rb8

RB8 legal support firm software

Form Manager User Guide

Form Manager

Use Form Manager to edit your RB8 forms, create new forms, delete obsolete forms and perform other form management tasks. RB8 forms are stored globally in your RB8 database, so changes made in Form Manager update across your RB8 system automatically, i.e., everyone accessing RB8 will see the same version of each form.

Form Manager resembles *Microsoft Word,* so it's easy to use. It will seem familiar to anyone who has used *Word* or similar word processing programs. It is better for working with RB8 forms because it includes a context-sensitive set of RB8 merge fields, so you can easily add appropriate fields to your forms.

Forms Manager comes with a default set of commonly used forms. These might be all you ever need, after replacing the placeholder logo with your company logo. (See "Adding your company logo.")

NOTE

You must belong to the RB8 Administrator or Forms Manager security group for access to Form Manager.

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Creating your own custom forms

In RB8's Form Manager, you can edit any of its default forms and create new forms. The easiest way to create additional forms is to start with an existing similar form.

1. In RB8, click **Tools > Form Manager.**

2. Click **File > Open.**

3. In the **Type** drop-down, choose the type of form you want to edit or create, then select an individual form and click **Open.**
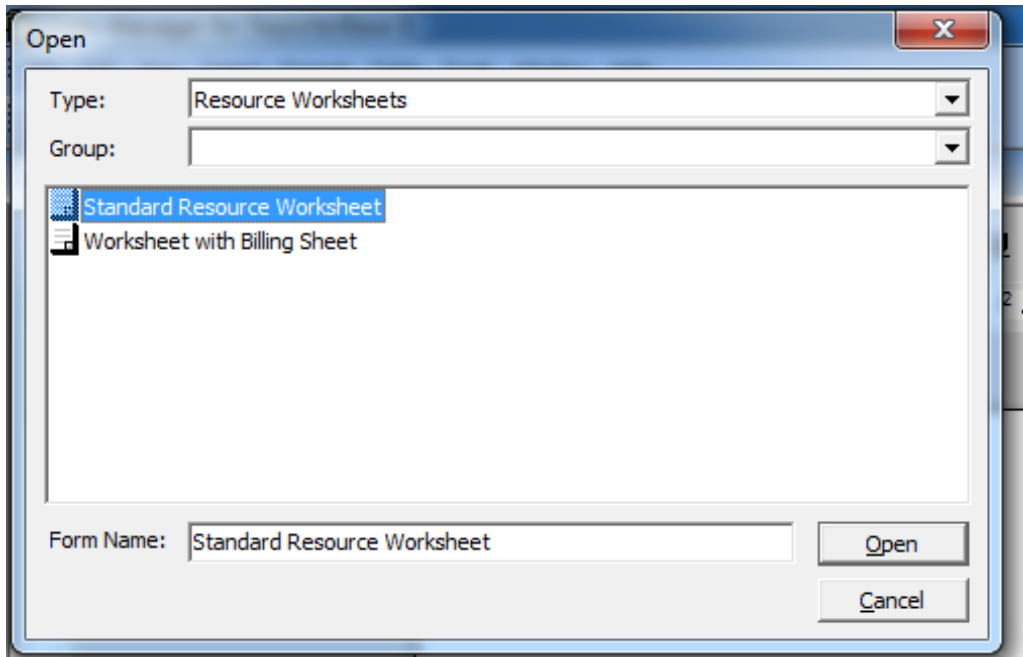
4. The form opens on the left in a *Word*-like interface. You can make changes in formatting, text, layout, etc. as you would in *Word*.
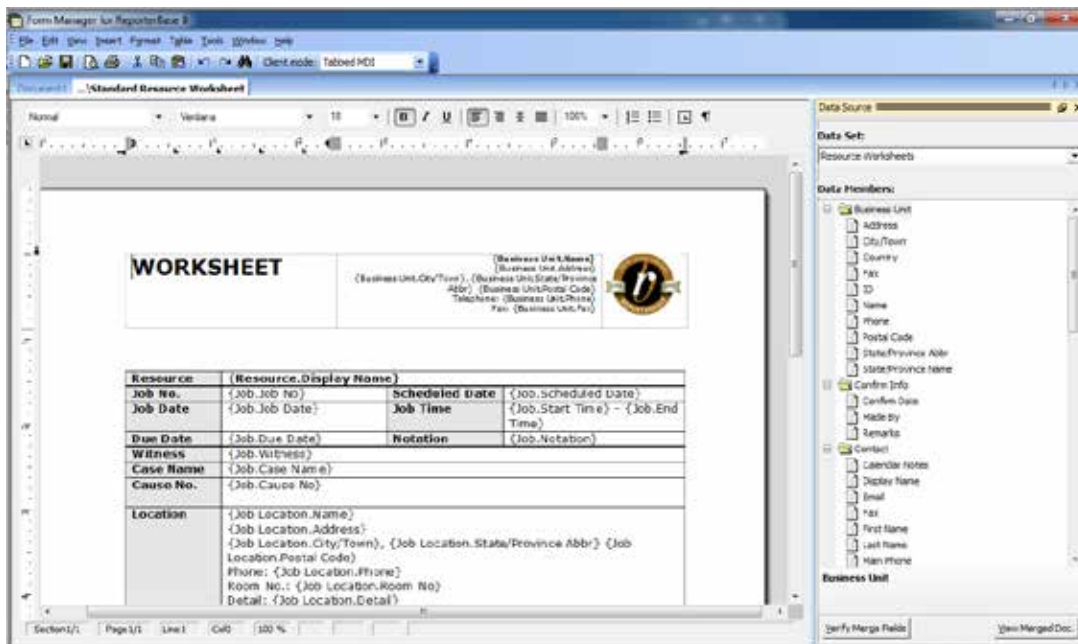
5. On the right side of the screen, the Data Source pane lists merge data fields that are appropriate for the current form type. To add a field to the form, insert your cursor in the form where you want the new information, then double-click the field name under **Data Members.** The merge field name appears in the form surrounded by curly brackets {}.

6. To remove a data field from the form, move the cursor over the field in the form. The cursor changes to a hand. Click to highlight, then press **Del.**

7. To change the company logo or other graphic, see "Adding your company logo."

8. Click **File > Save As,** then enter your new form's name in the **Form Name** field and click **Save.**

> **IMPORTANT**
>
> Selecting **Save As** saves the new form with a new name and does not overwrite your existing form.

> **TIP**
>
> In the Data Source pane, the **Data Set** drop-down lists the different groups of data fields. If you are working with an existing form, the **Data Set** drop-down automatically opens the correct set of data fields for the form. Do not select fields from other data sets. The data set must match the form type you are working with in the left pane. Click **Verify Merge Fields** to check that the merge fields on the form belong to the appropriate data set and will work on the form. Click **View Merged Doc** to see a preview of the document.

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Adding your company logo

Sometimes all you need to do with the default RB8 forms is add your company logo.

1. With the form you want to update open in Form Manager, insert your cursor where you want to add your company logo or other graphic.

2. If you want to remove an existing graphic, click the image to highlight, then press **Del.**

3. Click **Insert > Image,** locate your new graphic and click **Open.**

4. Right-click on the image, then click the **Saving Options** tab.

5. Under Saving Style, click **Export image and embed file reference.** Click **OK.**

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Deleting or reclassifying forms

In RB8's Form Manager, you can delete forms you no longer need and change other forms' name, form type and/or form group.

1. In RB8, click **Tools > Form Manager.**

2. In Form Manager, click **Tools > Change Form Status.**

3. In the Form Status window, click the form you want to delete or reclassify to highlight it.
   - **To delete the form,** right-click the highlighted form and click **Delete,** then click **Yes.**
   - **To reclassify the form,** double-click it. In the Form pop-up window, edit the name in the **Form Name** field, and/or select a new **Type** or **Group** in the corresponding drop-downs, then click **OK.**

WARNING

Changes made using **Change Form Status** are system-wide.

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Importing your own forms into RB8 Form Manager

If you already have forms that you created as Word documents, you can easily add them to your RB Form Manager.

1. In RB8, click **Tools > Form Manager.**

2. Click **File > Import.**

3. Locate the form you want to import (preferably a .doc file) and click **OK.**
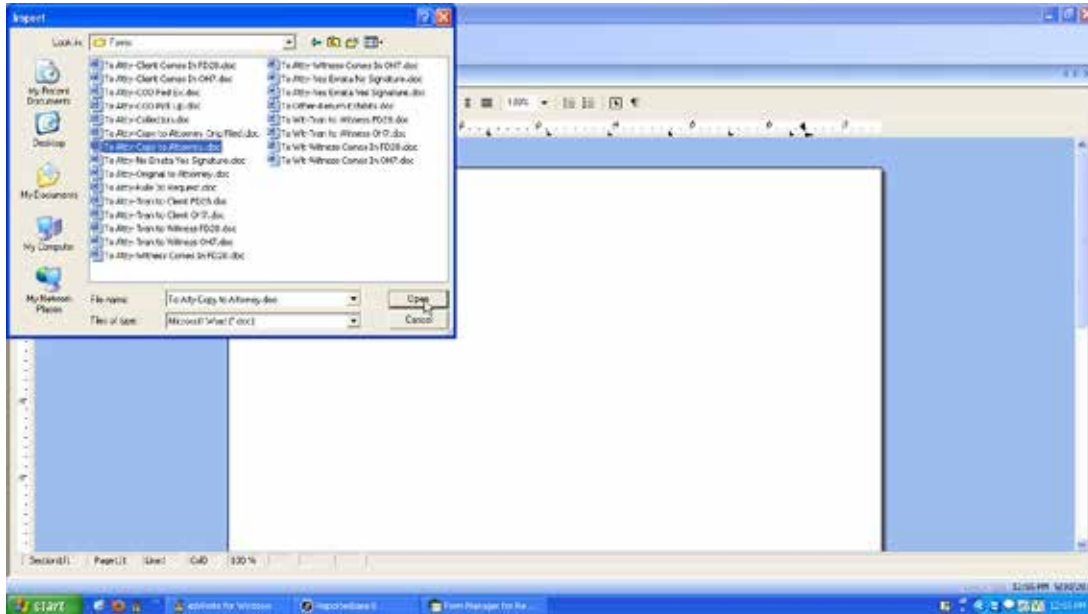
4. Click **Tools > Data Source Manager.** In the Data Source pane, select the type of form you are importing in the **Data Set** drop-down.
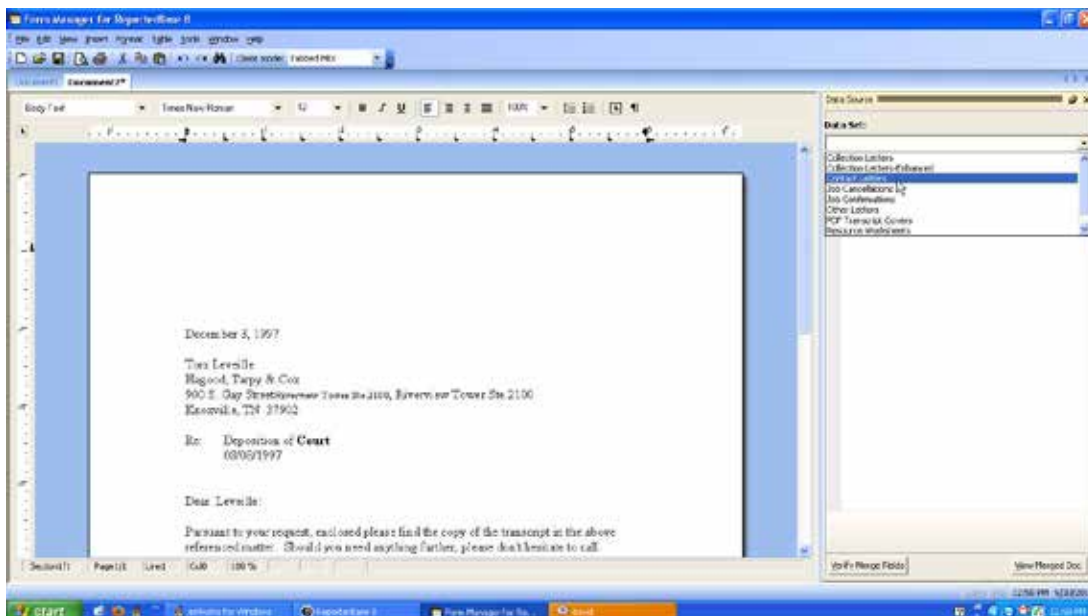
> **NOTE**
>
> You can import other document types besides Word docs, such as .form, .htm, or .rtf, but their formatting might change when you open them in Form Manager, requiring some editing.

5. The appropriate merge fields appear in the Data Members window. Highlight data in your form that has a corresponding data member field, then double-click its **Data Members** field name in the Data Source pane to change the selected text in your form into a merge field.
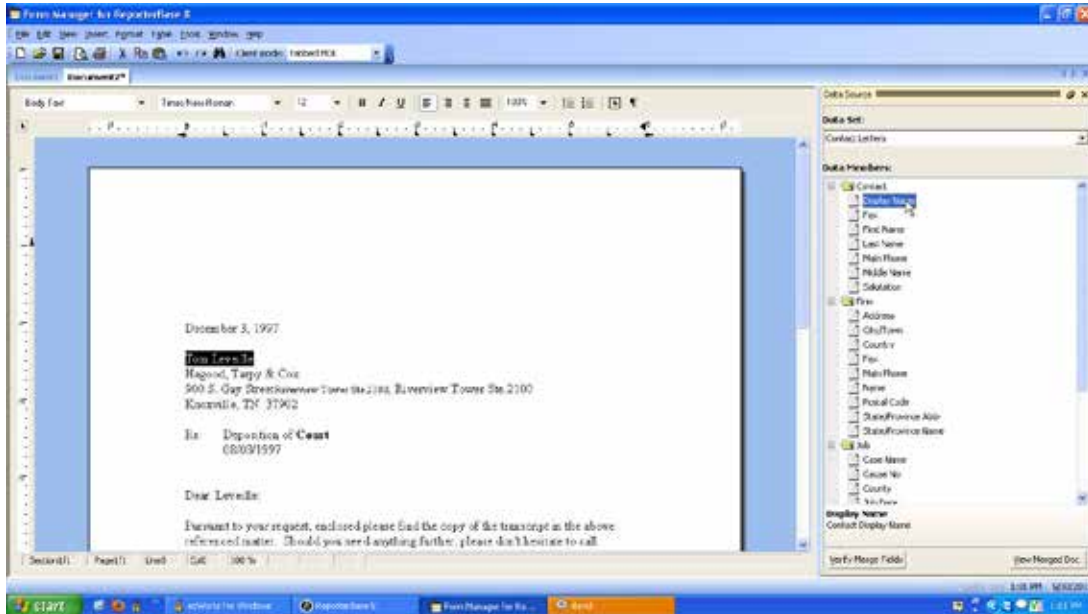
6. Repeat step 5 to add all of your merge fields to the form.

7. When finished, click **File > Save As,** then enter your form's name in the **Form Name** field and click **Save.**