007, select the **Microsoft Office** button , click **Word Options**.
 - ➔ Select **Advanced** (left pane).
 - ➔ Scroll to the **General** section then click **File Locations**.
 - ➔ 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.

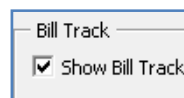


Matter Number:

User Name:

To toggle it on or off:

- ➔ Click  on the **Profile** section of the Forms WorkFlow ribbon.
- ➔ In the **Settings** window, check or uncheck **Bill Track** to turn the feature on or off.
- ➔ Click **OK** to close the Settings window.



Bill Track

Show Bill Track
