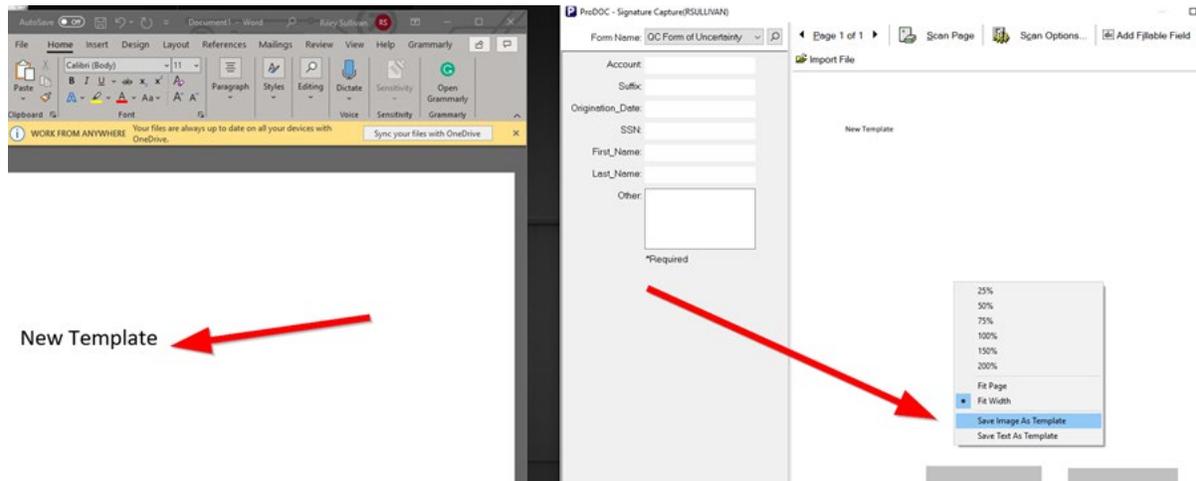


## Tech Tip #40: How to Replace a Template in ProDOC

**\*\*These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.\*\***

Replacing a form template is easy and almost identical to creating a template!

- The first thing you need to do is to save the new template as a .tiff file. Simply print your PDF or Word document to the ProDOC-IT printer.
- Once captured in ProDOC, right-click on the form and select **Save Image as Template**. You can save the new (.tiff) document onto your desktop for now.



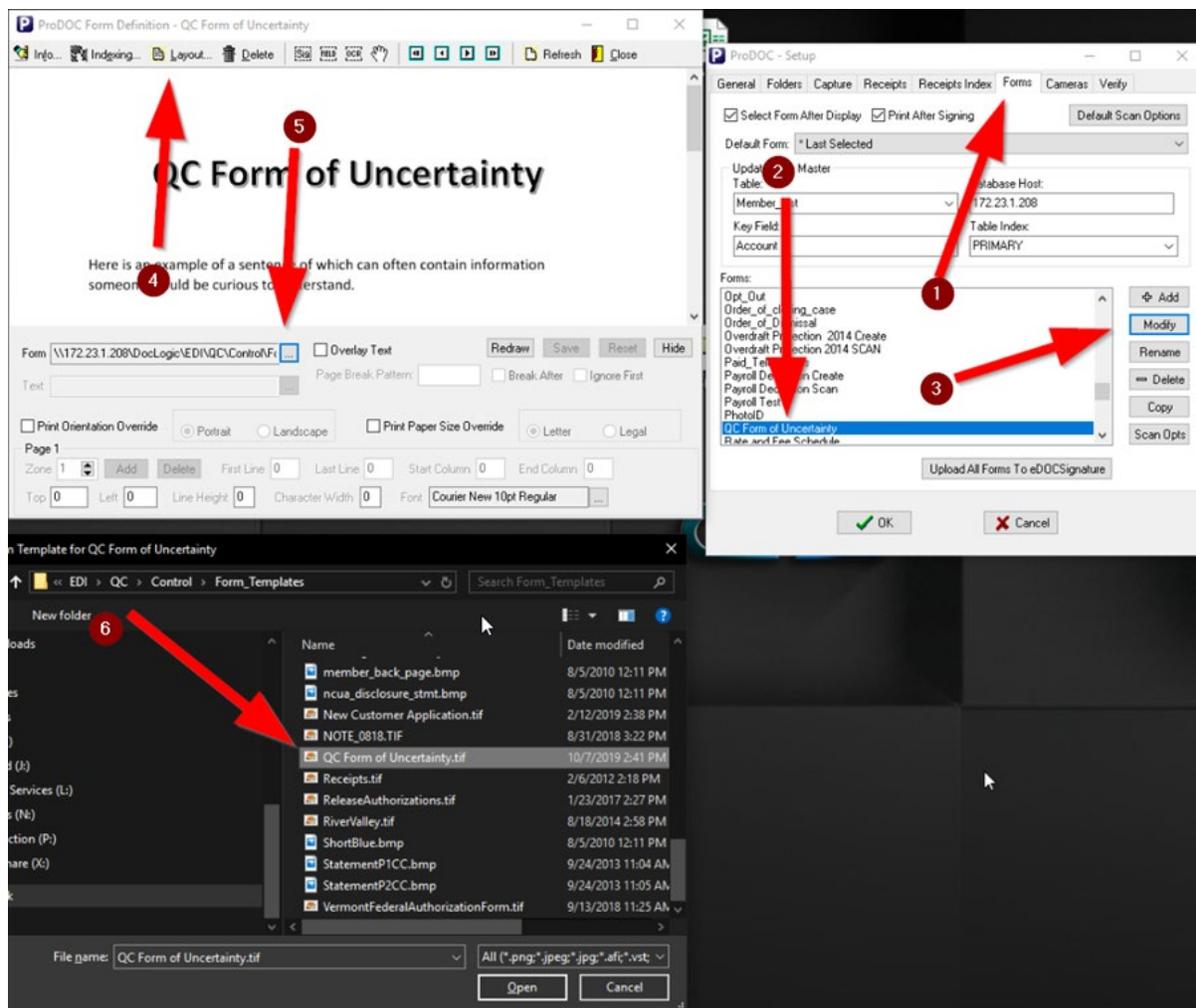
You need to find where the existing templates are saved. For most credit unions, these are stored on the server. For others, existing templates are saved on your local workstation to the C: drive. There is one step that differs between the two.

- You must have access to the **Forms** tab\* in ProDOC. Right-click on **ProDOC**, open **Setup**, and find the **Forms** tab at the top. From here, you can follow along with the screenshot below.

*\*If you do not see this tab, please contact an administrator at your credit union to assist with the change.*

- Select the form you are changing > **Modify** will open the form in ProDOC.
- Select **Layout** on the top > then the **ellipsis (...)** next to the Form field.

For credit unions whose templates are stored on the server, the file explorer should open to the Form\_Templates folder on your server (#5).



If the existing templates are located on your C: drive, see the additional steps outlined below. If the existing templates are stored on the server, skip these steps and continue below.

**For credit unions with Form\_Templates stored on the C: drive:**

- Navigate to your Priv\_PDoc folder which can typically be found here:  
**C:\RDI\_Work\Priv\_PDoc**
- Open the **Form\_Defs** file. You will find two locations that look like or are similar to this:

```
WORKSTATIONTIFFLOCATION=C:\RDI_Work\Form_Templates\  
WORKSTATIONUPGRADELOCATION=\\edoc\DocLogic\EDI\CUA3300\Upgrade\Form_Templates\
```

- Navigate to the second path in file explorer (this is the correct Form\_Templates folder to make changes). Follow the rest of the steps below.

**For credit unions with Form\_Templates stored on the server OR C: drive:**

- In the Form\_Templates folder, find the existing template.
- Update the .tiff file on the desktop with the same name as the .tiff on the server.
- Copy the .tiff file from the desktop into the Form\_Templates folder. You will be asked if you would like to replace the existing file. Click **Yes**.
- To push the new template out to all users, close and relaunch ProDOC. To see the new template, users will also need to close and relaunch their ProDOC.



Tech Tip Contributor  
Riley Sullivan, Client Development Specialist

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