

Oracle® Insurance IStream

IStream Writer User Guide

Release 1.3

E14880-01

May 2008

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Chapter 1

Overview

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

This chapter describes the following topics:

- *Document Conventions* on page 10
- *IStream Writer* on page 11
- *Roles in IStream Writer* on page 13
- *Understanding the User Interface* on page 15
- *Understanding IStream Writer Elements* on page 16
- *IStream Writer Documentation* on page 17
- *Using the Online Help* on page 18
- *Contacting Skywire Software for Help* on page 21

Note: The procedures and screen images included in this User Guide are based on Microsoft Word 2007.

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 Writer

IStream Writer enables organizations to shrink the timeline for bringing new products to market. IStream Writer streamlines product development, creation of state filings and policy production.

Product Development Tasks

During product development, insurers create complex documents that provide product wording for multiple states, lines of business and products. Before filing with the states, internal stakeholders such as legal and underwriting, review and approve the documents.

Traditionally, a product designer must then manually cut and paste wordings to create state-specific documents that are filed with the state DOIs along with the relevant rates and rules.

The product designer must manage the master version containing all wordings plus separate documents for each state. As each state requests modifications, they must change both the master document and state document before resubmitting the wording to the state.

Master Documents and State-Specific Documents

IStream Writer allows the product designer to specify in the master document how wording applies to states, lines of business and products, and then automates the creation of all state-specific documents. Now each time a state requires a change, only the master is modified and new state documents are automatically created. IStream Writer eliminates manual creation of state-specific documents for filing.

Policy Wordings and Specifications

To prepare for Policy Issuance, a Wording Expert identifies the policy wordings for each of the various benefit plans or policy types. The Wording Expert creates specifications separate from the approved filed documents, typically using Microsoft Word and Microsoft Excel to set out the state, line of business, product and benefit or coverage business rule information.

Using IStream Writer, the Wording Expert can leverage the existing IStream Writer document that already contains the information defined by Product Development. IStream Writer eliminates re-entry of rules and use of multiple source documents to communicate specifications, minimizing the compliance risk that increases as policy wording changes occur over time.

Creating Model Document Sections

In a traditional process, the next step is for the IStream Author to take the specifications they receive in Microsoft Word and Microsoft Excel format and manually create a model document. For large or complex documents this can be a lengthy process.

With IStream Writer, the specifications are contained within the IStream Writer document. The user can either transform the IStream Writer document into a

model document within IStream Writer—if IStream Author or the IStream Author plug-in are installed—or import the IStream Writer document into IStream Author, which automatically transforms the IStream Writer document into a model document. This reduces the occurrence of errors in translation and coding, and significantly shortens the timeline for model document creation. IStream Writer reduces the model document creation process from weeks to days.

Roles in IStream Writer

Although one person can easily play all of the roles within IStream Writer, there are four distinct areas of expertise. The roles defined below are merely a suggested way for a typical company to use IStream Writer.

The roles are:

- *Product Designer*
- *Specification Designer*
- *Database Analyst*
- *IStream Author*

Product Designer

The Product Designer creates the wording for the document and designs the initial look and feel of the documents that will be sent for filing.

The Product Designer creates a master document containing all of the state, LOB or product-specific information. From this master document, the Product Designer creates state-specific documents for filing to each applicable state Department of Insurance (DOI).

The Product Designer then incorporates all feedback received from the various DOIs back into the documents and refiles until all filings are approved.

Specification Designer

The Specification Designer builds on what the Product Designer has defined within the document and defines all variable data and business rules within the document. The Specification Designer also inserts logical section breaks into the IStream Writer document. These divide the IStream Writer document into model document sections upon transformation. Using the IStream Writer user interface, the Specification Designer defines IStream Writer lists and tables that are dynamically populated by a datasource.

The Specification Designer further defines the more complex styles to ensure that the document has a consistent look and feel.

Once the document is complete, the Specification Designer extracts the Data Elements File so that the defined variables can be mapped to the correct data fields.

Database Analyst

The Database Analyst defines the data structure that will be queried during the assembly of the final document, and completes the Data Elements File with this information. The Data Elements File (DEF) provides IStream Author with the appropriate database or XML file information that will be used to create the model document.

IStream Author

The author imports the IStream Writer document and the completed Data Elements File into IStream Author to be transformed into a model document (or opens the model document transformed from within IStream Writer). The author reviews the assembled code and makes adjustments where more complex code is required. The author then completes the required testing of the model document.

Understanding the User Interface

The IStream Writer user interface provides intuitive access to the application's features and functionality. The Administrator can modify the configuration of IStream Writer and the options that display on the user interface.

Related Topics:

- *Working with IStream Writer Documents* on page 26
- *IStream Writer Options* on page 59

Understanding IStream Writer Elements

IStream Writer elements are pieces of information that are attached to selected text within a Microsoft Word document. When an IStream Writer document is saved, the information about the elements is stored as part of the document. For more information about using the IStream Writer elements, see *Working with IStream Writer Elements* on page 40.

IStream Writer Documentation

IStream Writer includes the following documents on the installation CD. If you need a copy of any of these documents, please contact your system or product administrator.

- The *IStream Writer User Guide* describes how to use IStream Writer. It contains overviews, step-by-step procedures and descriptions of the screens and fields.
- The *IStream Writer Administrator's Guide* includes system requirements, technical information about the Data Elements File and configuration files, and installation and configuration information.
- The *IStream Writer Release Notes* contain general product information, product enhancements and new features, supported platforms and third-party software, and known limitations.
- The *IStream Writer Online Help* contains the same information as the User Guide, but in an online help format with a search tool. Both contain an index and a table of contents.

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 18
- *Searching the Help* on page 18
- *Using the Help Index* on page 19
- *Using the Help Table of Contents* on page 19
- *Navigating the Help* on page 19
- *Printing a Help Topic* on page 20

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 18
- *Using the Help Index* on page 19
- *Using the Help Table of Contents* on page 19
- *Navigating the Help* on page 19

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.

Contacting Skywire Software for Help

Customer Support hours are 8:00 AM to 8:00 PM. (Eastern Time), Monday through Friday. Outside of these hours, send us a detailed e-mail message and you will be contacted during regular business hours. Please provide detailed information, as described in the *Support Checklist*.

Contact Information

Mail: Customer Support
Skywire Software
19 Allstate Parkway, Suite 400
Markham, Ontario, L3R 5A4

Phone: 1-905-513-7466

Fax: 1-905-513-1419

Email: directsupport@skywiresoftware.com

Web: www.skywiresoftware.com

Support Checklist

When contacting Skywire Software Customer Support, please provide the following information:

- Your name, company name, email address, and phone number
- The exact version number, including any service pack numbers of
 - all your Skywire Software products
 - your network software
 - your database, including the type
 - Microsoft Windows and Microsoft Word
 - Microsoft .NET Framework
 - your DMS (Document Management System)
- Error messages and the circumstances of their occurrence
- A full description of the problem:
 - What happened? What were the sequence of events that preceded the problem?
 - In which screen or window did the problem occur?
 - Was the problem the result of pressing a key?
 - Did the screen freeze? What functions of the software are affected?
 - How many people are affected?

Chapter 2

Working With IStream Writer

This chapter describes the following topics:

- *Setup Recommendations and Considerations* on page 24
- *Working with IStream Writer Documents* on page 26
- *Working with the IStream Writer User Interface* on page 32
- *Working with IStream Writer Elements* on page 40

Setup Recommendations and Considerations

Please note the following setup recommendations when using IStream Writer:

- IStream Writer is supported with the following software:
 - Microsoft Windows XP SP1 or SP2 or Vista
 - Microsoft Word 2003 SP1, SP2 or Word 2007 (.doc file format only)
- A screen resolution of at least 1024 x 768 is recommended.

Please be aware of these issues when using IStream Writer:

- Depending on the settings configured by your IStream Writer administrator, some of the options described herein may not be present.
- The IStream Writer functionality may display when IStream Author, Customizer, Assembly and Outlook are opened. The IStream Writer functionality should never be used within these programs.

Microsoft Word Setup

This section describes how to set up and use Microsoft Word for IStream Writer to work properly.

Microsoft Word Security Settings

Before working with IStream Writer, ensure that you have set your Microsoft Word Security settings as follows:

Word Version	Security Setting	Symptom if Setting is Incorrect
2003	<p>From the Tools menu, select Macro > Security:</p> <ul style="list-style-type: none"> On the Security Level tab, the Security Level should be set to High (the default setting) or lower, but not Very High. On the Trusted Publishers tab, the Trust all installed add-ins and templates checkbox must be selected. This is the default setting. 	<p>IStream Writer may not appear when you open Microsoft Word.</p> <p>You may see the following message: <i>The command cannot be performed because a dialog box is open. Click OK, and then close open dialog boxes to continue.</i></p>
2007	<p>Click the Microsoft Office button, select Word Options > Trust Center > Trust Center Settings button.</p> <ul style="list-style-type: none"> Click the Macro Settings tab. In the For macros in documents not in a trusted location option, Disable all macros with notification must be selected. This is the default setting. Click the Add-Ins tab. Ensure Disable all Application Add-ins is <i>not selected</i>. This is the default setting. 	IStream Writer may not function properly.

Creating Trusted Locations in Microsoft Word 2007

In Microsoft Word 2007, you need a trusted location for IStream Writer specification documents. Use the Trust Center to create trusted locations, if required.

Launching Microsoft Word

After installing IStream Writer on a machine with IStream Author, Microsoft Word should be launched at least once. Otherwise, transformations attempted from IStream Author will fail.

Working with IStream Writer Documents

Since IStream Writer is embedded within Microsoft Word, it takes advantage of much of the existing functionality available in Microsoft Word. The IStream Writer user interface options have been embedded within the Microsoft Word user interface. Whenever Microsoft Word is opened, the IStream Writer functionality is available.

Related Topics

- *Working with IStream Writer Documents: File System* on page 26
- *Working with IStream Writer Documents: The Document Management System* on page 28

Working with IStream Writer Documents: File System

You create, open, save and close IStream Writer documents saved to the file system in the same way that you work with regular Microsoft Word documents. There are different steps for creating a IStream Writer document through the DMS, and for working with documents stored in the DMS. For more information, see *Working with IStream Writer Documents: The Document Management System* on page 28.

Creating a New IStream Writer Document and Storing it on the File System

To create a new IStream Writer document and store it on the file system, use the following method:

Method: Create a new IStream Writer document and store it on the file system

1. Open Microsoft Word.
A blank document will open.
2. Add text to the document.
3. Click the Microsoft Office button, and then click **Save**.
The **Save As** dialog is displayed.

Important: Ensure that **Save as type** is set to **Word 97-2003 Document (*.doc)**.

4. Navigate to the proper location and click **Save**.
Microsoft Word saves the document.
5. Click the **Writer** menu.
The **Writer** ribbon displays.
6. Click **Attach IStream Writer**.

The document is now an IStream Writer document.

7. Select text and add IStream Writer elements. For more information, see *Working with IStream Writer Elements* on page 40.
8. Save the document and exit Microsoft Word.

Opening Documents Saved to the File System

To open a Microsoft Word document from the file system, complete this method:

Method: Open a document on the file system


1. Click the Microsoft Office button, and then click **Open**.
The **Open** dialog is displayed.
2. Navigate to the folder that contains the document, select the document, and click **Open**.
The selected document opens.

For more information, see the *Microsoft Word Help*.

Note: If you open a document without a .doc extension (for example, .docx or .txt), you must save the document in .doc format before you can attach IStream Writer.

Saving IStream Writer Documents to the File System

To save a IStream Writer document from Microsoft Word to the file system, complete any one of the following steps:

- Click the Microsoft Office button, and then click **Save**.
- Click the Microsoft Office button, and then click **Save As**, select the folder where you want to save the document, and click **Save**.
- Click  on the Quick Access toolbar.

For more information, see the *Microsoft Word Help*.

Note: The autosave feature in Microsoft Word also works on IStream Writer documents. However, it is a best practice to save your work regularly.

Closing IStream Writer Documents Saved to the File System

IStream Writer documents saved to the file system are closed in exactly the same way as Microsoft Word documents. Complete any one of the following steps to close your document:

- Click the Microsoft Office button, and then click **Save**.
- Click the Microsoft Office button, and then click **Close**.

Microsoft Word prompts you to save, if applicable, and closes the document.

- Click the Microsoft Office button, and then click **Exit Word**.

Microsoft Word prompts you to save, if applicable, and closes the program.

- Click .

Microsoft Word prompts you save, if applicable, and closes the program.

For more information, see the *Microsoft Word Help*.

Working with IStream Writer Documents: The Document Management System

You can create or open new IStream Writer documents through the Document Management System (DMS). IStream Writer documents created through the DMS are saved slightly differently from those created through Microsoft Word directly.

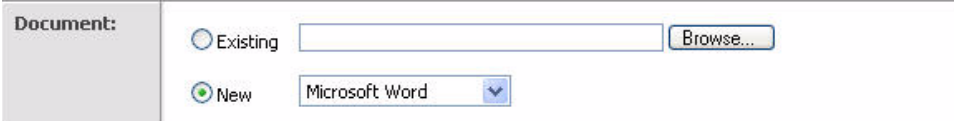
For information on creating, opening, saving and closing IStream Writer documents stored on the file system, see *Working with IStream Writer Documents: File System* on page 26.

Creating a New IStream Writer Document and Storing on the DMS

To create a new IStream Writer document and store it on the DMS, use the following method:

Method: Create a new IStream Writer document and store it on the DMS

1. To log onto the DMS, enter your **Username** and **Password** and click **Log-in**.
2. At the top of the screen, click **Add Item**. Choose **Document**.
3. Select the **New** radio button, and ensure that **Microsoft Word** is selected from the drop-down list.



4. Enter a **Name** for the document. You can also enter a **Description**, but this field is optional.
5. If applicable, click **Edit...** next to the **Categories** field to specify the **Categories** for the new document.

6. The default storage location for your new document is the IDM folder that you were browsing in when you clicked **Add Item**. To modify the DMS storage location for the new document, click **Browse DMS...** next to the **Create In** field.


Note: The contents of the **Categories** field may change if you modify the DMS storage location.

7. Browse to the folder that you want, and click **Select >** next to the folder name.
8. Click **Add**. Microsoft Word opens with the IStream Writer plug-in.
9. Add text to the document.
10. Click the **Writer** menu.
The **Writer** ribbon displays.
11. Click **Attach IStream Writer**.
12. Select text and add a IStream Writer element. For more information, see *Working with IStream Writer Elements* on page 40.
The document is now an IStream Writer document.
13. Make sure that you save your IStream Writer document by doing the following:
 - a. **Close** the IStream Writer document. You will receive a prompt asking you if you want to save your changes to the DMS, save the document as a copy on your Desktop, or discard your changes.
 - b. Select the radio button next to the option you want. Click **OK**.

Opening IStream Writer Documents from the DMS

If you saved your IStream Writer document to the DMS, follow this method to re-open it.

Method: Open an IStream Writer document from the DMS

1. To log onto the DMS, enter your **Username** and **Password** and click **Log-in**.
2. Navigate to your IStream Writer document.
3. Complete one of the following steps:
 - Click **Edit** next to the document name.
 - Click  next to the document name. From the list, choose **Edit**.

Microsoft Word opens with the IStream Writer plug-in.


Note: If you choose **Open** instead of **Edit**, the document will be read-only. You will be able to view your IStream Writer document, but you will not be able to save any changes.

Saving IStream Writer Documents to the DMS

If you created your IStream Writer document by choosing **Add Item** within the DMS, follow this method to save your changes.


Method: Save an IStream Writer document to the DMS

1. **Close** the IStream Writer document. You will receive a prompt asking you if you want to save your changes to the DMS, save the document as a copy on your Desktop, or discard your changes.
2. Select the radio button next to the option you want. Click **OK**.

Note: You can use the  icon or a Word menu option to save a temporary version of the document. However, you can only save your IStream Writer document back to the DMS by closing it.

Closing IStream Writer Documents Saved to the DMS

Complete any one of the following steps to close your document in Microsoft Word:

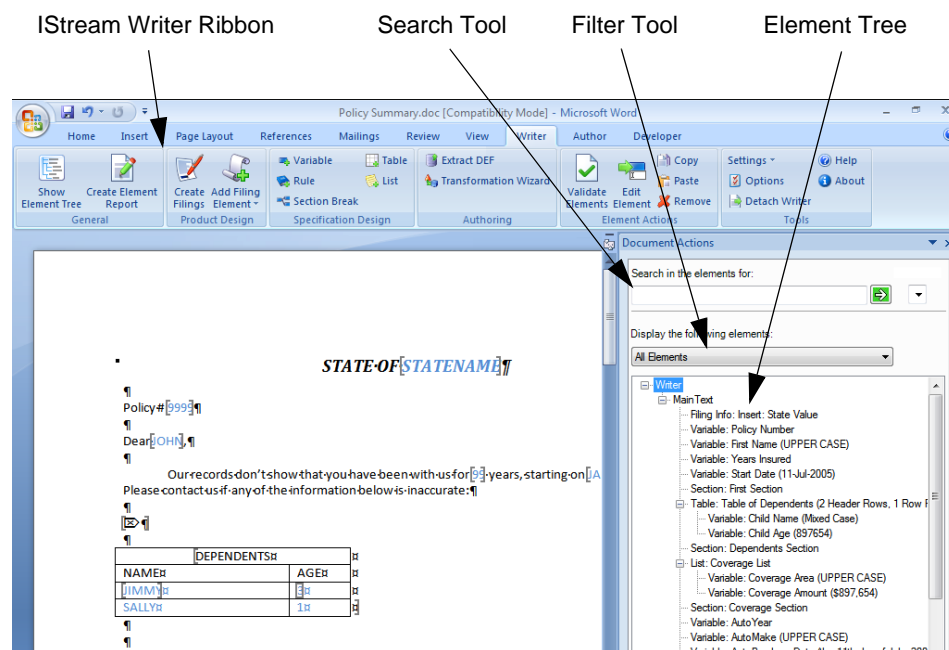
- Click the Microsoft Office button, and then click **Save**.
- Click the Microsoft Office button, and then click **Close**. (Microsoft Word prompts you to save, if applicable, and closes the document.)
- Click the Microsoft Office button, and then click **Exit Word**. (Microsoft Word prompts you to save, if applicable, and closes the program.)
- Click . (A dialog will appear when you close your document with various options for saving it.)

Working with the IStream Writer User Interface

The IStream Writer user interface options have been embedded within the Microsoft Word user interface. Whenever Microsoft Word is opened, IStream Writer functionality should be available. For more information, see *Microsoft Word Features: Important Considerations* on page 40.

The following topics provide an overview of the IStream Writer user interface options available:

- *Element Tree View* on page 32
- *IStream Writer Ribbon* on page 35
- *IStream Writer Context Menu Items* on page 37



Element Tree View

When an IStream Writer document is open, you can display the Element Tree view within the task pane. To display the Element Tree, either

- Click **Show Element Tree** on the Writer ribbon, or
- Click **Document Actions** on the View ribbon.

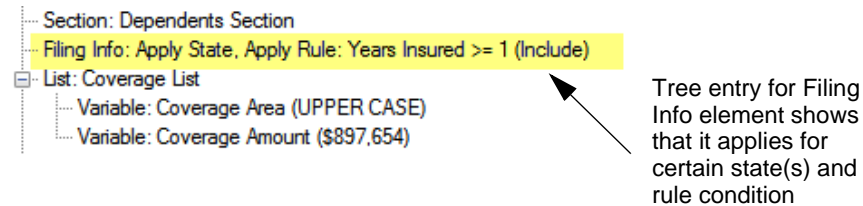
Above the display of elements in the document are the Element Tree Search and Filter tools. See *Element Tree Search and Filter Tools* on page 34.

Element Tree Element Listing

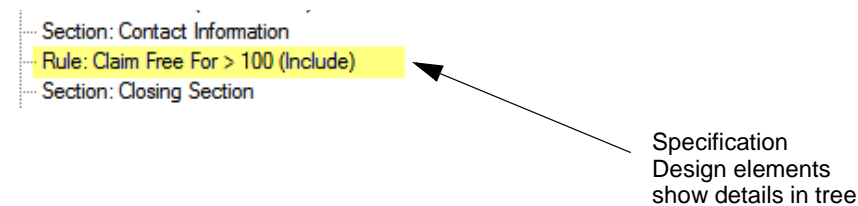
The IStream Writer element tree view displays all the IStream Writer elements in the current document in a hierarchical list. The elements in the body of the

document are grouped under **Main Text**. If present, there are also elements in the tree grouped under headers and footers.

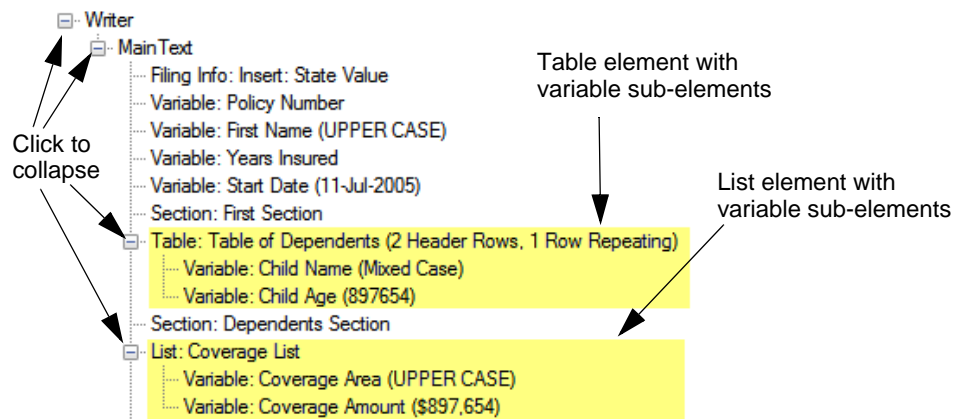
The element's tree listing starts with the type of element. For Filing Info elements, the type is followed by details of the element's settings from the Main Filing Info, Attached Variable, and Attached Rule tabs, if any.



For Specification Design elements, the type is followed by the description (for lists or tables), the appearance (if non-default) and the rule/variable details.



Related elements in the tree are grouped together. The groupings can be collapsed or expanded by clicking the little box beside the table or list element. For example, the variables in a table element are shown as children of the table.



Clicking an element in the tree view causes the same element in the document to be displayed and selected. You can multi-select elements in the tree view (using Ctrl-click, Shift-click, or click-and-drag) to perform bulk deletions. (See *Removing Elements* on page 47.)

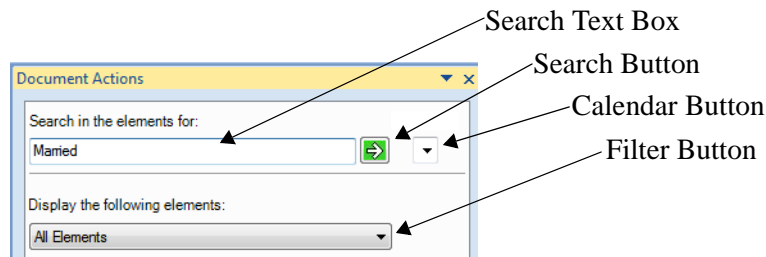
The default position for the task pane is docked to the right, but it can be docked on any other edge of the screen. As well, it can float on top of the document being edited.

You can close the task pane by clicking **X** in the top-right corner.

Important: When working with multiple IStream Writer documents open at the same time, each IStream Writer document can have its own element tree view displayed.

Element Tree Search and Filter Tools

When looking for a certain element in the element tree, you can scan the listing of elements until you find the one your want. Alternatively, you can use the Search Tool or the Filter to navigate the list quickly.



Element Tree Search Tool

The Search Tool functions in a similar manner to other Windows search bars.

Method: Search for text in the element tree

1. Display the element tree.
2. Type the text you are searching for in the search text box at the top of the task pane. The search is not case-sensitive. To search for the occurrence of a specific date, click the **Calendar** button and select a date from the pop-up tool. Dates can also be typed in the text box.
3. Click the green search button.

The systems will search down the document from the current position. If a match is found, the element will be highlighted, and the element will be selected in the document. If no match is found, you will be prompted to continue the search from the beginning of the document.
4. Search for other occurrences of the text by repeating the previous step.

Element Tree Filter Tool

The Filter Tool provide a way to change the element tree to display only elements of a certain type.

Method: Filter the element tree

1. Display the element tree.

- Click the **Display the following elements** button and select a type of element to filter by from the drop-down list, or select All Elements to display an unfiltered list.

After a short delay, the element tree refreshes, and displays the elements that match the selected type.

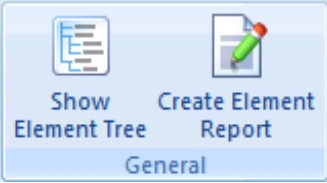
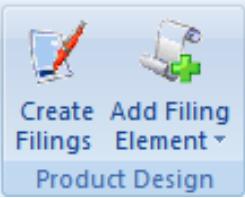
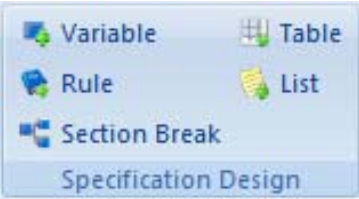
- Select **All Elements** to return the element tree to its default view.

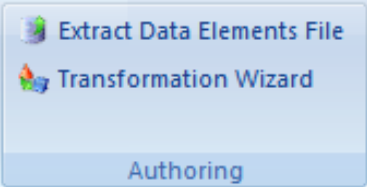
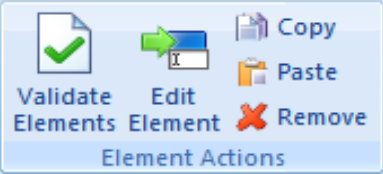
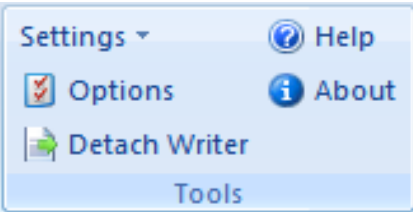
ISStream Writer Ribbon

The buttons on the ISStream Writer ribbon provide quick access to many of ISStream Writer's functions.

ISStream Writer Ribbon Buttons/Menu Commands

The Word 2007 ISStream Writer ribbon contains a set of buttons you can use to perform Writer commands. Word 2003 uses similar commands located in the ISStream Writer menu:

Ribbon Buttons	Button Name/ Menu Commands	Action
 <p>General</p>	Show Element Tree	Toggles on/off display of the ISStream Writer element tree view on the task pane.
	Create Element Report	Opens a new Word document with all elements defined in comment balloons
 <p>Product Design</p>	Create Filings	Opens the Create Filing Documents dialog.
	Add Filing Element	Opens the ISStream Writer Filing Info dialog (use drop-down list to Apply Brackets or DOI Instructions on selected text)
 <p>Specification Design</p>	Variable	Opens the ISStream Writer Variable dialog
	Rule	Opens the ISStream Writer Rule dialog
	Section Break	Opens the ISStream Writer Section dialog.
	Table	Opens the ISStream Writer Table dialog
	List	Opens the ISStream Writer List dialog

Ribbon Buttons	Button Name/ Menu Commands	Action
	Extract Data Elements File	Opens the Extract Data Elements File dialog.
	Transformation Wizard	Starts the Transformation Wizard to create a model document
	Validate Elements	Performs an element validation and displays the results.
	Edit Element	Opens the dialog associated with the selected element.
	Copy	Copies the properties of the selected element to the clipboard (but not the text itself).
	Paste	Creates a new element of the selected text with the properties of the element on the clipboard. This option does not paste text. This information can be pasted multiple times within the document.
	Remove	Prompts to confirm deletion of selected element or the Section Break from the document
	Settings	Displays the Settings drop-down menu.
	Options	Opens the IStream Writer Options dialog.
	Detach Writer	Removes the IStream Writer toolbar, menu and functions from the current document. Closes the IStream Writer element tree view. Document can now be sent to non-Writer users.
	Help	Opens a browser window with IStream Writer help pages
	About	Opens a dialog box with info about IStream Writer

Settings

The **Settings** drop-down menu has two choices:

Show Bookmarks

When IStream Writer elements are added to a document, Microsoft Word bookmarks are used to signify where the element begins and ends. This menu option allows you to toggle between showing and hiding the bookmark indicator brackets. When this option is selected, the bookmark indicators are displayed. When this option is not selected, the bookmark indicators are hidden.

Tip: Always have the **Show Bookmarks** option selected.

Highlight Elements

When an IStream Writer element is selected, moving red dots surround the element to give you a visual indication of where the element begins and ends. This effect is called the Marching Red Ants text effect. The Highlight Elements option allows you to toggle between showing and hiding the Marching Red Ants around the IStream Writer elements. When this option is selected, the Marching Red Ants are displayed. When this option is not selected, the Marching Red Ants are hidden.

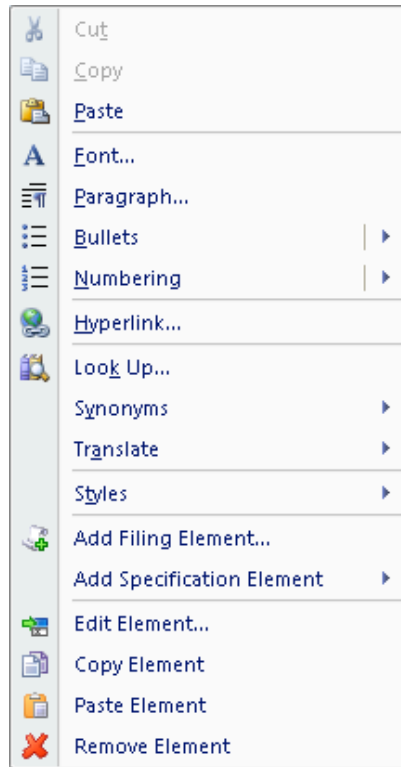
Validate IStream Writer Elements

Modification of the **Writer Options** may cause IStream Writer elements in existing documents to become invalid. When **Create Filings** is selected, a validation check is automatically performed on the document to ensure that all of the IStream Writer elements in the document remain valid. If any error instances are identified, a dialog will be presented to advise you of what is now invalid and where it can be found in the document. The **Validate Writer Elements** button allows you to perform the same type of document validation at any time. For more information, see *Validating IStream Writer Elements* on page 53.

Note: Click **Validate Writer Elements** to validate the document prior to transforming the document into a model document.

IStream Writer Context Menu Items

In Microsoft Office Word 2007 (but not Word 2003), a context menu with Writer commands displays when you right-click in the main text area.



} IStream Writer commands

Add Filing Element

Opens the IStream Writer Filing Info dialog.

Add Specification Design Element

Displays a sub-menu with the same buttons that are in the Specification Design area of the IStream Writer ribbon: Variable, Rule, Section Break, Table, and List.

Edit Element

Opens the appropriate IStream Writer dialog.

Copy Element

Copies the properties of the selected element to the clipboard (but not the text itself).

Paste Element

Pastes any copied IStream Writer element information to selected text. This information can be pasted multiple times within the document.

Note: This option does not paste text. It only pastes IStream Writer information that was copied to the clipboard using **Copy Element**.

Remove Element

This option removes the IStream Writer element from the selected text or the Section Break element from the document.

Working with IStream Writer Elements

This section contains information on how to work with IStream Writer elements.

- *Microsoft Word Features: Important Considerations* on page 40
- *Selecting Regular Text* on page 41
- *Selecting Tables* on page 44
- *Adding IStream Writer Elements* on page 44
- *Modifying IStream Writer Elements* on page 46
- *Modifying Text Selections for Existing IStream Writer Elements* on page 46
- *Removing Elements* on page 47
- *Nesting IStream Writer Elements* on page 47
- *Copying and Pasting IStream Writer Elements* on page 52
- *Validating IStream Writer Elements* on page 53
- *Creating an Element Report* on page 55
- *Adding Microsoft Word Comments* on page 55
- *Using Custom Microsoft Word Templates* on page 56

Microsoft Word Features: Important Considerations

In general, if you follow the instructions in this user guide when working with IStream Writer elements, you should have no problems. We recommend that you do not manually attempt to modify IStream Writer elements without using the functionality provided by IStream Writer.

When working with IStream Writer elements, keep the following important points in mind:

Undo

The Microsoft Word **Undo** feature should not be used with IStream Writer elements. Creating a IStream Writer element appears to be one step, however, behind the scenes many steps are actually being performed. Thus, when you select Undo, you will get unexpected results.

Spell Checking

When an IStream Writer element contains only one word such as “NewName,” be careful when using Word’s **Spelling and Grammar** check. If you use the Microsoft Word **Spelling and Grammar** check and it determines that the word within the element is spelled incorrectly, the element will be removed when the spelling is modified. As a best practice, do not use the option to change all instances of a word or you may inadvertently lose IStream Writer elements.

Find and Replace

Be careful when using Word's **Find and Replace** feature. If you use this feature to replace a one-word element, the element will be removed when the word is replaced. For example, if the word "Number" has an IStream Writer element applied to it and you use **Find and Replace** to change the text to "Policy Number," you will lose the attached IStream Writer element when the text is modified. As a best practice, do not use the option to change all instances of a word or you may inadvertently lose IStream Writer elements.

Tables

When modifying a table's structure, always remove any attached IStream Writer elements first, and add new elements when you are finished making your changes. If you do not remove IStream Writer elements beforehand, you may invalidate them while modifying the table structure.

Compare and Merge

The Microsoft Word Compare and Merge Document features should not be used with IStream Writer. You will get unexpected results.

Bookmarks

Do not delete bookmarks created by IStream Writer.

Selecting Regular Text

When you select text to apply an IStream Writer element to, you must be careful to follow these guidelines:

- Show the paragraph markers (¶) to ensure that you are selecting the exact text selection required.
- An IStream Writer element can be added to:
 - one character of text
 - one word or multiple words within a paragraph
 - one paragraph or multiple paragraphs of text.
- If spaces are not required when the selected text is not included in a document, select the spaces surrounding the text as well as the text.
- When selecting text to work with, select only a single, continuous block of text.
- Do not select non-continuous blocks of text.
- If you have selected more than one paragraph of text, ensure that you have highlighted all the text in all paragraphs, otherwise you may not be able to add the element.
- You may select text across page breaks and Word section breaks as long as the break occurs within a paragraph.


- Double-clicking on a word will select it. If you double-click and then use Shift + click on the surrounding text, the surrounding text will also be selected.
- Double-clicking on an existing IStream Writer element will display the appropriate IStream Writer dialog and the element details for the selected element.

Examples of Selecting Text

Acceptable	Unacceptable
I am selecting a Word without the spaces around it.	
I am selecting a Word and the spaces around it.	
Entire paragraph selection.	Partial paragraph selection.
Paragraph 1	Paragraph 1
Paragraph 1 text.	Paragraph 1 text.
Paragraph 2	Paragraph 2
Paragraph 2 text.	Paragraph 2 text.
Continuous paragraph selection.	Discontinuous paragraph selection.
Paragraph 1	Paragraph 1
Paragraph 1 text.	Paragraph 1 text.
Paragraph 2	Paragraph 2
Paragraph 2 text.	Paragraph 2 text.
Paragraph 3	Paragraph 3
Paragraph 3 text.	Paragraph 3 text.
Selected page break with paragraphs selected above and below.	Selected page break with paragraphs selected above only.
Sample Text	Sample Text
<Page Break>	<Page Break>
Sample Text	Sample Text
Unselected page break with one paragraph of text selected below.	Unselected page break with two or more paragraphs of text selected below.
Sample Text	Sample Text
<Page Break>	<Page Break>
Sample Text	Sample Text
Sample Text	Sample Text
Selected page break with text selected below only.	
Sample Text	
<Page Break>	
Sample Text	

Selecting Tables

Tables must be carefully selected within IStream Writer. You can add a table element only if the table is properly selected. The following details four methods for selecting tables:

- Click the table selection icon  in the top left corner of the table.
- Click to the left of the table beside the first row and drag your mouse down to the last row until all rows and columns are highlighted.
- Manually select the table by clicking in the first cell and dragging your mouse until the entire table is selected.

Important: You must select the whole table including the symbol that appears at the end of each row. If this symbol is not selected, you will not be able to add a table element.

Example:

Make	Model	VIN
Toyota	Camry	154254FJJGJG14G44G
Toyota	RAV4	JJGJGJ14511565454D4

Adding IStream Writer Elements

IStream Writer elements may be added to selected text. The text must be selected according to the guidelines defined in the topics, *Selecting Regular Text* on page 41, or *Selecting Tables* on page 44.

Method: Add an IStream Writer element

1. Save the document you are working on (if it is not already saved).
2. Click Attach IStream Writer (if it is not already attached).
3. Select text within the document.
4. On the IStream Writer ribbon, click the appropriate button for the element you wish to add.
A dialog box opens.
5. Complete all required information on the dialog box and click **OK**.

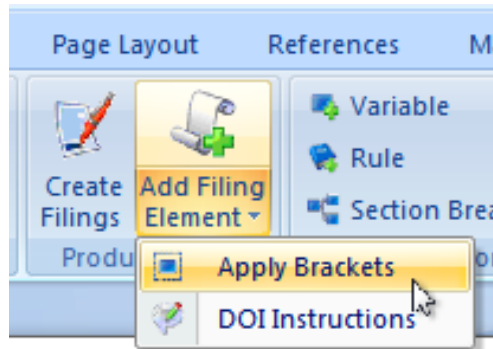
IStream Writer will apply bookmark brackets to the selected text and display Red Marching Ants around the outside of the text selection if the settings to view these options are selected. For more information, see *Settings* on page 36, and *Highlight Elements* on page 37 or *Selecting Tables* on page 44.

Applying Square Brackets

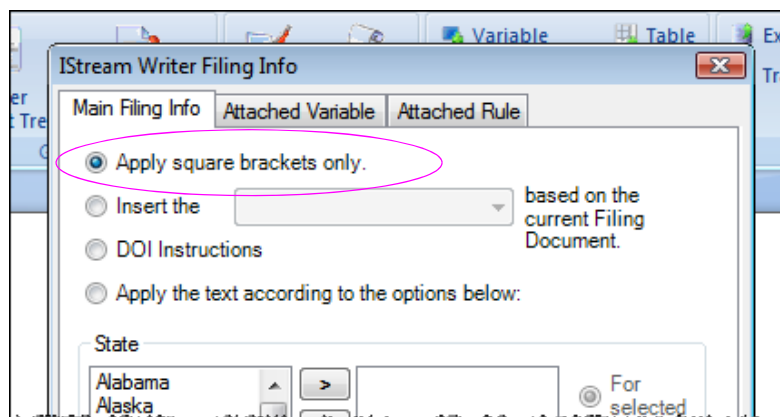
Square brackets can be easily added around selected text for filing purposes by using the following method.

Method: Apply square brackets

1. Select text within the document.
2. On the **Add Filing Element** drop-down menu, select **Apply Brackets**.



Alternatively, you can click **Add Filing Element**, select **Apply square brackets only** and click **OK**.



IStream Writer will apply square brackets to the selected text. IStream Writer will also apply bookmark brackets to the selected text. Depending on the Show Bookmarks and Highlight Elements settings, IStream Writer may display Red Marching Ants around the outside of the text selection if the settings to view these options are selected. For more information, see *Show Bookmarks* on page 32 and *Highlight Elements* on page 32.

These [square brackets] have been added.

Bookmark brackets not shown.

These [square brackets] have been added.

! Square and bookmark brackets shown.

Modifying IStream Writer Elements

IStream Writer elements can be easily modified.

Method: Modify an IStream Writer element

1. Open the element properties dialog box by performing one of these actions:
 - Double-click the element in the main text area.
 - Double-click the element description in the element tree view.
 - Right-click the element description in the element tree view and select **Edit Writer Element** from the context menu.
 - When an element is selected, click **Edit Element** in the Writer ribbon.
2. Make all required changes.
3. Click **OK**.

If it is not already highlighted, the system will highlight the text for the selected element.

Modifying Text Selections for Existing IStream Writer Elements

The text selection for existing IStream Writer elements can be modified.

Method: Modify the text selection of an existing IStream Writer element

1. Select an existing IStream Writer element in the main text area or the Writer Tree.

IStream Writer will display the Red Marching Ants to signify where the existing element begins and ends. (The **Highlight Elements** option must be enabled to view this.)

Note the bookmark brackets surrounding the text.
2. Add or delete text within those brackets as required.

Important: Do not add a new paragraph (¶) within an existing element. Do not press the Enter key or the element will become invalid.

3. Click **OK**.

Important: Be very careful when modifying the text selection for lists. It is recommended that you remove the List element and then add a new element for the modified selection. You should also be careful when modifying a table's structure if it has one or more IStream Writer elements applied to it (IStream Writer Table definition, Variables, Rules, or Filing Info). As a best practice, remove all IStream

Writer elements from the table, modify the table structure, and re-apply IStream Writer elements as necessary.

Removing Elements

Use this method to remove an IStream Writer element from your document:

Method: Remove an IStream Writer element

1. Select an existing IStream Writer element in the main text area or the Writer Tree.

IStream Writer will display the Red Marching Ants to signify where the existing element begins and ends. (The **Highlight Elements** option must be enabled to view this.)

2. Remove the selected element using one of these techniques:
 - Click **Remove** on the IStream Writer ribbon, then click **Yes** to remove the element or **No** to cancel.
 - Right-click the element description in the Writer Element Tree view, then click **Remove Element** from the context menu.

Note: You must right-click directly on the element that you want to remove. Clicking on the element and then right-clicking elsewhere in the document will cause an error message to be displayed when you make a selection from the context menu.

3. IStream Writer will remove all IStream Writer element information from the selected text.

Nesting IStream Writer Elements

IStream Writer elements are based on the text selected and can therefore be easily nested. For example, here is the method for adding an Attached Rule to a Filing Info element.

Method: Nesting an element

1. Select a paragraph of text according to *Selecting Regular Text* on page 41.
2. Click **Add Filing Element**.

The **IStream Writer Filing Info** dialog box opens.
3. On the Main Filing Info tab, select the Filing Info options for the element.
4. Select **Apply the text according to the options below**, and click **OK**.

IStream Writer will apply bookmark brackets to the selected text and display Red Marching Ants around the outside of the text selection if the settings to view these options are selected. For more information, see *Settings* on page 36, and *Highlight Elements* on page 37 or *Selecting Tables* on page 44.

5. Select a word or multiple words within the newly created IStream Writer element.
6. Click **Add Filing Element**.

The **IStream Writer Filing Info** dialog box opens.

7. On the **Attached Variable** or **Attached Rule** tabs, select the options for the element, and click **OK**.

IStream Writer will apply bookmark brackets to the selected text and display Red Marching Ants around the outside of the text selection if the settings to view these options are selected. For more information, see *Settings* on page 36, and *Highlight Elements* on page 37 or *Selecting Tables* on page 44.

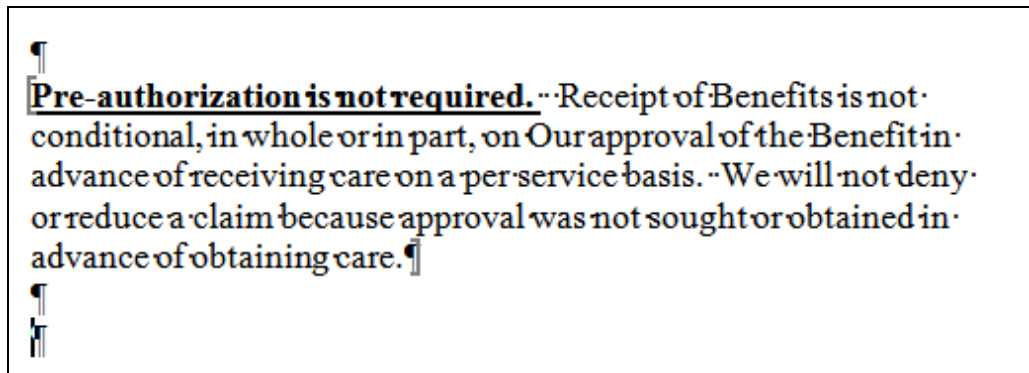
IStream Writer will nest the second element within the first element.

Note: IStream Writer elements cannot overlap.

Nesting Examples

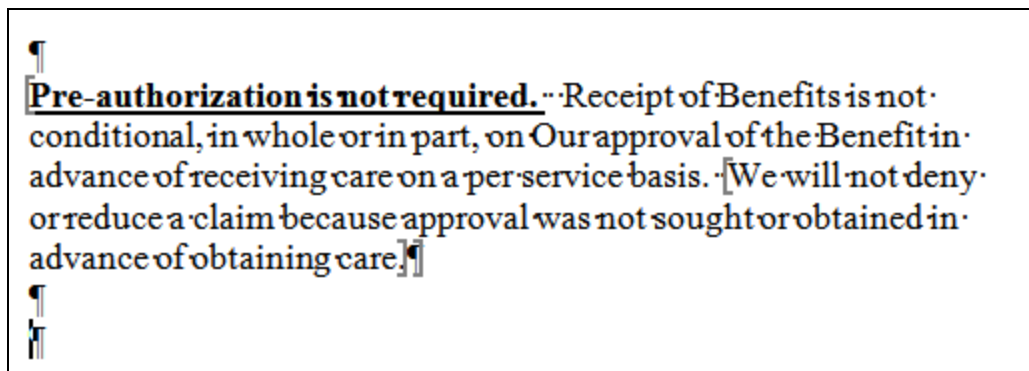
Example 1: Acceptable

- One IStream Writer Element surrounding the paragraph.



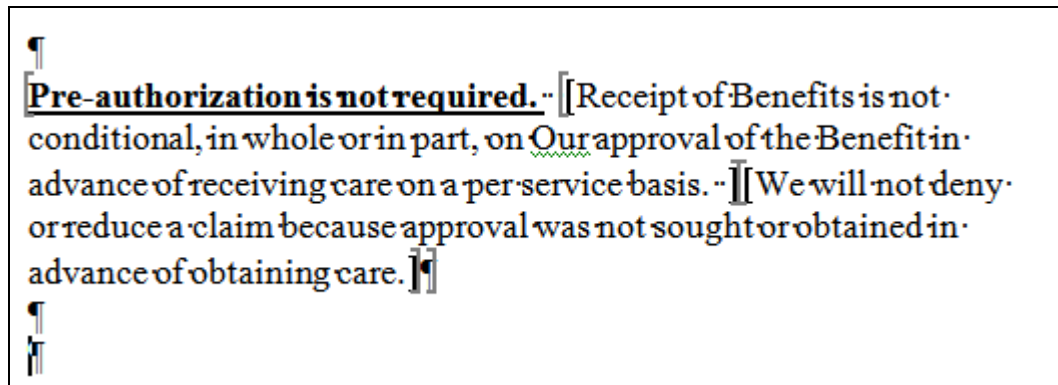
Example 2: Acceptable

- One IStream Writer element surrounding the paragraph.
- Another IStream Writer element surrounding the second sentence.

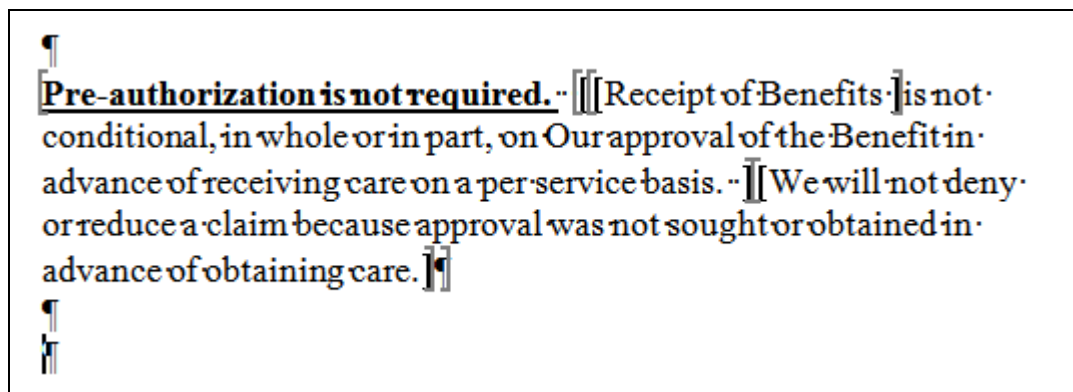


Example 3: Acceptable

- One IStream Writer element surrounding the paragraph.
- Another IStream Writer element surrounding the second sentence.
- Another IStream Writer element surrounding the first sentence.

**Example 4: Acceptable**

- One IStream Writer element surrounding the paragraph.
- Another IStream Writer element surrounding the second sentence.
- Another IStream Writer element surrounding the first sentence.
- Another IStream Writer element surrounding the words Receipt of Benefits.

**Example 5: Unacceptable**

- The IStream Writer elements outlined above.
- Attempting to create an element on text that overlaps two existing elements.

Pre-authorization is not required. **Receipt of Benefits** is not conditional, in whole or in part, on Our approval of the Benefit in advance of receiving care on a **per-service basis.** **We will not deny or reduce a claim because approval was not sought or obtained in advance of obtaining care.**

Element Nesting Restrictions

The following table outlines the scenarios when IStream Writer elements can and cannot be nested.

Starting from left column, select a row and select a column. Their joint cell indicates whether the element can **contain** an element (from the column) or not. If the cell has a check mark (✓) it means that nesting is allowed. If the cell is empty, it means that nesting is not allowed.

	Section	Filing Info (square brackets only)	Variable or Filing Info (Attached Variable or Insert the (<i>variable name</i>) based on the current Filing Document)	Single line Rule or Filing Info (Attached Rule, single line)	Multi-line Rule or Filing Info (Attached Rule, multi-line)	Table	Single line List	Multi-line List	Filing Info (DOI Instructions)	Filing Info (Apply the text according to the options below)
Section										
Filing Info (square brackets only)		✓	✓	✓	✓	✓	✓	✓	✓	✓
Variable or Filing Info (Attached Variable, or Insert the (<i>variable name</i>) based on the current Filing Document)										
Single line Rule or Filing Info (Attached Rule, single line)		✓	✓	✓			✓			✓

	Section	Filing Info (square brackets only)	Variable or Filing Info (Attached Variable or Insert the (<i>variable name</i>) based on the current Filing Document)	Single line Rule or Filing Info (Attached Rule, single line)	Multi-line Rule or Filing Info (Attached Rule, multi-line)	Table	Single line List	Multi-line List	Filing Info (DOI Instructions)	Filing Info (Apply the text according to the options below)
Multi-line Rule or Filing Info (Attached Rule, multi-line)		✓	✓	✓	✓	✓	✓	✓	✓	✓
Table		✓	✓	✓	✓		✓		✓	✓
Single line List		✓	✓	✓						✓
Multi-line List		✓*	✓	✓	✓*		✓			✓
Filing Info (DOI Instructions)										**
Filing Info (Apply the text according to the options below)		✓	✓	✓	✓	✓	✓	✓	✓	✓

* You may not have Filing Info or Rules elements of that overlap with the repeating element of a Multi-line List.

** A DOI Instruction element cannot *contain* **Apply the Text according to the options below**. Rather, these two Filing Info elements can be applied *together* to the same text selection. For more information, see *Adding DOI Instructions to State, LOB or Product- Specific Text* on page 86.

Note: It is recommended that no more than five levels of elements be nested.

Copying and Pasting IStream Writer Elements

There are two separate functions for copying and pasting: there are the features within Microsoft Word that copy and paste selected text, and there are also the features within IStream Writer that copy and paste selected elements.

Writer Copying and Pasting Elements

Elements can be easily copied from one piece of selected text to another within a document, or from text in one IStream Writer document to text in another.

Method: Copy and paste an element

1. Select and copy existing IStream Writer element info by performing one of the following steps:
 - In the main text area, click an element, then click **Copy** on the IStream Writer ribbon.
 - Right-click an element in the IStream Writer element tree and select **Copy Element** from the context menu.

The element information is copied to the clipboard.

2. Select the destination for the element info in the same or different document by performing one of the following steps:
 - paste to text by selecting the text and clicking **Paste** on the IStream Writer ribbon
 - paste to an existing element by clicking the element in the text area and clicking **Paste** on the IStream Writer ribbon, or by right-clicking the element in the IStream Writer tree and selecting **Paste Element** from the context menu.

The previously copied element information is pasted to the destination text or element.

Writer Copying and Pasting Text and Writer Elements

You can copy and paste text and the attached IStream Writer element by using the following multi-step process.

Method: Copy and paste text and element

1. Select the text of the Writer element that you want to copy.
2. Perform a Microsoft Word copy command.
3. Click the location for the pasted text (in the same or different document).
4. Perform a Microsoft Word paste command.

5. Select the Writer element that you want to copy. (Just clicking the element in the main text area or the Writer element tree view is sufficient.)
6. Perform a **Copy Element** command.
7. Select the previously pasted text.
8. Perform a **Paste Element** command.

The element information is pasted to the selected text.

Validating IStream Writer Elements

Validation exists in IStream Writer to ensure that the elements that you have created are acceptable and will be properly transformed. Occasionally, you may modify an existing IStream Writer element while making other changes within the document. These changes may make the element invalid. The validation checks within IStream Writer will alert you to areas of concern within the document.

There are two types of validation within IStream Writer:

- *Automatic Validation* on page 53
- *Manual Validation* on page 54

Automatic Validation

Your IStream Writer document elements will be automatically validated when the following actions are performed:

Create Filings

- All messages displayed that relate to Filing Info will be **Errors**. All errors must be corrected before the filing documents can be created.
- All messages displayed that relate to elements other than Filing Info elements will be **Warnings**. IStream Writer will proceed to create documents when only warnings are displayed.

Transformation to Model Document

- All messages displayed that relate to Filing Info will be **Warnings**. The model document will be created regardless of whether or not there are warnings.
- All messages displayed that relate to elements other than Filing Info elements will be **Errors**. The model document will be created regardless of whether or not there are errors.

The message indicates where in the document the issue occurs.

Opening an IStream Writer Document

IStream Writer validates a document when you open it if you have this option enabled. (For details about this option, see *Validation Property* on page 49 of the *IStream Writer Administrator's Guide*.) Any problems found will be displayed as **Warnings**. One of the following actions will occur:

- If no validation warnings are found, the document will open normally.
- If one or more validation warnings are found, the **Document Validation Warnings** dialog will display. This dialog will show all warnings found by the validation. Any problem elements will be listed by their Microsoft Word bookmark name. Click **Close** to dismiss the list of warnings, or click on an item on the list to see the location of the warning.

You can save the warnings for later by clicking the **Save Log** button. For more information, see *Manual Validation* on page 54.

Manual Validation

Manual validation can be performed at any time within IStream Writer.

Method: Validate the elements in a document

1. Click **Validate Writer Elements** on the **Writer** ribbon.

IStream Writer performs a validation of all the elements in the document, and one of the following actions will occur:

- If no validation errors are found, a dialog will appear to inform you that “No validation errors exist in the document at this time.” Click **OK**.
- If one or more validation errors are found in the document, the **Document Validation Warnings** dialog will display. This dialog will show all warnings found by the validation.
 - a. Click a warning within the dialog to go to the IStream Writer element that is causing the error.
 - b. Click **Save Log** if you would like to save the warnings to a text file on the file system. You can use the bookmark names in this text file to locate problem elements later.
 - c. Click **Close**.

The **Document Validation Warnings** dialog closes.

2. To locate an error by bookmark name:
 - a. Display the **Home** ribbon.
 - b. Click **Find** and select **Go To...** on the context menu.
 - c. Select **Bookmark** in the **Go to what** list and type the bookmark name in the **Enter bookmark name** text box, or select the appropriate bookmark from the drop-down list.
 - d. Click **Go to**.

The element at the selected bookmark will be selected.

Note: If you are sure that you entered the bookmark name correctly, but Word still cannot find the specified bookmark, check the header and footer. Word cannot

find bookmarks in the header and footer through the **Go To...** command. Once you are finished, click **Close** to exit the **Find and Replace** dialog.

- e. Click **Edit Element** to fix the element that was causing the validation error.

Invalid elements are often caused by accidentally adding an additional paragraph marker within an element by pressing the **Enter** key. Check to ensure that no additional paragraphs have been added to the element. The other major cause of invalid elements occurs when Groupings or Options that have been used in the document are modified or removed. For more information, see *Working with Groupings and Options* on page 63.

Creating an Element Report

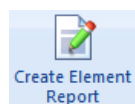
You can create a report that indicates all of the elements in the main text of your current IStream Writer document (but not the headers or footers). This can be useful when troubleshooting transformation and compilation errors.

The element report is a Microsoft Word copy of your IStream Writer document in which all of the IStream Writer elements are highlighted with Word comments. The text in each comment describes the element and indicates the element type (variable, section, rule, and so on).

Note: If you change your IStream Writer document, the element report is not updated. You will need to run the report again if you make any changes to your IStream Writer document.

Method: Create an element report

Click **Create Element Report** on the **Writer** ribbon.



The element report is generated.

Tip: You can save the report as a separate Microsoft Word file.

Adding Microsoft Word Comments

Microsoft Word comments may be used throughout IStream Writer as a method of communication between the people serving in the different roles. Microsoft Word comments in a IStream Writer document function as they do within a normal Microsoft Word document.

Important: A Microsoft Word comment entered within an IStream Writer document will carry through into the model document as long as the comment is not:

- contained within a variable

- on an IStream Writer table element
- on an IStream Writer list element
- on a section break

Pay careful attention to these considerations when adding Microsoft Word comments. If you apply a comment under any of these conditions, your comment may be lost during transformation.

Method: Add a Microsoft Word comment

1. Put your cursor in the document where you would like to add a comment.
2. On the **Review** ribbon, click **New Comment**.
Depending on your Microsoft Word settings, Microsoft Word will highlight the text nearest to your cursor and display a Comment field to enter the text for your comment.
3. Enter the text for the comment.
4. Click outside of the comment field.

The comment has been added.

Using Custom Microsoft Word Templates

Custom Microsoft Word templates are used to define styles within Microsoft Word documents. A style is a group of formatting attributes – such as font, alignment, color, and so on – that you can apply to text in one step. Each document that you create in Microsoft Word is automatically created based on the `NORMAL.DOT` template. The settings assigned to `NORMAL.DOT` can be adjusted to each individual user's preferences.

Note: Writer supports Microsoft Word templates in the Word 97-2003 (`.dot`) format. Avoid using templates in the default `.dotx` format.

Using `NORMAL.DOT` can produce varying results in the styles and fonts within your IStream Writer document and model document and should therefore not be used as the template for IStream Writer and model documents. By using a document template specifically created for the IStream Writer and model documents and used by everyone who contributes to the process, the chances of improperly formatted final documents can be greatly reduced.

Fewer problems arise if the document template that you are using is kept as simple as possible and contains only a limited number of styles.

Important: To ensure consistent formatting within your IStream Writer documents, it is highly recommended that you attach a custom Microsoft Word template to your IStream Writer document.

Method: Attach a custom Microsoft Word template

1. Open an IStream Writer document.
2. Click the Microsoft Office Button, and then click **Word Options**.
3. Click **Popular** (displayed by default).
4. Select **Show Developer tab in the Ribbon**.
5. Click **OK**.
6. Click the **Developer** tab.
7. Click **Document Template** on the Developer ribbon.
8. Click the **Templates** tab (displayed by default).
9. Under **Global templates and add-ins**, select the check box next to the template that you want to load.

Note: For instructions on how to create new Microsoft Word templates, see the *Microsoft Word Help*.

10. Check the **Automatically update document styles** check box to initially apply the template to the current document and click **OK**.

Microsoft Word closes the dialog and updates the document styles.

11. Click the Microsoft Office Button, and then click **Word Options**.
12. Click **Popular** (displayed by default)
13. Select **Show Developer tab in the Ribbon**.
14. Click **OK**.
15. Click the **Developer** tab.
16. Click **Document Template** on the Developer ribbon.
17. Click the **Templates** tab (displayed by default).
18. Clear the **Automatically update document styles** check box and click **OK**.

Microsoft Word closes the dialog. The styles now exist within the document.

Notes:

- The **Automatically update document styles** setting in Word must be cleared after initially applying the template styles to the document. If left checked, the results of the generated document may not be as intended.
- When the author creates the model document by transforming the IStream Writer document, the custom template must exist in the Templates folder on their machine.

Chapter 3

IStream Writer Options

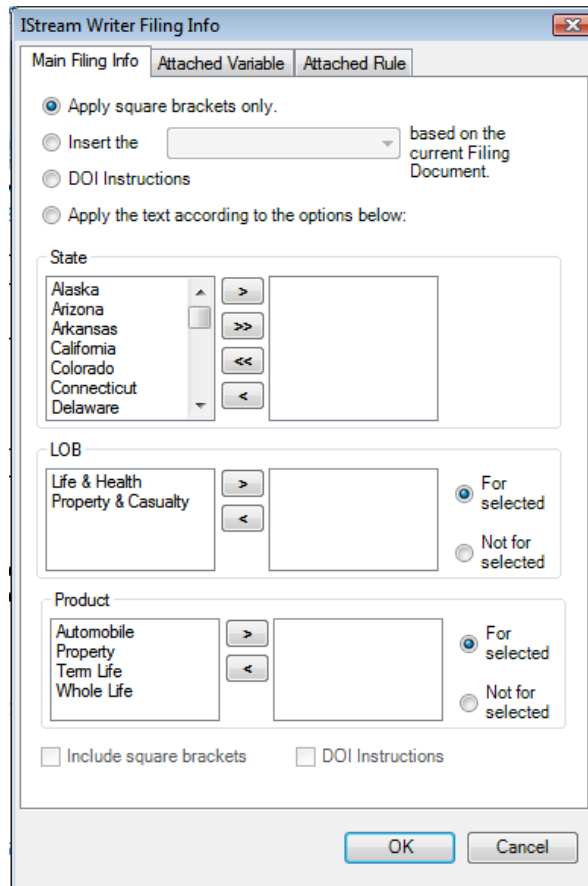
Following installation, you or your system administrator have the ability to modify the default options that appear on the IStream Writer Filing Info dialog.

This chapter describes the following topics:

- *Groupings and Options* on page 60
- *Accessing IStream Writer Options* on page 62
- *Working with Groupings and Options* on page 63
- *IStream Writer and the Document Management System* on page 70

Groupings and Options

The **Main Filing Info** tab of the IStream Writer Filing Info dialog box contains a section that allows you to define when to include a selection of text according to a combination of groupings and options within those groupings.



The three default groupings for the Filing Info dialog are:

- State
- LOB (Line of Business)
- Product

The default options for State are:

- the 50 US state names

The default options for LOB are:

- Life & Health
- Property & Casualty

The default options for Product are:

- Automobile
- Property

- Term Life
- Whole Life

All of the above noted defaults may be changed or modified to suit your preferences. In addition, new options may be added for all groupings. IStream Writer allows you the flexibility to define the groupings and options for information that will be used to create filing documents.

Accessing IStream Writer Options

To access the **IStream Writer Options** dialog, click **Writer Options** on the Writer ribbon.

The **IStream Writer Options** dialog opens.

The screenshot shows the **IStream Writer Options** dialog box with the **State** tab selected. The dialog contains the following elements:

- Grouping Name:** State
- Grouping Value Variable:** State Value
- Grouping Code Variable:** State Code
- Value:** (empty text box)
- Code:** (empty text box)
- Add** button
- Display Format** section with radio buttons: ☒ Value, ☐ Code, ☐ Both
- Available** list (empty)
- Display** list: Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Florida
- Remove** button
- ☒ Include the "Only selected values" and "All values except selected" radio buttons
- OK** and **Cancel** buttons at the bottom right.

The default values that appear in the **IStream Writer Filing Info** dialog are displayed within the tabs on the **IStream Writer Options** tabs.

You have the ability to modify or remove the existing groupings.

Note: The maximum number of groupings that can appear on the **IStream Writer Filing Info** dialog is three and the minimum number is one.

Working with Groupings and Options

When creating filing documents to send to Departments of Insurance, different categories or groupings of information are required. A filing document can contain information that differs from the generic wording based on state, line of business, product or other types of information. Depending on the requirements from the Departments of Insurance that you file with, you may require different groupings of information than what has been defaulted within IStream Writer. You may also require different options within the groupings. The following sections explain how to modify or remove the defaulted groupings and how to add, modify and remove the options within those groupings.

Important: Once IStream Writer has been installed across several workstations and the groupings and options have been defined, it is recommended that the settings be kept the same across all team members.

Related Topics

- *Adding Options to a Grouping* on page 63
- *Removing Options from a Grouping* on page 64
- *Modifying Existing Groupings* on page 65
- *Removing Groupings* on page 68

Adding Options to a Grouping

Options can be added to a grouping using the IStream Writer Options dialog.

Method: Add an option to a grouping

1. On the **Writer** ribbon, click **Writer Options**.
The **IStream Writer Options** dialog opens.
2. Select either the **State**, **LOB**, or **Product** tab.
The existing options for the selected tab are displayed.
3. The **Value** and **Code** fields are used to create new options for the grouping. Each option must have a value and a code. (The **Add** button will not be enabled until both the value and code have at least one character entered in their respective fields.)
4. Enter a value in the **Value** field.
5. Enter a code for that value in the **Code** field.
Example LOB option: Business Owners Policy (BOP)
6. Click **Add**.

Depending on the option selected for **Display Format**, the value, code, or both value and code for the newly added option is/are added to the **Display** field.



7. Using the radio buttons in the **Display Format** field, you can change how the options appear in the **Display** field.
 - **Value** – displays only the Value
 - **Code** – displays only the Code
 - **Both** – displays the Value and the Code.
8. Repeat steps 4 to 6 until all new options have been added.
9. Click **OK**.
The **IStream Writer Options** dialog closes and a reminder message is displayed.
10. Exit from Microsoft Word. (You must Exit from Microsoft Word in order for your **IStream Writer Options** changes to be applied.)
The next time you open Microsoft Word and work on an IStream Writer document, you will see the changes you made to the IStream Writer options.



Removing Options from a Grouping

Options can be removed from a grouping either temporarily or permanently.

Method: Remove an option from a grouping

1. On the **Writer** ribbon, click **Writer Options**.
The **IStream Writer Options** dialog opens.
2. Select either the **State**, **LOB** or **Product** tab.
The existing options for the selected tab are displayed.
3. The options that appear in the **Display** field are the options that appear within the **IStream Writer Filing Info** dialog. The options that appear in the **Available** field are options that are available for use, but not currently in use.
4. Options can be removed from the Display field in the following ways:

Function	Result
	Moves all options displayed in the Display field to the Available field.
Click an option to highlight it and then click  .	Moves the selected option(s) from the Display field to the Available field.

Function	Result
Click an option to highlight it. Shift + click further down in the list to select all required sequential options and then click  .	Moves all selected options from the Display field to the Available field.
Click an option to highlight it. Ctrl + click to select all required non-sequential options and then click  .	Moves all selected options from the Display field to the Available field.
Click an option or options to highlight them in either the Available or Display field. Click Remove .	Removes the selected options from the screen completely. You will need to add it as a new option to have it appear again.

5. Use any combination of the methods noted in the previous step until all unneeded options no longer appear in the **Display** field.

6. Click **OK**.

The **IStream Writer Options** dialog closes and a reminder message is displayed.

Note: Within a grouping, if nothing is displayed in the **Display** list, the grouping will not appear on the **Filing Info** screen.

7. Exit from Microsoft Word. (You must Exit from Microsoft Word in order for your **IStream Writer Options** changes to be applied.)

The next time you open Microsoft Word and work on an IStream Writer document, you will see the changes you made to the IStream Writer options.

Modifying Existing Groupings

The three default groupings of State, Line of Business and Product can be easily modified within IStream Writer. Here is an example method to modify the **Product** grouping.



Method: Modify the Product grouping

1. On the **Writer** ribbon, click **Writer Options**.

The **IStream Writer Options** dialog opens.

2. Click the **Product** tab.

The **Product** tab displays.

3. Click  to move one option or click  to move all of the default options from the **Display** field to the **Available** field. Alternately, you can select all options that will not be required in the user interface and click **Remove**. The selected options will be removed from the user interface.
4. Once the display field is empty, replace the **Grouping Name** *Product* with the name of the new grouping that you would like to display. For example: *Region*
5. As you type, IStream Writer will populate the **Grouping Value Variable** and the **Grouping Code Variable** fields. The information in these fields can be replaced by typing in a different value.

Note: The **Grouping Value Variable** and **Grouping Code Variable** values are displayed in the Variable drop-down lists on the Attached Variables, Attached Rules, Variables and Rules dialogs of the IStream Writer Filing Info dialog. For more information, see *Specification Design* on page 95.

6. The **Value** and **Code** fields are used to create new options for your grouping. Each option must have a value and a code. (The **Add** button will not be enabled until both the value and code have at least one character entered in the field.) Enter a value in the **Value** field and a code for that value in the **Code** field. Example: Eastern [East], Southern [South]

7. Click **Add**.

The value and code are added to the **Display** field.

8. Using the radio buttons in the **Display Format** field, you can change how the options appear in the **Display** field.

- **Value** – displays only the Value
- **Code** – displays only the Code
- **Both** – displays the Value and the Code.

9. Repeat steps 6 and 7 until all required options for the new grouping have been added and are displayed as required in the **Display** field.

10. Below the **Remove** button, there is the following check box:

Include the “Only selected values” and “All values except selected” radio buttons

This option allows you to determine whether it is necessary to show these radio buttons on the Filing Info dialog.

- **Only selected values** is the default and will apply if you choose not to have the radio buttons appear on the dialog. This option will include the selected text in a filing document if the document meets the selected values criteria. For example: If Western and Southern Regions are selected by the user with **Only selected values** and the filing documents they create are for Western and Southern regions, then the selected text will appear.
- **All values except selected** will include the selected text in a filing document if the document is not relevant for the selected values. For example: If Western and Southern Regions are selected by the user with **All values except selected** and the filing documents they create are for either the Western or Southern regions, then the selected text will not appear.

Leave the check box selected if you want the radio buttons to appear or clear the check box to not include the radio buttons.

11. Click **OK**.

The **IStream Writer Options** dialog closes and a reminder message is displayed.

12. Exit from Microsoft Word. (You must Exit from Microsoft Word in order for your **IStream Writer Options** changes to be applied.)

The next time you open Microsoft Word and work on an IStream Writer document, you will see the changes you made to the IStream Writer options.

Example:

Writer Options
Filing Info


Important: Make changes to the **Groupings** and **Options** prior to adding elements to your document or invalid elements may result.

Removing Groupings

Depending on your filing document requirements, it may not be necessary to define the text within your documents using three groupings of options. It is possible to modify the IStream Writer user interface to show from one to three groupings as required.


The following method lists the step to follow to show only the state grouping in the IStream Writer Filing Options dialog.

Method: Remove the LOB and Product groupings

1. On the **Writer** ribbon, click **Writer Options**.
The **IStream Writer Options** dialog opens.
2. Click the **LOB** tab.
The **LOB** tab opens.
3. Click  to remove all options from the **Display** field.

4. Click the **Product** tab.

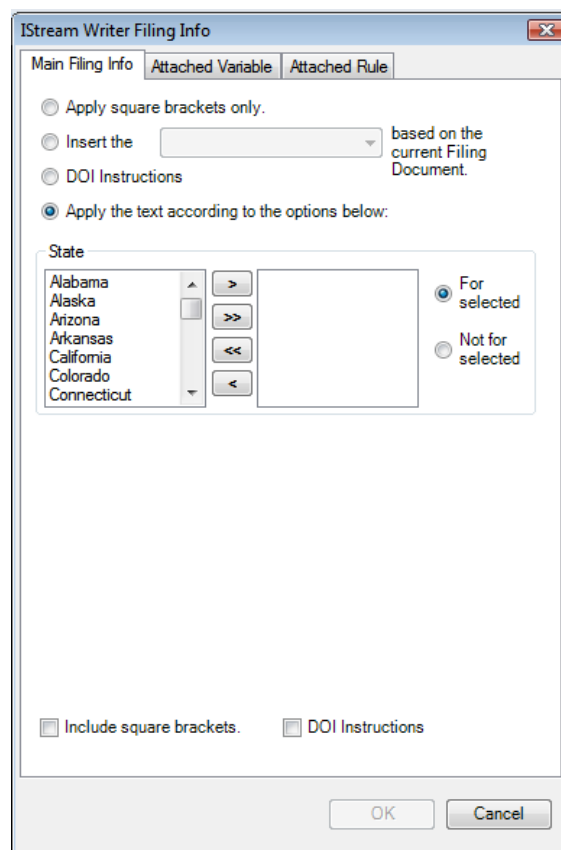
The **Product** tab opens.

5. Click  to remove all options from the **Display** field.
6. Click **OK**.

The **IStream Writer Options** dialog closes and a reminder message is displayed.

7. Exit from Microsoft Word. (You must Exit from Microsoft Word in order for your **IStream Writer Options** changes to be applied.)

The next time you open Microsoft Word and work on an IStream Writer document, you will see the changes you made to the IStream Writer options.



Important: Make changes to the **Groupings** and **Options** prior to adding elements to your document or invalid elements may result.

IStream Writer and the Document Management System

With IStream Writer, you can choose to save filing documents and Data Elements Files to the Document Management System (DMS) instead of to the file system. In order to use this feature, you must first configure IStream Writer to understand the DMS configuration. This setup procedure takes place within **IStream Writer Options**.

Note: Your system or program administrator may have already performed this set-up procedure when IStream Writer was installed.

Configuring the DMS

1. On the **Writer** ribbon, click **Writer Options**.

The **IStream Writer Options** dialog opens.

2. Click the **DMS Configuration** tab.

3. Select the **Enable DMS Access** check box.

If the **Enable DMS Access** check box is not selected, you will not be able to save filing documents or Data Elements Files to the DMS.

4. Type in the **Server Name**. This is the name of the computer that hosts the DMS.

5. Enter the **Port**. Normally, the port used is 2099.

6. Enter the **Connection**.

If you are using Microsoft SQL Server, the **Connection** is the database name where the DMS tables are stored.

If you are using Oracle, the **Connection** is the name of the Oracle user who owns the database tables.


Note: If you leave the **Connection** field blank, IStream Writer will use the default connection assigned to the `dftConnection` variable in the `[general]` section of the `opentext.ini` file on the IStream Document Manager server.

For more information, contact your administrator.

7. Enter a **User Name** and **Password**. This is the login information that you would normally use to gain access to the DMS. If you do not know your **User Name** or **Password**, contact your administrator.

Note: If you change your **User Name** and/or **Password** information, you must update the **User Name** and **Password** fields within IStream Writer's **DMS Configuration** settings.

8. Optionally, you can specify a **Location**. The folder that you specify as the **Location** will be the highest level that users can save to in the DMS. If you do not select a **Location**, Enterprise Workspace is used by default.

- a. To specify a **Location**, click  next to the **Location** field.
 - b. If you need to add a new folder, navigate to the area in the DMS for the new folder and click **Add Folder...** Enter a name for the folder and click **OK**.
 - c. Select the folder that you want to specify as the **Location**, and click **OK**.
9. Click the **Test Connection** button to ensure that you have properly established a connection to the DMS. If you receive a message indicating that the connection test was unsuccessful:
 - a. Click **OK**. Verify that the information entered in each field is correct.
 - b. Click the **Test Connection** button again.
10. Once the connection has been verified, you will receive a message telling you that the connection test was successful. Click **OK**.
11. In the **IStream Writer Options** dialog, click **OK**. A prompt will appear telling you that you need to close Microsoft Word and reopen it to apply your changes. Click **OK**.
12. Save any documents that you have open, and **Exit** Microsoft Word.
13. Reopen Microsoft Word. Your changes to the **IStream Writer Options** are applied.

Now you are ready to save filing documents and Data Elements Files to the DMS.

Chapter 4

Product Design

This chapter describes the following topics:

- *Product Design* on page 74
- *Working with Square Brackets* on page 75
- *Adding Document-Level Text Substitutions* on page 79
- *Modifying or Removing Document-Level Text Substitutions* on page 81
- *Defining State, Product and LOB-Specific Text* on page 82
- *Modifying State, Product and Line of Business Elements* on page 84
- *Working with DOI Instructions* on page 85
- *Filing Documents* on page 89

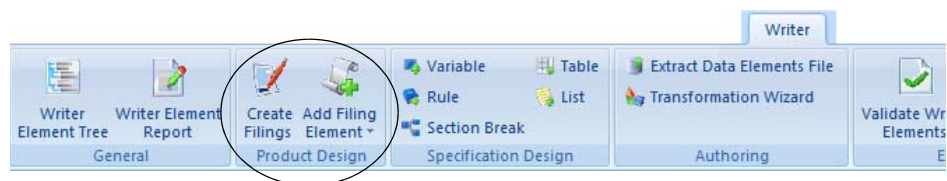
Product Design

The Product Designer is responsible for creating the IStream Writer document and for the initial look and feel of the state-specific documents for filing.

The Product Designer creates a master document containing all of the state, line of business and product text. IStream Writer is then used to define which selections of text should appear in which filing documents.

Once the element definition is complete, the Product Designer quickly creates the required filing documents.

IStream Writer was designed to be used by either one person or different roles with varying areas of expertise. The controls used for Product Design are found in the Product Design group on the IStream Writer ribbon.



Working with Square Brackets

When filing documents with departments of insurance, it is often necessary to define pieces of text as information that changes for each document by using square brackets. Using manual processes to add and remove these brackets from the text is often time consuming. IStream Writer allows you to add the square brackets to a selected piece of text with one click and will automatically remove all brackets it adds when creating the model document.

Related Topics

- *Adding Brackets to Filing Info Text* on page 75
- *Adding Brackets to Filing Info* on page 76
- *Adding Brackets to Tables* on page 76
- *Modifying or Removing Square Brackets* on page 77

Adding Brackets to Filing Info Text

Brackets can be applied to text using the steps in this method.

Method: Add brackets to text

1. Select text according to *Selecting Regular Text* on page 41 or *Selecting Tables* on page 44.
2. The most direct way to add brackets to text is to locate the Product Design group on the IStream Writer ribbon, click the drop-down menu button beside **Add Filing Element**, and select **Apply Brackets**.

IStream Writer will apply square brackets around the selected text and add the element to the Writer element tree view. If the options are selected, IStream Writer will also apply bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

3. Another way to add brackets to text is to follow these steps:
 - a. Click the **Add Filing Element** button on the IStream Writer ribbon.
The **IStream Writer Filing Info** dialog opens; the radio button for **Apply square brackets only** is selected by default.
4. Click **OK**.

IStream Writer will apply square brackets around the selected text and add the element to the Writer element tree view. If the options are selected, IStream Writer will also apply bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

Adding Brackets to Filing Info

When defining Filing Info for a piece of text—such as the state, line of business or product that the text is applicable for—square brackets can also be applied to text using the option available on the **IStream Writer Filing Info** dialog.

Note: You cannot add square brackets to DOI Instructions.

Method: Add brackets to Filing Info

1. Select text according to *Selecting Regular Text* on page 41.
2. Click the **Add Filing Element** button on the IStream Writer ribbon.
The **IStream Writer Filing Info** dialog opens with the **Main Filing Info** tab displayed.
3. Click the button for **Apply the text according to the options below**.
4. Define the appropriate combinations of state, line of business and product options. For more information, see *Defining State, Product and LOB-Specific Text* on page 82.
5. Select **Include square brackets**.
6. Click **OK**.
IStream Writer will create an element with the selected filing info, apply square brackets around the element's text and add the element to the Writer element tree view. If the options are selected, IStream Writer will also apply bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

Adding Brackets to Tables

Square brackets can be applied to tables in a similar manner to regular text. The following method lists the steps required to add square brackets to a table.

Method: Add brackets to a table

1. Select the table according to *Selecting Tables* on page 44.
2. The most direct way to add brackets to a table is to locate the Product Design group on the IStream Writer ribbon, click the drop-down menu button beside **Add Filing Element**, and select **Apply Brackets**.
IStream Writer will apply square brackets around the selected table and add the element to the Writer element tree view. If the options are selected, IStream Writer will also apply bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.
3. Another way to add brackets to a table is to follow these steps:

- a. Click the **Add Filing Element** button on the IStream Writer ribbon.

The **IStream Writer Filing Info** dialog opens; the radio button for **Apply square brackets only** is selected by default.

4. Click **OK**.

IStream Writer will apply square brackets around the beginning of the text in the first table cell and at the end of the text in the last cell and add the element to the Writer element tree view. If the options are selected, IStream Writer will also apply bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

Example:

Make	Model	VIN
Toyota	Camry	154254FJJGJG14G44G
Toyota	RAV4	JJGJGJ14511565454D4

Modifying or Removing Square Brackets

If square brackets were incorrectly applied to a piece of text within an IStream Writer document, they can be modified or removed.

Related Topics

- *Modifying Square Bracket Elements* on page 77
- *Modifying Filing Info Elements to Remove Square Brackets* on page 78
- *Removing Elements* on page 78

Modifying Square Bracket Elements

In some cases, you may not want to completely remove the element with the square brackets, but may want to add or remove information from the element.

Method: Modify a square bracket element

1. In the document or the Writer element tree view, double-click on the IStream Writer element with brackets that you want to modify.
The **IStream Writer Filing Info** dialog opens with the **Main Filing Info** tab displayed.
2. Modify the information as required.
3. Click **OK**.
IStream Writer applies the requested changes to the selected element.

Modifying Filing Info Elements to Remove Square Brackets

If you have added an IStream Writer element that contains filing information and square brackets and would like to remove the square brackets, you can easily modify the element to remove the brackets.

Method: Remove square brackets from a Filing Info element

1. In the document or the Writer element tree view, double-click on the IStream Writer element with brackets that you want to modify.

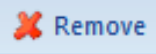
The **IStream Writer Filing Info** dialog with the **Main Filing Info** tab displayed.
2. Clear the **Include square brackets** check box.
3. Click **OK**.

IStream Writer will remove the square brackets from the selected element.

Removing Elements

If you have added an element in error or you want to remove the element with the square brackets completely, follow the steps in this method:

Method: Remove a Writer element

1. In the document or the Writer element tree view, select the IStream Writer element with brackets that you want to remove.
2. Either:
 - Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or
 - Click  on the **IStream Writer** ribbon.

IStream Writer removes the selected element from the document.

Note: This option completely removes the selected Writer element from the document including any filing information that may have been added.

Adding Document-Level Text Substitutions

When defining filing information within an IStream Writer document, you may need to define a place in the document where you would like the text to display a Grouping Value Variable. For example, you may want the state name that appears to correspond to the state that the document is being created for.

For example:

“Newborn children also include Your foster child(ren) and the foster child(ren) of Your Spouse. A foster child is a minor (i) over whom a guardian has been appointed by the clerk of superior court of any county in **North Carolina.**”

When creating documents for all or selected states, you would want the name of the state selected for the document to appear in this text rather than North Carolina. When you request a document for California, you would want to replace *North Carolina* with *California*. This capability is called document-level text substitution. You can insert the Grouping Value Variable and Grouping Code Variable for state, LOB, or product (or whatever names these groups have been assigned using Writer Options). See also *Modifying Existing Groupings* on page 65.

Method: Add a document-level text substitution

To define text in an IStream Writer document to be substituted, follow the steps in this method:

1. Select text according to *Selecting Regular Text* on page 41. In the example above, you would select North Carolina.
2. Click **Add Filing Element** on the IStream Writer ribbon.
The **IStream Writer Filing Info** dialog opens with the Main Filing Info tab displayed.
3. Click **Insert the Grouping Value/Code Variable Option based on the current Filing Document.**
The options in the drop-down list correspond to what has been defined in the **Writer Options** screen. See *Modifying Existing Groupings* on page 65.
4. Select the correct option from the drop-down list. In the example above, you would want to use the **State Value**. The following is a list of the default options available from the drop-down list:

Grouping Value/Code Variable Option	Displayed in Document
State Value	The name of the state.
State Code	The state code.
LOB Value	The line of business name.

Grouping Value/Code Variable Option	Displayed in Document
LOB Code	The code defined for the line of business.
Product Value	The product name.
Product Code	The code defined for the product.

5. Click **OK.**

IStream Writer will apply bookmark brackets to the selected text and display Red Marching Ants around the outside of the text selection if the settings to view these options are selected. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

When the filing documents are created, the text selected will be replaced with the appropriate information defined for the document.

Modifying or Removing Document-Level Text Substitutions

Using the following method, you can modify existing document-level text substitutions you have added to filing information text.

Method: Modify a document-level text substitution

1. Select an element with a document-level text substitution added to the filing information.
2. Click **Add Filing Element** on the IStream Writer ribbon.
The **IStream Writer Filing Info** dialog opens with the **Main Filing Info** tab displayed.
3. Click the drop-down list and modify your previous selection.
4. Click **OK**.

IStream Writer applies the requested changes to the selected element.

Method: Remove a document-level text substitution

Using the following method, you can delete existing document-level text substitutions you have added to filing information text.

1. Select an element with a document-level text substitution added to the filing information.
2. Remove the selected element using one of these techniques:
 - Click **Remove** on the IStream Writer ribbon, then click **Yes** to remove the element or **No** to cancel.
 - Right-click the element description in the Writer Element Tree view, then click **Remove Element** from the context menu.

Note: You must right-click directly on the element that you want to remove. Clicking on the element and then right-clicking elsewhere in the document will cause an error message to be displayed when you make a selection from the context menu.

IStream Writer removes the selected element from the document.

Defining State, Product and LOB-Specific Text

IStream Writer allows you to create one generic document containing all text for a new insurance product. Within this generic document, you can easily define all text that is state, LOB or product-specific. Once defined, IStream Writer can extract separate documents for filing to each applicable Department of Insurance.

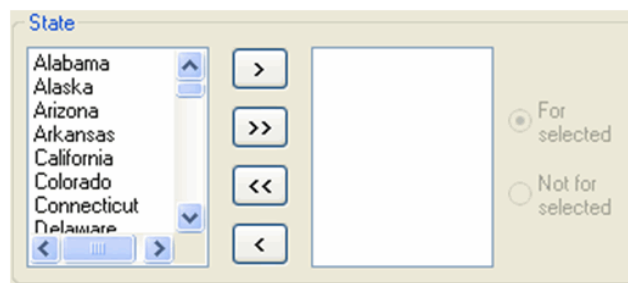
Method: Define state, product, and LOB-specific text

1. Select text according to *Selecting Regular Text* on page 41 or *Selecting Tables* on page 44.
2. Click **Add Filing Element** on the IStream Writer ribbon.
The **IStream Writer Filing Info** dialog opens with the Main Filing Info tab displayed.
3. Click **Apply the text according to the options below**.
IStream Writer enables the state, line of business and product groupings on the dialog.

Note: All groupings and options can be modified through the **Writer Options**. For more information, see the *IStream Writer Options* on page 59.

4. You may select any combination of the options within a grouping and any combination of the groupings that apply for the selected text.
5. The radio buttons that appear on the right of the dialog allow you to make easier option selections:
 - The default **For selected** option will include the selected text in your filing documents for all options that you move into the selected list (the right-hand list).
 - The **Not for Selected** option allows you to include the selected text in your document for all options other than those that you move into the selected list (the options in the left-hand list).





Example:



If you select **Alabama** and **California** and move them to the selected (right-hand) list and choose the **For selected** radio button, the selected text will be included when you create filing documents for **Alabama** and **California**, but not for all other states.

If you select **Alabama** and **California** and move them to the selected (right-hand) list and choose the **Not for selected** radio button, the selected text will be included when you create filing documents for all states except for **Alabama** and **California**.

6. To select options from any of the three groupings, do the following:

- To select all options click . IStream Writer will move all available options into the selected list.
- To select one option from the list, click the option and highlight it. Click . IStream Writer will move the selected option into the selected list.
- To select multiple sequential items, click an option to highlight it. Shift + click further down in the list to select all required sequential options and then click .
- To select multiple non-sequential items from the list, click an option to highlight it. Ctrl + click further down in the list as often as required to select all applicable options and then click .

Tip: To find options in the list more quickly, click in the box and type in the first letter that the option you are looking for begins with. IStream Writer will display the first option that begins with that letter and you can scroll to find the correct option more quickly.

7. Once all applicable options are selected, you can choose whether or not you would like to include square brackets around the element by using the **Include square brackets** check box. If you would like the square brackets to be applied, select the check box.
8. You can also decide whether or not you want to define the element as a DOI Instruction. If you want the element defined as a DOI Instruction, select the **DOI Instructions** check box. For more information on DOI Instructions, see *Working with DOI Instructions* on page 85.

Note: You cannot enclose state, LOB or product-specific text within square brackets *and* define the text as a DOI Instruction. You can select only *one* of these two options.

9. Click **OK**.

IStream Writer will apply square brackets around the selected text if the check box was selected. If the options are selected, IStream Writer will also apply bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

Modifying State, Product and Line of Business Elements

Once an element has been added to selected text within IStream Writer, it can be modified.

Method: Modify an element with state, product, and/or LOB Filing Info

1. Click in the element that you would like to modify.
2. Click **Add Filing Element** on the IStream Writer ribbon.
The **IStream Writer Filing Info** dialog opens with the **Main Filing Info** tab displayed.
3. Make any required changes to the state, LOB and product options.
4. Click **OK**.

IStream Writer will apply all changes to the selected element.

Removing State, Line of Business or Product Elements

If you have incorrectly added a state, line of business and/or product element to text within your document, you can remove the element with these steps:

Method: Remove a state, LOB, or Product element

1. Click on the element that you would like to remove.
2. Remove the selected element using one of these techniques:
 - Click **Remove** on the IStream Writer ribbon, then click **Yes** to remove the element or **No** to cancel.
 - Right-click the element description in the Writer Element Tree view, then click **Remove Element** from the context menu.

Note: You must right-click directly on the element that you want to remove. Clicking on the element and then right-clicking elsewhere in the document will cause an error message to be displayed when you make a selection from the context menu.

IStream Writer removes the selected element from the document.

Working with DOI Instructions

If you want to include a special note or instruction to the Departments of Insurance (DOIs) in your filings, you can add a DOI Instruction element to your IStream Writer document. When transforming an IStream Writer document, you have the option of removing the DOI Instructions. If you do not choose to remove them, they will be converted to leave the DOI Instructions in as a comment.

Text defined as a DOI Instruction will not be distinguished from regular document text in your filing documents. You may want to add the text “Note to DOI” as a part of your Instruction to make sure that the DOIs interpret it as a note and not as a part of the regular document content.

You can add a DOI Instruction on its own if you want the instruction to appear in all filing documents, or you can apply a DOI Instruction to state, LOB or product-specific content so that it only appears in certain filing documents.

You can add a DOI Instruction to any of the following items:

- fully selected table rows
- entire tables
- graphics
- fully selected continuous paragraphs

Related Topics

- *Adding DOI Instructions* on page 85
- *Adding DOI Instructions to State, LOB or Product- Specific Text* on page 86
- *Modifying DOI Instructions* on page 87
- *Removing DOI Instructions* on page 87

Adding DOI Instructions

If you want the DOI Instruction to appear in all filings, you can apply a DOI Instruction on its own.

Method: Add a DOI Instruction

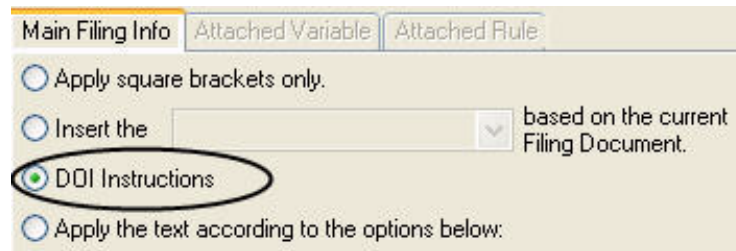
1. Select text that you want to define as a DOI Instruction according to *Working with DOI Instructions* on page 85.
2. The most direct way to add a DOI instruction is to locate the Product Design group on the IStream Writer ribbon, click the drop-down menu button beside **Add Filing Element**, and select **DOI Instructions**.

Another way to add DOI Instructions to selected text is to follow these steps:

- a. Click the **Add Filing Element** button on the IStream Writer ribbon.

The **IStream Writer Filing Info** dialog opens.

- b. Click **DOI Instructions**.



3. Click **OK**.

IStream Writer will add the element to the Writer element tree view. If the options are selected, IStream Writer will also apply bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

The selected text is defined as a DOI Instruction.

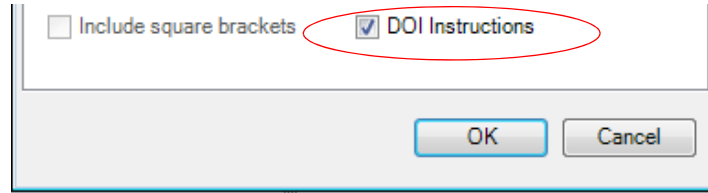
Adding DOI Instructions to State, LOB or Product-Specific Text

If you want the DOI Instruction to appear in filing documents according to options that you specify, you can add a DOI Instruction to state, LOB or product-specific text. For example, you could make a paragraph apply to the state of California, and add a DOI Instruction element to that text. When you generate your filing documents later, that DOI Instruction would only appear in filing documents for California.

Note: **State**, **Product**, and **LOB** are the default groupings defined in the **Writer Options**. All groupings and options can be modified. For more information, see the *IStream Writer Options* on page 59.

Method: Add a DOI Instruction to state, LOB or product-specific text

1. Select the text that you want to define as a DOI Instruction.
2. Click **Add Filing Element** on the **IStream Writer** ribbon.
The **IStream Writer Filing Info** dialog opens with the **Main Filing Info** tab displayed.
3. Select the radio button to **Apply the text according to the options below**. Specify your options. For more information, see *Defining State, Product and LOB-Specific Text* on page 82.
4. Select the **DOI Instructions** check box at the bottom of the **Main Filing Info** tab.



5. Click **OK**.

The selected text is defined as a DOI Instruction. The element appears in the Writer element tree view, along with any other options selected.

Modifying DOI Instructions

Once you have added a DOI Instruction, you can easily modify it.

Method: Modify a DOI Instruction

1. Double-click on the DOI Instruction element that you would like to modify in the main text area or the Writer element tree view.

The **IStream Writer Filing Info** dialog opens with the **Main Filing Info** tab displayed.

2. Make any required changes. If the DOI Instruction is applied on its own, you can make it state, LOB or product-specific by following the steps in *Adding DOI Instructions to State, LOB or Product-Specific Text* on page 86. If the DOI Instruction is already state, LOB or product-specific, you can open the dialog and select the **DOI Instructions** radio button to remove the state, LOB or product-specific definition from the text. You can also modify the current **Apply the text according to the options below** settings.

3. Click **OK**.

Your changes are applied.

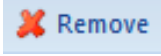
Removing DOI Instructions

You can remove a DOI Instruction along with the attached state, LOB or product-specific definition (**Apply the text according to the options below**). You can also remove a DOI Instruction element without removing the attached state, LOB or product-specific definition.

Method: Remove a DOI Instruction along with the state, LOB or product-specific definition

1. Click on the element that you would like to remove.

2. To remove a DOI Instruction along with the state, LOB or product-specific definition, either:

- Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or
- Click  on the **IStream Writer** ribbon.

The DOI Instruction element, along with the state, LOB or product-specific definition (**Apply the text according to the options below**), is removed.

Method: Remove a DOI Instruction only

1. Open the element that you would like to remove the DOI Instruction from by double-clicking it in the main text area or the Writer element tree view.

The **IStream Writer Filing Info** dialog opens with the **Main Filing Info** tab displayed.

2. Clear the **DOI Instructions** check box.
3. Click **OK**.

The text is no longer defined as a DOI Instruction, but settings for **Apply the text according to the options below** are retained.

Filing Documents

Once all Filing Info has been defined within your IStream Writer document, you can create filing documents for various states, Lines of Business or products as required. If necessary, the Product Designer can go back into the IStream Writer document after the Specification Designer has added new elements and incorporate any changes required by the Departments of Insurance. Once the changes are complete, the Product Designer can create new versions of the filing documents for re-submission. The Specification Design elements will be ignored when the filing documents are created and will therefore have no impact on the filing documents.

Filing documents can be created one at a time, or in batches.

Related Topics

- *Creating Filing Documents* on page 89
- *Modifying the Storage Path of Filing Documents* on page 91
- *Opening a Filing Document* on page 93

Creating Filing Documents

You can create filing documents for one or more states using the Create Filing Documents dialog.

Important: The creation of filing documents is not supported for documents with protection enabled.

Method: Create filing documents

1. Click **Create Filings** on the IStream Writer ribbon.
The **Create Filing Documents** dialog opens.
2. Click a **state** if applicable. To select multiple states, do one of these steps:
 - Click **Select All** to select all of the states defined in the list.
 - Click an initial state name, then press and hold the **Shift** key and click further down in the list to select a sequential list.
 - Click an initial state name, then press and hold the **Ctrl** key while clicking other states to select them as often as required to select a non-sequential list.
3. Select a **Line of Business** from the drop-down list if applicable.
4. Select a **Product** from the drop-down list if applicable.

Please note:

- You can select any combination of the state, line of business or product options, but you must select at least one option from one of these three lists in order to create a filing document.
- If no state, line of business or product information is selected, IStream Writer cannot evaluate any rules. The output will be identical to the IStream Writer document and will contain all text.
- If you defined any document-level text substitutions within the document (using **Insert the drop-down option based on the current Filing Document**) you must select the appropriate state, line of business or product option when creating the filing document or an error will occur. The **Document Validation Warnings** dialog will appear to inform you that the document level text substitution value is missing. The filing document(s) will be created as requested, but the element(s) containing the document level text substitution(s) will appear in the filing document identically to how they appear in the IStream Writer document.

5. Enter the **Document Name**. If you select multiple states, the field label changes to **Default Name**. Enter a value that will be applied to the start of all document names; the state codes will be appended at the end of the document's name. For example, if one of the states you selected was Alabama, and you entered the default name "ABC," when you click **Add**, the filing document created will be named "ABC_AL."
6. Click **Add**.
The document you added is displayed in the **Requested Filing Documents** table.
7. To remove a document you have added to the table, click the document to highlight it and click **Remove**.
8. You can choose to save the filing documents to your DMS (if enabled) or to the file system. Choose the storage type, then click **Browse** to set the path. For more information, see *Modifying the Storage Path of Filing Documents* on page 91.
9. To remove all comments, bookmarks and Microsoft Word tracked changes from the filing document, select the **Perform document clean up** check box.

Note: If the Microsoft Word Track Changes function was used while creating the IStream Writer document, when the **Perform document clean up** check box is selected, Track Changes will be turned off and all changes will be accepted for the Filing Documents.

10. Click **OK**.

IStream Writer creates the filing document(s) and stores them in the selected location(s).

Note: You will need to update the Table of Contents when you review the filing documents.

Modifying the Storage Path of Filing Documents

You can select any folder on your file system as the storage path for newly created filing documents. You can also save filing documents to the DMS.

Method: Modify the storage path for new filing documents

1. Define and add all required filing documents to the **Requested Filing Documents** table. For more information, see *Creating Filing Documents* on page 89.
2. If available, select the **DMS** radio button to save your filings to the DMS, select. To save to the file system, select the **File System** radio button.

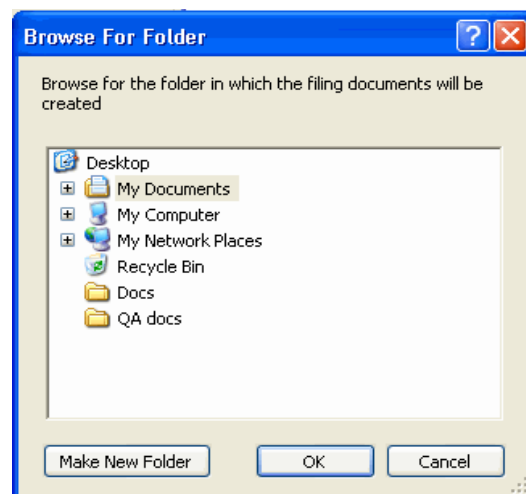
Note: If the DMS is available for document storage but the **DMS** radio button is still disabled, you need to configure the DMS within IStream Writer. For more information, see *IStream Writer and the Document Management System* on page 70.

3. Click **Browse** next to the **Storage Path** field.

The result depends on whether you are saving to a file system or a DMS.

If you are saving to the file system:

IStream Writer displays the **Browse for Folder** dialog.



- a. Navigate through the file system until you find the correct storage location for your filing documents.
- b. If a new folder is required, click **Make New Folder**.

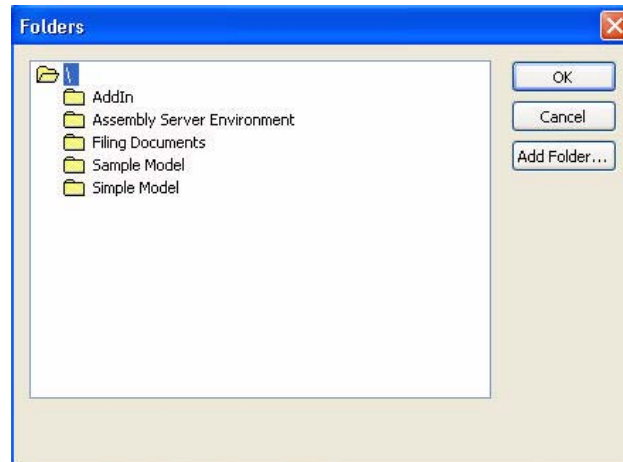
IStream Writer will add a **New Folder** beneath the current existing location that you have highlighted. Right-click on your new folder and select **Rename**. Enter a new name for the folder.

- c. When the correct folder is selected, click **OK**.

IStream Writer will use the newly selected folder as the default storage path for all IStream Writer documents.

If you are saving to the DMS:

The **Folders** dialog displays.



- a. Navigate through the DMS until you find the correct storage location for your filing documents.
- b. If a new folder is required, click **Add Folder...** This will add a new folder beneath the current existing location that you have selected.
- c. In the **Add Folder** dialog that appears, enter a name for your folder and click **OK**. Your new folder is created.
- d. When the correct folder is selected, click **OK**.

Note: The default DMS storage path (indicated by a \ in the **Storage Path** field) is the **Location** specified under the **DMS Configuration** tab within **Writer Options**.

IStream Writer will use the newly selected folder as the default storage path for all IStream Writer documents.

Opening a Filing Document

Once created, you can open filing documents saved to the file system or to the DMS.

Method: Open a filing document saved to the file system

1. Click the Office button and select **Open**.

Microsoft Word displays the **Open** dialog.

2. Navigate to the **Storage Path** folder where the filing documents were created and select a filing document.

3. Click **Open**.

Microsoft Word opens the filing document.

You should see the following items:


- Square brackets around the text you defined as changeable for each policy.
- Text specific to the state, line of business or product information that you selected on the Create Filing Documents dialog.

You should not see the following:

- Bookmarks brackets indicating IStream Writer elements are attached to a piece of text.
- Text that is not specific to the state, line of business or product information that you selected on the **Create Filing Documents** dialog.

Note: The document will be displayed using the Microsoft Word view in which the original IStream Writer document was saved, for example Normal, Print Layout or Outline.

Method: Open a filing document saved to the DMS

1. To log onto the DMS, enter your **Username** and **Password** and click **Log-in**.
2. Navigate through the DMS to the filing document that you want to open.
3. Complete one of the following steps:
 - Click **Edit** next to the filing document that you want to open.
 - Next to the filing document that you want to open, click . Choose **Edit** from the list.

Note: If you click **Open** instead of **Edit**, you will be able to view the filing document, but it will be read-only.

Microsoft Word opens the filing document.

You should see the following:

- Square brackets around the text you defined as changeable for each policy.
- Text specific to the state, line of business or product information that you selected on the Create Filing Documents dialog.

You should not see the following:

- Bookmarks brackets indicating IStream Writer elements are attached to a piece of text.
- Text that is not specific to the state, line of business or product information that you selected on the **Create Filing Documents** dialog.

Chapter 5

Specification Design

This chapter describes the following topics:

- *Specification Design* on page 96
- *Applying Rules and Variables to Filing Info Elements* on page 97
- *Sections* on page 105
- *Variables* on page 112
- *Rules* on page 117
- *Tables* on page 122
- *Lists* on page 126

Specification Design

Once the Product Design tasks are complete, the Specification Design elements can be added to the IStream Writer document. These elements are focused on defining the information in the document that will be required to define the sections, variables, rules, tables and lists that will be transformed when the model document is created.

Important: The Product Designer can go back into the IStream Writer document after the Specification Designer has added new elements and incorporate any changes required by the Departments of Insurance. Once the changes are complete, the Product Designer can create new versions of the filing documents for re-submission. The Specification Design elements will be ignored when the filing documents are created and will therefore have no impact on the filing documents.

Applying Rules and Variables to Filing Info Elements

You are free to add Specification Design elements to text with Product Design element information using the **Attached Rule** and **Attached Variable** tabs on the **IStream Writer Filing Info** dialog.

Suppose you have some text that you want to show as changeable text—EMPLOYEE NAME—so you make it a Filing Info element with square brackets. When you are ready to define EMPLOYEE NAME as a variable, you do not want to overwrite the square brackets because changes may be required by the DOI and the filing documents may need to be created again. In this case, you could add an Attached Variable to display database values for EMPLOYEE NAME. Suppose you have some text that is used only for filings in California, and you apply this setting on the Main Filing Info tab. You would add an Attached Rule if some of that text should only be included if DIVORCE is “true.”

Note: Specification Design elements cannot be added to text that is already defined with Specification Design elements. For example, an element can have both filing information and an attached rule, but some text cannot have a table element and a list element at the same time.

Related Topics

- *Working with Attached Variables* on page 97
- *Working with Attached Rules* on page 100

Working with Attached Variables

You can work with Attached Variables in the following ways:

- *Contents of the Variable Name Drop-Down* on page 97
- *Adding an Attached Variable* on page 98
- *Modifying an Attached Variable* on page 99
- *Removing an Attached Variable* on page 99

Contents of the Variable Name Drop-Down

When working with Attached Variables in IStream Writer, you will notice that the **Variable Name** drop-down list contains:

- the names of all variables currently used in the document.
- the names of variables defined in the IStream Writer configuration files. These are the pre-defined variables installed with IStream Writer, and/or those that your system administrator has added.

You may also notice that the list contains variables that are no longer used in your IStream Writer document. A variable name will appear in the drop-down list until all instances of the variable have been removed from the document and the

document has been refreshed. To refresh the document, close the document and Microsoft Word. Reopen the document and the removed variable name will no longer appear in the list.

Adding an Attached Variable

An Attached Variable can easily be added to an existing Filing Info element.

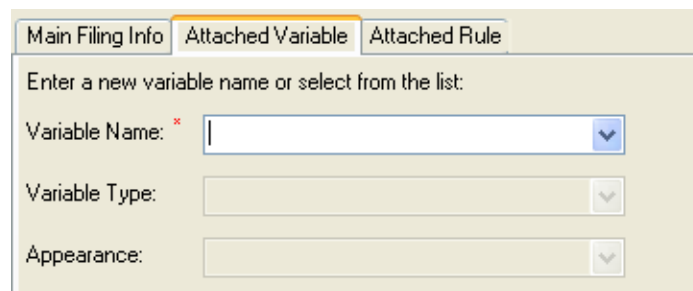
Method: Add an attached variable

1. Double-click on an existing Filing Info element in the main text area or the Writer element tree view.

The **IStream Writer Filing Info** dialog opens and the **Main Filing Info** tab is displayed.

2. Click the **Attached Variable** tab.

The **Attached Variable** tab opens.

The screenshot shows the 'Attached Variable' tab of the 'IStream Writer Filing Info' dialog. At the top, there are three tabs: 'Main Filing Info', 'Attached Variable' (which is selected and highlighted with an orange border), and 'Attached Rule'. Below the tabs, the text 'Enter a new variable name or select from the list:' is displayed. There are three input fields: 'Variable Name: *' with a text box and a dropdown arrow, 'Variable Type:' with a dropdown arrow, and 'Appearance:' with a dropdown arrow.

3. Enter a new **Variable Name** or select an existing variable from the drop-down list.

Note: When variable names are extracted to the Data Elements File, any spaces or special characters in the variable name will be changed to an underscore; letters and numbers will remain unchanged. For example, an element named “First Name” (with a space between the two words) will be extracted to read “First_Name.” In light of this restriction, if the names of two variables are the same except that one variable uses an underscore in its name and the other variable uses a space, the two variables will appear the same in the extracted Data Elements File.

4. If you added a new variable name, select the appropriate **Variable Type** from the drop-down list.

If you selected an existing variable from the drop-down list, the **Variable Type** will be defaulted as previously defined. This default cannot be changed unless all instances of elements that contain the variable are removed from the document.

5. Enter the preferred appearance for the variable in the **Appearance** field.

Note: When you select a variable from the variable drop-down list, the appearance will default to the last used appearance for that variable. If you defined a variable as

Text with the appearance of UPPER CASE, the next time you select that variable from the drop-down to apply it to another piece of text, the appearance will default to UPPER CASE.

6. Click OK.

IStream Writer attaches the new variable information to the current Filing Info element.

Modifying an Attached Variable

An Attached Variable can be modified with these steps:

Method: Modify an attached variable

1. Double-click on an existing element that contains an Attached Variable in the main text area or the Writer element tree view.

The **IStream Writer Filing Info** dialog opens and the **Main Filing Info** tab is displayed.

2. Click the **Attached Variable** tab.

The **Attached Variable** tab opens.

3. Make changes as required:

- Modifying the **Variable Name** field will create a new attached variable that will replace the existing attached variable.
- The **Variable Type** can only be modified if you are creating a new attached variable.
- The **Appearance** can be modified at any time by selecting another option from the list.

4. Click **OK**.

IStream Writer modifies the Attached Variable information for the selected element.

Removing an Attached Variable

Attached Variables can be removed in two ways:

- *Remove the attached variable only*
- *Remove the entire element*

Method: Remove the attached variable only

1. Double-click on an existing element that contains an Attached Variable in the main text area or the Writer element tree view.

The **IStream Writer Filing Info** dialog opens and the **Main Filing Info** tab is displayed.
2. Click the **Attached Variable** tab.

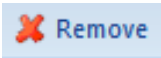
The **Attached Variable** tab opens.
3. Delete the variable name from the **Variable Name** field.

The **Variable Type** and **Appearance** fields are disabled.
4. Click **OK**.

The Attached Variable information is removed from the element. The Filing Info remains.

Method: Remove the entire element

To remove the entire element containing the Filing Info and the attached variable, complete one of the following steps:

- Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or
- Click  **Remove** on the **IStream Writer** ribbon.

IStream Writer removes the selected element from the document.

Note: The same attached variable can be used multiple times within an IStream Writer document. The variable name will appear in the **Variable Name** drop-down list until all instances of the variable have been removed from the document and the document has been refreshed. To refresh the document, close the document and Microsoft Word. Reopen the document and the removed variable name will no longer appear in the list.

Working with Attached Rules

You can work with Attached Rules in the following ways:

- *Adding an Attached Rule* on page 101
- *Modifying Attached Rules* on page 103
- *Removing Attached Rules* on page 103

Adding an Attached Rule

Including or excluding text defined with filing info, based on the result of a simple logical expression (using state name/code, LOB name/code, or product name/code by default), involves adding an attached rule.

Method: Add an attached rule

1. Double-click on an existing element that contains an Attached Variable in the main text area or the Writer element tree view.

The **IStream Writer Filing Info** dialog opens and the **Main Filing Info** tab is displayed.

2. Click the **Attached Rule** tab.

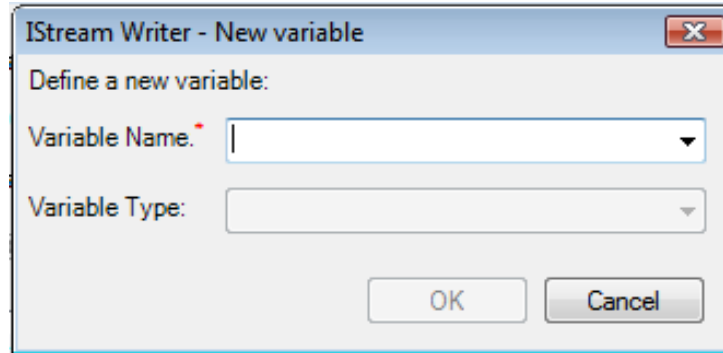
The **Attached Variable** tab opens.

The screenshot shows the 'Attached Rule' tab of the 'IStream Writer Filing Info' dialog. It features three input fields: 'Variable:', 'Operator:', and 'Value:', each with a dropdown menu and a 'New Variable' button. Below these fields are radio buttons for 'And' and 'Or', an 'Add' button, and a table with columns for 'Variable', 'Operator', and 'Value'. At the bottom, there are radio buttons for 'Include in the document' and 'Exclude from the document', and a 'Remove' button.

3. Select an existing **Variable** from the drop-down list or click **New Variable** to enter a new variable for the rule.

Note: When variable names are extracted to the Data Elements File, any spaces or special characters in the variable name will be changed to an underscore; letters and numbers will remain unchanged. For example, an element named “First Name” (with a space between the two words) will be extracted to read “First_Name.” In light of this restriction, if the names of two variables are the same except that one variable uses an underscore in its name and the other variable uses a space, the two variables will appear the same in the extracted Data Elements File.

4. If you clicked **New Variable**, the **New variable** dialog appears.



- a. Enter a **Variable Name**.
- b. Select a **Variable Type** from the list.
- c. Click **OK**.

IStream Writer displays the new variable in the **Variable Name** field.

5. Select an **Operator** from the drop-down list.
6. Enter a **Value**.

- or -

If you would like the rule condition **Value** to be based on a variable, select the **Variable** check box.


IStream Writer enables the **New Variable** button.

7. Click **New Variable** and refer to step 6.
8. Click **Add**.

The rule condition is added to the table.

9. Below the table, you have the option to specify what happens when the condition defined for the rule is met. You can
 - include the selected text in the document, or
 - exclude it from the document.

The default is to include the text when the rule condition is met. Select the appropriate radio button.

10. Additional conditions can be added to the rule that you have defined. To add another condition, enter the **Variable Name**, **Operator** and **Value** as outlined above. After the first condition is added to the rule, you have additional options:
 - **And / Or** – You can define whether the new condition is in addition to the previous condition or instead of the previous condition by choosing either the **And** or the **Or** radio button. The default is **And**.
 -  When more than one condition is added to the table, you can highlight a condition and use these buttons to move the conditions up and down within the table.

- When more than two conditions are added to the table, you can highlight two or more conditions and apply brackets around the conditions to signify order of operations:



applies brackets around the selected conditions



removes previously applied brackets from selected conditions

- Once a condition had been added to the table, you can remove it if it is incorrect by highlighting the condition and clicking **Remove**.

11. Click **OK** to incorporate all changes and add the **Attached Rule** to the existing Filing Info element.

Modifying Attached Rules

Attached Rules can be modified within the IStream Writer Filing Info dialog.

Method: Modify an attached rule

1. In the main text area or the Writer element tree view, double-click on an existing element that contains an Attached Rule.
The **IStream Writer Filing Info** dialog opens and the **Main Filing Info** tab is displayed.
2. Click the **Attached Rule** tab.
The **Attached Rule** tab opens.
3. Modify the existing **Attached Rule** information for the element.
4. Click **OK**.
IStream Writer modifies the **Attached Rule** information for the selected element.

Removing Attached Rules

Attached Rules can be removed in two ways:

- *Remove the attached rule only*
- *Remove the entire element*

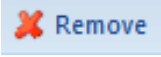
Method: Remove the attached rule only

1. In the main text area or the Writer element tree view, double-click on an existing element that contains an Attached Rule.
The **IStream Writer Filing Info** dialog opens and the **Main Filing Info** tab is displayed.

2. Click the **Attached Rule** tab.
The **Attached Rule** tab opens.
3. Select a condition within the table and click **Remove**. If applicable, repeat this step until all of the rule conditions are removed from the table.
4. Click **OK**.
The Attached Rule information is removed from the element. The Filing Info remains.

Method: Remove the entire element

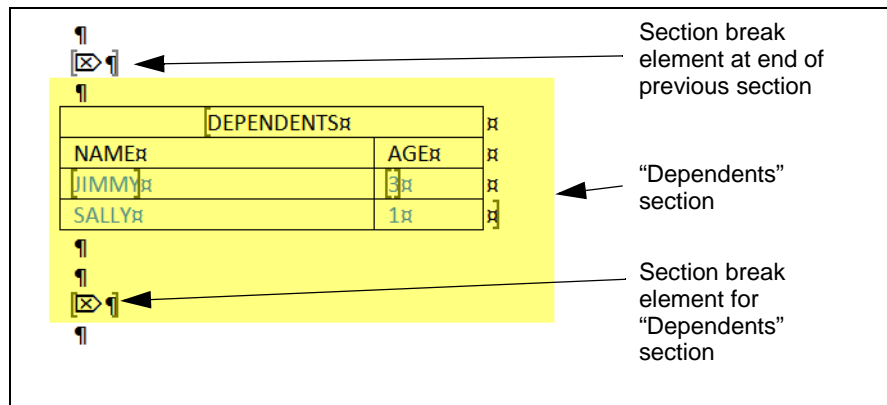
To remove the entire element containing the Filing Info and the attached rule, complete one of the following steps:

- Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or
- Click  on the **IStream Writer** ribbon.

IStream Writer removes the selected element from the document.

Sections

A model document is comprised of several sections. In most model documents, the master section and control section contain the majority of code required to properly assemble the document into a document. The other sections within the document contain the relevant text and additional code for the document. In IStream Writer, you will use section break elements to define the properties of a section by placing a section break element at the end of the text for that section.



Some important considerations when working with sections and IStream Writer section break elements:

- The length and content contained within a section is usually determined by the author and varies from document to document.
- Rules can be written to determine when a given section should be incorporated within a document.
- IStream Writer section break elements are very different from Microsoft Word section breaks.
- Sections can be shared across multiple model documents.

In IStream Writer, you are given the functionality to define where the document should be broken up into logical sections. Adding section break elements in IStream Writer will save time for the author as the document will be broken into logical sections during transformation.

IStream Writer will automatically create a master section and control section for your document during transformation. If you do not define any sections within your IStream Writer document, IStream Writer will put the entire document into one section and call it “Main.”

When defining section break elements within IStream Writer, the first section starts at the beginning of the document and ends wherever you place the first section break element. The next section will begin following the first section break element and ends at the next section break element. This continues until the entire document is broken into sections.

IStream Writer will take all information from the last section break element to the end of the document and place it in a section called “Last.”

Important: Section break elements are unique within IStream Writer as they are the only element where selection of text is not required. In fact, section break elements cannot be applied to selected text. Section names must be unique within the document or a validation warning will display. You cannot name your sections “Last” or “Control.” Since IStream Writer creates these sections automatically when a document is transformed in IStream Author, calling one of your own sections either of these names will create problems upon transformation.

You can work with sections in the following ways:

- *Adding Section Break Elements* on page 106
- *Applying Rules to a Section Break Element* on page 108
- *Modifying Section Break Elements* on page 110
- *Removing Section Break Elements* on page 110

Adding Section Break Elements

Section break elements can be added within IStream Writer by following this method.

Method: Add a section break element

1. Working from the top of the IStream Writer document, determine where you would like to add the first section break element.
2. Place your cursor in the document where you would like to insert the section break element marker. **DO NOT SELECT ANY TEXT.**
3. Click **Section Break** in the Specification Design area of the Writer ribbon.
The **IStream Writer Section** dialog opens.

4. Enter a **Section Name**.


Important: Section names must be unique within a document or a validation warning will be displayed.

5. Select one of the following options to determine when to include this section in a document:
- **Apply Model Document effective/termination date to this section** – When the model document is created, there is an option on the **New Model Document** screen to define an effective date for the model document. Selecting this option will automatically apply the effective date defined for the model document to the section you are creating.
 - **Define the dates for when to include this section** – allows you to enter an **Effective Date** and **Termination Date** for this new section which will be different from the model document effective date. If the section you are defining is a piece of legislative text that cannot be included in the document until after a certain date and the model document will be

effective prior to that date, you would select this option so that the section is only included in the model document when it becomes effective.

6. In the **Section Rules** area, select one of the following options:
 - **Include this section in the document at all times** – the section will always be included in the generated document as long as the effective and termination dates are within range. This is the default.
 - **Include this section according to the following rule** – the section will only be included in the generated document if certain rule conditions are met. For more information, see *Applying Rules to a Section Break Element* on page 108.
7. Click **OK**.

Note: The **OK** button will not be enabled if you attempt to add sections inside a table, a header, a footer, endnotes or within a text box.

IStream Writer inserts the section break element marker  into the document.

8. Scroll further down from this marker in the document to define the next section. The next section will begin just after the first section break element and incorporate all text in the document down to where you define the next section break element.
9. Repeat this process until all of the document sections are defined.

Applying Rules to a Section Break Element

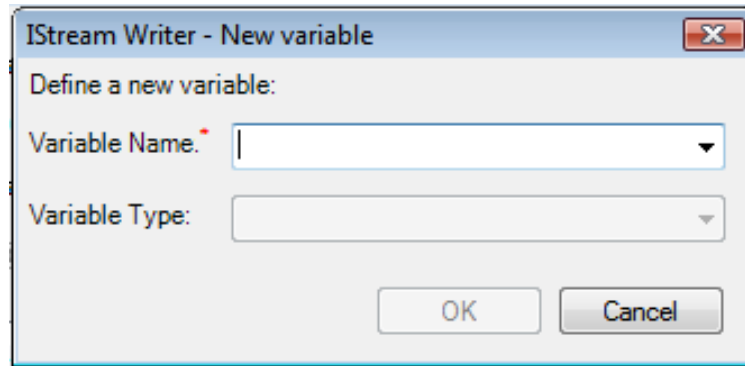
Rules can be added to a section break element to define when a section should be included in a document. For example, you may choose to not include a section about dependant coverages if the policyholder is not a parent.

The **Rules** portion of this screen functions identically to the Attached Rules and Rules tabs within the IStream Writer Filing Info dialog.

Method: Apply rules to a section break element

1. Define a new section break element as outlined in *Adding Section Break Elements* on page 106.
2. Instead of leaving the default option of **Include this section in the document at all times**, click the radio button to select **Include this section according to the following rule**.

The **Rule** portion of the dialog is enabled.
3. Select an existing variable from the drop-down list or click **New Variable** to enter a new variable for the rule.
4. If you clicked **New Variable**, the **New variable** dialog appears.



- a. Enter a **Variable Name**.

Note: When variable names are extracted to the Data Elements File, any spaces or special characters in the variable name will be changed to an underscore; letters and numbers will remain unchanged. For example, an element named “First Name” (with a space between the two words) will be extracted to read “First_Name.” In light of this restriction, if the names of two variables are the same except that one variable uses an underscore in its name and the other variable uses a space, the two variables will appear the same in the extracted Data Elements File.

- b. Select a **Variable Type** from the list.
- c. Click **OK**.
- d. IStream Writer displays the new variable in the Variable Name field.

5. Select an **Operator** from the drop-down list.
6. Enter a Value.

- or -

If you would like the rule condition **Value** to be based on a variable, select the **Variable** check box.

IStream Writer enables the **New Variable** button.

7. Click **New Variable** and refer to step 4.
8. Click **Add**.

The rule condition is added to the table.

9. Below the table, you have the option to specify whether when the condition defined for the rule is met if you would like to include the selected text in the document or exclude it from the document. The default is to include the text when the rule condition is met. Select the appropriate radio button.
10. Click **OK** or proceed to step 11.

IStream Writer attaches the new variable information to the current section.

11. Additional conditions can easily be added to the rule that you have defined. To add another condition, enter the **Variable Name**, **Operator** and **Value** as outlined above. After the first condition is added to the rule, you have additional options:

- **And / Or** – You can define whether the new condition is in addition to the previous condition or instead of the previous condition by choosing either the **And** or the **Or** radio button. The default is **And**.



- When more than one condition is added to the table, you can highlight a condition and use these buttons to move the conditions up and down within the table.
- When more than two conditions are added to the table, you can highlight two or more conditions and apply brackets around the conditions to signify order of operations:




applies brackets around the selected conditions.



removes previously applied brackets from selected conditions.

- Once a condition had been added to the table, you can remove it if it is incorrect by highlighting the condition and selecting the **Remove** button.

12. Click **OK**.

IStream Writer inserts the section marker  into the document.

Modifying Section Break Elements

Section break elements can be easily modified within IStream Writer.

Method: Modify a section break element

1. Double-click on an existing section break element in the main text area or the Writer element tree view.

IStream Writer Section dialog opens.

2. Make all required changes to the existing information.
3. Click **OK**.


IStream Writer applies all changes to the existing element.

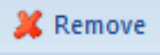
Removing Section Break Elements

Section break elements can be removed from your IStream Writer document by following this method:

Method: Remove a section break element

1. Select a section break element using one of these methods:

- In the main text area, click a section break element icon .
 - In the Element Tree, click a Section break element.
2. Complete one of the following steps:
- Right-click the selected element and select **Remove Element** from the context menu, or

- Click  on the **IStream Writer** ribbon.

IStream Writer removes the section break element from the document.

Copying and Pasting IStream Writer Section Break Elements

IStream Writer section break elements can be copied and pasted to create new section breaks within the same or different document. You can also paste the properties of a section break onto an existing section break. See *Copying and Pasting IStream Writer Elements* on page 52.

Variables

Variables are pieces of information contained in a document that are replaced with a value from the database or XML data when a document is generated. *Policy number* is an example of a variable that could be defined within IStream Writer. The policy number changes for each customer and therefore for each document. The correct information must be extracted from the data source for each customer.

There are four different types of variables that can be defined within IStream Writer:

- Text
- Numeric
- Date
- Boolean

For each variable type there are default appearance options that can be selected to determine how the information that is extracted from the data source will appear in the document.

Example: If you have a variable called Insured Name and you select the **Variable Type** of **Text** and the **UPPERCASE** appearance, when the Insured Name is extracted from the data source it will display in the document in all upper case characters (JANE DOE).

There is a list of pre-defined variables that are installed with IStream Writer:

- Line of Business Code
- Line of Business Value
- Product Code
- Product Value
- State Code
- State Value

Note: The list of pre-defined variables can be modified by your system administrator.

The IStream Writer user interface provides a user-friendly method for quickly defining variables.

You can work with variables in the following ways:

- *Contents of the Variable Name Drop-Down* on page 113
- *Adding a Variable* on page 113
- *Modifying Variables* on page 114
- *Removing Variables* on page 114
- *Copying and Pasting Variable Elements* on page 116

Contents of the Variable Name Drop-Down

When working with variables in IStream Writer, you will notice that the **Variable Name** drop-down list contains:

- the names of all variables currently used in the document.
- the names of variables defined in the IStream Writer configuration files. These are the pre-defined variables installed with IStream Writer, and/or those that your system administrator has added.

You may also notice that the list contains variables that are no longer used in your IStream Writer document. A variable name will appear in the drop-down list until all instances of the variable have been removed from the document and the document has been refreshed. To refresh the document, close the document and Microsoft Word. Reopen the document and the removed variable name will no longer appear in the list.

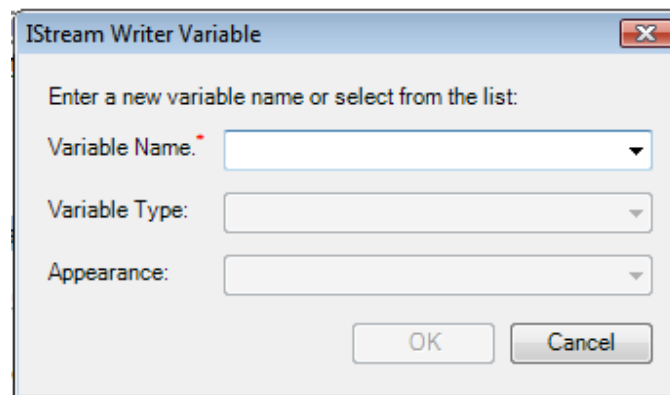
Adding a Variable

Variable can be added using the **IStream Writer Variable** dialog.

Method: Add a variable

1. Select text according to the guidelines in *Selecting Regular Text* on page 41.
2. Click **Variable** in the Specification Design section of the **Writer** ribbon.

The **IStream Writer Variable** dialog opens.



3. Enter a new **Variable Name** or select an existing variable from the drop-down list.

Note: When variable names are extracted to the Data Elements File, any spaces or special characters in the variable name will be changed to an underscore; letters and numbers will remain unchanged. For example, an element named “First Name” (with a space between the two words) will be extracted to read “First_Name.” In light of this restriction, if the names of two variables are the same except that one variable uses an underscore in its name and the other

variable uses a space, the two variables will appear the same in the extracted Data Elements File.

4. If you added a new variable name, select the appropriate **Variable Type** from the drop-down list.
5. If you selected an existing variable from the drop-down list, the **Variable Type** will be defaulted as previously defined. This default cannot be changed unless all instances of elements that contain the variable are removed from the document.
6. Enter the preferred appearance for the variable in the Appearance field.
7. When you select a variable from the variable drop-down list, the appearance will default to the last used appearance for that variable. If you defined a variable as Text with the appearance of UPPER CASE. The next time you select that variable from the drop-down to apply it to another piece of text, the appearance will default to UPPER CASE.
8. Click **OK**.

If the options are selected, IStream Writer applies bookmark brackets and Red Marching Ants to the selected text. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

Modifying Variables

Variables can be modified using the **IStream Writer Variable** dialog.

Method: Modify a variable

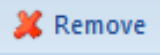
1. Double-click a variable in the main text area or the Writer element tree view.
The **IStream Writer Variable** dialog opens.
2. Modify the **Variable Name** field, if required.
This will create a new variable that will replace the existing variable.
3. The **Variable Type** can only be modified if you are creating a new variable.
4. The **Appearance** can be modified at any time by selecting another option from the list.
5. Click **OK**.

IStream Writer modifies the variable information for the selected element.

Removing Variables

An Attached Variable can be removed using the **IStream Writer Variable** dialog.

Method: Remove a variable

1. Click on an existing element that contains a variable.
2. Complete one of the following steps:
 - Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or
 - Click  on the **IStream Writer** ribbon.

IStream Writer removes the variable from the document.

Note: The same variable can be used multiple times within a IStream Writer document. The variable name will appear in the **Variable Name** drop-down list until all instances of the variable have been removed from the document and the document has been refreshed. To refresh the document, close the document and Microsoft Word. Reopen the document and the removed variable name will no longer appear in the list.

Copying and Pasting Variable Elements

Variable elements can be copied from one piece of selected text to another within a document, or from a different IStream Writer document. See *Copying and Pasting IStream Writer Elements* on page 52.

Important: You cannot paste IStream Writer element information to an element of a different type.

Rules

Rules are used to determine when information should or should not be included within a document.

For example, suppose you have some text that reads, “you are over 65 years of age, you are now eligible for...” You could use a rule to include this text only if the person over 65 years old.

Often, rules incorporate variables within them and are therefore based on information that is extracted from a data source. In the previous example, the “age” variable would be used in the rule expression “age>65.”

Rules can be very complex. The IStream Writer user interface provides you with a user-friendly means to write rules without needing to know the coding language.

IStream Writer handles many rule scenarios, but there may be instances where the rules will need to be manually coded by a user with Author after the document has been transformed. You can use Microsoft Word comments to provide a user running Author with additional details for very complicated rules.

You can work with rules in the following ways:

- *Adding Rules* on page 117
- *Adding Rules to Tables* on page 120
- *Modifying Rules* on page 120
- *Removing Rules* on page 121
- *Copying and Pasting Rule Elements* on page 121

Adding Rules

The following method describes the steps involved in adding rules.

Method: Add a rule

1. Select text according to the guidelines in *Selecting Regular Text* on page 41.
2. Click **Rule** in the Specification Design section of the **Writer** ribbon.
The **IStream Writer Rule** dialog opens.

IStream Writer Rule

Variable: **New Variable**

Operator: **New Variable**

Value: ☐ Variable **New Variable**

☒ And ☐ Or **Add** **▲** **▼** **()** **()**

...	(Variable	Operator	Value)

Then: ☒ Include in the document ☐ Exclude from the document **Remove**

OK **Cancel**

3. Select an existing variable from the drop-down list or click **New Variable** to enter a new variable for the rule.
4. If you clicked **New Variable**, the **New Variable** dialog appears.

IStream Writer - New variable

Define a new variable:

Variable Name: **▼**




Variable Type: **▼**

OK **Cancel**

- a. Enter a **Variable Name**.

Note: When variable names are extracted to the Data Elements File, any spaces or special characters in the variable name will be changed to an underscore; letters and numbers will remain unchanged. For example, an element named “First Name” (with a space between the two words) will be extracted to read “First_Name.” In light of this restriction, if the names of two variables are the same except that one variable uses an underscore in its name and the other variable uses a space, the two variables will appear the same in the extracted Data Elements File.

- b. Select a **Variable Type** from the list.

- c. Click **OK**.
- d. IStream Writer displays the new variable in the **Variable Name** field.
5. Select an **Operator** from the drop-down list.
6. Enter a Value.
- or -
- If you would like the rule condition **Value** to be based on a variable, select the **Variable** check box.
- IStream Writer enables the **New Variable** button.
7. Click **New Variable** and refer to step 5.
8. Click **Add**.
- The rule condition is added to the table.
9. Below the table, you have the option to specify whether when the condition defined for the rule is met if you would like to include the selected text in the document or exclude it from the document. The default is to include the text when the rule condition is met. Select the appropriate radio button.
10. Click **OK**.
- IStream Writer attaches the new variable information to the current Filing Info element.
11. Additional conditions can be added to the rule that you have defined. To add another condition, enter the **Variable Name**, **Operator** and **Value** as outlined above. After the first condition is added to the rule, you have additional options:
 - **And / Or** – You can define whether the new condition is in addition to the previous condition or instead of the previous condition by choosing either the And or the Or radio button. The default is And.
 -  When more than one condition is added to the table, you can highlight a condition and use these options to move the conditions up and down within the table.
 - When more than two conditions are added to the table, you can highlight two or more conditions and apply brackets around the conditions to signify order of operations:
 -  applies brackets around the selected conditions.
 -  removes previously applied brackets from selected conditions.
 - Once a condition had been added to the table, you can remove it if it is incorrect by highlighting the condition and selecting the **Remove** button.
 - Click **New**.

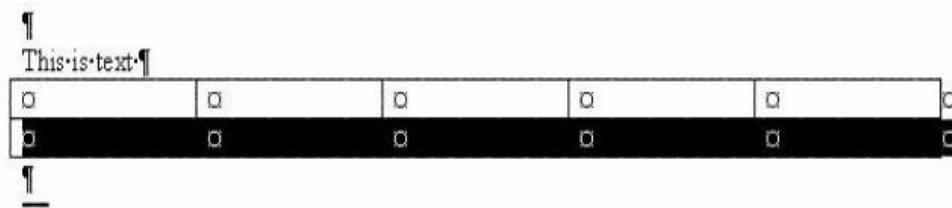
If the options are selected, IStream Writer applies bookmark brackets and Red Marching Ants to the selected text. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

Adding Rules to Tables

Rules are added to tables in the same way that rules are added to other document text. For more information, see *Adding Rules* on page 117.

You can add a rule to a single cell, a single row, or a multiple rows within a table. When adding rules to a table, there are a few special considerations:

- A rule can only span complete table rows. For example, a rule can apply to one, two, or four complete rows. A rule cannot apply to half a row, one and a half rows, or three and a half rows.
- A rule in a table cell must not span multiple paragraphs.
- Be careful when modifying the structure of a table with a rule applied to it. If you need to add or delete table rows or columns, you should remove all elements applied to your table, including rules, make your changes, and create new elements for the modified table.
- If the table is defined as an IStream Writer element, a rule cannot apply to both the header row and the rows that follow within the body of the table. For example, if the first row is the header row on a IStream Writer table, you cannot add a rule that applies to both the first and second row. For more information on IStream Writer tables, see *Tables* on page 122.
- If you want to add a rule to a row on a table, ensure that you select the entire row, including the symbol at the end of the row. For a visual example, refer to the picture below:



Modifying Rules

Rules can be modified within the IStream Writer dialog.

Method: Modify a rule

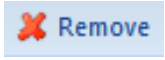
1. Double-click a rule in the main text area or the Writer element tree view.
The **IStream Writer Rule** dialog opens.
2. Modify the existing **Rule** information for the element.
3. Click **OK**.

IStream Writer modifies the **Rule** information for the selected element.

Removing Rules

Rules can be removed if required.

Method: Remove a rule

1. Click on an existing element that contains a rule.
2. Complete one of the following steps:
 - Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or
 - Click  on the **IStream Writer** ribbon.

IStream Writer removes the rule from the document.

Important: Do not apply rules to images or objects within IStream Writer. The image will be replaced by a small rectangle within the rule in IStream Author. For images that are dependent on rules for inclusion in the model document, position the image on a separate line and create a rule for that line.

Copying and Pasting Rule Elements

Rule elements can be copied from one piece of selected text to another within a document, or from a different IStream Writer document. See *Copying and Pasting IStream Writer Elements* on page 52

Important: When you copy and paste a rule from another IStream Writer document, any variables that you created specifically for that rule in the other document will not be updated in the variables list in your current document. To update the variables list, exit from Microsoft Word and then reopen the document. The variable list will be updated. If you extract the DEF prior to updating the variables list, the DEF will contain the new rule-specific variables.

Tables

Microsoft Word tables can exist within a IStream Writer document as part of the normal text of the document as long as the table does not contain rows of variable information.

If the information within the table includes rows of variable information, the table must be defined using an IStream Writer table element. For example, a table that has a row of variable information for each beneficiary would need to be defined as an IStream Writer table. At a high level, the steps involved in defining an IStream Writer table are as follows:

1. Select a table and define in IStream Writer that it is a table.
2. Define the information for the repeating rows.
3. Define all variable and rule information that should be contained within the cells of the table.

When defining an IStream Writer table, you need to be very precise about selecting the table with your cursor. For more information, see *Selecting Tables* on page 44.

The following are important considerations to adhere to when working with tables:

- Tables cannot contain merged cells. If your table contains merged cells you will get the following message when the document is transformed:
“Transformation failed with exception. Could not import IStream Writer Specification Document.”
- Variables can only be added to a single cell of a table. Variables that span multiple cells are not allowed.
- You can add a rule to a single cell, single row, or multiple rows within a table. For more information, see *Adding Rules to Tables* on page 120.

You can work with tables in the following ways:

- *Adding Rules to Tables* on page 120
- *Adding Table Elements* on page 122
- *Modifying Table Elements* on page 124
- *Removing Table Elements* on page 125

Adding Table Elements

Tables can be easily defined within IStream Writer.

Method: Add an IStream Writer table element

1. Select a Microsoft Word table within your document according to the information detailed in *Selecting Tables* on page 44.

2. Click **Table** in the Specification Design area of the Writer ribbon.

The **IStream Writer Table** dialog opens. IStream Writer displays the number of rows in the currently selected table.

Select the entire table in the document. Indicate the number of unique header rows and the number of unique rows that contain repeating information in the table.

Table Description:

The number of rows in the selected table is 2.

Number of unique heading rows: 0

Number of unique rows with repeating information: 1

Example - One heading row and one unique row with repeating information

Dependent Name	Relationship	Age
Mary	Spouse	35
Jane	Child	7

OK Cancel

3. Enter a **Table Description**. This description appears in the Data Elements File and can be used to provide the database analyst with additional information regarding the table.
4. Define the **Number of unique heading rows** for the table. In most cases there will be one heading row, but there may be cases where multiple rows of information are required as heading rows.
5. Define the **Number of unique rows with repeating information**. In most cases there will be one repeating row, but there may be cases where multiple rows of information are required to repeat.

Example 1 – One heading row with one row of repeating information:

Make	Model	VIN
Toyota	Camry	154254FJJGJGI4G44G

Example 2 – Two heading rows with two rows of repeating information:

First Name	Last Name	License Number
	Vehicle Number	Status
Joe	Smith	5859585757494
	3	Primary
Jane	Smith	9458498594585
	2	Secondary

6. Click **OK**.

If the options are selected, IStream Writer applies bookmark brackets and Red Marching Ants. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

Make	Model	VIN
Toyota	Camry	154254FJJGJG14G44G
Toyota	RAV4	JJGJGJ14511565454D4

- 7.** Click within the table and select text within a cell. Variables and rules can be added to the text within the table. However, these elements must be contained within a single cell. Rule and variable elements cannot span multiple cells, rows or columns.
- 8.** Define the text within the table as either a rule or variable for all cells within the repeating rows. For more information, see *Contents of the Variable Name Drop-Down* on page 113 and *Add a rule* on page 117.

The table is defined in IStream Writer.

Note: To ensure the column widths are preserved in your model documents, open the **Table Properties** dialog, click the **Table** tab, click **Options**, and ensure the **Automatically resize to fit contents** check box is clear.

Modifying Table Elements

You can use the IStream Writer Table dialog to make changes to a table element. However, if you want to modify your table's structure, you should remove all IStream Writer elements (including the IStream Writer table definition) for the table, change the table, and add new IStream Writer elements to the modified table.

Important: Do not add or delete rows and columns in a table that has one or more IStream Writer elements applied to it, including an IStream Writer table element definition, variables, rules and Filing Info. You should remove all IStream Writer elements, modify the table structure, and add new IStream Writer elements as necessary. For more information on removing and adding IStream Writer table elements, see *Removing Table Elements* on page 125 and *Adding Table Elements* on page 122.

Method: Modify a table element

1. Double-click a table element in the main text area or Writer element tree view.

The **IStream Writer Table** dialog opens.

2. Modify the **Table description**. This description appears in the Data Elements File and can be used to provide the database analyst with additional information regarding the table.
3. Click **OK**.

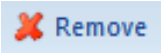
IStream Writer modifies the table information for the selected element.

Removing Table Elements

Table elements can be removed with this method.

Method: Remove a table

1. Click on a table that contains an existing IStream Writer Table element.
2. Complete one of the following steps:
 - Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or

- Click  on the **IStream Writer** ribbon.

IStream Writer removes the table element from the document.

Note: If you need to remove an IStream Writer table element to make changes to the number of rows, when you remove the Table element, the variable and rule elements within the table will not be removed. You should also remove other IStream Writer elements before you modify the table's structure.

Lists

Dynamic lists are often used within documents. There are two types of lists that can be defined in IStream Writer:

- single-line list
- multi-line list

Single-line lists are used to display a list of information in a string that is separated by punctuation and includes a final separator (such as *and*). The number of items that appear in the list will depend on values found in the database.

Example: The insured's children: John, James, Jeffrey and Jessica

Multi-line lists are used to display items that may appear as a bulleted list such as vehicles on a policy.

Example: The following vehicles are covered under this policy:

- 2004 Toyota Rav4 HDJK898D7F87987DD
- 2002 Toyota Camry KDFJDK0989895498G

You can work with lists in the following ways:

- *Adding Single-Line Lists* on page 126
- *Adding Multi-Line Lists* on page 128
- *Modifying Lists* on page 131
- *Removing Lists* on page 132
- *Copying and Pasting List Elements* on page 132

Adding Single-Line Lists

Single-line lists can be added to your document with this method:

Method: Add a single-line list

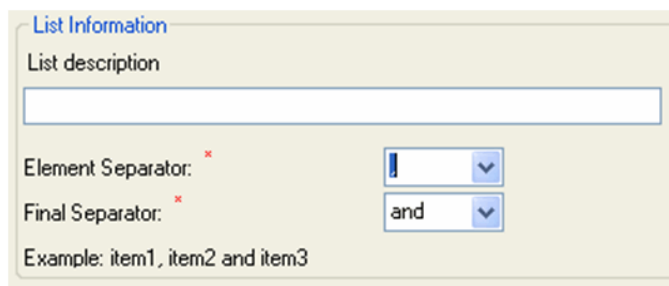
1. Create a sample of what the list will look like in your document.

Example: Child name (Age), Child name (Age) and Child name (Age)

Note: The number of entities in your sample list is not significant. The number of items that appear in the populated list will depend on entries in the database. Although this example shows "Child name (Age)" three times, The populated list might only show one child and their age.

2. Select the entire list.
3. Click **List** on the Writer ribbon.

The **IStream Writer List** dialog opens.



List Information

List description

Element Separator: *

Final Separator: *

Example: item1, item2 and item3

4. Enter a **List description**. This description appears in the Data Elements File and can be used to provide the database analyst with additional information regarding the list.
5. Select an **Element Separator** from the drop-down list or enter a custom separator.
6. Select a **Final Separator** from the drop-down list or enter a custom separator.
7. Click **OK**.

If the options are selected, IStream Writer applies bookmark brackets and Red Marching Ants around the selected list. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

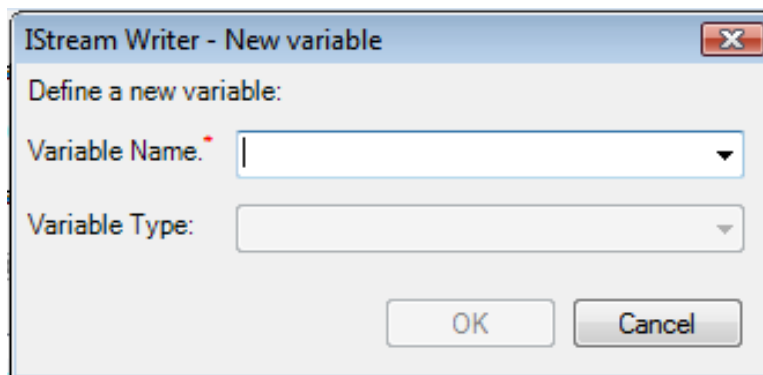
Once the list element has been created, it is necessary to define the variable information within the list.

8. Highlight the first variable in the list.

Example:

Child name (Age), Child name (Age) and Child name (Age)

9. Click **Variable** in the Specification Design section of the **Writer** ribbon. The **IStream Writer Variable** dialog opens.



IStream Writer - New variable

Define a new variable:

Variable Name: *

Variable Type:

OK Cancel

10. Enter a new variable name in the **Variable Name** field or select an existing variable from the drop-down list.

Important: When variable names are extracted to the Data Elements File, any spaces in the variable name will be changed to an underscore. Therefore, an element named

“First Name” will be extracted to read “First_Name”. When naming variables do not make the only difference between the variable names a space or underscore or they will appear the same in the extracted Data Elements File.

11. If you added a new variable name, select the appropriate **Variable Type** from the drop-down list.

If you selected an existing variable from the drop-down list, the **Variable Type** will be defaulted as previously defined. This default cannot be changed unless all instances of elements that contain the variable are removed from the document.

12. Enter the preferred appearance for the variable in the **Appearance** field.

Note: When you select a variable from the variable drop-down list, the appearance will default to the last used appearance for that variable. If you defined a variable as Text with the appearance of UPPER CASE. The next time you select that variable from the drop-down to apply it to another piece of text, the appearance will default to UPPER CASE.

13. Click **OK**.

If the options are selected, IStream Writer applies bookmark brackets and Red Marching Ants to the selected text. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

14. Define the next variable in the list.

Example: Child name (Age), Child name (Age) and Child name (Age)

15. Repeat steps 9 to 13 to define the variable.
16. If there are additional variables within the list you are working with, continue to define them until the variable information for the list is complete.

Important: Only define the repeating variable information in the list once. This information will be used to define the repeating information in the list.

Example: [Child name (Age), Child name (Age) and Child name (Age)]

When the list element has been applied and the variable information has been defined for each piece of variable text within the first repeating section, the list definition for IStream Writer is complete.

Adding Multi-Line Lists

A multi-line list element can be defined by following this method:

Method: Add a multi-line list

1. Create a sample of what the list will look like in your document.

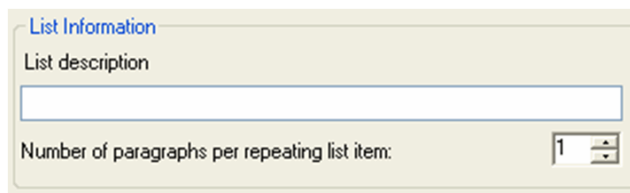
Example:

Child name (Age)

Note: Even though the sample list you type has only one line, the number of items that appear in the populated list will depend on entries in the database.

2. Select the entire list.
3. Click **List** on the Writer ribbon.

The **IStream Writer List** dialog opens.



4. Enter a **List description**. This description appears in the Data Elements File and can be used to provide the database analyst with additional information regarding the list.
5. Define the number of paragraphs per repeating list item. In the example above, there is one paragraph for the repeating list item. However, you may have a list that contains multiple lines of text that repeat.

Tip: Turn on the paragraph markers (¶) to determine how many paragraphs repeat in your list.

Example:

```
Child·name·(Age)¶
Street·Address,·City,·State,·Zip¶
¶
```

In this example, there are three paragraphs for each repeating item in the list.

6. Click **OK**.

If the options are selected, IStream Writer applies bookmark brackets and Red Marching Ants around the list. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

7. Once the list element has been created, it is necessary to define the variable information within the list. Highlight the first variable in the list.

Example:

```
Child name (Age)
Child name (Age)
Child name (Age)
```

8. Click **Variable** on the Writer ribbon.

The **Variable** dialog opens.

9. Enter a new variable name in the **Variable Name** field or select an existing variable from the drop-down list.

Important: When variable names are extracted to the Data Elements File, any spaces in the variable name will be changed to an underscore. Therefore, an element named “First Name” will be extracted to read “First_Name”. When naming variables do not make the only difference between the variable names a space or underscore or they will appear the same in the extracted Data Elements File.

10. If you added a new variable name, select the appropriate **Variable Type** from the drop-down list.
11. If you selected an existing variable from the drop-down list, the **Variable Type** will be defaulted as previously defined. This default cannot be changed unless all instances of elements that contain the variable are removed from the document.
12. Enter the preferred appearance for the variable in the Appearance field.

Note: When you select a variable from the variable drop-down list, the appearance will default to the last used appearance for that variable. If you defined a variable as Text with the appearance of UPPER CASE. The next time you select that variable from the drop-down to apply it to another piece of text, the appearance will default to UPPER CASE.

13. Click **OK**.

If the options are selected, IStream Writer applies bookmark brackets and Red Marching Ants to the selected text. For more information, see *Settings* on page 36 and *Highlight Elements* on page 37.

14. Define the next variable in the list.

Child name (Age)

Child name (Age)

Child name (Age)

15. Repeat steps 9 to 13 to define the variable.
16. If there are additional variables within the list you are working with, continue to define them until the variable information for the list is complete.

Important: Only define the variable information in the list once. This information will be used to define the repeating information in the list.

[Child name] (Age)

[Street Address, City, State, Zip code]

[]

[Child name (Age)]

[Street Address, City, State, Zip code]

[]

[Child name (Age)]

[Street Address, City, State, Zip code]

Note: This example shows three multi-line entries, but it is not necessary to type more than one. Remember, the number of items that appear in the populated list will depend on entries in the database.

17. When the list element has been applied and the variable information has been defined for each piece of variable text within the first repeating section, the list definition for IStream Writer is complete.

Modifying Lists

Lists can be modified within the IStream Writer List dialog. However, if you need to change the number of paragraphs that are selected, it is highly recommended that you remove the existing IStream Writer list element, modify the paragraphs, and then add a new IStream Writer list element for the modified list.

Important: Do not add or delete paragraphs in a list that has an IStream Writer element applied to it. Remove the IStream Writer list element and add a new IStream Writer list element. For more information, see *Removing Lists* on page 132, *Adding Single-Line Lists* on page 126 and *Adding Multi-Line Lists* on page 128.

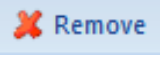
Method: Modify a list

1. Double-click an existing IStream Writer list element applied.
The **IStream Writer List** dialog opens.
2. Modify the **List description**. This description appears in the Data Elements File and can be used to provide the Database Analyst with additional information regarding the list.
3. Click **OK**.
IStream Writer modifies the list information for the selected element.

Removing Lists

Lists can easily be removed in IStream Writer.

Method: Remove a list

1. Click on an existing IStream Writer list element in the main text area or the Writer element tree view.
2. Complete one of the following steps:
 - Right-click the element in the Writer element tree view and select **Remove Element** from the context menu, or
 - Click  on the **IStream Writer** ribbon.

IStream Writer removes the selected list element from the document.

Note: Removing an IStream Writer list element will not remove the variable elements defined within the list.

Copying and Pasting List Elements

List element info can be copied from one list element and pasted to another list element or to a list without IStream Writer info within a document or between different IStream Writer documents. See *Copying and Pasting IStream Writer Elements* on page 52.

When you paste a list that was copied from another IStream Writer document, any variables that you created specifically for that rule in the other document will not be updated in the variables list of your current document. To update the variables list, exit from Microsoft Word and then reopen the document. The variable list will be updated. If you extract the DEF prior to updating the variables list, the DEF will contain the new rule specific variables. After copying and pasting the list element, you will need to adjust the properties of the new list, if necessary, and to define (or copy and paste) the variables in your new list.

After copying, all variables defined within the list must be individually copied and pasted to the new list element. For more information, see *Copying and Pasting Variable Elements* on page 116.

Chapter 6

The Data Elements File

This chapter describes the following topics:

- *The Data Elements File* on page 134
- *Extracting the Data Elements File* on page 135
- *Merging Data Elements Files* on page 136

The Data Elements File

The Data Elements File (DEF) is an XML file that is a key component in the transformation of IStream Writer documents to IStream Author modules. This file is like a map that tells the IStream transformation component where to look for information during the transformation process.

The DEF can be extracted from your IStream Writer document at any time during the IStream Writer element definition process. This file contains a template populated with the Variable Names and Variable Types for all variables defined within an IStream Writer document.

The DEF template provides the required data structure for the transformation. Within the structure of the DEF there are places for the database analyst to complete the following information:

Query Information

- Reference name
- InfoSource name
- Ordinal
- Whether the query is repeatable or not
- SQL statement

Element Information

- SpecName (defaulted during extraction)
- SpecType (defaulted during extraction)
- Query Reference
- Variable name
- Whether the variable is Key data or not
- Field Type
- Separator
- Ordinal
- Database Table Name

Note: For more detailed information on the Data Elements File, how to properly map it and examples of completed DEFs, please refer to the *IStream Writer Administrator's Guide*.

Extracting the Data Elements File

The Data Elements File can be extracted any time you have an IStream Writer document open. The DEF is specific to the document that it is extracted from. If there are no variables defined within your document when you extract the DEF, the file will still be created as a template.

Method: Extract the Data Elements File

1. On the **IStream Writer** ribbon, click **Extract DEF**.

If you have DMS access enabled:

The **Extract Data Elements File** dialog opens.

2. If you want to save the DEF to the file system, select the **File System** radio button. To save the DEF to the DMS, select the **DMS** radio button.
3. Click **Browse** next to the **File Path** field, and navigate to where you would like to save the DEF.

Note: The default DMS storage path (indicated by a \ in the **Save in** field) is the **Location** specified under the **DMS Configuration** tab within **Writer Options**.

4. Enter a **File name** for the DEF.
5. Click **Save**.
6. Click **OK**.

IStream Writer displays a message to inform you that the Data Elements File was created or updated successfully.

The DEF can now be sent to the Database Analyst for mapping. For more information on how to map the DEF, please see the *IStream Writer Administrator's Guide*.

If you do not have DMS access enabled:

The **Save as** dialog opens.

2. Browse through the file system to where you want to save the DEF.
3. Enter a **File name** for the DEF.
4. Click **Save**.

IStream Writer displays a message to inform you that the Data Elements File was created or updated successfully.

The DEF can now be sent to the Database Analyst for mapping. For more information on how to map the DEF, please see the *IStream Writer Administrator's Guide*.

Merging Data Elements Files

If additional variables are added to your IStream Writer document after you have extracted a DEF from your IStream Writer document and begun the process of completing the DEF mapping, you can perform a merge of a new DEF version with the previous DEF version.

Method: Merge Data Elements Files

1. On the **IStream Writer** ribbon, click **Extract DEF**.
The **Extract Data Element File** dialog opens.
2. Navigate to the folder in the file system or in the DMS where the existing DEF is stored.
3. Click the existing DEF that has been mapped or partially mapped to highlight it, then click **Save**. Click **OK**.

IStream Writer merges the two DEFs together. One of the following happens:

- IStream Writer displays a message to inform you that the Data Elements File was created or updated successfully. Click **OK**.
- IStream Writer displays the **Document Validation Warnings** dialog to inform you of any mismatches between elements that currently exist in the DEF, and those that were changed in the mapped version. Review the messages and click **OK** or **Save Log** to save a copy of the warnings to a Text file.

The revised DEF can now be mapped.

Chapter 7

Authoring with IStream Writer Documents

This chapter describes how you can use IStream Author with IStream Writer documents, and describes the following topics:

- *Authoring IStream Writer Documents* on page 138
- *Transforming Writer Documents within IStream Writer* on page 140
- *Transforming IStream Writer Documents Within IStream Author* on page 143
- *Re-importing IStream Writer Documents into IStream Author* on page 152
- *Transformation Failures* on page 159
- *Reviewing the Model Document and Model Document Outline* on page 160

Authoring IStream Writer Documents

IStream Writer allows the majority of code for a model document to be defined from a user-friendly interface without knowing the coding language. Once the work in IStream Writer is completed, the Data Elements File (DEF) is extracted and mapped. The completed IStream Writer document and mapped DEF are sent to IStream Author for transformation.

During transformation, the majority of the information in the IStream Writer document is transformed from the defined IStream Writer elements into code. It is then necessary for the author to complete any complex coding in the model document that could not be handled by IStream Writer.

Important Considerations

The following are items to consider before transforming your IStream Writer Specification Document in IStream Author:

Writer Options

The **Writer Options** on the IStream Author workstation should be identical to the **Writer Options** on the Specification Designer's workstation. When all work is completed on the Specification Designer's workstation, copy the `UserPreferences.config` file to the IStream Author workstation.

In Windows XP, the `UserPreferences.config` file is located in `C:\Documents and Settings\username\Application Data\Skywire Software`.

Note: You must select **Show Hidden files and folders** in your folder settings to see these folders.

In Vista, `UserPreferences.config` file is located in `C:\users\username\AppData\roaming\Skywire Software\IStream Writer`.

Default File Repository

The location of the default file repository and the method for changing it is determined by your system setup.

- On systems with the Author application installed, you can change the Writer default file repository from the Author options screen.
- On systems with the Author add-in (but without the Author application), you can change the Writer default file repository on the Repository tab of the Author Options dialog.

Microsoft Word Section Breaks

Microsoft Word section breaks must not be positioned directly above IStream Writer elements that span one paragraph or more, or directly above IStream Writer Table elements. Otherwise, your Microsoft Word section breaks may not

be carried through into the model document. To address this issue, insert a hard carriage return (¶) between the section break and the IStream Writer element.

Example:

Unacceptable

.....Section Break (Continuous).....

Dependent Name	Dependent Age
Joe	7
Sally	12

Acceptable

.....Section Break (Continuous).....

¶

Dependent Name	Dependent Age
Joe	7
Sally	12

Transforming Writer Documents within IStream Writer

You can transform IStream Writer documents into model documents in two different ways:

- *Creating a Model Document from an IStream Writer Document* on page 140
- *Reimporting an IStream Writer Document into a Model Document* on page 141

Note: The first time you perform a transformation with Vista and Word 2007, you may receive a security alert from your local software firewall (for example, the Windows firewall). Add the program to the exceptions list (with Windows firewall, click **Unblock**) to stop these messages from appearing for future transformations.

Creating a Model Document from an IStream Writer Document

You can create a new model document from an IStream Writer document using the Transformation Wizard.

Note: To perform transformation from within IStream Writer, you require IStream Document Manager 6.1 or later to be installed.

Method: Creating a model document from an IStream Writer document

1. Ensure an IStream Writer document is open.
2. In the **Authoring** area of the IStream Writer ribbon, click **Transformation Wizard**.
3. In the **Step 1** screen, select whether you want to create a **Traditional Model Document** or a **Model Document Outline**.
4. Click **Next**.
5. In the **Step 2** screen, enter a **Name** and optional **Description**.
6. Enter an **Effective Date** and **Termination Date** if necessary.
7. Select a **Data Elements File**. Use the **DMS** button (if available) to browse the DMS or **File System** button to browse the file system.
8. Select **Remove “[]” during transformation** to remove all square brackets from the document that were added as part of IStream Writer elements. If this option is cleared, then the square brackets from the IStream Writer elements will appear in the model document.

9. To remove DOI Instruction elements from the model document, select the **Remove DOI instructions during transformation** check box. If you clear this check box, DOI Instruction elements will be included in the model document as comments.
10. You can attach a template (.DOT file) to the outline. All sections under the outline will use the template.
The template must be in the local file system:
 - a. Click the **Attach Template** check box.
 - b. Click the browse arrow to navigate to the template to be attached.
 - c. Select the template and click **Open**.
11. Click **Next**.
12. In the **Step 3** screen, enter the location to save the model document in the **File Path**. Click **Browse** to select a location.
13. Select whether you want to:
 - **Open Model Document in Author when Transformation completes**
 - **Generate Model Document after Transformation completes**
14. Click **Finish**.
The **Transforming Specification Document** dialog box opens.
15. To cancel the transformation, click **Cancel**. Note that you cannot cancel the transformation process after a certain point.
16. After the transformation is complete, click **Close** to close the dialog, or click **Save Log** to save the warning messages to a file.
The model document has been transformed into an IStream Writer document.

Reimporting an IStream Writer Document into a Model Document

You can reimport an IStream Writer document into an existing model document. In the process, the IStream Writer document will be transformed into a model document.

Method: Reimport an IStream Writer document into a model document

1. Ensure an IStream Writer document is open.
2. In the **Authoring** area of the IStream Writer ribbon, click **Transformation Wizard**.
3. In the **Step 1** screen, select **Re-Import Existing Model**.
4. Click **Next**.

5. In the **Step 2** screen, click **Browse...** to enter the **File Path** of the model document which you want to import the IStream Writer document into.
6. Click **Next**.
7. Enter an **Effective Date** and **Termination Date** if necessary.
8. Select a **Data Elements File**. Use the **DMS** button (if available) to browse the DMS or **File System** button to browse the file system.
9. Select whether you want to:
 - **Open Model Document in Author when Transformation completes**
 - **Generate Model Document after Transformation completes**
10. Click **Finish**.

The **Transforming Specification Document** dialog box opens.
11. To cancel the transformation, click **Cancel**. Note that you cannot cancel the transformation process after a certain point.
12. In the **Section to Import** dialog box, select the check boxes in the **Import** column for the sections that you want to reimport.
 - Click **Select All** to select all the sections.
 - Select if you want to **Display only new and updated sections**.
13. Click **OK**.
14. After the transformation is complete, click **Close** to close the dialog, or click **Save Log** to save the warning messages to a file.

The IStream Writer document has been reimported into a model document.

Transforming IStream Writer Documents Within IStream Author

There are two ways to transform an IStream Writer document with IStream Author:


- *Transforming an IStream Writer Document into a Model Document* on page 143
- *Transforming an IStream Writer Document into a Model Document Outline* on page 148

Transforming an IStream Writer Document into a Model Document

You can use IStream Author to transform an IStream Writer document and DEF into a model document.

Important: The DEF must be extracted prior to transformation.

Method: Transform an IStream Writer document into a model document

1. Open **IStream Author**.
2. Click **File > New Model Document**, or click  on the toolbar.
The **New Master Section** dialog opens.

Give the model document a **Name**. (Master section name and model document name are the same.)



The name can be up to 254 characters long. However, names longer than 128 characters do not appear in the **Most Recently Used** list on the **File** menu.



Warning: Use only letters and numbers and do not use spaces or special characters (such as ? : / ' or -) because this can cause problems when generating the model document.

3. Optionally enter a **Description**. This will appear as part of the document's properties.
4. Enter an **Effective Date** if necessary. The default is the current system date.
5. Enter a **Termination Date** if necessary. The default is blank, meaning that this section is effective indefinitely.

Effective and termination dates control when certain sections will be used during assembly. For more information, see *Using Effective and Termination Dates* on page 165.

6. Do *not* select the **Text Only Section** check box.
7. Click the radio button next to **Import**.

The  and the  buttons next to the **Import** field are enabled. These buttons enable you to import a IStream Writer document from the file system or from another document storage repository, like a DMS.



8. To choose a IStream Writer document to import, complete one of the following steps:
 - To import an IStream Writer document from the file system, click  next to the **Import** field.
 - To import an IStream Writer document from a repository, such as a DMS, click the  button next to the **Import** field. If the repository that you want is not shown in the **Open** dialog, you can click the **Repository...** button to select a different repository.
9. Navigate to the IStream Writer document that you would like to transform.
10. Select the IStream Writer document and click **Open**.





Note: If you are importing an IStream Writer Document from a DMS, you must at least have *Reserve* permissions on the document. If you do not have the appropriate access permissions, you will receive a message asking you to make sure that the document is not in use or read-only. If this occurs, ask your DMS administrator to change your permissions to give you access to the file that you need.

11. Select **Import** to import an existing Microsoft Word .DOC file that contains IStream Writer elements.

The system will select the **Data Elements File** check box, but note that this check box will be grayed out. If required, see *System Does Not Select DEF Checkbox in IStream Author* on page 69 in the *IStream Writer Writer Administrator's Guide* for troubleshooting information.

Note: If this check box does not appear on your screen, the IStream Writer upgrade for IStream Author was not successfully installed. Please contact your system administrator.

The  and the  buttons next to the **Document** field become enabled. These buttons enable you to import a document from the file system or from another document storage repository, like a DMS.

12. Complete one of the following steps:
 - To import a document from the file system, click  next to the **Document** field.
 - To import a document from a repository, such as a DMS, click the  button next to the **Document** field. If the repository that you want is not shown in the **Open** dialog, you can click the **Repository...** button to select a different repository.
13. Navigate to the document that you would like to use in the transformation.
14. Select the document and click **Open**.
15. Select the **Data Elements File** required using the  and the  buttons next to the **Data Elements File** field, and click **Open**.

Note: If you are importing the Data Elements File from a DMS, you must at least have Reserve permissions on the file. If you do not have the appropriate permissions, you will receive a message asking you to make sure that the file is not in use or read-only. If you have this problem, ask your DMS administrator to change your permissions to give you access to the file that you need.

16. Ensure that the **Remove “[]” during transformation** check box is selected to remove all square brackets from the document that were added as part of IStream Writer elements. If this option is deselected, the square brackets from the IStream Writer elements will appear in the model document.
17. If you want to remove DOI Instruction elements from the model document, ensure that you select the **Remove DOI instructions during transformation** check box. If you clear the check box, DOI Instruction elements will be included in the model document as comments.
18. You can attach a template (.DOT file) to the master section. All sections under this section will use the template.

The template must be in the local file system:

- a. Click the **Attach Template** check box.
 - b. Click the browse arrow to navigate to the template to be attached.
 - c. Select the template and click **Open**.
19. Click **OK**.
The **InfoSource Save As** dialog opens.
 20. Select the appropriate InfoSource where you would like to store the new model document.
 21. Enter a **Name** for the model document and click **Save**.

Note: If you name your model document **My Model**, a folder with the same name will be created and the document will be stored within that folder.

Example: C:\MODELS\My Model\CMS\My Model\CMS

22. The **Transforming Specification Document** dialog opens. This dialog displays the details and progress of the transformation. Any errors or warnings will be displayed here, but the transformation will continue regardless of any errors or warnings.

To cancel the transformation, click **Cancel**. Note that you cannot cancel the transformation process after a certain point.

Tip: If a *Transformation failed with exception* message appears, you need to make a copy of the current log file. See *Transformation Failures* on page 159.

Example: If a variable was added to the IStream Writer document and the DEF was not updated through the Extract DEF function, you will see something similar to the following text in the **Transforming Specification Document** dialog.

```
Transformation started ...  
Validating source document
```

```
Validation completed without errors
Creating Control Section
Control Section Created
Creating Section "Main"
Warning: variable "var1" is not defined in the DEF
Section Created
Creating Master Section
Master Section Created
Transformation completed.
```

The model document will be created and the undefined variable will appear in the section as follows:

TEXT

Newborn children also include Your foster child(ren) and the foster child(ren) of <Writer_UNDEFINED_VARIABLE(Spouse)>. A foster child is a minor (i) over whom a guardian has been appointed by the clerk of superior court.

ENDTEXT

To fix this, you can manually fix the code or you can return to the IStream Writer document and Extract the DEF to merge it with the existing file. For more information, see *Merging Data Elements Files* on page 136.

Note: If the Microsoft Word Track Changes function was used while creating the IStream Writer document, on transformation, Track Changes will be turned off and all changes will be accepted.

23. Click **Cancel** to close the **Transforming Specification Document** dialog or click **Save Warnings** to save the warnings file. Note that you cannot cancel the transformation process after a certain point.

The newly created model document master section is compiled and opened in IStream Author.

A message indicates IStream Writer has finished importing the sections.

24. Click **OK**.
25. Click the + sign to the expand the list of sections in the navigation pane in IStream Author.

A list of the newly created sections appears.

IStream Writer automatically creates a Master Section and a Control Section for the model document.

26. All sections defined in the IStream Writer document are listed. If no sections were defined in the IStream Writer document, IStream Writer will automatically create a section called **Main**. If the sections defined in the document did not encompass the entire document, IStream Writer will create a section called **Last** which will include all text in the document that has not been defined as part of another section. For more information, see *Adding Section Break Elements* on page 106.

The Transformation of the IStream Writer Document and DEF into the model document is complete.

27. You should test the model document to ensure that the code was transformed as expected and that no errors occur in the document.

Note: Ensure that you check the syntax of QUERY statements that include variables in the SQL statement. Single quotes may have been added where they are not needed.


28. Complete any additional code required to complete the document and perform all required testing scenarios for the document.

Important: If you think that you might want to re-import your IStream Writer document later, do not rename `control.CDS` or move **INCLUDE** rules from the Master section (`.CMS`) to another model document section. Doing either one of these will cause IStream Writer's re-import feature not to work properly.

Transforming an IStream Writer Document into a Model Document Outline

You can use IStream Author to transform an IStream Writer document into a model document outline.

Method: Transform an IStream Writer document into a model document outline

1. Open IStream Author.
2. Click **File > New Model Document Outline...** or click  on the toolbar.
The **New Master Section** dialog opens.

Give the model document a **Name**. (Master section name and model document name are the same.)

The name can be up to 254 characters long. However, names longer than 128 characters do not appear in the **Most Recently Used** list on the **File** menu.

Warning: Use only letters and numbers and do not use spaces or special characters (such as ? : / ' or -) because this can cause problems when generating the model document.

3. Optionally enter a **Description**. This will appear as part of the document's properties.
4. Enter an **Effective Date** if necessary. The default is the current system date.
5. Enter a **Termination Date** if necessary. The default is blank, meaning that this section is effective indefinitely.



Effective and termination dates control when certain sections will be used during assembly. For more information, see *Using Effective and Termination Dates* on page 165.





Note that the **Text Only Section** check box cannot be selected.

6. Select **Import** to import an existing Microsoft Word .DOC file that contains IStream Writer elements.

The system will select the **Data Elements File** check box, but note that this check box will be grayed out. If required, see *System Does Not Select DEF Checkbox in IStream Author* on page 69 in the *IStream Writer Writer Administrator's Guide* for troubleshooting information.

Note: If this check box does not appear on your screen, the IStream Writer upgrade for IStream Author was not successfully installed. Please contact your system administrator.

The  and the  buttons next to the **Document** field become enabled. These buttons enable you to import a document from the file system or from another document storage repository, like a DMS.

7. Complete one of the following steps:
 - To import a document from the file system, click  next to the **Document** field.
 - To import a document from a repository, such as a DMS, click the  button next to the **Document** field. If the repository that you want is not shown in the **Open** dialog, you can click the **Repository...** button to select a different repository.
8. Navigate to the document that you would like to use in the transformation.
9. Select the document and click **Open**.
10. Select the **Data Elements File** required using the  and the  buttons next to the **Data Elements File** field, and click **Open**.

Note: If you are importing the Data Elements File from a DMS, you must at least have Reserve permissions on the file. If you do not have the appropriate permissions, you will receive a message asking you to make sure that the file is not in use or read-only. If you have this problem, ask your DMS administrator to change your permissions to give you access to the file that you need.

11. Ensure that the **Remove “[]” during transformation** check box is selected to remove all square brackets from the document that were added as part of IStream Writer elements. If this option is deselected, the square brackets from the IStream Writer elements will appear in the model document.
12. If you want to remove DOI Instruction elements from the model document, ensure that you select the **Remove DOI instructions during transformation** check box. If you clear the check box, DOI Instruction elements will be included in the model document as comments.
13. You can attach a template (.DOT file) to the outline. All sections under the outline will use the template.

The template must be in the local file system:

- a. Click the **Attach Template** check box.
- b. Click the browse arrow to navigate to the template to be attached.
- c. Select the template and click **Open**.

14. Click **OK**.
15. The **Transforming Specification Document** dialog opens. This dialog displays the details and progress of the transformation. Any errors or warnings will be displayed here, but the transformation will continue regardless of any errors or warnings.
16. Click **Cancel** to close the **Transforming Specification Document** dialog or click **Save Warnings** to save the warnings file. Note that you cannot cancel the transformation process after a certain point.

The newly created model document outline is compiled and opened in IStream Author.

A message indicates IStream Writer has finished importing the sections.

17. Click **OK**.

The model document outline appears in IStream Author. You can view the various sections in the model document outline.

The transformation of the IStream Writer Document and DEF into the model document outline is complete.

You review the model document outline to ensure that the code was transformed as expected and that no errors occur in the document.

Re-importing IStream Writer Documents into IStream Author

After you have transformed your IStream Writer document and the DEF to create a model document in IStream Author, you may need to update your model document based on changes to the IStream Writer document. For example, a state may ask you to modify document wording, or a benefit may be added. You may also need to update your model document based on changes to the Data Elements File, such as changes to database field names, or to the queries used.

If changes do not affect the entire model document, you may want to re-import the affected sections only without overwriting others. You may also want to import new sections created with section breaks in IStream Writer without overwriting the entire model document. You can use IStream Writer's re-import feature to accomplish either one of these tasks.

Note: If you want to replace your entire model document, you should use the **New Model Document** command under the **File** menu in IStream Author. For more information, see *Transforming IStream Writer Documents Within IStream Author* on page 143.

Important Considerations

When re-importing IStream Writer documents, note the following important considerations:

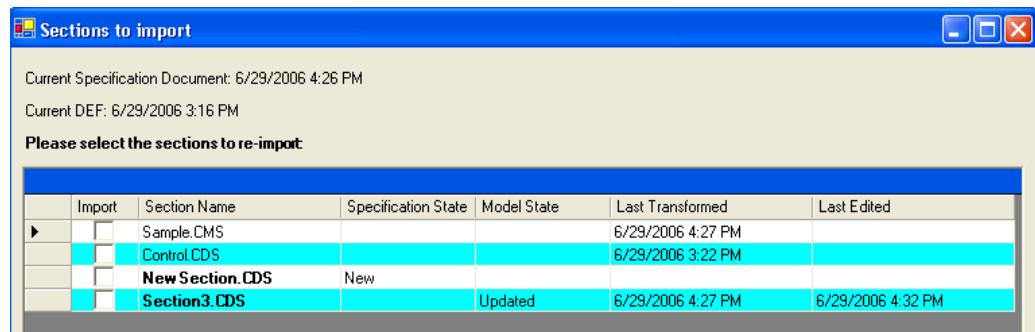
- If you changed the organization of your model document after the initial transformation, IStream Writer's re-import feature will not work properly. Changing the name of `control.CDS` and moving **INCLUDE** rules from the Master (`.CMS`) section to another model document section are both examples of model document reorganization.
- You cannot change the **Remove “[]” during transformation** and **Remove DOI instructions during transformation** settings when re-importing. IStream Writer will simply use the settings that had been selected during the initial transformation of the IStream Writer Document. However, you can change these settings by overwriting the entire model document using the **New Model Document** command under the **File** menu in IStream Author. For more information, see *Transforming IStream Writer Documents Within IStream Author* on page 143.
- You cannot change the attached Microsoft Word `.DOT` template after the initial transformation of your IStream Writer Specification Document. Even if you change the `.DOT` template in Microsoft Word before re-import, the template shown in the **Attach Template** entry field will still be used. If you want to change the `.DOT` template applied to your model document, you must use the **Tools > Templates and Add-ins...** menu command in IStream Author following re-import, and manually attach the appropriate `.DOT` template to each model document section. Alternatively, you can apply a new `.DOT` template by overwriting the entire model document using the

New Model Document command under the **File** menu in IStream Author. For more information, see *Transforming IStream Writer Documents Within IStream Author* on page 143.

The Sections to Import Dialog

The **Sections to import** dialog appears during the re-import process, and lists available sections for import into IStream Author.

The table columns give you information about each available section. It is important that you understand the information in each column so that you can decide whether you need to import a listed section or not.



The columns are as follows:

- *The Specification State Column* on page 153
- *The Model State Column* on page 154
- *The Last Transformed Column* on page 155
- *The Last Edited Column* on page 155

The Specification State Column

The **Specification State** column tells you whether each listed section was added using a section break, modified, or left unchanged in IStream Writer since the last transformation.

New Status in the Specification State Column

If you see **New** in the **Specification State** column next to a **Section Name**, that means that you have added a new section break to the Specification Document in IStream Writer since the last transformation. This section is not yet part of the model document, and you will need to import the section if you want to include it in the model document.

If you renamed a section break in the IStream Writer Specification Document, you will also see **New** in the **Specification State** column next to this renamed section. The section will not be included in the list by its old name, although it is a part of the current model document.

Updated Status in the Specification State Column

If you see **Updated** in the **Specification State** column next to a **Section Name**, that means that you have modified the section in IStream Writer since the last transformation, or that changes to the DEF affect the section. A section is considered modified if

- you changed the section content in IStream Writer
- you added or changed IStream Writer elements

Note: Formatting changes made to the IStream Writer specification document—including changes to text style, graphics, text justification, margin width and page orientation—are *not* detected during the re-import process. Changes to Microsoft Word **Table Properties** or to table size are also not detected. If you have only made formatting changes to a section in IStream Writer since the last transformation, the section will not be marked as **Updated** in the **Specification State** column.

The Master and Control sections will also be marked as **Updated** in the **Specification State** column if an IStream Writer element modified in the Specification Document is defined as keydata in IStream Author.

An **Updated** section is already part of the model document, but you will need to re-import it if you want the changes you made in IStream Writer to appear in the model document.

Empty Specification State Column

If the **Specification State** column is empty next to a **Section Name**, that means that you have not edited the section in IStream Writer since the last transformation. You do not need to re-import the section.

Important: If you want to import a new section, you may want to re-import the Master section, even if it has not been changed in IStream Writer since the last transformation. If you import new sections without also re-importing the Master, you will need to code an INCLUDE rule in the Master for each new section using IStream Author. For more information on coding rules, see the *IStream Author User Guide*.

The Model State Column

The **Model State** column tells you whether each listed section was modified or left unchanged in IStream Author since the last transformation.

Updated Status in the Model State Column

If you see **Updated** in the **Model State** column next to a **Section Name**, that means that the you have modified the section in IStream Author since the last transformation. A section is considered modified if you changed any of the following in IStream Author:

- section content
- effective and termination dates

- keydata
- PDF properties
- the section name
- the section description
- whether or not the section is flagged as text only

If you choose to re-import a section marked **Updated** in the **Model State** column, you will lose any changes that you made to the section using IStream Author.

Warning: If you change the **Section Properties** of a model document section in the DMS, or if you use **Model Edit** to modify section content, the section will *not* appear as **Updated** in the **Model State** column during re-import. You will lose any changes made to the section in the DMS if you choose to re-import it from IStream Writer.

Empty Model State Column

If the **Model State** column is empty next to a **Section Name**, that means that you have not modified the section using IStream Author. You do not need to worry about losing any changes made to the section in IStream Author if you choose to re-import it from IStream Writer.

The Last Transformed Column



This column displays the date that each section was last transformed using IStream Author. If you have not transformed a listed section previously, the column is empty for that section.

The Last Edited Column



This column displays the date that each section was last modified using IStream Author since the last transformation. If you have not modified a listed section in IStream Author since the last transformation, the column is empty for that section.

Method: Re-import existing model document sections, or import new sections

1. Open IStream Author.
2. From the **File** menu, select **Re-import Writer Document**.
3. Navigate to the model document that you want to import sections to. If the repository where you stored your model document is not shown in the **Open** dialog:
 - a. Click the **Repository...** button.
 - b. Select the storage repository where the original model document is stored, and then click **OK**.
4. Select the model document that you want to import to, and click **Open**.

5. The **Re-import** dialog appears. Verify the contents of the **Document** field to ensure that you are importing from the correct IStream Writer Specification Document. The default for the **Document** field is the location of the IStream Writer document at the last transformation.
6. If you need to manually navigate to the IStream Writer document that you want to import from, you can browse the file system or another storage repository, such as the DMS. To manually locate a IStream Writer document for import, complete one of the following steps:
 - To locate a document stored on the file system, click the  button next to the **Document** field. Select the appropriate IStream Writer document, and click **Open**.
 - To locate a document stored in another repository, such as the DMS, click the  button next to the **Document** field. If the repository that you want is not shown in the **Open** dialog, you can click the **Repository...** button to select a different repository. Select the appropriate IStream Writer document, and click **Open**.

Note: If you are importing the IStream Writer specification document from the DMS, you have must at least *Reserve* permissions on the document. If you do not have the appropriate permissions, you will receive a message asking you to make sure that the document is not in use or read-only. If you have this problem, ask your DMS administrator to change your permissions to give you access to the document that you need.

7. Verify the contents of the **Data Elements File** field to ensure that you are importing from the correct Data Elements File. The default for the **Data Elements File** field is the location of the DEF at the last transformation.
8. If you need to manually navigate to the Data Elements File that you want to import from, you can browse the file system or another storage repository, such as the DMS. To manually locate a DEF for import, complete one of the following steps:
 - To locate a DEF stored on the file system, click the  button next to the **Data Elements File** field. Select the appropriate DEF, and click **Open**.
 - To locate a DEF stored in another storage repository, such as the DMS, click the  button next to the **Data Elements File** field. If the repository that you want is not shown in the **Open** dialog, you can click the **Repository...** button to select a different repository. Select the appropriate DEF, and click **Open**.

Note: If you are importing the Data Elements File from the DMS, you must have at least *Reserve* permissions on the file. If you do not have the appropriate permissions, you will receive a message asking you to make sure that the file is not in use or read-only. If you have this problem, ask your DMS administrator to change your permissions to give you access to the file that you need.

9. Click **OK** in the **Re-import** dialog.

The **Sections to import** dialog opens. This dialog gives you important information about each section. For details, see *The Sections to Import Dialog* on page 153.

10. If you want to display only the sections that have been created or modified in IStream Writer since the last import, select the **Display only New and Updated sections** check box. If you want to see all sections, leave the **Display only New and Updated sections** check box clear.
11. Select the **Import** check box next to each section that you want to import, or check the **Select All** check box at the bottom of the screen to choose all listed sections. Click **OK**.

Selected sections are imported.

12. If a section selected for re-import has been modified in IStream Author since the last transformation, a dialog will appear with the following message:

**Selected section 'Section.CDS' was edited since last transformation.
Overwrite section anyway?**

- To overwrite this section only, click **Yes**. Any changes made to the section in IStream Author before the re-import will be lost.
- To overwrite this section and all other selected sections that have been modified in IStream Author since the last transformation, click **Yes to All**. Any changes made to the corresponding sections before the re-import will be lost.
- To skip re-import of this section, click **No**. The section will not be re-imported from IStream Writer. Any changes made to the section in IStream Author before the re-import will be saved.
- To cancel import of all the selected sections, click **Cancel**.

13. When IStream Writer finishes importing sections, the **IStream Writer Import** dialog displays. Click **OK**.

14. Click the + sign to the expand the list of sections in the navigation pane in IStream Author.

A list of the document sections displays. If you created new sections in IStream Writer and imported them into IStream Author, these sections will now be included in the list. Remember to manually code **INCLUDE** rules into the Master section if you imported new model document sections without also re-importing the Master.

The re-import of the IStream Writer Document and DEF into the model document is complete.

15. You should test the model document to ensure that the code was transformed as expected and that no errors occur in the document.

Note: Ensure that you check the syntax of **QUERY** statements that include variables in the **SQL** statement. Single quotes may have been added where they are not needed.

- 16.** Complete any additional code required to complete the document and perform all required testing scenarios for the document.

Transformation Failures

If a section of the IStream Writer specification document fails to transform in IStream Author, the transformation process will skip the section and continue. However, you still need to address any transformation failures once the process is complete.

“Transformation Failed with Exception” Error

If a *Transformation failed with exception* message appears when transforming a IStream Writer document, perform these steps:

1. Close IStream Author (if it is open), then open IStream Writer.
2. Open the document that you are trying to transform.
3. Try to transform the document again. If this fails, continue to the next step.
4. Validate the IStream Writer document that you are trying to transform. To do this, on the **Writer** ribbon, click **Validate Writer Elements**.
5. If no errors are found during validation, please contact Skywire Software Support, and complete the remaining steps now to back up your current log file before it is overwritten. (Skywire Software Customer Support requires this log file to help determine the cause of the transformation error.)
6. Navigate to the appropriate logs folder.

If you have IStream Document Manager installed, the default folder is:

`C:\Program Files\Whitehill Technologies\IStream\Logs\`

If you are using IStream Writer *without* IStream Document Manager, the default logs folder is:

`C:\Writer Installation Folder\Logs`

7. Within this folder, locate the current log folder. Folders are named by year and date in the following format: LOG_YYYY_MM_DD, for example, LOG_2008_11_18.
8. Within the above folder, locate the current log folder. Folders are named by year, date and time in the following format: RUN_YYYYMMDDHHMM, for example: RUN20081118140439.
9. Within the above folder, locate the latest log file in this folder. Files are named by year, date and time in the following format: YYYYMMDDHHMMSS.ILF, for example: 20081118140857.ILF.
10. Copy this .ILF file to another location, and e-mail it to directsupport@skywiresoftware.com. Include an explanation of the issue encountered in your e-mail.

Reviewing the Model Document and Model Document Outline

Once the model document or model document outline has been created by the transformation process, an author needs to review it.

Model Document Sections

Note: In a model document section, all code is in red, all comments are in blue, and exceptions are in bold pink.

The Master Section

The Master Section contains all of the `INCLUDE` statements for the model document.

The Control Section

The Control Section includes:

- `keydata`
- variables not based on queries
- `DEFINE` statements

All Other Sections

In all of the other sections of the model document, the `TEXT` and `ENDTEXT` statements have been added around the text sections.

The code for all other defined IStream Writer elements is embedded with the text that it relates to in the relevant section.

Model Document Outline Elements

A model document outline appears in IStream Author and consists of:

- the **control section** – appears at the top of the outline, with all the sections and section definitions below it
- **section definitions** – these contain sections
- **sections** – these each contain a `.CDS` file that contains a portion of the actual document content

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