

Oracle® Insurance IStream

IStream Customizer User Guide

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Chapter 1

Overview

Welcome to the IStream Customizer User Guide.

This User Guide contains overviews, step-by-step procedures and descriptions of the screens and fields.

This chapter describes:

- *Document Conventions* on page 8
- *IStream Customizer* on page 9
- *IStream Customizer Terms* on page 10
- *IStream Document Manager Documentation* on page 12
- *Using the Online Help* on page 14

Document Conventions

Tips, Notes, Important Notes and Warnings

Tip: A **Tip** provides a better way to use the software.

Note: A **Note** contains special information and reminders.

Important: An **Important** note contains significant information about the use and understanding of the software.

Warning: A **Warning** contains critical information that if ignored, may cause errors or result in the loss of information.

Other Document Conventions

- Microsoft Window names, buttons, tabs and other screen elements are in bold, for example: Click **Next**.
- paths, URLs and code samples are in the Courier font, for example:
`C:\Windows`
- values that you need to enter or specify are indicated in the italicized Courier font, for example, *server_name*
- values that are optional are indicated with square brackets, for example [reserved]

IStream Customizer

IStream Customizer helps modify your document to include changes in the text that apply for specified periods of time or to specific documents or generations of documents. These changes are regenerated as a new document during the time the wordings are in effect, but are not incorporated back into the model document on which the changed document was based.

IStream Customizer is useful where there is a need to customize documents in a very controlled way and retain those customizations during subsequent document regenerations.

IStream Customizer is an optional add-on to IStream Document Manager, which also includes:

- an **IStream Document Management System (DMS)**, which manages documents and versions to help you establish workflow processes
- **IStream Author**, which helps users construct, edit and manage model documents and sections that are used to produce complex contracts, policies and correspondence
- **IStream InfoConnector**, which keeps track of multiple InfoSources so that you can take advantage of on-site business knowledge in more than one data source
- **IStream Assembly Server**, which is the document generation application that assembles complex documents based on model documents

IStream Customizer Terms

The following list of basic terms is used throughout IStream Customizer:

- *Model Document* on page 10
- *IStream Document Overview* on page 10
- *Tagged Text Blocks* on page 10
- *Tag Names* on page 11
- *Custom Wording* on page 11
- *Wording Names* on page 11

Model Document

A model document is a document created in Author that may contain tagged text blocks. (See *Tagged Text Blocks* on page 10.) It may contain all possible standard wording for a policy, a contract or any other type of document. It is used to generate an IStream document, which can be customized in IStream Customizer.

IStream Document Overview

An IStream document:

- is a generated document based on a model document.
- is created by generating a document from an IStream Document Manager client application (such as Author) and saving the generated document
- contains only the standard wording that applies based on data selected from the database, such as a policy for an individual policy holder
- can contain tagged text blocks that can be customized in IStream Customizer

Tagged Text Blocks

A tagged text block is a block of text and variables placed between a TEXT TAG NAME ...ENDTEXT rule in Author, the document-authoring tool in IStream Document Manager. IStream Document Manager treats all text and formatting codes within this rule as literal text, and inserts the text into a document. Tagged text blocks indicate to IStream Customizer those text blocks that may be customized for this particular document.

Note: Do not use variables within text boxes contained inside tagged text blocks, because these variables cannot be customized in IStream Customizer.

Example: TEXT TAG MyFirstTag
This contract is effective 30 days after the policy is approved.
ENDTEXT

Tag Names

Each tagged text block has a tag name. These help identify each unique tagged text block. To modify the document, you apply changes (called custom wordings) to the tagged text block. In the example below, `MySecondTag` is the tag name.

Note: Tag names cannot be more than 64 characters long.

Example: `TEXT TAG MySecondTag`
Your premium payment is now due.
`ENDTEXT`

Custom Wording

Custom wordings are changes applied to a tagged text block in an IStream document. The process of applying custom wordings is called *customization*. Custom wordings are applied to sections of the document using tagged text blocks. Custom wordings can be applied to a document at the page, paragraph, line or word level.

Note: You cannot use IStream Customizer to customize an IStream chart or graph.

Wording Names

Each custom wording has a wording name to identify it. This name helps you to locate the custom wording in IStream Customizer to change the text or properties of the custom wording. For more information on custom wording properties, see *Custom Wordings Properties on page 45*.

Note: Wording names cannot be more than 64 characters long

IStream Document Manager Documentation

IStream Document Manager includes the following documents and online help files:

General Documentation

- The *IStream Document Manager Release Notes* include general product information, product enhancements and new features, supported platforms and third-party software, assorted considerations, and known issues and limitations.
- The *IStream Document Manager ReadMe* file describes the contents of the installation package.
- The *IStream Document Manager Glossary* contains definitions of commonly used IStream terms.

User Guides and Online Help

- The *IStream Assembler Online Help* describes how to generate documents from sections and model documents.
- The *IStream Assembler Add-in for Microsoft Word Online Help* describes how to perform certain IStream Assembler functions directly within Microsoft Word.
- The *IStream Author User Guide* describes how to create, edit, and test sections or model documents.
- The *IStream Author Add-in for Microsoft Word Online Help* describes how to perform certain IStream Author functions directly within Microsoft Word.
- The *IStream Customizer User Guide* describes how to modify the content of generated documents so that the changes will be applied during subsequent document generations.
- The *IStream Document Manager DMS Guide for IStream and Model Documents* describes how to edit and work with IStream sections and model documents using the DMS user interface.
- The *DMS Plug-in for Author Online Help* describes how to access DMS functionality in IStream Author.
- The *IStream InfoConnector Online Help* describes how to set up and configure IStream InfoSources.

Advanced Guides

- The *IStream Document Manager Guide for New Installations* explains how to complete a new installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.

- The *IStream Document Manager Upgrade Installation Guide* explains how to upgrade an *existing* installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.
- The *IStream Document Manager Message Reference Guide* contains lists of error, log and SDK messages from the various IStream components. It is for technical users who need additional information about the various IStream messages they receive.
- The *IStream Document Manager Technical Guide* is for system administrators and technical support staff who configure IStream Document Manager and set up links between it and their company's database. This guide is also for those who set up and maintain security groups and operators in the system, and who install, optimize, maintain and troubleshoot IStream Document Manager. It also describes installing and configuring IStream XML InfoSources for interactive and batch generation.
- The *IStream Assembler* and *Extensibility Toolkit Guides* contain detailed descriptions of the components in the IStream Toolkit, or SDK. They are for technical users who need to integrate IStream components with their own or other third party applications.

In addition to the toolkit guides, the *IStream Toolkit SDK Samples Guide* gives an overview of the toolkit samples. The samples are working examples that can help you develop custom applications.

For more information about the toolkit, see the *IStream Document Manager Toolkit ReadMe*.

Using the Online Help

This section describes how to use the Online Help and includes information about these topics:

- *The Contents of the Online Help* on page 14
- *Searching the Help* on page 14
- *Using the Help Index* on page 15
- *Using the Help Table of Contents* on page 15
- *Navigating the Help* on page 15
- *Printing a Help Topic* on page 16

The Contents of the Online Help

The Online Help contains the same contents as the related PDF document, but in an online Help format.

To open the Online Help, click the **Help** menu.

The Help is divided into two frames:

- the left frame displays the navigation tools: **Contents**, **Index** and **Search**
- the right frame contains the contents of each Help topic

There are different ways to find a Help topic:

- *Searching the Help* on page 14
- *Using the Help Index* on page 15
- *Using the Help Table of Contents* on page 15
- *Navigating the Help* on page 15

Searching the Help

You can search the entire Help contents to find a specific topic.

Method: Search the Help

1. In the left pane of the Help, click the **Search** tab.
2. Enter the word(s) you want to search for, then click **Go!** or press Enter.
3. A list of Help topics is displayed in descending order by **Rank**. The Rank indicates how many times the word(s) you searched for appears in a Help topic. It can help indicate how relevant the topic may be in your search.

Tip: Use specific words in your search, for example: *model document*. Avoid using plurals, for example, “*sections*,” because this may limit your search results.

Using the Help Index

The Help **Index** contains a listing of all the Help topics in alphabetical order.

Method: Use the Help Index

1. In the left pane of the Help, click the **Index** tab.
2. Click the letter that corresponds to the topic you are searching for. You cannot select a letter that is greyed out, because it contains no index entries.
3. A list of all index entries beginning with the letter you selected is displayed.
4. Scroll to the index entry of the topic you are searching for.
5. Click the topic to view its contents in the main body of the Help.

Using the Help Table of Contents

When you open the Help, the **Contents** are displayed. The **Contents** contain main topics and their subtopics.

Each main topic appears as a book icon:



Each subtopic appears as a page icon:



Subtopics can also appear as book icons. In other words, books can appear within other books.

You can open a book by clicking a book icon or the text next to the book icon. This will expand the book and display the topics within that book.

To close an open book, click the book icon. The book “collapses”, hiding the topics within the book.

Tip: When a Help topic is displayed, you can click the “Show in Contents” button to open the corresponding book that contains the displayed Help topic:



Navigating the Help

To go to the next or previous Help topic in the **Contents**, use the Next and Previous buttons in the right pane of the Help:



To go to the next or previous topic that you have viewed, use the **Forward** and **Back** buttons in your Web Browser.

Printing a Help Topic

You can print a Help topic in case you want to refer to it later.

Method: Print a Help topic

1. Click the Print icon in the upper-right corner of the Help:



2. The Print dialog box is displayed.
3. Click **Print** to print the Help topic.

Chapter 2

Getting Started

This chapter describes:

- *Opening IStream Customizer* on page 18
- *Viewing the IStream Customizer Screen* on page 19
- *Viewing IStream Document Properties* on page 27
- *Setting IStream Customizer Options* on page 28
- *Working with Documents in IStream Document Manager* on page 33

Opening IStream Customizer

There are several ways to open IStream Customizer.

Method: Open IStream Customizer

- Click **Start > Programs > IStream > Customizer**.
- From IStream Document Manager, click the **Customize** link for the IStream document

Note: You cannot run multiple instances of IStream Customizer on the same system.

Note: When you first log in to Windows, an IStream cleanup utility briefly appears in a DOS window.

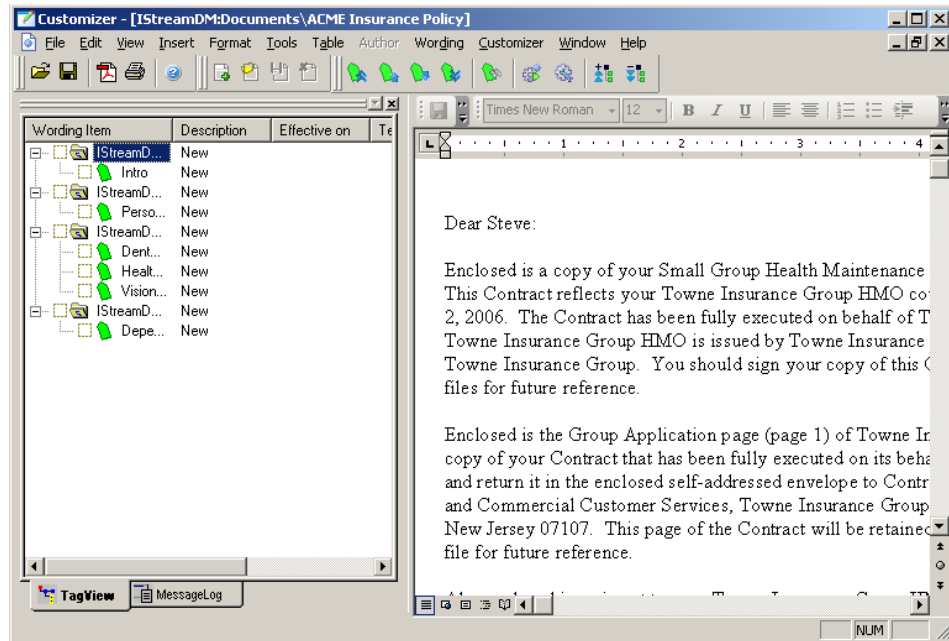
Warning: When using IStream Customizer on Windows XP, ensure that you use the Windows Classic style appearance so that you can highlight tags correctly.

Method: Change Windows XP display settings to Classic style

1. Right-click a blank area of your desktop, and select **Properties**.
2. From the **Themes** tab, select **Windows Classic**.
3. Click **OK**.

Viewing the IStream Customizer Screen

The IStream Customizer screen consists of two windows. The left window contains the **Tag View** tab to display the tag hierarchy, and the **Message Log** tab to display messages which occur during generation or customization. The right window, or the Word window, displays the IStream document. Both windows can be resized and repositioned within the IStream Customizer main window.



The windows described in this section are:

- *The Word Window* on page 19
- *The Tag View Window* on page 21
- *The Message Log Window* on page 25
- *Viewing IStream Document Properties* on page 27

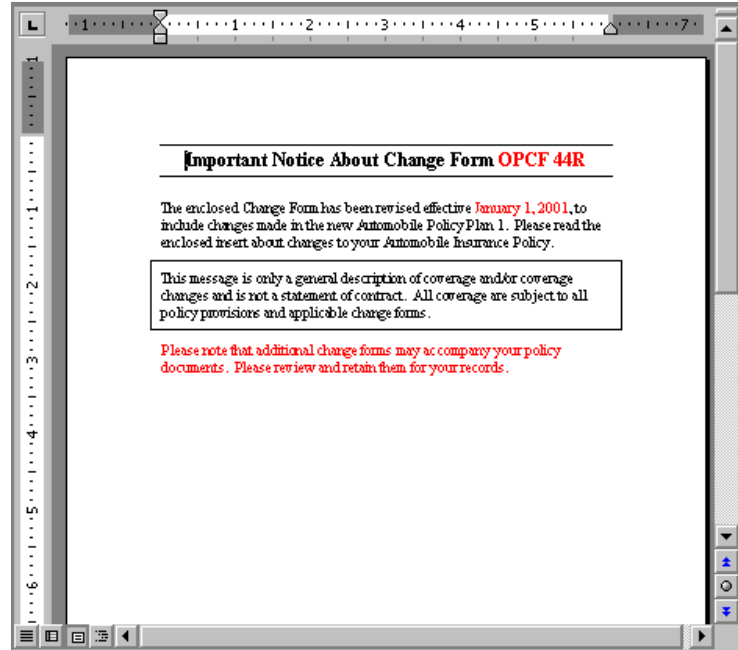
Note: Livelink menu functionality (installed with the Livelink Explorer module) is not supported.

The Word Window

The Word window displays Microsoft Word with the IStream document containing the tagged text blocks. Tagged text blocks are the customizable parts of an IStream document.

Important: Do not use the Word Outline view when working with documents.

See also: *Opening an IStream Document* on page 61.



Importing Custom Wordings from Other Documents

When opening a customizable document that does not already have custom wordings, you will be asked if you want to import custom wordings from another IStream document. This allows you to create a new variation of a customized document without having to redefine all of the custom wordings.

You can import custom wordings from another IStream document that is based on the same model document as the document that you are opening.

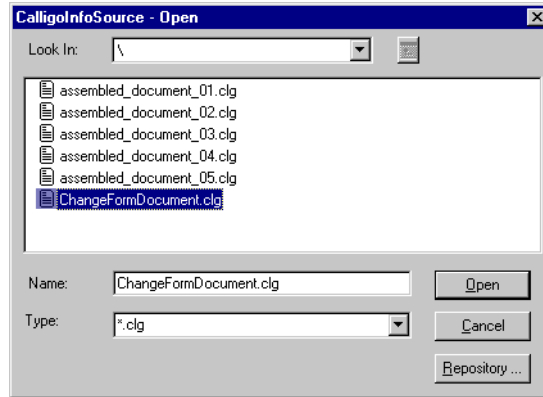
Method: Import custom wordings from another IStream document

1. Select **File > Open**.
2. Select the file without custom wordings you want to open, then click **Open**.

A prompt appears to ask if you want to import custom wordings from another document.

3. Click **Yes**.

The **Open** dialog opens.



4. Select a document (based on the same model document as the document selected in step 2) to import custom wordings from, then click **Open**.

When custom wordings are imported, the information for the custom wordings appears in the **Tag View**.

| Wording Item | Description | Effective on | Terminate on | Wording Content |
|--|-------------|--------------|--------------|---------------------------|
| CalligolInfoSource:ChangeFormTitle.CDS | New | | | |
| FormNumber | New | | | |
| New form for January 2002 | New | 12/11/2001 | | JAN 10U |
| CalligolInfoSource:ChangeFormBody.CDS | New | | | |
| FormDate | New | | | |
| New Date For January 1 2002 | New | 12/11/2001 | | January 1, 2002 |
| MoreForms | New | | | |
| No Additional Forms Changed | | 12/11/2001 | | No additional policy f... |

5. If your QuickGen default is set to **Auto** (see *QuickGen Tab* on page 32), a QuickGen will automatically be performed. The changes for the imported custom wordings will be reflected in the tag view and within the document.

If your QuickGen default is set to **Prompt**, a message appears asking if you want to perform a QuickGen.

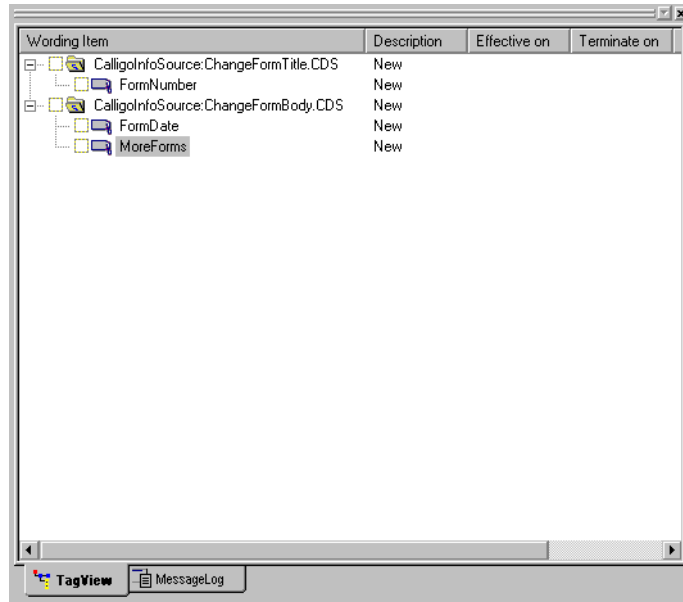
- If you choose **Yes**, a QuickGen will be performed. The changes for the imported custom wordings will be shown in the tag view and within the document.
- If you choose **No**, the imported custom wording information will only be reflected in the tag view.

(For more information, see *QuickGen* on page 69).

You can now work with the customizable document.

The Tag View Window

IStream Customizer displays the **Wording Names** and **Tag Names** in your document in the **Tag View**. Once a generated document is open in IStream Customizer, click the **Tag View** tab. IStream Customizer displays all the **Tag Names** and **Wording Names** associated with the generated document in the Word window.



IStream Customizer does not display the **Tag Names** and **Wording Names** in the document unless the document was previously generated with both the **Include Tag Information** and **Include Custom Wordings** options selected in **Options > Generation**.

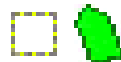
To learn more about generation modes, see *Selecting the Generation Mode* on page 37.

Identifying Tags

A “pencil” symbol appears on folders that contain customized tags:



A dotted square next to a tag icon represents a newly created tag:



When you open the CLG file again, the dotted tag icon is replaced by a regular tag icon:



Expanding and Collapsing the Tag View

You can expand the **Tag View** to see the **Tag Names**, **Wording Names**, and other properties associated with the custom wordings.

Method: Expanding and collapsing tags

1. Open a generated IStream document in the Word window as described in *Opening an IStream Document* on page 61.

2. Click the **Tag View** in the left window on the IStream Customizer screen.

IStream Customizer displays the model document name (*.CMS) and section names (*.CDS) in the **Tag View**.

- Click the plus (+) sign next to the document name to expand the **Tag View**.

IStream Customizer displays all the **Tag Names** and their associated **Wording Names**.

- Click the minus (-) sign next to the document name to collapse the **Tag View**.
- To expand and collapse all items in the tree view, use the **Expand All** and **Collapse All** functions in the **Customizer** menu, or use the following two buttons in the toolbar:



Changing the Tag View Display

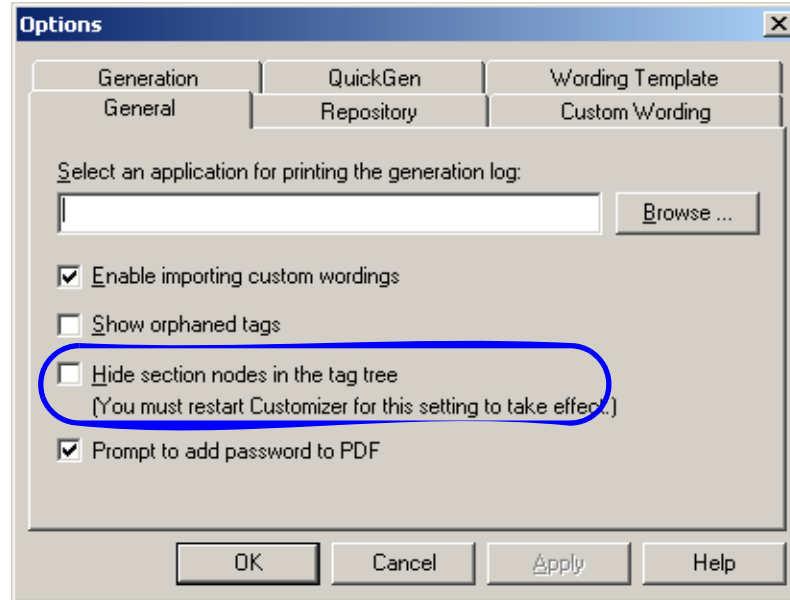
By default, when viewing a generated document, tags appear in the tree view nested under their respective master sections (.CMS) or subsections (.CDS)

You can also display the tags listed by their tag name, followed on the same line by their section name, in the following format: `tag name:section name`

This view allows you to more easily navigate the tree.

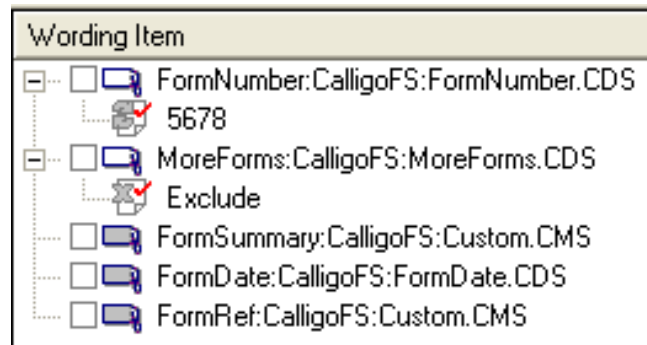
Method: Display tags listed by tag name and section name

1. From the **Customizer** menu, select **Options > General**.
2. Select the **Hide section nodes in the tag tree** checkbox.

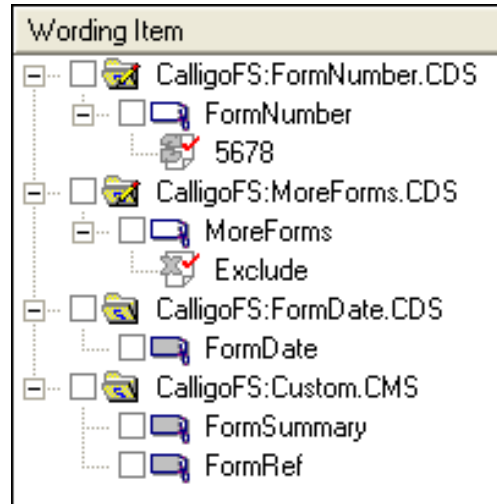


- Restart IStream Customizer for this change to take effect.

When you reopen the .CLG file in IStream Customizer, each tag name will appear in the tag tree on its own line, followed by a colon, and the section name.









Note: To display tags using the method in previous versions, leave **Hide section nodes in the tag tree** cleared. (This is the default setting.) The tags will be displayed in the previous “nested” format.



Icons in the Tag View

IStream Customizer displays icons next to the **Wording Names** in the **Tag View** to indicate what is happening to the custom wording and the tagged text blocks in the document. The following table describes each icon. By default, the icons are gray. If a custom wording is opened in the Word window, the icons become red.

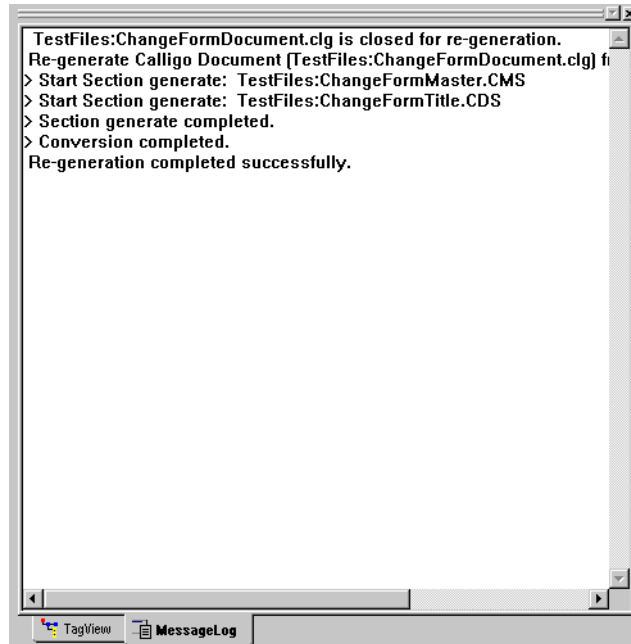
| Icon | Description |
|---|--|
|  | text to be inserted before the tagged text block |
|  | text to be inserted after the tagged text block |
|  | text to replace the tagged text block |
|  | tagged text block to be deleted |
|  | the custom wording is applied (check mark on icon) |
|  | a folder containing a custom wordings/tags |

The Message Log Window

The **Message Log** not only displays all the messages sent out by the Assembly Server during generation, but it also shows you everything that is happening while you are working in IStream Customizer. To view the **Message Log**, click the **Message Log** tab in the **Tag View** window.

Note: The size of the **Message Log View** is limited to 64 KB.

The following screenshot shows messages from both IStream Assembler and IStream Customizer. The messages prefixed with “>” are from IStream Assembler and the messages without a “>” prefix are from IStream Customizer.



Printing the Message Log

You can print the Message Log while you are working in IStream Customizer. However when you exit IStream Customizer, everything in the **Message Log** is deleted.

Method: Print the Message Log

1. Make sure your cursor is in the **Message Log** window.
2. Select **File > Print**.

Notepad displays the **Message Log** and prints the log.

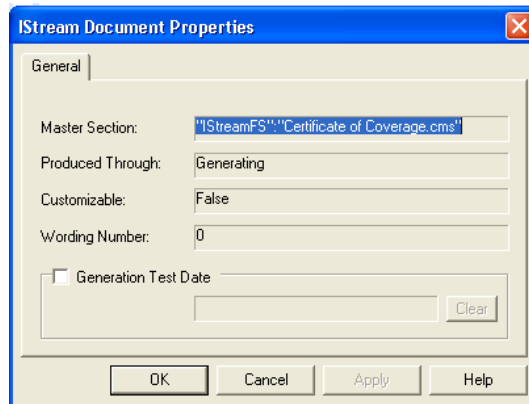
Viewing IStream Document Properties

You can view basic information about the document opened in IStream Customizer.

Method: Display IStream document properties

1. Open a document in IStream Customizer.
2. Select **File > Properties**.

The **IStream Customizer Document Properties** dialog opens.



The dialog displays:

- the name of the IStream Customizer document's **Master Section**
 - **Produced Through:** how the document was produced
 - whether the document is **Customizable**
 - **Wording Number** – the number of wordings in the document
 - the **Generation Test Date** for the document: see *Setting the Generation Test Date* on page 5 for instructions on using the Generation Test Date.
3. Click **OK** to close the window.

Setting IStream Customizer Options

Use the **Customizer Options** to set options and functions.

Method: Display the Options dialog

- Select **Customizer > Options**.

The **Options** dialog opens. This dialog includes the following tabs:

- *General Tab* on page 28
- *Repository Tab* on page 29
- *Custom Wording Tab* on page 29
- *Wording Template Tab* on page 31
- *Generation Tab* on page 31
- *QuickGen Tab* on page 32

General Tab

Use the **General** tab to:

- select a word processor for printing the IStream Customizer log
 - enable or disable the importing of custom wordings
 - show or hide orphaned tags
 - hide selection nodes in the tag tree
 - prompt to add a password to a PDF
-

Method: Set the General options

1. Do one of the following steps:
 - Click the **Browse** button to search for and select a word processor to use for printing the IStream Customizer log.
 - Select **Enable importing custom wording** to allow IStream Customizer to import custom wordings from other documents as follows:
 - if selected, you are asked if you want to import custom wordings when you open a document that does not already have custom wordings applied
 - if not selected, you are not asked if you want to import custom wordings

- Select **Show orphaned tags** to display orphaned wordings. Clear this checkbox to hide these wordings. See *Orphaned Custom Wordings* on page 55 for more information.
 - Select **Hide section nodes in the tag tree** to display tags listed by tag name and section name. For details, see *Changing the Tag View Display* on page 23.
 - Select **Prompt to add password to PDF** to apply a password that users will need to enter to open the generated PDF.
2. Click **Apply** to save the settings.
 3. Click **OK** to close the **Options** dialog.

Repository Tab

Use the **Repository** tab to select the default repository to use with IStream Customizer.

Note: If the CLG files you want to work with are stored on a file system, you will need to ensure that you have configured an InfoSource to point to this file system's location.

Method: Set the Repository options

1. Click the **Browse** button to select a repository to use with IStream Customizer.
Information about the repository displays in the **Type**, **Location**, and **Description** fields.
2. Click **Apply** to apply the settings.
3. Click **OK** to close the **Options** dialog.

Custom Wording Tab

Use the **Custom Wording** tab to:

- select the colors that applied wordings and tagged text are displayed in
- configure the Microsoft Word Track Changes feature

Method: Set the Custom Wording options

1. From the **Applied Wording Color** drop-down list, select a color.
Applied Wordings appear in the selected color.
2. From the **Tagged Text Color** drop-down list, select a color.
Tagged Text appears in the selected color.

- To hide the **Custom Wording Properties** dialog that appears when adding a new wording, clear the **Show property dialog when adding a new wording** check box. (By default, this check box is selected.)

When this check box is cleared, the **Custom Wording Properties** will no longer appear when you add a new wording. Instead, a new wording will automatically be added with default properties. (See *Creating Custom Wordings* on page 49 for details.)

- Configure your **Track Changes** settings. (For details, see *Track Changes Options* on page 30.)
- Click **Apply** to save your settings.
- Click **OK** to close the **Options** dialog.

Warning: If your IStream Customizer document uses its own color to mark a word or paragraph, the colors on the **Custom Wording** tab will overwrite your document colors within the current IStream Customizer session.

Track Changes Options

The following table indicates the Track Changes options you need to select or clear so that tracked changes will appear for:

- existing wordings** (wordings that are already in the document) *and*
- new wordings** (wordings that you add later to the document)

| Track Changes Options | Existing Wordings | New Wordings |
|---|--|--|
| Check: <ul style="list-style-type: none"> Enable Track Changes - <i>and</i> - Existing wordings will be opened with Track Changes on | displayed with tracked changes visible | displayed with tracked changes visible |
| Check: <ul style="list-style-type: none"> Enable Track Changes - <i>and</i> - Existing wordings will be opened with their last saved Track Changes settings | displayed based on their last Track Changes settings (tracked changes may or may not appear) | displayed with tracked changes visible |
| Uncheck: <ul style="list-style-type: none"> Enable Track Changes | displayed based on their last Track Changes settings (tracked changes may or may not appear) | displayed with track changes off |

Setting Color Options for Macros and QuickGen

If a macro is used with QuickGen, you should set the **Custom Wording > Applied Wording Color** and **Tagged Text Color** options to **Auto**. If different colors are used, these colors will be saved into your document.

If you prefer to use the different colors for editing, you have several options:

- if you change the **Applied Wording Color** and **Tagged Text Color** options to **Auto** before running the macro, the colors will not be saved in the document
- you can include an additional macro to **Select All** and change the text color as required

Note: If you print in black and white only, the colors are irrelevant.

Wording Template Tab

Use the **Wording Template** tab to select the template that you want to apply to your new wordings, or to reload your wording after attaching a new template.

Method: Set the wording template options

1. Select **Use the template of the open IStream Customizer document** to apply the template of the IStream Customizer document that is currently open to your new wordings.

Alternatively, select **Use the following template**, then **Browse** to a specific template to apply to your new wordings.

2. If you have a custom toolbar saved in your template, and want to use this toolbar while editing your wordings, select **Reload wording after attaching a new template**.

If you select this field, the wording will be reloaded and the custom toolbar appears when you apply the main document template to the wording that you are opening.

(You are prompted to apply the main document template to the wording that you are opening only when the template of your wording document is different than that in the main IStream Customizer document.) Note that you will not see any difference when you create a new wording with the template.

By default, this field is cleared to improve performance.

3. When you are done making your changes, click **OK** to save these settings.

Generation Tab

Use the **Generation** tab to identify which information is included in the customized document. You can include or exclude both **Tag Information** and **Custom Wordings**. The options you select here determine what actions can be performed on the generated document later.

See *Selecting the Generation Mode* on page 37 for details about the combinations of settings.

Method: Set the Generation options

1. Select the **Include Tag Information** checkbox to have tag information included in the generated document.

Note: If you do not select this option, your newly generated document cannot be customized further.

2. Select the **Include Custom Wordings** checkbox to include custom wordings in the generated document during the next generation. **We strongly recommend that you select this option.**
3. Click **Apply** to apply the settings.
4. Click **OK** to close the **Options** dialog.

QuickGen Tab

Use the **QuickGen** tab to choose the default setting for the QuickGen function. QuickGen allows you to see the changes made to custom wordings in the document without having to perform a full generation. (See *QuickGen* on page 69.)

Method: Modify the QuickGen default setting

1. Select a QuickGen option:
 - **Auto** – each time you save and close a wording window, a QuickGen is performed; all saved changes to custom wordings are immediately applied and displayed in the CLG document in the Word Window.
 - **Prompt** – each time you save and close a wording window, a prompt is displayed asking you if you want to perform a QuickGen
 - **Manual** – a QuickGen will be performed only if you manually choose to do so from the **Customizer** menu or QuickGen button on the IStream Customizer toolbar
2. Click **Apply** to apply the settings.
3. Click **OK** to close the **Options** dialog.

Working with Documents in IStream Document Manager

To allow other users to customize documents saved in IStream Document Manager, permission for customization needs to be set for each customizable document. See *Setting Document Permissions* on page 33 for more information.

When working with customizable documents in IStream Document Manager, you can open IStream Customizer directly from the document in the DMS. *Opening Customizable Documents from IStream Document Manager* on page 34 explains how to open customizable documents directly from IStream Document Manager.

Setting Document Permissions

To allow users to customize IStream Customizer documents from the DMS, you need to set the **Customize** and **Generate** permissions for the documents. You can assign permission for customization and generation to all the users on your system, or you can limit the number of users able to customize the document.

Note: New documents within a folder will automatically have the same permissions as the folder. Existing documents will retain their permissions unless **Apply to this item/sub-item** is selected during permission updates.

Method: Set document permissions

1. Log in to IStream Document Manager.
2. Navigate to the document to set permissions for.
3. Click the **Functions** button.
4. Select **Functions > Permissions**.
The document's **Permission** page opens.
5. Click a user in the list at the left to set permissions for the user.
The **Permissions** options for the user display.
6. Do one of the following steps:
 - To assign permissions to all users, click **Public Access** in the list of users at the left of the screen, then click **Generate** and **Customize** in the **Permissions** list.
 - OR -
 - To assign permissions to specific users, click a user in the list of users at the left of the screen, then click **Generate** and **Customize** in the **Permissions** list.
7. Click **Update** to save the changes.

8. To assign permissions to another user, click a user in the list of users at the left of the screen. Assign permissions to the user, then click **Update** to save the changes.
9. Click **Done** to return to the document in IStream Document Manager.
The specified users now have permission to customize the document from IStream Document Manager.

Opening Customizable Documents from IStream Document Manager

You can open IStream Customizer from within IStream Document Manager. To do this, you must have permission to customize the document. See *Setting Document Permissions* on page 33 for instructions.

Method: Customize a document using IStream Document Manager

1. Log in to IStream Document Manager.
2. Navigate to the document you want to open.
3. Click the **Customize** link next to the document name.
The document opens in IStream Customizer.

Chapter 3

Tagged Text Blocks

This chapter describes:

- *Tagged Text Blocks* on page 36
- *Preparing to Work with Tagged Text Blocks* on page 37
- *Using Color to Distinguish a Tagged Text Block* on page 39
- *Locating a Tag or Tagged Text Block* on page 40

Tagged Text Blocks

A tagged text block is a block of text placed between a TEXT TAG NAME ... ENDTEXT rule. You apply custom wordings to a tagged text block to make changes to a document. These changes customize the document for a specific purpose.

Some typical uses of tagged text blocks are:

- specifying the terms in an insurance policy
- changing document or form names
- changing the date on a document
- changing wordings or clauses
- removing, adding, or replacing text or paragraphs

Tag Limitations

- An IStream document can have a maximum of 16,000 tags, including applied custom wording items. However, performance may be affected as the number of tags in the IStream document increases.
- IStream Customizer does not support tags from sections that have been included using the pipe (|) or double-pipe (||) syntax.

Preparing to Work with Tagged Text Blocks

Before you can work with tagged text blocks in a generated document, you need to confirm that the document is customizable, or that custom wordings can be created for the document:

1. Select **Customizer > Options > Generation** and ensure that **Include Tag Information** and **Include Custom Wordings** are both selected.
2. Generate the document.

If the document opened in IStream Customizer has already been generated with both these **Generation** mode options selected, then it is ready to be customized now.

An IStream document that is ready for customization lists tag and wording names in the tag view.

Selecting the Generation Mode

Assembler uses generation modes to control what information to include in the document during generation.

To customize a document in IStream Customizer, the tag information must be included during document generation. To include tag information you select a **Generation Mode** that includes tag information.

To view the **Generation Modes** currently selected, select **Customizer > Options** and click the **Generation** tab.

You can include or exclude **Tag Information**, **Custom Wordings** or both. The following sections describe each combination of settings:

Include Tag Information and Custom Wordings

This is the default generation mode. IStream Customizer will create a new document that includes all of the tag information and custom wordings in the document. You must use this mode if you want to apply additional custom wordings later.

Include Tag Information Only

The generated document will contain only the tag information, and not the custom wording text. While you can create custom wordings in the generated document in IStream Customizer because the tag information is still available, you cannot apply them during document regeneration.

Include Custom Wordings Only

A generated document is created using the most recent custom wordings. However, because no tag information is included in the generation, you cannot add more custom wordings without first changing the generation mode and regenerating the document.

Exclude Tag Information and Custom Wordings


The generated document will contain no tag information or custom wordings. The generated document will therefore look like the original IStream document. You cannot add any custom wordings to the generated document without changing the generation mode and regenerating the document.

Generating a Document

Once you confirm that both the **Tag Information** and **Custom Wordings Generation Mode** options are selected, you need to regenerate the IStream document.

When you perform a generation, all information for the document is updated from the database.

Method: Regenerate a document in IStream Customizer

1. Select **Customizer > Regenerate**, or click the **Regenerate**  button.
IStream Customizer automatically begins regenerating the document. The **Message Log** window indicates the regeneration process.
The new IStream document opens as soon as the regeneration process is complete.
2. Select **File > Save**, or click the **Save** button to save your regenerated IStream document.

Note: You can also perform a QuickGen to quickly see the changes you have made to custom wordings as they will appear within your document. This process, unlike full generation, does not update the values in the document from the database. The QuickGen function overrides selections made for the Generation Mode. (See *Selecting the Generation Mode* on page 37.) It assumes that both the Include Tag Information and Include Custom Wordings options are selected.

Related Topic

- *QuickGen* on page 69

Using Color to Distinguish a Tagged Text Block

You can use color to identify tagged text blocks and custom wordings in your document. This makes it easier to distinguish them from other text. You choose the color you prefer by selecting **Customizer > Options**.

Note: To ensure that the font, size, and color of your text appears correctly, the formatting information must be explicitly applied to all text between a TEXT...ENDTEXT rule. This is particularly important when you apply color to distinguish a tagged text block. If you just accept the default text properties of the document template, all subsequent text will appear with that color.

Method: Apply color to a document

1. Open a generated document in IStream Customizer.
2. Select **Customizer > Options**.
3. Click the **Custom Wording** tab.
4. Select the color for your custom wording from the **Applied Wording Color** drop-down list.
5. Select the color for your tagged text block from the **Tagged Text Color** drop down list.
6. Click **Apply**.
IStream Customizer applies the colors to your document in the Word Window.
7. Click **OK** to save your changes.

Note: If a macro is used in conjunction with QuickGen, see *Setting Color Options for Macros and QuickGen* on page 30 for additional steps.

Locating a Tag or Tagged Text Block


You need to locate tags and tagged text blocks to add custom wordings to your IStream document. You can locate a tag in the following ways:

- by *Retrieving a Tag*
- by *Highlighting a Tag*
- by *Using the Navigation Buttons*

Retrieving a Tag

Retrieve Tag helps you locate a **Tag Name** in the **Tag View**. In large documents, you sometimes may not be able to see the **Tag Name** when your cursor is in the tagged text block in the Word window. You can use **Retrieve Tag** to highlight the corresponding tag in the **Tag View**.

Method: Retrieve a Tag Name

1. Place your cursor in the tagged text block in the generated document.
2. Select **Customizer > Retrieve Tag**, or click the **Retrieve Tag** button . IStream Customizer automatically highlights the matching **Tag Name** in the **Tag View**.

Highlighting a Tag

Highlight Tag lets you find a tagged text block in the Word window when you are in the **Tag View**. It is particularly useful in large documents. You can use **Highlight Tag** to highlight the corresponding tagged text block in the Word window.

Method: Highlight a tag





1. Place your cursor on the **Tag Name** in the **Tag View**.
2. Select **Customizer > Highlight Tag**. IStream Customizer highlights the matching tagged text block in the Word window.

Using the Navigation Buttons

The IStream Customizer toolbar has four buttons that help you navigate the **Tag Names** and tagged text blocks.

To use these buttons, place your cursor in the **Tag View**, then select one of the options to move your cursor down or up in the **Tag View**, highlighting the matching tagged text block in the generated document.

The navigation buttons are:

| Button | Action |
|---|--|
|  | moves the cursor to the first Tag Name in the Tag View |
|  | moves the cursor to the last Tag Name in the Tag View |
|  | moves the cursor up one Tag Name in the Tag View |
|  | moves the cursor down one Tag Name in the Tag View |

Chapter 4

Custom Wordings

This chapter describes:

- *Understanding Custom Wordings* on page 44
- *Viewing Custom Wording Properties* on page 57
- *Custom Wordings Properties* on page 45
- *Working with Custom Wordings* on page 49

Understanding Custom Wordings

Custom wordings are changes applied to a generated document. The process of applying custom wordings is called *customization*.

Custom wordings are applied to sections of a document called tagged text blocks. For more information, see *Tagged Text Blocks* on page 36.

Custom wordings can be added to a document at the page, paragraph, line or word level. They do not affect the formatting of the existing document, except the pagination when text is added or removed.

Note: The more wordings an IStream document has, the longer it will take to regenerate.

Custom Wordings Properties

The **Custom Wording Properties** are:

- *Section Name* on page 45
- *Tag Name* on page 45
- *Wording Name* on page 45
- *Description* on page 45
- *Customization Modes* on page 45
- *Disable Wording* on page 46
- *Effective Dates* on page 46
- *Termination Dates* on page 47

To view or edit the **Custom Wording Properties**, see *Viewing Custom Wording Properties* on page 57.

Section Name

Section Name is the name of the section of the model document that the IStream document was generated from. IStream Customizer enters this name automatically.

Tag Name

Tag Name is a name given to a tagged text block when the document is created in Author. You can see a list of all the **Tag Names** in the **Tag View**. Tag names cannot be more than 64 characters long.

Wording Name

Wording Name is the name that you give to the custom wording you create. The **Wording Name** appears in the **Tag View** below the **Tag Name** with which it is associated. **Wording Names** apply only to the generated document and can also be the same as the **Tag Name**. It cannot be more than 64 characters long.

Description

A **Description** includes any information that may be useful in identifying or explaining a custom wording. It cannot have more than 32,768 characters.

Customization Modes

Customization Modes are the types of changes that you can make to a tagged text block. There are four types:

- **Before** inserts a custom wording before the tagged text block
- **After** inserts the custom wording after the tagged text block

- **Replace** replaces the tagged text block with a custom wording
- **Delete** removes the tagged text block

Replace and **Delete** are mutually exclusive modes and therefore only one can be applied within the effective time period.

An icon indicating the applied customization mode appears next to the **Wording Name** in the **Tag View**.

Disable Wording

If you select the **Disable Wording** option, IStream Customizer will exclude the custom wording regardless of the document's **Effective Date**. This lets you create custom wordings for a future use, so that you can compare the current document with how it will look with the custom wording.

IStream Customizer grays out the **Wording Name** of the disabled custom wording in the **Tag View**.

When the **Disable Wording** option is cleared, IStream Customizer includes the custom wording in the document during regeneration or QuickGen.

Effective and Termination Dates

This section describes:

- *Effective Dates* on page 46
- *Termination Dates* on page 47
- *Changing the Effective or Termination Dates* on page 47
- *Effective and Termination Date Overlap* on page 48

Effective Dates

The **Effective Date** is the starting date of the custom wording. Each custom wording must have an **Effective Date** that is no later than the **Termination Dates** applied to the custom wording. The default date is the current system date.

IStream Customizer compares the custom wording **Effective Date** to the **Generation Test Date**, which is a date you can specify to test customizations. This comparison tells Assembler when to start including the customizations in the generated document. For more information on the **Generation Test Date**, see *Setting the Generation Test Date* on page 64.

For details on how to change the **Effective Date**, see *Changing the Effective or Termination Dates* on page 47.

Important: Ensure that your **Effective** and **Termination Dates** do not overlap. (See *Effective and Termination Date Overlap* on page 48.)

Termination Dates

The Termination Date is the end date of the custom wording. IStream Customizer will stop including the customization in the document on this date. Click **Clear** to remove any date from this field.

If the custom wording does not have a **Termination Date**, IStream Customizer will continue to include the customization indefinitely. A custom wording's **Termination Date** should follow its **Effective Date**.

For details on how to change the **Effective Date**, see *Changing the Effective or Termination Dates* on page 47.

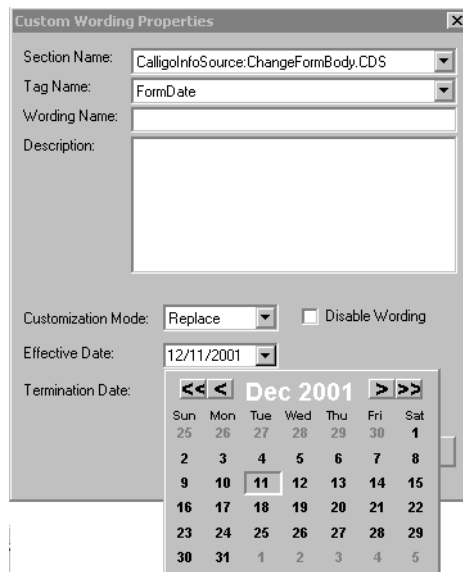
Changing the Effective or Termination Dates

You can change the **Effective Date** if the custom wording should be in effect sooner or later than originally planned.

You can also change the **Termination Date** if the custom wording should be in effect for a longer or shorter amount of time than originally planned.

Method: Change the dates of custom wordings

1. In the **Custom Wording Properties** dialog box, click the arrow next to the **Effective Date** or **Termination Date** to open the drop-down calendar.



2. Select a date from the drop-down calendar:
 - a. Use the <<< and >>> arrows to select a month.
 - b. Click a date to select it.

If you do not enter a date, the **Effective Date** will be the current system date.

3. Click **OK** to save the changes.

Note: A prompt displays if the **Effective** and **Termination** dates of another custom wording in the tag overlap with the selected **Effective** and **Termination** dates. For more information, see *Effective and Termination Date Overlap* on page 48.

Effective and Termination Date Overlap

If you have more than one occurrence of a specific type of custom wording for a tag, the **Effective** and **Termination Dates** for those custom wordings cannot overlap. However, overlap may be allowed between different types of custom wordings in a tag.

The following table indicates when overlapping dates are allowed:

| Customization Mode of Custom Wording 1 | Customization Mode of Custom Wording 2 | Overlapping Allowed? |
|--|--|----------------------|
| Before | Before | No |
| Before | After | Yes |
| Before | Replace | Yes |
| Before | Delete | Yes |
| After | After | No |
| After | Replace | Yes |
| After | Delete | Yes |
| Replace | Replace | No |
| Replace | Delete | No |
| Delete | Delete | No |


Working with Custom Wordings

This section describes the functions you can perform with custom wordings:

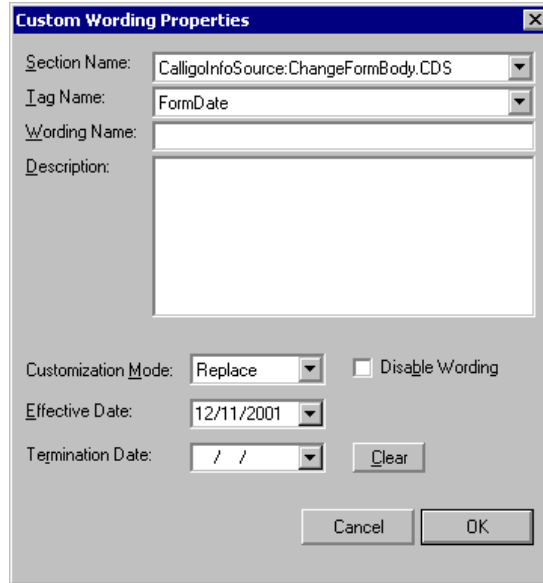
- *Creating Custom Wordings* on page 49
- *Using QuickGen* on page 51
- *Removing a Custom Wording* on page 51
- *Editing Custom Wordings* on page 51
- *Text and Formatting in Custom Wordings* on page 52
- *Saving Custom Wordings* on page 53
- *Closing Custom Wordings* on page 53
- *Copying Custom Wordings* on page 54
- *Orphaned Custom Wordings* on page 55

Creating Custom Wordings

Method: Create new custom wordings

1. Open a document in IStream Customizer.
2. Select the **Tag Name** from the **Tag View** of the tagged text block you want to customize, or click within the tagged text in the body of the document.
3. Select **Wording > Add Wording**, or click  on the toolbar.

The **Custom Wording Properties** dialog box opens if you have configured IStream Customizer to display it. See *Set the Custom Wording options* on page 29.



Note: If you click outside of a text tag in your IStream document and try to apply a wording, IStream Customizer will apply the wording to the last tag in your document by default.

4. If you have configured IStream Customizer to display the **Custom Wording Properties** dialog, then complete the following fields:
 - **Wording Name** (this cannot be more than 64 characters)
 - **Effective Date**
 - **Termination Date** (optional)
 - **Description** (optional).

See *Custom Wordings Properties* on page 45 for more information on Custom Wording properties.

If you have configured IStream Customizer *not* to display the **Wording Properties** dialog, a new wording will automatically be added with the following default properties:

- a **Wording Name** comprised of the **Tag Name** followed by a digit
- a **Customization Mode** of **Replace**
- an **Effective Date** equal to the current date
- a blank **Termination Date** and a blank **Description**

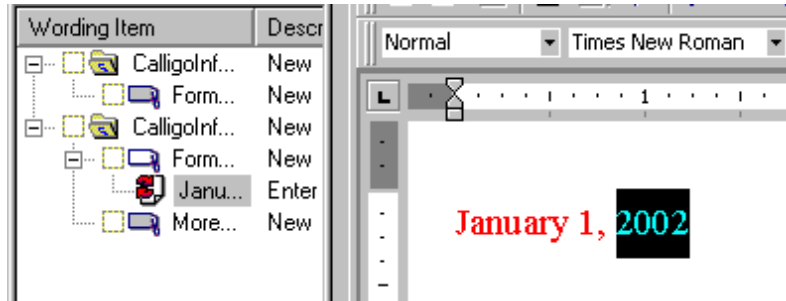
Note: If a **Replace** wording already exists and is within the **Effective Date** and **Termination Date** range of the new wording, a message will be displayed indicating there is a conflict. To resolve this, you will need to check the properties of the existing wording.

5. Select a **Customization Mode**. (See *Customization Modes* on page 45 for more information on customization modes.)
6. Click **OK** to exit the **Custom Wording Properties** dialog box.

IStream Customizer automatically opens Word if you selected the **Before**, **After** or **Replace Customization Mode**.

If you select **Delete**, the Word window does not open. Text from the original tagged text block will not appear during QuickGen and will be deleted during regeneration.

7. Enter the new custom wording in the Word window that opens if you select **Before**, **After** or **Replace**.



Using QuickGen

After creating one or more custom wordings, you can use QuickGen to view what the document will look like with the wordings included. For more information, see *QuickGen* on page 69.

Applying a Custom Wording

You can apply one or more custom wordings by regenerating the document. See *Generating a Document* on page 38.

Removing a Custom Wording

If you created a custom wording by mistake, you can remove it.

Method: Remove a custom wording

1. Click a **Wording Name** in the **Tag View**, or click within the wording that you want to remove in the body of the document.
2. Select **Wording > Remove Wording**.
You are asked if you want to permanently delete the custom wording.
3. Click **Yes**.


IStream Customizer removes the wording from **Tag View**.

Editing Custom Wordings

IStream Customizer allows you to edit custom wordings. However, you should not edit variables or expressions (information that appears between < > angle brackets). This may create invalid variables or expressions, causing errors when

you regenerate or QuickGen the document. You must also avoid adding headers and footers to a custom wording.

Method: Edit a custom wording

1. With your IStream document open, select the custom wording in the tree view, or click within the wording in the body of the document.
2. Click  to open the selected wording.

Note: If you did not select a wording properly, an error message displays. If you see this message, make sure that you have selected a wording, and then try again.

3. Edit the wording in the Word window.
4. Select **Wording > Close Wording** from the **Wording** menu.

Text and Formatting in Custom Wordings

Formatting applied to text in a custom wording may affect the text following the custom wording. For example, if you format text in a custom wording to be bold and italic, the text following the wording may inherit the bold and italic setting, even though it is not formatted this way in the model document.

To prevent this, select the last paragraph marker (¶) at the end of the custom wording and apply the formatting that should follow the custom wording to the paragraph marker. Text following the marker should inherit the formatting assigned to the paragraph marker.

Formatting Example

In the following example, the paragraph marks (¶) are displayed for reference. The line “this text should be bold and italic” is a custom wording that will be edited in IStream Customizer. In this example, the custom wording should be bold and italic, but the text following should be plain text.

In the following custom wording,¶
this text should be bold and italic¶
but this text should be plain.¶

The output for this example will incorrectly be:

In the following custom wording,¶
this text should be bold and italic¶
but this text should be plain.¶

To fix this, select the very last paragraph marker in the custom wording. Apply the formatting for the text that follows the custom wording to the paragraph marker.

In this example, you would select the paragraph marker at the end of:

this text should be bold and italic¶

and apply the formatting that should apply to the text following the custom wording to the paragraph marker. Text following the marker will inherit the formatting assigned to the paragraph marker.


Saving Custom Wordings

Saving custom wordings includes the custom wordings in the document when it is QuickGen'd or regenerated. You do not need to regenerate the document to save newly created or changed custom wordings. You can choose to save a single custom wording or all the custom wordings you have created since the last time you regenerated the document.

Note: IStream Customizer automatically saves the custom wording properties when you click **OK** in **Wording Properties**.

Saving a Single Custom Wording

Method: Save a single custom wording

1. Select the custom wording by clicking in the Word window containing the custom wording.
2. Select **Save Wording** from the **Wording** menu or click  .
IStream Customizer automatically saves the custom wording.

Saving All New Custom Wordings

To save all the custom wordings that have been created since the document was last regenerated, select **Wording > Save All Wordings**. IStream Customizer saves all new custom wordings.

Closing Custom Wordings

When you close the Word window containing the custom wording, IStream Customizer checks if there have been any changes since the wording was last saved. If there are, IStream Customizer prompts you to save the most recent changes before you close.

Note: If your QuickGen default is set to **Auto**, you are prompted to close all custom wording windows so that a QuickGen can be performed. If your QuickGen default is set to **Prompt**, you are asked if you want to perform a QuickGen. For more information, see *QuickGen* on page 69.

Method: Close a custom wording

1. Select the custom wording by clicking in the Word window containing the custom wording.

2. Complete any of the following steps:
 - Click the close button [X] in the upper right corner of the Word window.
 - Select **Wording > Close Wording**.

- Click the **Close Wording** button  in the toolbar.

IStream Customizer checks if there have been any changes since the wording was last saved. If there are, you are asked if you want to save your most recent changes.

3. Click **Yes** to save the custom wording.

Copying Custom Wordings

IStream Customizer lets you copy text from one custom wording to another, and from one document to another.

Method: Copy custom wordings in IStream Customizer

1. Open the custom wording you want to copy.
2. Highlight the text to be copied.
3. Select **Edit > Copy**.
4. Open the destination custom wording.
5. Select **Edit > Paste**.

IStream Customizer copies the text from the original custom wording to the destination custom wording.

Method: Copy a custom wording from one document to another


1. Copy the custom wording.
2. Close the document you are copying from.
3. Open the document to which you are copying the custom wording.
4. Paste the custom wording into this document.

Orphaned Custom Wordings


Orphaning occurs when the tagged text block associated with a custom wording does not exist. There are four reasons why this may happen. The following table lists the reasons, and suggested resolutions.

| Reason for orphaned custom wording | Suggested resolution |
|--|--|
| The name of the tagged text block associated with the custom wording was changed in Author. | Resolve the difference in Author or IStream Customizer. |
| The tagged text block associated with the custom wording was removed in Author. | Remove the custom wording. |
| The tagged text block associated with the custom wording was not included because of a condition created by IF statements. | Do nothing. This is an acceptable orphan. |
| IStream Customizer's option to include tag information during regeneration was disabled. | Enable Include Tag Information in the Generation options. For more information on Generation Modes, see <i>Selecting the Generation Mode</i> on page 37. |

IStream Customizer can be set to display or hide orphaned custom wordings in the Tag View. For details, see *Setting IStream Customizer Options* on page 28.

When the IStream Customizer options are set to display orphaned wordings, orphaned wordings are displayed in the **Tag View** with this icon: .

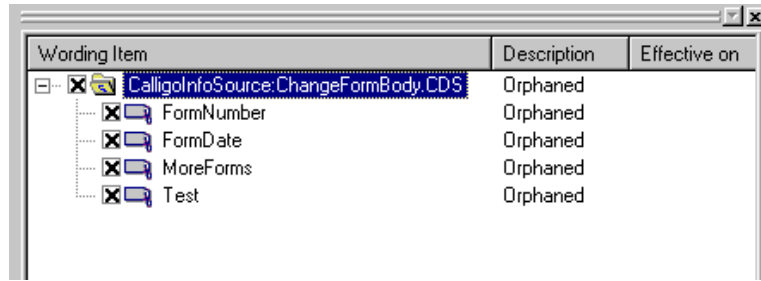
To open an orphaned custom wording:

- double-click the **Wording Name** in the **Tag View**
- select **Wording > Open Custom Wording**
- click  on the toolbar

Setting the Orphaned Custom Wording Options

You can set up IStream Customizer so that orphaned custom wordings are displayed or hidden from the **Tag View**.

When orphaned tags are set to show, orphaned tags in the document are displayed in the **Tag View**.



| Wording Item | Description | Effective on |
|---|-------------|--------------|
| <input checked="" type="checkbox"/> CalligolInfoSource.ChangeFormBody.CDS | Orphaned | |
| <input checked="" type="checkbox"/> FormNumber | Orphaned | |
| <input checked="" type="checkbox"/> FormDate | Orphaned | |
| <input checked="" type="checkbox"/> MoreForms | Orphaned | |
| <input checked="" type="checkbox"/> Test | Orphaned | |

When orphaned tags are set to not show, orphaned tags in the document are not displayed in the **Tag View**.

Method: Set the orphaned tag options

1. Select **Customizer > Options**.
2. Select or clear the **Show orphaned tags** checkbox as required.
3. Click **OK**.

Viewing Custom Wording Properties

Before you can view or change the properties of a custom wording, the generated document must be open and have custom wordings.

Method: View custom wording properties

1. In the **Tag View**, click the **Wording Name** of the custom wording you want to view, or click within the applied custom wording's text in the IStream document in the Word window.
2. Do one of the following steps:
 - Select **Wording > Wording Properties**.
 - *OR* -
 - In the Tag View, right-click the custom wording you want to view and select **Wording Properties** from the pop-up menu.

The **Custom Wording Properties** dialog box opens, displaying all properties attached to the custom wording.

The screenshot shows the 'Custom Wording Properties' dialog box. The title bar is blue with the text 'Custom Wording Properties' and a close button. The dialog is divided into several sections. The top section has three dropdown menus: 'Section Name' (CalligolInfoSource:ChangeFormBody.CDS), 'Tag Name' (FormDate), and 'Wording Name' (empty). Below these is a large empty text area for 'Description'. The bottom section contains a 'Customization Mode' dropdown (Replace), a 'Disable Wording' checkbox, an 'Effective Date' dropdown (12/11/2001), and a 'Termination Date' dropdown (/ /) with a 'Clear' button. At the very bottom are 'Cancel' and 'OK' buttons.

For descriptions of these properties, see *Custom Wordings Properties on page 45*.

3. Click **OK** to close the **Custom Wording Properties** dialog box.

Chapter 5

Customized Documents

This chapter describes:

- *Understanding Customized Documents* on page 60
- *Opening an IStream Document* on page 61
- *Adding a Custom Wording* on page 62
- *Saving the IStream Document* on page 63
- *Setting the Generation Test Date* on page 64
- *Regenerating a Document* on page 65
- *Printing a Customized Document* on page 66
- *Viewing a PDF of a Generated Document* on page 67
- *Closing a Document* on page 68

Understanding Customized Documents

A customized document is an IStream document that has custom wordings applied it when you regenerate the document. You can also perform a QuickGen which allows you to see any saved custom wordings as they are created. (For more information, see *QuickGen* on page 69.)

Opening an IStream Document

Note: You can open any IStream document in the Word window within IStream Customizer. If the CLG files you want to work with are stored on a file system, you will need to ensure that you have configured an InfoSource to point to this file system's location.

Note: Opening an IStream document from the DMS locks it to prevent other users from modifying it until you have completed working with it.

Method: Open a document in IStream Customizer

1. Select **File > Open**.

You are directed to the default repository (where generated documents are stored).

2. Select the file you want to open, then click **Open**.

If the document does not already have custom wordings, you will be asked if you want to import custom wordings from another document.

3. To import custom wordings from another IStream document that already has custom wordings defined, click **Yes**. See *Importing Custom Wordings from Other Documents* on page 20 for instructions on importing custom wordings.

To open the selected document without importing custom wordings, click **No**.

Adding a Custom Wording


When you select **Add Wording** while your cursor is positioned on the Word pane, the Retrieve Tag process runs, and the relevant tag is automatically selected in the Word pane. This reduces the need to display the **Tag View**. Closing the **Tag View** gives additional space to view the document.

To add a custom wording to the generated document, you must first be able to locate the **Tag Name** for it. See *Locating a Tag or Tagged Text Block* on page 40 for ways to locate a **Tag Name**. After you locate a **Tag Name** you can add a custom wording. See *Creating Custom Wordings* on page 49 for more information.

Saving the IStream Document

Once you finish adding custom wordings, you must save your IStream document.

Method: Save an IStream document

- Select **File > Save** or click the Save button  on the toolbar. Filenames for IStream documents can contain a maximum of 64 characters.

Please note:

Tip: IStream Customizer does not assign a new name to the document unless you select **File > Save As**.

Setting the Generation Test Date

If your document contains custom wordings or document sections with different **Effective Dates**, you can use the **Generation Test Date** to ensure the custom wordings work properly.

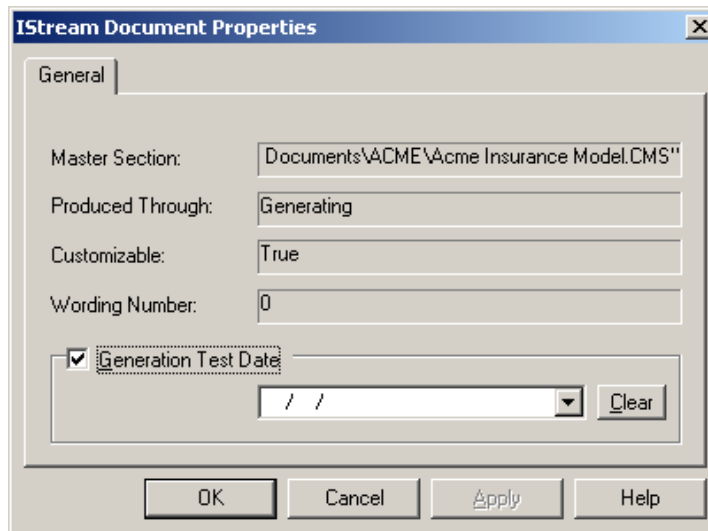
For example, you may have a document where some custom wordings will not come into effect until several months from now. To test the document, set the **Generation Test Date** to the **Effective Date** for the custom wordings. When you regenerate it, the custom wordings will function as if they have been activated.

Generation Test Dates are not supported with QuickGen. For more information about QuickGen, see *QuickGen* on page 69.

Method: Set the Generation Test Date

1. Select **File > Properties**.

The **IStream Document Properties** dialog opens.



2. Click **Generation Test Date**.
3. Select a date from the drop down calendar, using the <<< and >>> arrows to select a month. Click a date to select it. If you do not enter a date, the **Generation Test Date** is the current system date.
4. Click **OK** to exit the **IStream Document Properties** dialog.

When you regenerate your document, your custom wordings will act according to the **Generation Test Date** you selected. If the selected date is on the **Effective Date** or within the **Effective Date** range of a custom wording, the wording will be included in the generated document.

Regenerating a Document

Regenerating a document automatically applies all new and existing custom wordings.

Before regenerating a document, you can use the QuickGen feature to view any custom wordings you have created and saved. For more information, see *QuickGen* on page 69.

Note: If the Track Changes feature is enabled in Word, you need to accept all changes after modifying any expressions, before you regenerate the document using either QuickGen or full generation.

During regeneration all custom wordings are applied if:

- the Disable Wording option has not been applied
- they have a valid **Effective Date** and may have a valid **Termination Date**, or
- they are relevant to the tagged text blocks being generated.

Note: When an IStream document is being customized, if the model document it originated from is changed in IStream Author, the changes will not be applied to the CLG file until IStream Customizer is restarted and the document is regenerated.

Note: If your IStream document was edited in IStream Customizer and contains custom wordings, when you **Export CLG to PDF**, the PDF created will not be regeneratable.

If there are no **Tag Names** after you have regenerated the document, check if the document is customizable: see *Preparing to Work with Tagged Text Blocks* on page 37.

Note that the more wordings you have in an IStream document, the longer it will take to regenerate.

For more information, see *Generating a Document* on page 38.

Printing a Customized Document

Once the document is regenerated and includes the customizations, you can print it.

Method: Print a customized document


1. Ensure that the cursor is in the Word window.
2. Select **File> Print**.
The document prints.

Viewing a PDF of a Generated Document

You can view a .CLG document in PDF format from IStream Customizer.

Important: You will need a PDF viewer (such as Adobe Reader) installed on your system. If you do not have a PDF viewer, the PDF will not be created even if you have a PDF printer driver installed.

Method: View a PDF of a .CLG file

1. Ensure a .CLG file is open in IStream Customizer.
2. Select **File > View PDF**, or click the View PDF button  on the toolbar.

IStream Customizer generates a PDF of the .CLG file, and the PDF opens in your PDF viewer. Within the viewer, you can save the PDF if you want to refer to it later.

Closing a Document

When you close a document, IStream Customizer checks if the document or custom wordings have been changed since the document was last modified.

Method: Close a document in IStream Customizer

1. Select **File > Close**.

IStream Customizer checks if there have been any changes to the document. If not, IStream Customizer closes your document. If there have been changes, you are asked if you want to save the changes to the IStream document.

2. Click **Yes** to save the document.

IStream Customizer saves and closes your document.

Note: After you close a document, it is unlocked in the DMS and other users can customize it.

Chapter 6

QuickGen

This chapter describes:

- *QuickGen* on page 70
- *Using QuickGen* on page 71

QuickGen

You can use the QuickGen function in IStream Customizer to immediately view changes you have made to a document by adding, editing or removing custom wordings.

QuickGen is similar to a generation but is faster because it does not need IStream Customizer to connect to the database to retrieve variable values: see *Customized Documents* on page 59.

Note: After performing a QuickGen, the log from the last generation will still be available through IStream Customizer. Please see *Viewing the Generation Logs* on page 82 for more information.

Comparing QuickGen and Full Generation

The following table summarizes the differences between QuickGen and full regeneration.

| Process | QuickGen | Full Regeneration |
|---|----------|-------------------|
| Updates variable information from the database or XML file. | No | Yes |
| Model document changes are incorporated in the customizable document. | No | Yes |
| Custom wording information is saved in the background. | Yes | Yes |
| Wording information is not saved into the document until the IStream document is saved. | Yes | Yes |

Warning: If the database or variables within the model document have changed, these changes will not be reflected in the QuickGen results. If you add new variables or coding expressions in a custom wording, they cannot be processed by QuickGen and an error appears in the message log and within the context of the document. To incorporate these new variables and coding expressions into the document, you *must* do a full regeneration.

Unsupported Date Features

QuickGen always uses the current system date to determine which wordings to include. Because of this, the following features are not supported in QuickGen:

- Generation Test Dates – for more information, see *Setting the Generation Test Date* on page 64
- the EFFECTDATE variable in model documents created with IStream Author

Therefore, if you need to use these features, use the full generation method instead.

Using QuickGen

This section describes how a QuickGen is performed based on your QuickGen default settings, and describes:

- *Automatic QuickGen* on page 71
- *Prompt for QuickGen* on page 71
- *Manual QuickGen* on page 73
- *QuickGen and Open Wording Windows* on page 73

Modifying the QuickGen Default Setting on page 73

Note: If the Track Changes feature is enabled in Word, you need to accept all changes after modifying any expressions, before you regenerate the document using either QuickGen or full generation.

Automatic QuickGen

If the default QuickGen setting on your computer is **Auto**, a QuickGen is performed when you:

- import custom wordings
- save and close a custom wording window
- delete a wording
- change the properties of a wording

All new and saved changes are immediately applied and displayed in the CLG document open in the Word Window: see *Viewing the IStream Customizer Screen* on page 19.

Important: For QuickGen to work, the generated document (CLG file) in use must have been generated with the QuickGen setting enabled. This setting is always used when generating locally with IStream Customizer, but your system administrator must ensure that this setting is also enabled on the Assembly Server and Publisher Workers.

Prompt for QuickGen

If the default QuickGen setting on your computer is **Prompt**, a prompt is displayed asking you if you want to perform a QuickGen when you:

- import custom wordings
- save and close a custom wording window
- delete a wording
- change the properties of a wording.

Click **Yes** and all new and saved changes are immediately applied and displayed in the CLG document open in the Word Window: see *Viewing the IStream Customizer Screen* on page 19.


Click **No** and the custom wording window is closed and no changes are displayed.

Manual QuickGen

You can choose to perform a QuickGen manually any time.

Method: Perform a manual QuickGen

Do either of the following actions:

- select **QuickGen** on the **Customizer** menu
- click the QuickGen toolbar button 

If there are multiple custom wording windows open, they are closed: see *QuickGen and Open Wording Windows* on page 73.

The **Log View** is displayed, showing the progress of the QuickGen.

When the QuickGen has been completed successfully, the Outline Explorer will change from the **Log View** to the **Tag View** and all new or saved changes are immediately applied and displayed in the CLG document open in the Word Window: see *Viewing the IStream Customizer Screen* on page 19.

If the QuickGen is unsuccessful, an error appears in the log view.

QuickGen and Open Wording Windows

If multiple custom wording windows are open and you have selected to perform a QuickGen, a prompt is displayed advising that all wording windows must be closed before performing a QuickGen.

IStream Customizer will ask whether you want to save the changes to each open custom wording. Select **Yes** or **No** to determine which wordings to save. Once all custom wordings have been closed, a QuickGen will be performed as requested.

Modifying the QuickGen Default Setting

The default setting for QuickGen is chosen when IStream Customizer is installed. (For more information about this setting, see the *IStream Document Manager Installation Guide*). However, you can change this setting anytime by using the **QuickGen** tab in IStream Customizer options. For more information, see *QuickGen Tab* on page 32.

Chapter 7

Model Documents

This chapter provides tips for creating model documents in Author for use with IStream Customizer, and describes tag names and variables.

Tag Names in Model Documents

To allow customizations, a model document must have a tag name, or tag, associated with any text blocks you want to customize. Tag names identify the tagged text blocks.

Example: Here is an example of a tagged text block:

```
TEXT TAG Alter
In case of accidental death, the benefit payable is doubled.
ENDTEXT
INITIALIZE CLASS
TEXT TAG "Alter" + class_no
For class <class_no> there is an additional paragraph.
ENDTEXT
DEFINE CLASS_NO CLASS_NO+1
NEXT
```

The tag names you would see in the **Tag View** are

- “Alter”
- “Alter1” (first class)
- “Alter2” (second class), and so on.

Note: Tag names cannot be more than 64 characters long.

Using a Variable as a Tag Name

The following example shows how you can use a VARIABLE as TAG name:

```
Example: DEFINE variable "tag123"
TEXT TAG <variable>
....
ENDTEXT
```

This can be useful for creating a unique series of TAGS. If you have a TAG inside a loop, then each resulting paragraph will have the same TAG in Customizer. If you want each paragraph to have a unique TAG in Customizer, you can add a variable to the TAG name.

```
Example: DEFINE Count 1
DO WHILE Count < 10
TEXT TAG <count>
```

The number is <count>...

```
ENDTEXT
DEFINE Count Count +1
ENDDO
```

This will create nine paragraphs, each with a unique TAG.

Note: When an IStream document is being customized, if the model document it originated from is changed in IStream Author, the changes will not be applied to the CLG file until IStream Customizer is restarted and the document is regenerated.

Appendix A

Displaying Information and Logs

This chapter describes:

- *Displaying Server Information* on page 80
- *Displaying User Information* on page 81
- *Viewing the Generation Logs* on page 82

Displaying Server Information

You can display information about the IStream Assembly Server, including its name and port number.

Method: Display server information

- Select **Customizer > Server Info**.

The **IStream Assembly Server Machine Information** dialog opens.

- The **Server Address** is the name of the Assembly Server.
- The **Server Port** is the port number of the Assembly Server.

The following table specifies the server to which IStream Customizer submits the requests for generation when you click **Regenerate**, depending on the values you enter in these two fields:

| Server Address | Server Port | Result |
|------------------------------|-------------|---|
| local | 4300 | the locally installed IStream Assembler will generate the documents |
| an IP address or a host name | 4300 | the documents will be generated on a remote server |

Please note

- You can generate from IStream Customizer using local generation if it is available (if Author workstation is installed on the same client system), or remote generation if the Assembly Server is installed on a server.
- IStream Customizer must be shut down and restarted when you change the Assembly Server information.

Displaying User Information

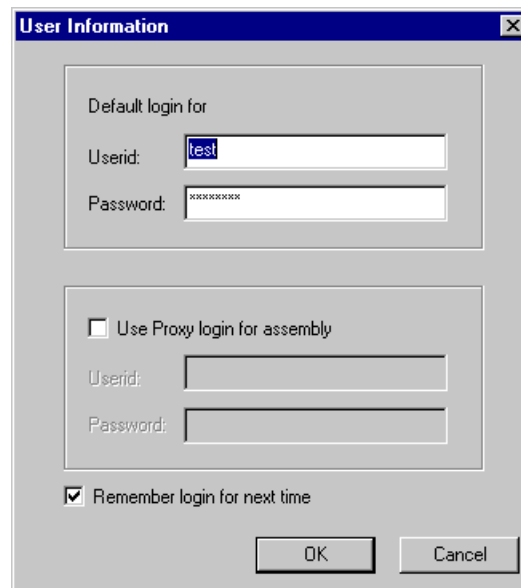
In the **User Information** dialog box, you can set the default values for the user ID and password, and the proxy ID and password. These credentials are used if IStream Customizer was launched, for example, as a standalone application from a client system. If IStream Customizer is started from the DMS, then the DMS passes user and proxy credentials, and these are in effect instead of the default credentials set in IStream Customizer.

User information is passed by IStream Customizer to other IStream components. Assembler compares the components to verify the user credentials and permissions to use model documents and their sections, or access any other data or information needed during the document generation.

Method: Display the User Information

- Select **Customizer > User Info**.

The **User Information** dialog opens.



Viewing the Generation Logs

Use the **View Logs** function to view the Full Generation and QuickGen logs.

Method: View logs

- Select **Customizer > View Logs**.

Both the Full Generation and QuickGen logs open in Notepad. If the opened document does not have a QuickGen log, then only the Full Generation log appears.

Appendix B

Frequently Asked Questions

This section contains various frequently asked questions about IStream Customizer.

Can I have multiple custom wordings for one tagged text block?

Yes, however it is important to remember that **Replace** and **Delete** are mutually exclusive and therefore only one of them can be associated with the tag text block in a time period.

Why does the Wording Name does not appear in the regenerated document after creating a custom wording?

Check these points:

Has the default Generation Mode been selected?

1. Select **Customizer > Options**.
2. Click the **Generation Mode** tab.
3. Check if the document is being generated with both tag info and customizations.

Is the Disable Wording option selected?

If it is, remove the **Disable Wording** option. See *Disable Wording* on page 46.

Does the effective time period include today's date?

If not:

1. Open the **Custom Wordings Properties** dialog.
2. Change the **Effective Date** or **Termination Date**.

or

Change the effective period to include today's date.

For more information about these fields, see *Custom Wordings Properties* on page 45.

Is the custom wording associated with the tags of the model document being generated?

If not, ensure that the custom wording is attached to the correct tagged text block.

How can I tell if the block of text I want to work with is a tagged text block?

1. In the Word window, place your cursor at the point in the document where you want to make changes.
2. Select **Customizer > Retrieve Tag**, or click the **Retrieve Tag** button.



If the text is tagged, the tag name will be highlighted.

You can also use the IStream Customizer **Options** to apply color to the text blocks to distinguish them from other text or custom wordings.

If I apply three modes of customization to a text block, (for example: before, after, and delete) will I orphan the custom wordings that are being inserted before and after the delete tagged text block?

No, the original tag is still listed in the **Tag View** and therefore the new custom wordings have a reference.

How do you highlight a tagged text block?

You can highlight a tagged text block by clicking the **Tag Name** in the **Tag View**. As you scroll through the **Tag View**, the corresponding tagged text blocks become highlighted. You can also click a **Tag Name** and select **Customizer > Highlight Tag**.

Why is the QuickGen button grayed out after opening an IStream document in IStream Customizer?

QuickGen requires that a customized document be updated to include additional information in the file. This occurs as part of the document assembly process or when performing a full generation when the document is first opened in IStream Customizer. See your system administrator for additional information.

Note: When the document is generated for the first time, the two checkboxes in the **Options > Generation** screen must be selected:

1. Select **Customizer > Options**.
2. Click the **Generation** tab and ensure that the following check boxes are selected:
 - **Include Tag Information**
 - **Include Custom Wordings**
3. Perform a full regeneration.

The **QuickGen** button will be enabled.

Why are the tags in the Tag View not highlighted?

When using IStream Customizer on Windows XP, ensure that you use the Windows Classic style appearance to be able to highlight tags correctly. See *Change Windows XP display settings to Classic style* on page 18.

Appendix C

Running Macros

This appendix describes how to run Microsoft Word macros within IStream Customizer.

Running Microsoft Word Macros

You can run Microsoft Word macros within IStream Customizer to make changes to a generated document, such as updating a table of contents. Note that the Microsoft Word template which stores the macro has to be attached to the relevant sections.

A generated document is normally protected, preventing you from making changes other than through custom wordings. By using macros, you can unprotect, modify, and then re-protect the generated document.

Note: Before using a macro to update your document, you need to perform any required QuickGens or full regenerations, or the changes will be lost during the generation process.

If you have applied tag or wording colors in IStream Customizer and made modifications using this feature, the color will be saved as part of the modification.

You use the **Protect** and **Unprotect** methods to enable your custom Microsoft Word macro code to change the IStream generated document.

Warning: You should not use tag and wording colors when using **Protect** and **Unprotect**.

Unprotect

The **Unprotect** macro removes the protection from the currently active IStream document in IStream Customizer that was protected either by IStream Customizer or by calling the **Protect** method. Once an IStream document in IStream Customizer is unprotected, it must be protected again so that IStream Customizer can work properly.

Note: **Unprotect** cannot unprotect a document that was protected with a custom password.

You should use **Unprotect** inside a Microsoft Word macro.

Protect

The **Protect** macro protects the currently active IStream document in IStream Customizer.

The document that is being protected can only be unprotected by IStream Customizer or by calling the **Unprotect** method.

Note: You should use **Protect** inside a Microsoft Word macro.

Macro Example

```
dim cmzUtil
set cmzUtil = CreateObject("Customizer.Preview")

cmzUtil.unprotect
```



```
'{do custom processing}
cmzUtil.protect

set cmzUtil = nothing
```


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