

## **Assistance in altering templates.**

CostsMaster uses Word templates as the basis of each exported bill. This document gives suggestions on how to alter the templates should you need to do so.

IMPORTANT. CostsMaster support can only give advice on matters related directly to the CostsMaster software. The following instructions relate to using Word and are therefore offered as suggested practice only. Use at your own risk!

### **Where do I find the templates?**

#### **For version 2.4 or earlier**

The templates are by default stored in a folder called "export templates" within the directory in which CostsMaster is installed. By default this is C:\program files\costsmaster\export templates. Use "My Computer" to navigate to that folder

#### **For version 2.5 and later**

The templates are by default stored in a folder called "export templates" within the CostsMaster Files folder in My Documents. Use "My Computer" to navigate to that folder

### **What template do I need to alter?**

The following templates are installed by CostsMaster:

#### **Templates without lines for pre-printed paper:**

3column.dot	3 Column
6column.dot	6 Column
4colcrim.dot	4 Column Central Funds

#### **Templates with lines for blank paper:**

3coltab.dot	3 Column
6coltab.dot	6 Column
4crimtab.dot	4 Column Central Funds

#### **Schedules:**

clssch.dot	Schedule of Inter Partes Costs at CLS Rates
docsch.dot	Document Schedule
sas.dot	Summary Assessment Schedule

#### **Front & Back Sheets:**

clsfam.dot	CLS Family Backsheet
clsnofam.dot	CLS Non-Family Backsheet
noncls.dot	Non-CLS Backsheet

#### **Miscellaneous:**

breakdown.dot	Breakdown of Costs
n252.dot	Notice of Commencement
d252.dot	Notice of Commencement (family)

n258a.dot	Request for Detailed Assessment (CLS only)
d258a.dot	Request for Detailed Assessment (Family CLS only)

Please note that the CLAIM1 template is not a Word template. It is not installed in this location and cannot be altered.

### **Is it safe to alter my original templates?**

For small changes, perhaps, but it is safer to create copies first which you then amend. Apart from the risk of making a change that stops the template from working, if CostsMaster ships with altered templates at some point in the future, any original templates you have amended could be overwritten and your changes lost.

To make a new set of templates for editing:

1. Using My Computer, locate the folder in which the export templates are installed.
2. Make a copy of this folder and call it “amended export templates” or similar.
3. Start CostsMaster and go to the Options – Local Settings – File Locations menu. Change the value for the Word templates directory to the new copy folder you just created. Should you need to revert to your original templates just change this setting back to the original value.

### **How do I open a template for editing?**

1. Use My Computer to navigate to your export templates folder. If you created a copy folder previously navigate to that.
2. Locate the template you wish to alter. Select it, then right click it and select “open”. This will open it in Word. (Note that if you simply double clicked on it Word would not open it but would create a new document based on it which is not quite what you want).

### **What else do I need to be aware of?**

There are two things you need to bear in mind when editing templates: bookmarks and macros.

#### **Bookmarks**

CostsMaster uses various bookmarks in the templates to allow it to insert text at pre-determined places. If the locations of these bookmarks change then it is likely that the text will be inserted in the wrong place. If any of the bookmarks are removed it is likely that the export may fail.

## Macros

CostsMaster uses macros in the Word templates for bills to alter the indents for different sections of the text. If you are making any alterations to indents you will need to alter the macros to match.

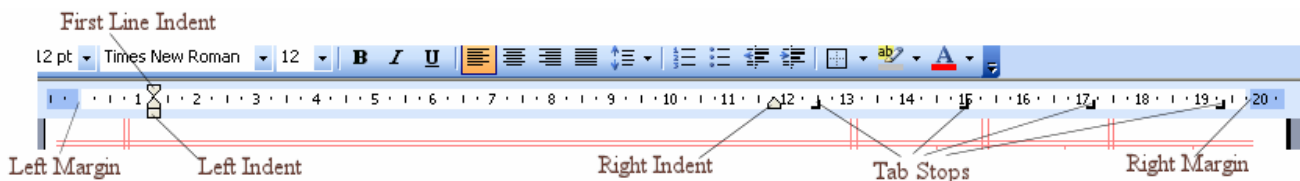
The macros we are interested in are:

<b>Normal</b>	Formatting for all ordinary text aligned with the left edge of the column.
<b>Numbered</b>	Formatting for numbered profit costs lines – differs from “Normal” in that it has a greater left indent (equal to the “indent” macro), a first line indent and right indent that is shifted to the left to accommodate the profit cost sub-column
<b>Disbnumbered</b>	Formatting for numbered disbursement lines – differs from “Numbered” in that the right indent is further across the page as there is no profit cost sub-column within the main text
<b>Indent</b>	Formatting for text that is indented, such as procedural steps. Differs from “Normal” in the greater Left indent.
<b>Shortindent</b>	Formatting for text that must be indented but must take account of the profit cost sub-column in the text. Its left indent is the same as “indent” but the Right indent is the same as “numbered”.

You can alter the macros by going to the Tools – Macro – Visual Basic Editor menu to open the Visual Basic Editor. This will open in a new window showing the code for each of the macros.

Although this may look a little scary to the uninitiated, a quick glance will reveal that the macros we are interested in simply set the left indent, first line indent and right indent and the only part that needs changing is the figure in brackets at the end of each line which is the position of the relevant item in centimetres.

## How do I alter tabs, indents and margins?



The picture above shows the location of the margins, the left, right and first line indents and the tab stops in a 3 column lined template. Any of the above

items can be altered by dragging the relevant item. Dragging an item will usually snap it to the nearest quarter centimetre but it is possible to set items with more precision by using the various dialogs as follows:

Margins:	File – Page Setup
Indents	Format – Paragraph
Tabs	Format – Tabs

In order to test your changes when attempting to match pre-printed paper we recommend you type some text into the main column of the bill, then tab into the columns and type the largest number you wish to accommodate. Print this page on cheap flimsy paper which you can then align with your pre-printed paper and hold up to the light to see how the figures line up with the pre-printed lines. Repeat this after each change to see how the alterations are going. Remember to delete the sample text before finally saving the document!

### **Tabs and Margins**

Tab stops and margins need to be altered in the document. Before changing these items you need to ensure that you are changing them for the whole document and not just the current line. To do this go to the Edit menu and click “Select All”.

Please note when setting margins that the templates have deliberately wide margins which Word may offer to “fix”. If it does, please decline this invitation.

The tab stops are all right stops i.e. they mark the place where the pence figures will end. Each column has a tab stop and there is one further tab stop in the main text column at the right which is used for profit costs sub-columns.

### **Indents**

Indents need to be altered in the macros. The best method is to alter indents in the document also and when you are happy with the results make changes to the macros. To do this you need to type some appropriate text into the main column of the bill, then run the first relevant macro (by going to the Tools – Macro – Macros menu, selecting the macro and clicking “run”) and adjust the indents for each. When you are happy with the figures go to the Format – Paragraph menu and make a note of the values for Left Indent, Right Indent and First Line Indent (if any). Then open the Visual Basic Editor as described previously and enter those values for the macro in question in place of the figure in brackets at the end of each line. Repeat this for each of the relevant macros.

The Left Indent is measured from the left margin and the right indent from the right margin (rather than from the left as may reasonably be assumed). The First Line Indent is measured from the Left Indent, so a first line indent to the left of the Left Indent will have a negative value.

## **How Do I Alter The Red Lines on a Lined Bill?**

The red lines in the template are an image stored in the header as a background graphic. This background graphic is a vector graphic, that is a collection of lines grouped together to make a single image. Editing the image requires breaking this image apart into its individual lines which you can then move or delete as appropriate.

Before you can do anything with the image you need to select it. You do this as follows:

1. Go to the View menu and select "Header & Footer" (or double click in the top region of the page). This will display the contents of the header and will make the red lines appear in full colour.
2. Move the mouse around the header box until the mouse cursor changes to a pointer with four arrows pointing N, S, E & W. When this cursor appears click and the background graphic will be selected. The Word picture bar may also appear.
3. You will see little circular handles at the top, bottom, middle left & right and at each corner of the image. It is possible to resize the image as a whole by dragging these handles, or to move the image by clicking and dragging it anywhere in the middle. If you simply want to make more space at one of the margins this may be sufficient for your purposes and you need go no further with these steps (but you will almost certainly need to alter the tab stops and margins as described earlier).

If you wish to add, delete or move individual elements of the image you will need to edit it. There are two ways of doing this: editing the image with a vector graphics program or editing the image directly in Word.

### **Editing the image in a Vector Graphics Program**

To do this you will need suitable software. I used Corel Draw but there are many drawing packages on the market that support vector graphics.

Select the image as described above. Right click the image and select cut, then paste it into your vector editing software. You can now ungroup the image to its individual elements and make any changes you want. When you are finished save it to disk as a Windows Metafile. Then, in Word, go to the "Insert, picture, from file" menu and re-import your altered image. You may have to alter the tab stops and margins to match your new image unless you spend time aligning it carefully.

### **Editing the image directly in Word**

Select the image as described above. Right click on it and select Edit Picture. Word will prompt you with "This is an imported picture, not a group. Do you

want to convert it to a Microsoft Office Drawing Object?” You need to say “yes” to continue.

You will immediately notice that the lines and text suddenly appear thicker. It would appear that this is confined to the screen only and the lines still print out as they did before but the text may need toning down a little.

You should also notice that each line now has its own circular handle, so each line can be moved or deleted. Do take care as it is very easy to inadvertently move other lines. If your changes involved alterations to the lateral placement of lines you may need to alter the tab stops and margins as described previously.

### **How do I add text to the header and footer in a template?**

CostsMaster uses the header and footer to insert different information so adding extra information can be tricky. What you can add differs between the header and the footer:

#### **Header**

It is not recommended that you add text to the header in the template. CostsMaster lets you specify the format of the text it inserts in the header in the Options – Export Phrases – Headers menu where you can choose to include the date, reference, filename or company name.

#### **Footer**

The footer is used to insert the CostsMaster logo and under the terms of the licence you are not permitted to remove it. You can add other text to the footer but you should bear in mind that the logo is always inserted at the beginning of the footer so it is necessary to leave space for it. You can achieve this by adding one or two carriage returns before your additional text.

#### **Altering the header and footer**

To alter the header or footer either double click at the very top or very bottom of the page or go to the View – Header and Footer menu. The header will be shown in a dotted line and you can type text just as you would in the rest of the document. To access the footer simply scroll to the bottom of the page.