



There are 8 steps to complete this task:

1. Open the template in Microsoft Word.
2. Select File.
3. Select Properties to open Advanced Properties.
4. Select the Custom tab.
5. Ensure the required CycomTemplate and DocProfile properties are present with the correct values.
6. Add the optional SaveasPDF, IsExpWitnessAmount, and IsWorkflowDelay properties if applicable.
7. Press OK.
8. Close the template.

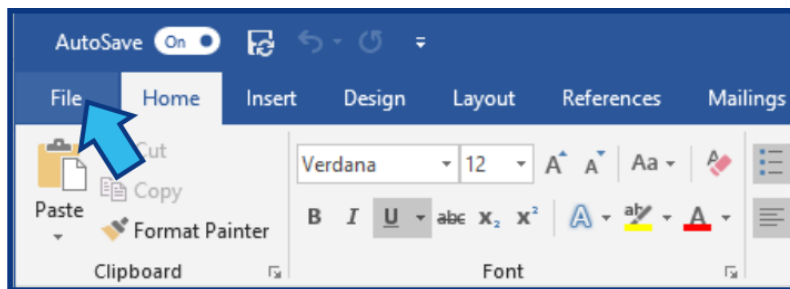
Standard Guide

Step 1. Open the template in Microsoft Word.

Open the template you want to associate with a **CLW Workflow** in **Microsoft Word**.

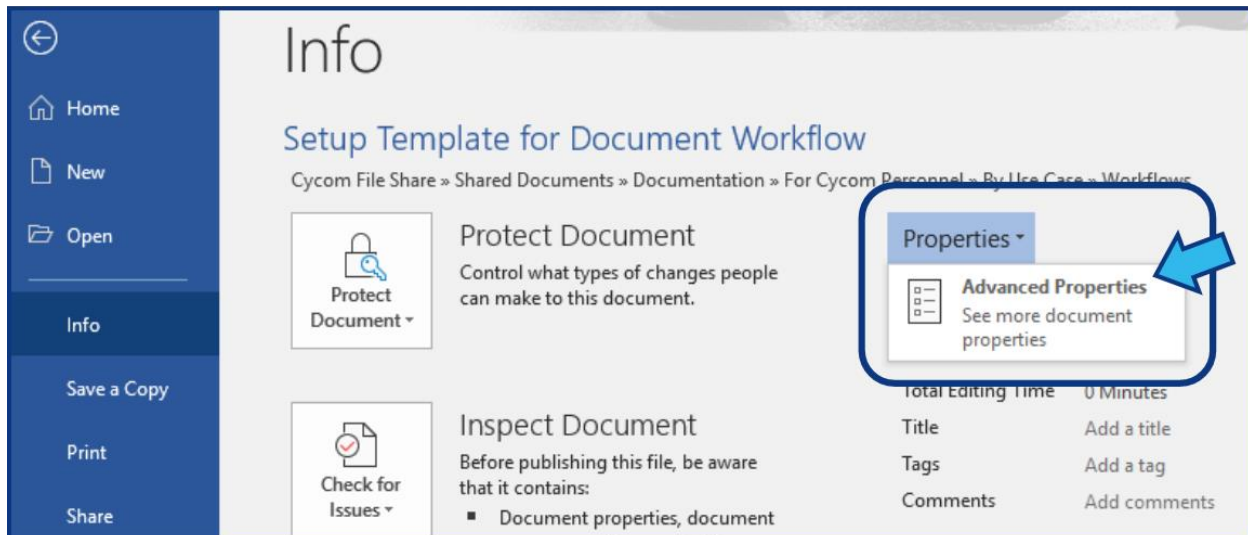
Step 2. Select File

On the **Menu Bar** at the top, select **File**.



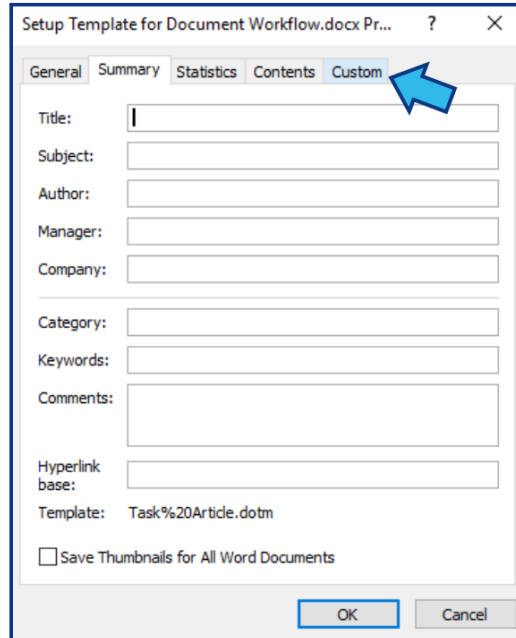
Step 3. Select Properties to open Advanced Properties.

On the top right, select the **Properties** drop-down and select **Advanced Properties**.



Step 4. Select the Custom tab.

Select the **Custom** tab from the **Properties** window.



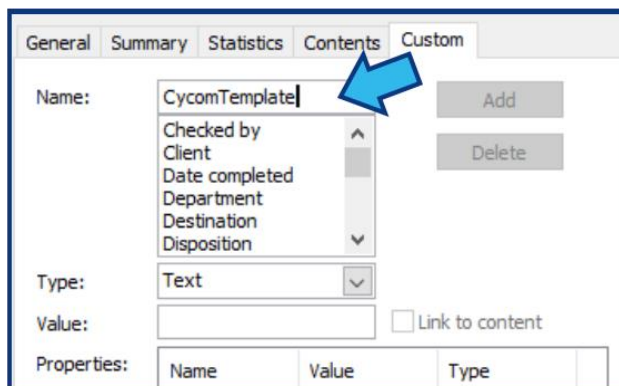
Step 5. Ensure the required **CycomTemplate** and **DocProfile** properties are present with the correct values.

Minimally, **CycomTemplate** and **DocProfile** must be listed in the **Properties** shown.

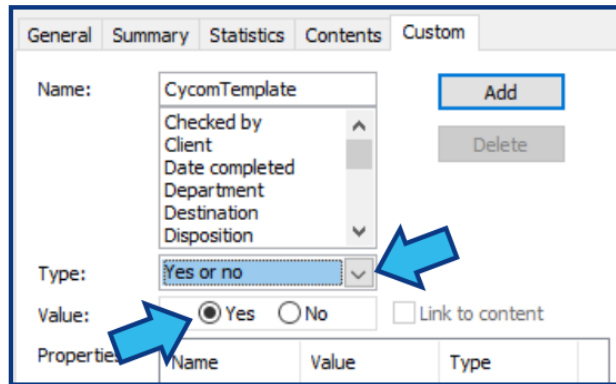
If not present, do the following steps to add them.

Add **CycomTemplate** property:

- Enter **CycomTemplate** in the **Name** field.



- Select **Yes or no** for the **Type** field.
- Select **Yes** for **Value**.



General Summary Statistics Contents Custom

Name: CycomTemplate

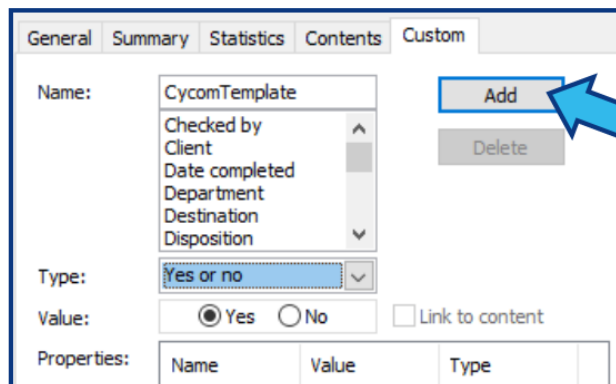
Checked by
Client
Date completed
Department
Disposition

Type: Yes or no

Value: Yes No Link to content

| Properties: | Name | Value | Type |
|-------------|------|-------|------|
| | | | |

- Press **Add** to add the new **CycomTemplate** property to this template.



General Summary Statistics Contents Custom

Name: CycomTemplate

Checked by
Client
Date completed
Department
Disposition

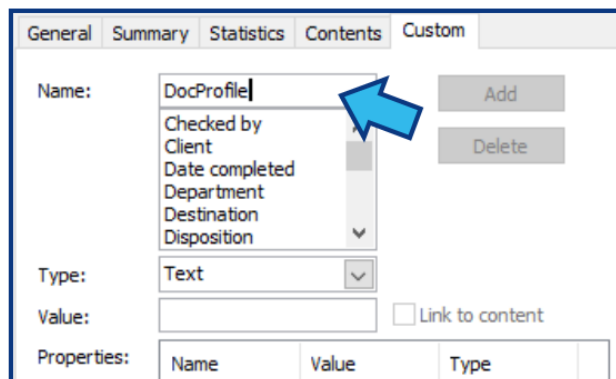
Type: Yes or no

Value: Yes No Link to content

| Properties: | Name | Value | Type |
|-------------|------|-------|------|
| | | | |

Add **DocProfile** property:

- Enter **DocProfile** in the **Name** field.



General Summary Statistics Contents Custom

Name: DocProfile

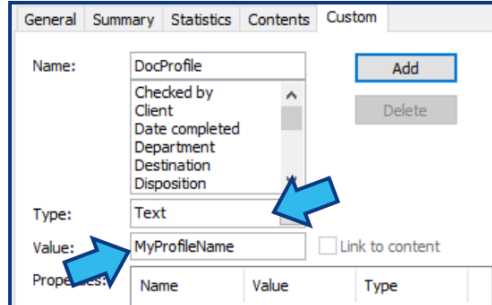
Checked by
Client
Date completed
Department
Disposition

Type: Text

Value: Link to content

| Properties: | Name | Value | Type |
|-------------|------|-------|------|
| | | | |

- Select **Text** for the **Type** field.
- Enter the **Workflow Profile** name of the **Workflow** to which this template will be associated.



General Summary Statistics Contents Custom

Name: DocProfile

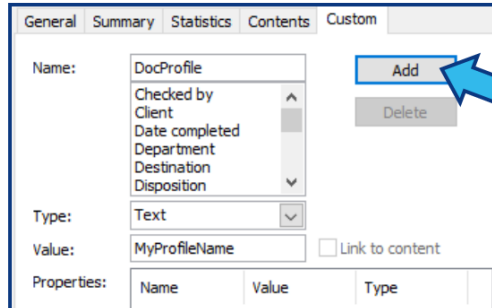
Checked by Client
Date completed
Department
Disposition

Type: Text

Value: MyProfileName Link to content

| Name | Value | Type |
|------|-------|------|
| | | |

- Press **Add** to add the new **DocProfile** property to this template.



General Summary Statistics Contents Custom

Name: DocProfile

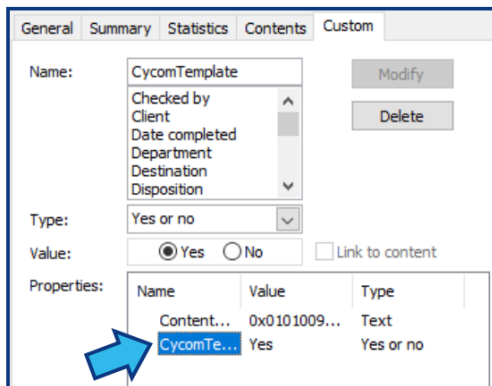
Checked by Client
Date completed
Department
Disposition

Type: Text

Value: MyProfileName Link to content

| Name | Value | Type |
|------|-------|------|
| | | |

If present, use the following steps to verify the values provided are correct.
Select the **CycomTemplate** property.



General Summary Statistics Contents Custom

Name: CycomTemplate

Checked by Client
Date completed
Department
Disposition

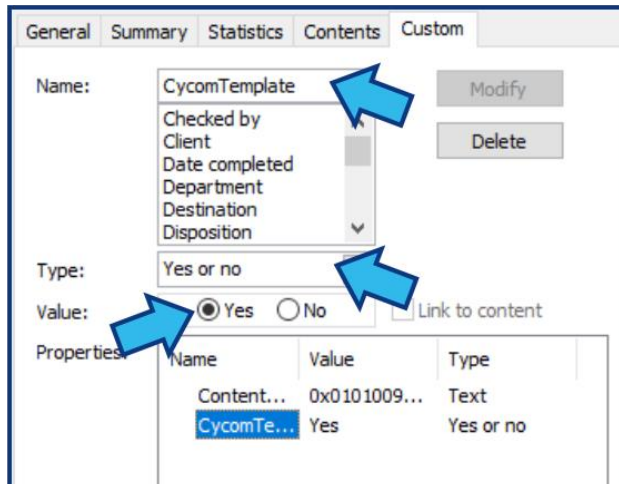
Type: Yes or no

Value: Yes No Link to content

| Name | Value | Type |
|------------|--------------|-----------|
| Content... | 0x0101009... | Text |
| CycomTe... | Yes | Yes or no |

Verify **CycomTemplate** property:

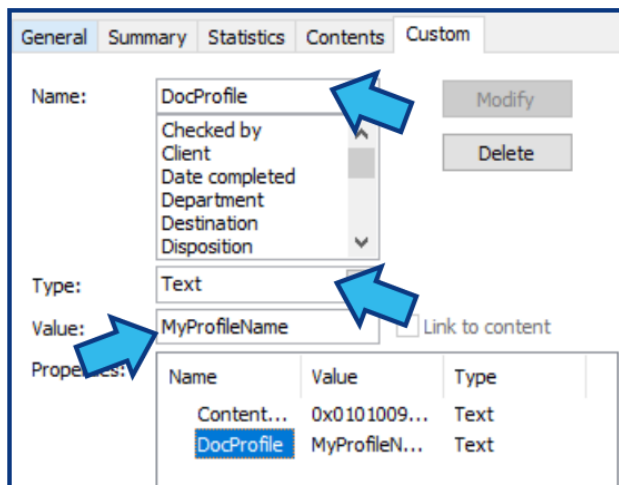
- Verify the **Name** is **CycomTemplate** (without a space, 'C' and 'T' uppercase, and without any additional characters).
- Verify the **Type** is **Yes or no**.
- Verify the **Value** is **Yes**.



| Name | Value | Type |
|------------|--------------|-----------|
| Content... | 0x0101009... | Text |
| CycomTe... | Yes | Yes or no |

Verify **DocProfile** property:

- Verify the **Name** is **DocProfile** (without a space, 'D' and 'P' uppercase, and without any additional characters).
- Verify the **Type** is **Text**.
- Verify the **Value** is the exact **Workflow Profile** name of the **Workflow** to which this template will be associated.



| Name | Value | Type |
|------------|---------------|------|
| Content... | 0x0101009... | Text |
| DocProfile | MyProfileN... | Text |

Step 6. Add the optional SaveasPDF, IsExpWitnessAmount, and IsWorkflowDelay properties if applicable.

The following properties are optional. If needed, use the steps provided in **Step 5** for adding the **CycomTemplate** property substituting the information provided below in the **Name**, **Type**, and **Value** fields.

SaveasPDF property:

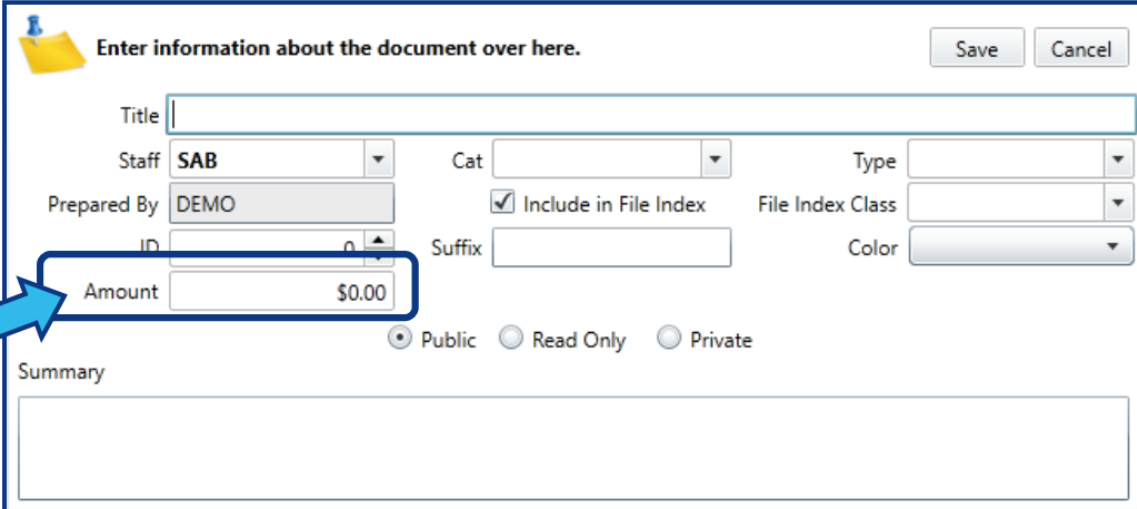
- **Name:** SaveasPDF
- **Type:** Yes or no
- **Value:** Yes

When this property is added and the value is set to **Yes**, it will cause **Word** to open the template, immediately save it to the matter as a **PDF**, and then close the template. This is especially useful when there is a need to “lock down” a template format to prevent the user from unintentionally changing the layout or data within the template.

IsExpWitnessAmount property:

- **Name:** IsExpWitnessAmount
- **Type:** Yes or no
- **Value:** Yes

When this property is added and the value is set to **Yes**, it causes a field to be visible on the **Document Details** window at the creation time of the document, as shown below. The purpose of this field is so that a document workflow can enable different workflow approval steps if the dollar amount is above/below a set value.



Enter information about the document over here. Save Cancel

Title

Staff **SAB** Cat Type

Prepared By **DEMO** Include in File Index File Index Class

ID Suffix Color

Amount

Public Read Only Private

Summary

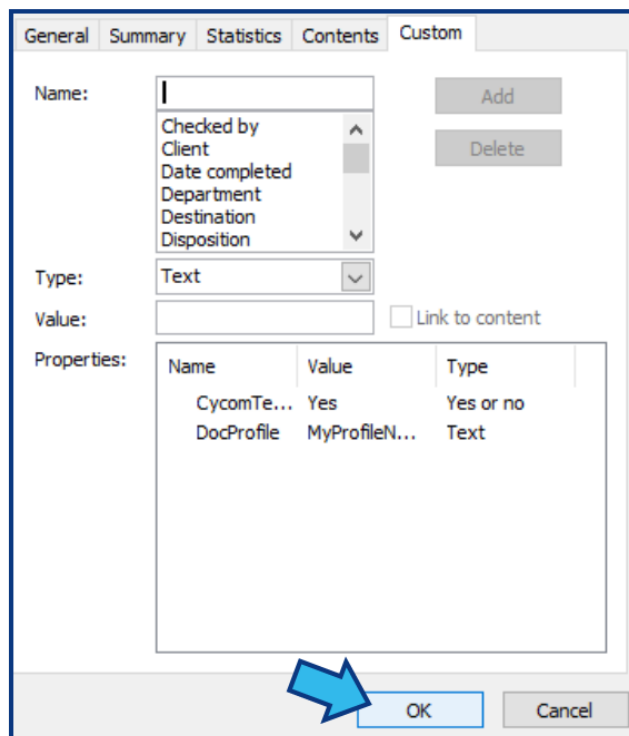
IsWorkflowDelay property:

- **Name:** IsWorkflowDelay
- **Type:** Yes or no
- **Value:** Yes

When this property is added and the value is set to **Yes**, this will cause the document workflow steps to be temporarily bypassed. This is useful when a document is being created by the user, but not all information is known at the time of creation of the document. Perhaps some details will be filled in on the document later. When this option is enabled, the user is presented with a popup after they click the **Save** button in the **Document Details** window, asking whether the document should be submitted for workflow execution. Answering **Yes** to that question will cause the workflows to execute.

Step 7. Press OK.

Once all required and desired properties are added and/or verified, press **OK** to accept and apply any changes.



| Name | Value | Type |
|------------|---------------|-----------|
| CycomTe... | Yes | Yes or no |
| DocProfile | MyProfileN... | Text |

Step 8. Close the template.

The template is now able to be used in a **CLW Workflow**. Close the template and/or **Microsoft Word**.