



TIP OF
THE
MONTH



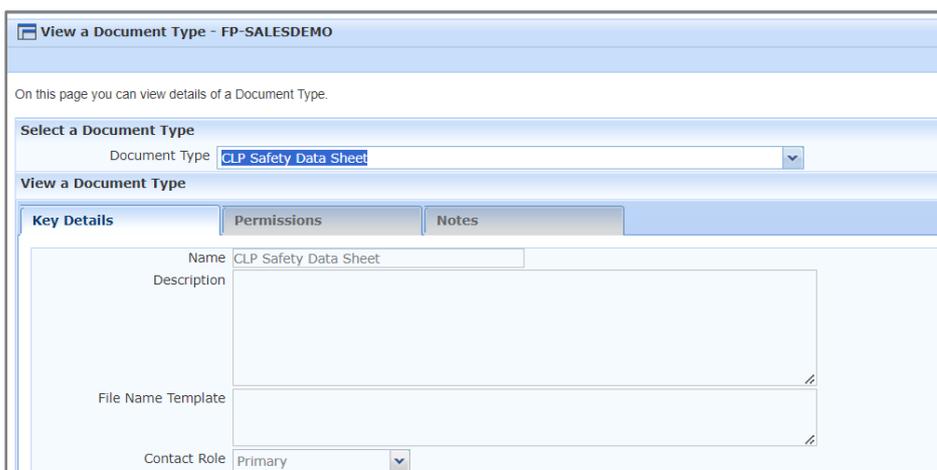
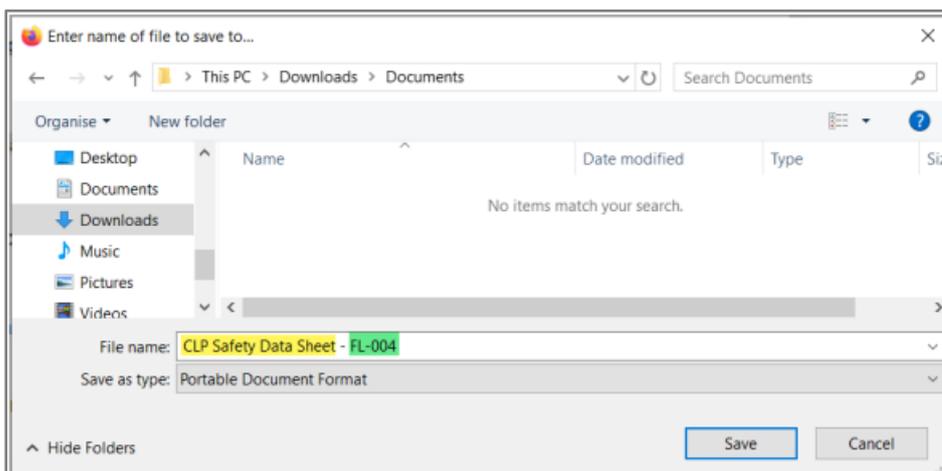
Changing the Name and File Name of a Document

Within Formpak you can change the name of a Document and the File Name when saving.

For this example, a CLP Safety Data Sheet is being saved for Item FL-004.

In View a Document Type, we can see that the Name of the Document is 'CLP Safety Data Sheet.' The File Name

Template field is blank, so the default file name will be the Document Type (Name) and the suffix Code.



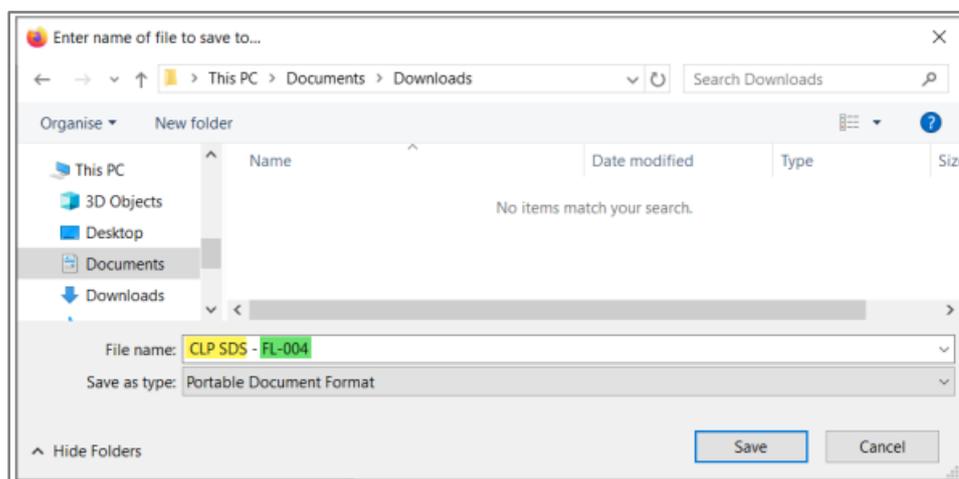
To change the name of the Document:

1. Navigate to Modify a Document Type
2. Select the Document Type you would like to change the name of from the drop-down list.
3. Change the document name, in this example the name has been changed to CLP SDS.

Note: this will also change the Document Name in the drop-down list in Print Document for an Item.

4. Select Save.

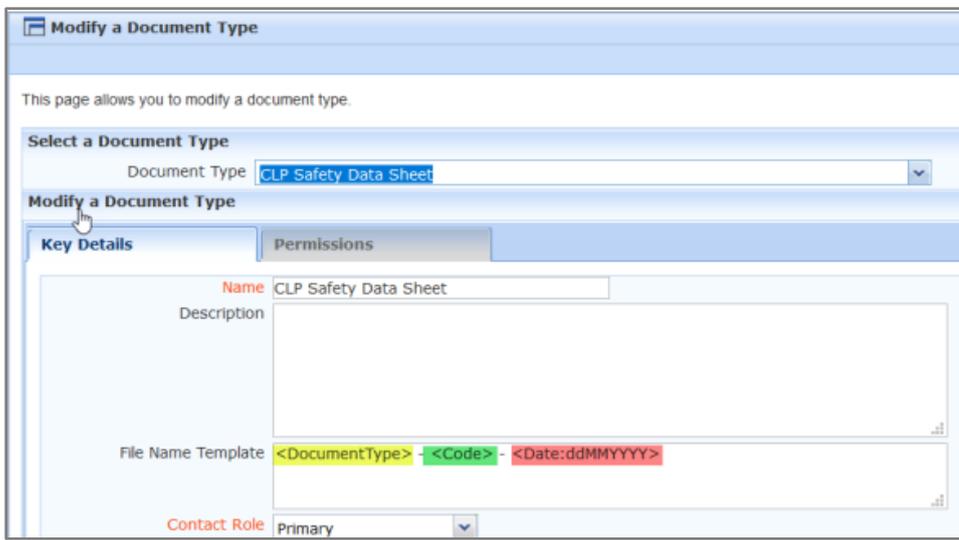
When generating the Document in Print Document for an Item and selecting either 'Preview' or 'Print to PDF' the download 'Save As' file name now contains the updated name and Code.



The Document is also renamed in the list for Print Document for an Item.

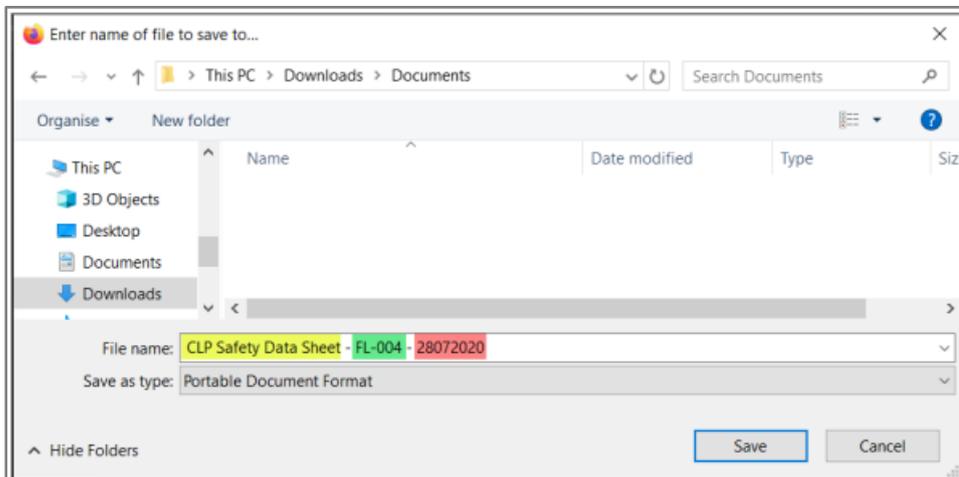
To add suffixes to the File name:

1. Navigate to Modify a Document Type.
2. Select the Document Type you would like to change the name of from the drop-down list.
3. Enter the chosen fields in the File Name Template field – In this example the Document Type, Code and Date are required.



4. Click Save

When creating the Document in Print Document for an Item and selecting either 'Preview' or 'Print to PDF' the download 'Save As' file name now contains the required suffixes.



Below are the different suffixes which can be added to the File Name Template:

<DocumentType> Name of Document type

<Code> Code of Item / Cross Reference

<Name> Name of Item / Cross Reference

<Version> Document version

<VersionDate:> Version date, you can specify date format after ':',

e.g <VersionDate:MMdd> or <VersionDate:ddMMYYYY>

<Date:> Document created date, you can specify date format

<ApplicationName> Name of Application

<Dosage> Dosage(s) of Application

<RegionCode> Code of Region

<LanguageCode> Code of Language.

Mini Tip

Using Capitals to Search

Search with Capital Letters

Using the first capitalised letter for each word for the area you want to navigate to. For example, FMI takes you to 'Find Matching Items.'

The screenshot shows a web application interface with a navigation menu at the top containing 'Home', 'Projects & Tasks', 'Jobs', 'Items', 'Classification', 'Properties', 'Suitability', 'Certifications', 'Documents & Reports', and 'Parties'. The left sidebar has a search bar with 'FMI' entered and a link to 'Find Matching Items'. The main content area is titled 'Find Matching Items' and contains the text: 'On this page you can search for Items by specified conditions.' Below this is a form with a 'Code' input field and a 'Name' dropdown menu set to 'OR'.

Or AANF will take you to 'Add a New Formulation'

The screenshot shows the 'Add a New Formulation' page. The navigation menu includes 'Administration'. The left sidebar has a search bar with 'AANF' and a link to 'Add a New Formulation'. The main content area is titled 'Add a New Formulation' and contains the text: 'On this page, you can add a new Formulation.' Below this is a form with three tabs: 'Formulation', 'Development Job', and 'Attachments'. The 'Formulation' tab is active and contains various fields: 'Name', 'Item to Modify', 'Item Type' (set to 'All Item Types'), 'Item Class', 'Item Code Sequence', 'Code', 'Task', 'Yield' (with a '%' sign), 'Costing Method' (set to '[Default]'), 'Item Count' (set to '1'), 'Cost Price', 'Require review' (checkbox), 'Reviewer', 'Duration' (set to '01/08/2022'), and 'Application Scenario' (radio buttons for 'Application Scenario' and 'No Application Scenario').