



WK Forms™

QUICK START GUIDE

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INTRODUCTION

Welcome to *WK Forms*™!

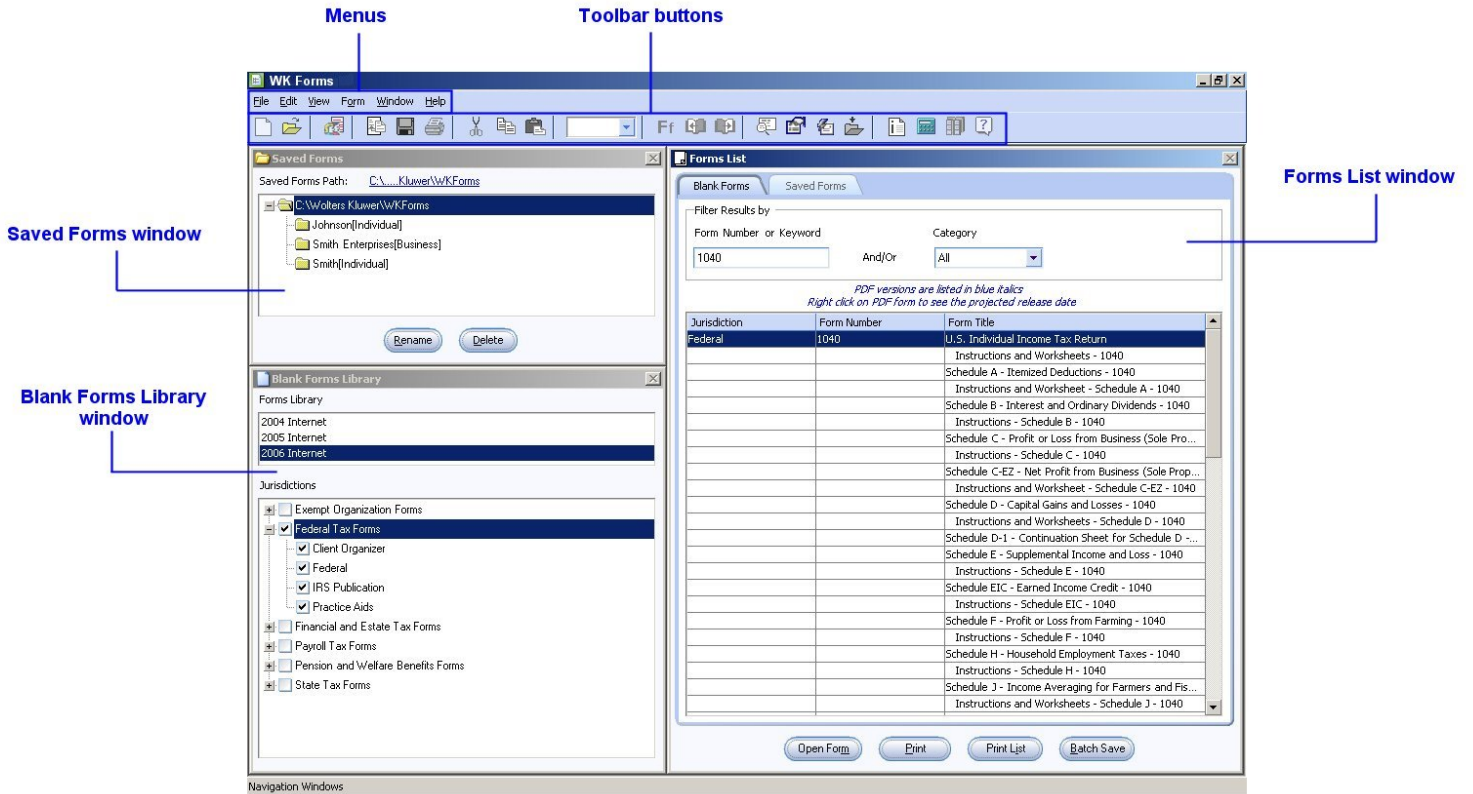
With *WK Forms*, you can access, fill out, print, and maintain forms. The *WK Forms* application offers you the most recent versions of official forms from various local, state, and federal agencies (along with other official sources).

In this quick start guide, you will learn how to:










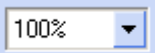










- Navigate around the *WK Forms* workspace
- Set your *WK Forms* preferences
- Open a blank form
- Save a form
- Create and use a template form
- Print a form
- Calibrate your printer
- Create a profile and apply the profile to a form
- Insert and delete duplicate pages
- Perform calculations and use the calculator
- Link to and from research explanations
- Get help if you need it

The WK Forms workspace

Before you start working with *WK Forms*, it is important that you are familiar with the workspace. The following illustration shows the various menus, windows, and buttons available in *WK Forms*.



Toolbar buttons

| | |
|---|--|
|  | Open Blank Forms button. Enables you to view the forms list on the “Blank Forms” tab of the “Forms List” window. |
|  | Open Saved Forms Folder button. Allows you to search for specific saved forms folders. |
|  | New Profile Data button. Allows you to create a new profile. |
|  | Apply Profile Data button. Apply profile data to a form. |
|  | Save button. Saves the form. |
|  | Print button. Prints the form. |
|  | Cut button. Cuts selected text. |
|  | Copy button. Copies selected text. |
|  | Paste button. Pastes cut or copied text. |
|  | Zoom drop-down menu. Allows you to change the zoom level of a form. |
|  | Change Field Font button. Allows you to change the font of the currently selected text in a form. |
|  | Previous Page button. Go to the previous page of a multiple page form. |
|  | Next Page button. Go to the next page of a multiple page form. |
|  | Search button. Allows you to search within a form. |
|  | Filing Requirements button. Displays the filing information for a form. |
|  | Add To Folder button. Adds a form directly to the client data folder. |
|  | Access Instructions button. Displays the form instructions for a form. |
|  | Calculator button Opens the calculator. |
|  | Access Research button. Accesses research topics. |
|  | Help button. Opens the help system. |

Getting help

We have included a few different ways for you to get help with WK Forms. Along with this quick start guide, WK Forms includes a help system that is available from within the application.

To view the help file:

- Click the **Help** menu and select **Help**.

The help system is opened in a separate window.

To view customer support contact information:

- Click the **Help** menu and select **Customer Support**.

The "Customer Support" dialog box is displayed.

To view the "About" information for the forms application:

- Click the **Help** menu and select **About**.

The "About" dialog box is displayed.

To view the forms application tutorial:

- Click the **Help** menu and select **Quick Start Tutorial**.

The tutorial is opened in a new window.

First time use

The first time you open WK Forms, the "First Time Use" dialog box is displayed. The information you enter in the "First Time Use" dialog box sets the application preferences and gets you connected quickly and easily.

If for some reason you are not able to enter the necessary information when the "First Time Use" dialog box is displayed, you can enter the information later by clicking the **File** menu and selecting **Preferences**.

Setting preferences

You can easily set all of your general preference settings from one location in the forms application. To view and make changes to your general preference settings, simply click the **File** menu and select **General Preferences** to view the "General Preferences" dialog box.

Display Settings

You can customize the information displayed on forms, the numeric format, the color of various form fields, and the font.

To set Information Display settings:

- Click the **File** menu and select **Preferences**.
- Click the **Display Settings** tab.
- Click in the checkbox next to **Filing Information** to display a dialog box containing form filing information (if available) each time a form is opened.
- Click in the checkbox next to **Print Identifying Information on the Top of Each Form** to display applicable identifying information in the upper, right-hand corner of forms.
- Click in the checkbox next to **Print Time and Date Stamp** to display the date and time in the upper, left-hand corner of forms.

To set Numeric Format settings:

- Click the **File** menu and select **Preferences**.
- Click the **Display Settings** tab.
- Click in the checkbox next to **Round to Whole Dollar Amounts** to round calculations to the nearest whole number.
- Click in the checkbox next to **Negatives in Parentheses** to display negative numbers in parentheses.
- Click in the checkbox next to **Insert Commas** to insert commas in numbers.

To set Field Colors settings:

- Click the **File** menu and select **Preferences**.
- Click the **Display Settings** tab.
- Click the **Active Border Color**, **Inactive Field Color**, or **Calculation Field Color** buttons.
- On the "Color" dialog box, select a color.
- Click **OK**.

Note: The color of the buttons in the "Field Colors" section of the "General Preferences" dialog box matches the colors selected for those fields.

To set Font settings:

- Click the **File** menu and select **Preferences**.
- Click the **Display Settings** tab.
- Click in the checkbox next to **Disable AutoSizing** to disable autosizing of fonts throughout the forms application. (**Note:** Autosizing of fonts only works if the size of the currently selected font is equal to or smaller than the default font that was selected when the form was created.)
- Click the **Change Font** button.
- Select the type, style, size, and script for the font on the "Font" dialog box.
- Click **OK**.

A dialog box is displayed that informs you that, "If you have selected a font that is larger than a field on a form, the largest font available will be used on the form. The software is designed to prevent you from selecting a font larger than the boundaries of the form field."

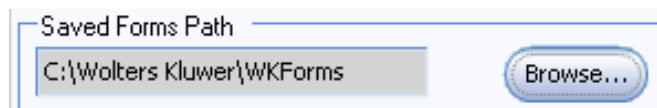
- Click **OK**.

The font is changed according to your selections.

Note: The choice of the font you want to use may be limited due to agency form restrictions.

Saved Forms Path

You can easily change the path to which the forms application creates saved forms folders.



To change the saved forms path:

- Click the **File** menu and select **Preferences**.
- Click the **Display Settings** tab.
- In the "Saved Forms Path" section, click the **Browse** button.
- On the "Browse For Folder" dialog box, select the drive and folder of the new saved forms path.
- Click **OK**.
- Click **OK** to close the "General Preferences" dialog box.

The new saved forms path is set and is shown in the "Saved Forms" window.

Note: You can quickly change the saved forms path by clicking the hyperlink that is displayed to the right of "Saved Forms Path" on the "Saved Forms" window.

New or revised forms posted

You can set the number of days that the forms application uniquely identifies forms that have been "added" or "revised."

Note: By default, the forms application identifies forms within your subscription that were added or revised within the past 30 days.

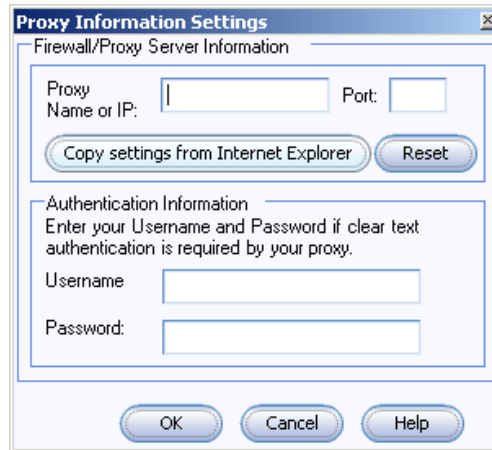
To set the show "added or revised" forms date range:

- Click the **File** menu and select **Preferences**.
- Click the **Display Settings** tab.
- In the "New or revised forms posted" section, type a number from **1** through **90** in the "Enter number of days prior to the current date to show new or revised forms" field. (For example, if you enter a value of **10**, the forms application identifies forms within your subscription that have been added or revised within the past 10 days.)

Note: If you do not want the forms application to identify forms within your subscription that have been recently added or revised, simply click in the checkbox next to **Do not highlight new or revised forms in the Blank Forms list**.

Firewall/Proxy Server Information

If the computer on which you use the forms application is setup behind a firewall, or if you use a proxy server to access the Internet, you need to set up the forms application accordingly. If you have any questions regarding your local firewall or proxy server settings, please contact your local network administrator.



To set firewall/proxy server information settings:

- Click the **File** menu and select **Preferences**.
- Click the **Access Configuration** tab.
- In the "Firewall/Proxy Server Information" section, click the **Setup** button.

The "Proxy Information Settings" dialog box is displayed.

- Type the proxy name or IP address of the proxy server in the "Proxy Name or IP" field.
- Type the port number for the proxy in the "Port" field.
- or -
- Click the **Copy settings from Internet Explorer** button to copy the proxy settings currently being used by Internet Explorer into the forms application. (**Note:** The proxy settings used in Internet Explorer and copied into the forms application are copied "exactly" as used in Internet Explorer. No changes are made to these settings, and any changes that may need to be made to the settings will need to be done directly in Internet Explorer before copying them into the forms application.)
- If authentication is used by the proxy, type your user name and password in the spaces provided.
- When you are finished entering your proxy information settings, click **OK** to close the "Proxy Information Settings" dialog box and return to the "General Preferences" dialog box.
- Click **OK** to save your settings and return to the main forms application screen.

Login

You can access form libraries from the Internet by setting your login settings in the forms application.

Note: To access form libraries over the Internet, you must have a subscription to these libraries. Please contact your customer support representative if you have any questions regarding your subscription.

To set your login settings:

- Click the **File** menu and select **Preferences**.
- Click the **Access Configuration** tab.
- In the "Login" section, type your user name and password in the spaces provided.
- Click the drop-down arrow next to **Research Sites** and select the URL that matches the particular site to which you subscribe.
- Click in the checkbox next to **IP Authentication** if you have arranged to have IP based authentication.
- Click **OK** to save your settings and return to the main forms application screen.

The system attempts to connect based on the login settings you entered, and if successful, Internet libraries are displayed on the list of libraries shown on the "Blank Forms Library" window. You can view the status of your "connection" by clicking the **File** menu and selecting **Connection Status**.

Form Access Path

You need to set the form access path if you have CD's that contain forms that need to be used within the forms application. The form access path is the path of the CD drive from which the forms application loads the forms from the CD. The form access path can be a:

- drive and folder on your local machine
- mapped drive and folder on your local machine
- shared drive or folder on the network to which you have access

Note: The "interim" forms library will be available with the CD library and contains all forms that have been updated within the past 90 days.

To set the form access path:

- Click the **File** menu and select **Preferences**.
- Click the **Access Configuration** tab.
- Type the form access path in the "Form Access Path" field, or click the **Browse** button to select the drive and folder of the form access path on the "Browse For Folder" dialog box. Click **OK** once you have selected the location from which CD's will be accessed.

The form access path is set, and you can now add CD unlock codes.

- Click **OK** to return to the main forms application screen.

To clear the form access path:

- Click the **File** menu and select **Preferences**.

- Click the **Access Configuration** tab.
- Click the **Clear** button to clear the current form access path.
- Click **OK** to return to the main forms application screen.

CD Unlock Codes

You need to add CD unlock codes to the forms application if you have set a "Form Access Path" on the "General Preferences" dialog box.



To add a CD unlock code:

- Click the **File** menu and select **Preferences**.
- Click the **Access Configuration** tab.

Note: If the "Form Access Path" has not yet been set, you must set it before you can add CD unlock codes. For more information on setting the form access path, see the "Form Access Path" section of this guide.

- Type the CD access code in the "CD Access Codes" field, and then click the **Add** button.

The CD access code is added to the list to the right of the "CD Access Codes" field, and you can repeat the previous step to add additional CD access codes.

- Click **OK** to return to the main forms application screen.

To remove a CD unlock code:

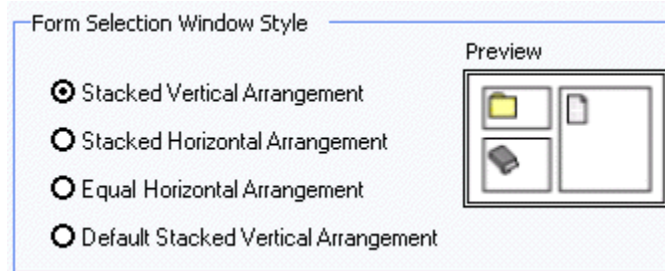
- Click the **File** menu and select **Preferences**.
- Click the **Access Configuration** tab.
- Select the CD unlock code you want to remove from the list next to the "CD Access Codes" field.
- Click the **Remove** button, and then click **OK** to verify you want to remove the CD unlock code.

The CD unlock code is removed from the list of CD access codes.

- Click **OK** to return to the main forms application screen.

Form Selection Window Style

The main forms application screen is made up of three separate windows located below the menus and toolbar: "Saved Forms" window, "Blank Forms Library" window, and "Forms List" window. You can customize the size and arrangement of these windows to suit your individual preference.



To change the forms application window settings:

- Click the **File** menu and select **Preferences**.
- Click the **Display Settings** tab.
- In the "Form Selection Window Style" portion of the "General Preferences" dialog box, click in the radio button next to your layout preference: **Stacked Vertical Arrangement**, **Stacked Horizontal Arrangement**, **Equal Horizontal Arrangement**, or **Default Stacked Vertical Arrangement**. (**Note:** When you select one of the window arrangements, a preview of the arrangement can be seen to the right of the radio buttons.)
- Click **OK** to save your selection and close the "General Preferences" dialog box.

TIP! Customizing the "Forms" windows.

You can also resize and move each of the three "Forms" windows on the main forms application screen like you would any other window in Microsoft Windows.

- To resize one of the "Forms" windows, simply move your mouse pointer to the edge or corner of the window (until your mouse pointer turns into an arrow with two points). Click and drag the edge or corner of the window, and the size and shape of the window is changed according to your mouse movements.
- To move the windows, just click and drag the title bar of the window to move it to another location on the screen.

Note: The changes you make to the window settings are saved when you exit the forms application.

To quickly restore window settings:

- If you have resized and moved the three "Forms" windows, you can quickly put them back to your default setting by clicking the **Window** menu and selecting **Arrange**.

Opening a blank form

A blank form can be opened from the list of blank forms available in your blank forms library. The blank forms that are available in the blank forms library depends on your subscription. For more information on your subscription, contact customer support.

To open a blank form:

- Select a saved forms path for any blank forms you may end up wanting to save later from the list shown in the "Saved Forms" window. (**Note:** If the saved forms path is not expanded, simply click the "+" icon to the left of the saved forms path to expand it.)
- If you want the blank form you open to be saved to a particular client you have created, select a folder that is shown in the expanded list below the saved forms path.

Note: Selecting a saved forms path allows you to easily save the form to that particular saved forms path later.

- Select a forms library from the list shown in the "Forms Library" section of the "Blank Forms Library" window.
- In the "Jurisdictions" section of the "Blank Forms Library" window, click in the checkbox(es) next to the jurisdictions you want to view. (**Note:** You can expand and collapse jurisdiction items by clicking the "+" and "-" icons.)

The list of available forms for the jurisdiction(s) you selected is displayed on the "Blank Forms" tab of the "Forms List" window and is sorted by jurisdiction. (**Note:** If a PDF version of a form is available, the title of the form appears in blue italics.)

- Select a form from the list, and then click the **Open Form** button (or just double-click the form title from the list). (**Note:** To open multiple forms, press the **Ctrl** or **Shift** keys while selecting forms and then click the **Open Form** button.)

The blank form you selected is opened. (**Note:** Some forms have filing information that is displayed in a dialog box when you open the form.)

TIP! Sorting the list of blank forms.

You can sort the list of blank forms by clicking any of the column headings. Click the column heading once to sort the forms in ascending order, and click the column heading a second time to sort the forms in descending order. To remove the sorting for a column heading, press the **Ctrl** key and then click the column heading.

TIP! Switching between multiple open forms.

If you have more than one form open, you can easily switch between the forms you have open by clicking the tabs displayed above the forms. You can also click the **Window** menu and select the form you want to view from the list of open forms shown.

Saving a form

You can close a form you have open on your screen at any time, and you have the option of applying profile information to the form if you decide to save a form to which you have made changes.

To save a form:

- Click the **Save** button (or click the **File** menu and select **Save**).
- If you attempt to save a form before any profile information has been applied to the form, the "Apply Profile Data" confirmation dialog box is displayed, and you are asked if you would like to apply profile information to the form.
 - Click **Yes** to apply a profile to the form. On the "Select Profile Data to Apply" dialog box, select the profile you want to apply to the form, and then click the **Open** button. (**Note:** If the specific profile you want to apply to the form is not displayed on the "Select Profile Data to Apply" dialog box, simply browse to the location of the profile.)
 - or -
 - Click **No** if you do not want apply profile information to the form.
- On the "Save Form" dialog box, type a name for the file in the "File name" field (or accept the default file name), select the folder in which you want to save the form, and then click the **Save** button. (**Note:** You may want to double-check to be sure you have browsed to the folder associated with the profile you just applied to the form.)

The form is saved. (**Note:** Once you have saved the form you are currently working on and need to save it again based on subsequent changes to the form during the same session, you can simply click the **Save** button. The changes you have made to the form are saved without having to select the client folder.)

Note: If you attempt to save a form that has been previously saved in a particular saved forms folder, a message is displayed asking if you want to overwrite the current file. Click **Yes** if you want to overwrite the current file with the new version, or click **No** to display the "Save As Form" dialog box and select another folder in which to save the form (or select a different file name).

To save multiple forms:

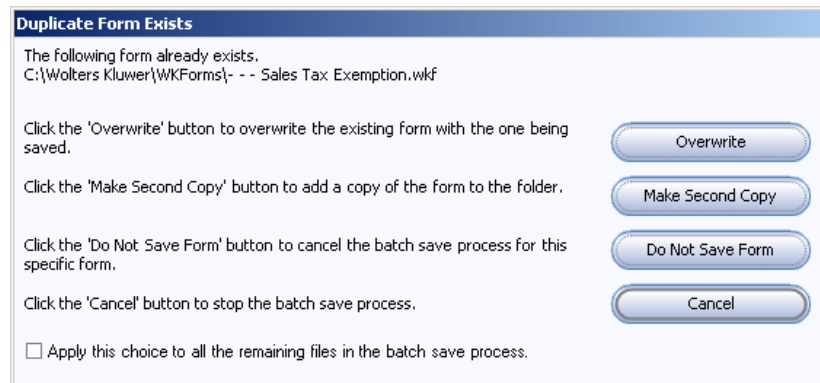
- Select a forms library from the list shown in the "Forms Library" section of the "Blank Forms Library" window.
- In the "Jurisdictions" section of the "Blank Forms Library" window, click in the checkbox(es) next to the jurisdictions to view forms included in those jurisdictions. (Note: You can expand and collapse jurisdiction items by clicking the "+" and "-" icons.)

The list of available forms for the jurisdiction(s) you selected is displayed on the "Blank Forms" tab of the "Forms List" window and is sorted by jurisdiction.

- Select the forms you want to save from the list shown on the "Blank Forms" tab. To select multiple forms, press the **Ctrl** or **Shift** keys on your keyboard while selecting forms.
- Once you have selected the forms you want to save, click the **Batch Save** button.

- Click **Yes** if you want to apply profile information to the forms you selected, or click **No** to save the forms without applying profile information.
- If you decided to apply profile information to the forms, you need to select a profile. On the "Select Profile Data to Apply" dialog box, select the profile you want to apply to the form, and then click the **Open** button. (**Note:** If the specific profile you want to apply to the form is not displayed on the "Select Profile Data to Apply" dialog box, simply browse to the location of the profile.)
- or -
- If you decided not to apply profile information to the forms, the "Select a Saved Forms Folder" dialog box is displayed. On the "Select a Saved Forms Folder" dialog box, type a name for the file in the "File name" field, select the folder in which you want to save the form, and then click the **Save** button.

If any of the forms already exist in the destination folder you selected, the "Duplicate Form Exists" dialog box is displayed.



- Click the **Overwrite** button if you want to overwrite the existing form.
- Click the **Make Second Copy** button if you want to make another copy of the form.
- Click the **Do Not Save Form** button if you do not want to save the form.
- Click **Cancel** to end the batch save process.
- Click in the checkbox next to **Apply this choice to all the remaining files in the batch save process** if you want to make your selection on the "Duplicate Form Exists" dialog box the selected choice for all the forms in the batch process.
- Once the batch save process is complete, click **OK** to return to the main forms application screen.

Opening a saved form

You can open forms that you opened and saved previously in *WK Forms*.

To open a saved form:

- Select a saved forms path for which you want to view saved forms from the list shown in the "Saved Forms" window. (**Note:** If the saved forms path is not expanded, simply click the "+" icon to the left of the saved forms path to expand it.)
- Select a folder that is shown in the expanded list below the saved forms path.

The list of saved forms for the saved forms path and folder you selected is displayed on the "Saved Forms" tab of the "Forms List" window. (**Note:** Any forms you might have saved as PDF files are shown on the list of saved forms as well, and the title of the PDF version of the form appears in blue italics.)

- Select a form from the list, and then click the **Open Form** button (or just double-click the form title from the list). (**Note:** To open multiple forms, press the **Ctrl** or **Shift** keys while selecting forms and then click the **Open Form** button.)

The saved form you selected is opened. (**Note:** Some forms have filing information that is displayed in a dialog box when you open the form.)

TIP! Sorting the list of saved forms.

You can sort the list of saved forms by clicking any of the column headings. Click the column heading once to sort the forms in ascending order, and click the column heading a second time to sort the forms in descending order. To remove the sorting for a column heading, press the **Ctrl** key and then click the column heading.

TIP! Switching between multiple open forms.

If you have more than one form open, you can easily switch between the forms you have open by clicking the tabs displayed above the forms. You can also click the **Window** menu and select the form you want to view from the list of open forms shown.

Creating a template form

To create a template form:

- First you need to create a profile and the associated folder in which the template form will be stored. See “Creating a profile” for more information on how to create a profile.
- Open the blank form you want to use as the basis for your template from the list of blank forms on the "Blank Forms" tab on the "Forms List" window. See “Opening a blank form” for more information on how to open a blank form.
- Enter any applicable information on the form that will serve as your template.

Now you need to save the template form.

- Click the **File** menu and select **Save**.
- Click **No** to confirm that you do not want to apply profile data to the template form.
- On the "Save Form" dialog box, select the profile you created earlier and click the **Save** button.
- Close the form that is open.

The template form you created is saved to the template profile folder.

Using a template form

To open a template form:

- On the "Saved Forms" window, select the template profile folder you created when you created the template form. See “Creating a template form” for more information on how to create a template form.
- Once you have selected a folder on the "Saved Forms" window, the list of saved forms in the selected folder is displayed on the "Saved Forms" tab on the "Forms List" window.
- Select the template form you want to open, and then click the **Open Form** button (you can double-click on a form to open it as well).

The template form you selected is opened and is displayed on your screen.

To save an open template form to another folder (and apply profile information):

- Click the **Edit** menu and select **Apply Profile Data**.
- Select the profile you want to apply to the template form, and then click the **Open** button.

The profile data you selected is applied to the template form.

- Click the **File** menu and select **Save As**.

The "Save As" dialog box is displayed, and the folder associated with the profile you just applied to the form is selected.

- Click the **Save** button.

The template form (with the newly applied profile information) is saved.

Working with PDF versions of forms

The PDF version of a form is provided while the form is being developed for *WK Forms*. You cannot edit the PDF versions of forms within *WK Forms*. The PDF version of a form is opened outside of *WK Forms*. (**Note:** The PDF versions of forms are only available in the "Internet" and "Interim" libraries.)

Note: Adobe Reader 7.0 or above is required to open PDF versions of forms in *WK Forms*.

Both the "Blank Forms" and "Saved Forms" tabs of the "Forms List" window display the PDF version of forms in the applicable location within the list of forms. You can easily locate the PDF version of a form by looking for forms that are displayed in a blue italic font. The PDF version is removed from the list of forms when a version that is editable within *WK Forms* is made available.

Note: To add a PDF version of a form to the "Saved Forms" list, open the PDF version of the form and then save it to one of your saved forms data folders. The process of saving the PDF version to your saved forms data folder may vary depending on the application assigned to opening PDF files.

Saving a form as a PDF file

To save a form as a PDF file:

- With the form you want to save open on your screen, click the **File** menu and select **Save As**.
- Follow the steps for saving a form (located in the "Saving a form" section of this guide).
- On the "Save Form" dialog box, click the "Save as type" drop-down menu and select **PDF Files (*.pdf)**.
- Click the **Save** button.

The "Save as PDF" dialog box is displayed, and you can set a password for the PDF file you are saving.

- If you want to password protect the PDF file, click in the checkbox and type a password in the space provided.
- Click **OK**.

The form is saved as a PDF file in the location you specified.

Printing a form

You can print copies of blank and saved forms, along with copies of form instructions.

To print a form:

- With a form currently open on your screen, click the **Print** button (or click the **File** menu and select **Print**).
- Set your print options on the "Print" dialog box, and then click **OK**.

The form is printed.

Note: If the form you have selected to print is a machine-read form, and you have not calibrated your printer, you are prompted to calibrate your printer. For more information on how to calibrate your printer, see the "Calibrating a printer" section of this guide.

Printing a forms list

You can print a list of all of the forms currently listed on the "Forms List" window.

To print a forms list:

- Select a forms library from the list shown in the "Forms Library" section of the "Blank Forms Library" window.
- In the "Jurisdictions" section of the "Blank Forms Library" window, click in the checkbox(es) next to the jurisdictions to view forms included in those jurisdictions. (**Note:** You can expand and collapse jurisdiction items by clicking the "+" and "-" icons.)

The list of available forms for the jurisdiction(s) you selected is displayed on the "Blank Forms" tab of the "Forms List" window and is sorted by jurisdiction.

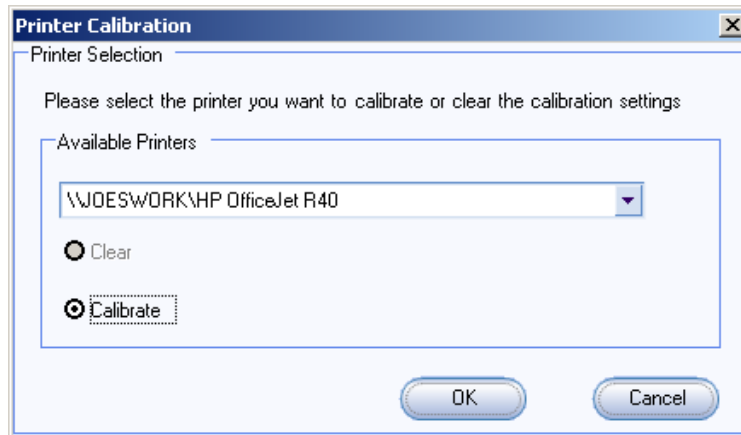
- Click the **Print List** button.
- Set your print options on the "Print" dialog box, and then click **OK**.

The list of forms shown on the "Blank Forms" window is printed.

Calibrating a printer

Certain forms require that data printed on the form are properly aligned. You can set up your printer so it is properly calibrated and ensure that forms are printed correctly and can be properly read by automated processing equipment.

Note: If you use more than one printer with the forms application, you will need to calibrate each printer separately.



To calibrate a printer:

- Turn on your printer.
- Click the **File** menu and select **Printer Calibration**.
- Click the drop-down menu and select the printer you want to calibrate.
- Click in the radio button next to **Calibrate**.
- Click **OK**.

A printer calibration sheet will be sent to your printer. The printer calibration sheet enables you to identify horizontal and vertical alignment positions on your printer. Follow the instructions on the printer calibration sheet to finish calibrating your printer.

Note: If you attempt to print a machine-read form on a printer that has not been calibrated, you are prompted to calibrate your printer.

To clear printer calibration settings for a selected printer:


- Click the **File** menu and select **Printer Calibration**.
- Click the drop-down menu and select the printer you want to clear.
- Click in the radio button next to **Clear**.
- Click **OK**.

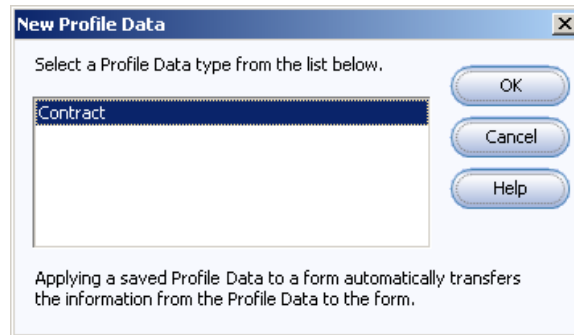
The calibration settings for the printer you selected are cleared.

Creating a profile

With the forms application, you can create profiles. A profile contains data that can be easily transferred to forms.

To create a profile:

- Click the **New Profile Data** button  (or click the **File** menu and select **New Profile Data**).
- Select the type of profile you want to create.



- Click **OK**.
- Type the profile information in the spaces provided. (**Note:** Fields highlighted in red are required fields and must be filled out before the profile can be saved.)
- Click the **Save** button to save the new profile (or click the **File** menu and select **Save**).


The new profile is saved in the default saved forms folder path, which is displayed in the "Saved Forms" window on the main forms application screen.

Note: A folder matching the new profile is added to the saved forms path when you save the new profile. The new folder is named based on the type of profile created and the information entered in specific fields on the form.

Applying Profile Data information to a form

Once you have created a profile, you can apply that profile information to forms in the forms application.

To apply profile information to a form:

- With the form to which you want to apply the profile information open, click the **Apply Profile Data** button  (or click the **Edit** menu and select **Apply Profile Data**).
- On the "Select Profile Data to Apply" dialog box, select the profile you want to apply to the current form, and then click the **Open** button.

The profile information you selected is applied to the form, and if the form has not been previously saved, the "Save Form" dialog box is displayed.

- If the "Save Form" dialog box is displayed, type a name for the form in the space provided, and then click the **Save** button.

Note: Some forms only accept certain types of profile information. A message is displayed if you attempt to apply a profile to a form that does not accept that profile type.

To apply client profile information to multiple forms:

- Select the forms to which you want to apply profile information from the list of forms displayed in the list of forms on the "Blank Forms" tab on the "Forms List" window. (**Note:** To select multiple forms, press the **Ctrl** key on your keyboard while selecting the forms.)
- Click the **Batch Save** button located at the bottom of the "Forms List" window.
- Click **Yes**.
- Select the profile you want to apply to the forms you selected, and then click the **Open** button.

The profile information is applied to all of the forms you selected, and all the forms are saved to the client folder that contains the profile you selected.

Inserting and deleting duplicate pages

You can add a duplicate page to a blank form or to a form you have already saved.

To insert a duplicate page:

- Navigate to the page of the form you want to duplicate.
- Click the **Form** menu and select **Insert Duplicate Page**.
- Click **Yes** to insert the duplicate page.

The duplicate page is added at the end of the form. Any profile information that was applied to the form is also included on the duplicate page, but any data fields and calculations are cleared. (**Note:** If you add a duplicate page to a form, the duplicate form can be identified by the "Duplicate Page" text at the top of the inserted page.)

Note: A duplicate page cannot be added to a profile form.

To delete a duplicate page:

- Navigate to the duplicated page of the form you want to delete.
- Click the **Form** menu and select **Delete Duplicate Page**.
- Click **Yes** to verify that you want to delete the selected duplicate page.

The duplicate page is deleted.

Performing calculations

Each time you enter information in a form field that affects calculations on the form, WK Forms updates the applicable calculations when you exit the field in which the information was entered. If for some reason you want to override one of these calculation fields, you can both override it and restore it if necessary from within the open form.

Note: In the forms application, calculation fields are highlighted (by default) with a color that is different from the highlighted color of other data entry fields. For more information on how to change the form field highlight colors, see the “Setting preferences” section of this guide.

To override a calculation at the field level:

- Select the calculation field you want to override by clicking in the field.
- Click the **Yes** button on the "Override Calculation" dialog box to override the calculation.

The calculation for the field you selected is overridden, and you can now type your customized data in the field.

Note: You can also override a calculation by right-clicking in a calculation field, selecting **Override Calculation** from the menu that is displayed, and then clicking the **Yes** button on the "Override Calculation" dialog box.

To override a calculation at the form, page, or field level:

- Click the **Edit** menu, select **Override Calculation**, and then select one of the override calculation options: **All Pages**, **Current Page**, or **Current Field**.
- Click the **Yes** button on the "Override Calculation" dialog box to override the calculations.

The calculations are overridden for the option selected.

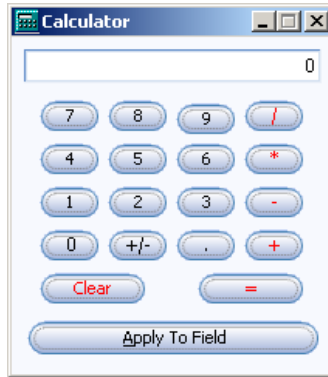
To restore a calculation:

- Right-click in a field in which a calculation was overridden, select **Restore Calculation** from the menu that is displayed, and then click the **Yes** button on the "Restore Calculation" dialog box.
- or -
- Click the **Edit** menu, select **Restore Calculation**, and then select one of the restore calculation options: **All Pages**, **Current Page**, or **Current Field**.
- Click the **Yes** button on the "Restore Calculation" dialog box to restore the calculations.

The calculations are restored for the option selected.

Using the calculator

You can perform calculations in the forms application using the included calculator, and you can even transfer the calculations to a form field.



To open the calculator:

- Click the **Calculator** button  (or click the **Help** menu and select **Calculator**).

The calculator is displayed in the "Calculator" dialog box, and you can perform any necessary calculations.

Note: The "Calculator" dialog box is displayed in an "always on top" state in the forms application. You can continue to work on any open forms and use the calculator at the same time.

To transfer a calculation to a field in a form:

- Select the field in the form to which you want to transfer the calculation.
- Click the **Apply To Field** button on the "Calculator" dialog box.

The calculation is transferred from the calculator to the field you selected in the form.

Linking to research information

You can view helpful research information for some forms in the forms application. The research information available to you will depend on your subscription.

To access research information for a form:

- With a form open on your screen, click the **Access Research** button and select the level of links you want to view: **Form Level Links**, **Page Level Links**, or **Field Level Links**. (**Note:** You can also click the **Form** menu and select **Access Research**.)
- Select a link from the list of research links displayed on the expanded menu. (**Note:** The amount of links that are active depends on the publications included in your Research Network subscription.)

Linking to WK Forms from research explanations

You can access forms directly from the research explanations. Selected research explanations contain links that enable you to access a specific form within *WK Forms*.

TROUBLESHOOTING**1. Is it necessary to calibrate the printer?**

Certain forms need alignment to be made compatible with automated processing equipment. Government agencies set specifications for form printing and calibrating your printer ensures machine readability of the form.

2. I am unable to calibrate the printer.

Ensure that your printer is connected and turned on. For more information, see the “Calibrating a printer” section of this guide.

3. Information is lost when I create duplicate a page of a form.

A duplicate page contains the profile data that was entered on the original page, but all data entry and calculations fields are cleared in the duplicate page. To avoid the duplication of text, you may want to only create duplicate pages of a blank form.

4 I am unable to duplicate the page of a profile form.

You cannot create a duplicate page of a profile form.

5 I am using the CD version of *WK Forms*, and I am not able to access the forms.

Make sure you have set a form access path and added the appropriate CD unlock codes. For more information, see the “Form Access Path” and “CD Unlock Codes” sections of this guide.

6. I cannot view any of the forms I have saved.

To view the list of forms you have saved, make sure you have selected the proper folder on the “Saved Forms” window in which you saved the forms. Once you have located the proper folder, click the **Saved Forms** tab on the “Forms List” window.