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Features and functionality

TEMPLATES

Q1. Does veroDocs deploy with a standard set of templates?

Most organizations will have their own templates that would be used to create new veroDocs templates. However, we can offer a 'Starter' solution with core templates configured to match your requirements.

Q2. Can we import existing templates into veroDocs?

Yes. Any templates your organization has can be stored and distributed via veroDocs. They will be accessible through the 'New Document' Menu in the Word Ribbon.

However, we would recommend creating your templates from scratch to ensure no legacy issues are carried over into veroDocs.

Q3. We already have dozens or even hundreds of different templates – can veroDocs handle large volumes?

Yes – but we may be able to help consolidate the number of templates you use. For example, if there are separate letter templates for individual offices, we can help combine them. They will still reflect the necessary themes, styles, and languages required.

If they are precedent documents, rather than physical templates that create the document, they can be stored in the Content Manager.

Q4. How easy is it to change the templates?

Word controls template layouts and content (including styles). Any aspect of the physical templates can be managed by anyone with knowledge of or experience with Word styles.

Q5. Does veroDocs offer the same level of functionality in PowerPoint as in Word?

Currently, veroDocs can control template visibility and DocID. Improvements to the PowerPoint veroDocs App is high on our roadmap.

Q6. Does veroDocs offer the same level of functionality in Excel as in Word?

Compared to Word, there is not the same level of template functionality - simply because it is not required based on how Excel works.

Currently, veroDocs can control template visibility and DocID. Simple addition can be achieved in Word both natively and using veroDocs' functionality.

FORMS

Q7. What are the types of forms used in veroDocs – and why are they used?

Forms prompt document creators to enter the relevant details for the type of document they want to create. For example, a form attached to a letter template may have fields to enter contact details and delivery instructions.

Forms help ensure all the necessary information ends up in the document and makes it easy for users to pull in data from connected systems. The form will dynamically change according to the information selected and will display the relevant fields.

Q8. Can we have one master form, rather than individual forms for each document type?

Forms are typically designed to capture the information for the particular document type being created. However, one form can be used multiple times if the information being captured is the same.

STYLES

Q9. Will dates and other styles automatically adjust if we switch languages?

Yes. Ribbon icons, dates, and other document elements can be language and country-specific.



Q10. Can we have different numbering sets within the same document?

Yes. Styles are implemented using Word's standard functionality. During the veroDocs implementation, we would make sure the different styles are visible to the user and that they could swap from one style set to another.

Q11. Can veroDocs support different headers/footers in a single document?

Yes. Functionality can be added to insert information into different headers or footers.

For example, the footer on the first page of a letter can have the disclaimer, and the second page has the page number. Multi-section headers and footers are also possible.

Q12. Can we integrate variables, images, or formatting, e.g., different fonts and colors, into the footers?

Yes – for both the header and footer. Variable information, document IDs, and any formatting – including themes – can be supported.

Q13. Would DocsCorp review our existing template styles after purchase and before deployment?

Yes, we can and would like to review your template styles.

CONTENT MANAGER

Q14. What kind of content would I store in the Content Manager?

The Content Manager is your organization's content library. It can include clauses, terms and conditions, logos, marketing information, or any content you choose.

Q15. How do I access the Content Manager?

The Content Manager is accessible in Word. It is a

pane that can be docked in various locations, so you can quickly easily access blocks of content as you build out your document. Users can drag-and-drop content blocks onto the page and any styles will be maintained, including numbering.

Q16. Can veroDocs users save content components/blocks as favorites?

Yes. Users can create their own content blocks, if their organization allows them, and save these somewhere specific to them.

There is not currently an "add to favorites" function, but it is on the roadmap.

Q17. If certain content is confidential, and only one or two people have access to the details, can veroDocs manage this?

Access to any content can be restricted. For example, HR content would not be visible to the rest of the organization. Word's privacy and protection functionality can be used to ensure that certain parts of the document are restricted, if necessary.

Q18. Can I insert multiple content blocks at once?

You can only insert one block at a time. Although, an enhancement to allow multiple blocks is on the roadmap.

Q19. Once the document is created, what is to stop someone from changing the variable information?

An option can be added to lock or remove content controls, for example, to protect the finished document. We can also help you configure an option to 'protect' areas of the document from further editing.

RIBBON

Q20. What is included in a standard Ribbon?

Each firm's Ribbon will look slightly different since it can contain whichever functions meet your users' specific requirements. For example, your firm's Ribbon



could include quick access to Heading Styles, Author Information, Languages, and Content Libraries.

Q21. Can we modify the Ribbon ourselves?

Yes. At present, the Ribbon can be modified by anyone with XML skills and some knowledge of the veroDocs calls, etc. A new veroDocs Solution Center is being developed, which will make Ribbon configuration easier.

Q22. Can the “New Document” menu with available templates be organized into folders?

Yes. veroDocs templates can be organized into folders and sub-menus to make them easy to access and manage.

Q23. Can we create custom macros and assign them to a Ribbon?

Yes, you can assign custom macros or in-house development to Ribbon icons.

Integration

Q24. Does veroDocs support Office 365?

Yes. veroDocs supports Office 365 when it is installed locally.

Q25. Does veroDocs integrate with pdfDocs?

Yes, via Word. Because pdfDocs integrates with and is accessible through Word, we can include pdfDocs icons (i.e., functionality) on your customized Ribbon. This ensures convenient access to your PDF creation, editing, and bundling tools.

Q26. Which other systems does veroDocs integrate with?

veroDocs integrates with iManage, NetDocuments, SQL Server, Active Directory, and CRM systems via lightweight Apps.

veroDocs can be integrated with other systems, too. We would evaluate specific requirements on a case-by-case basis.

Q27. When veroDocs integrates with iManage, can we configure post-profiling of templates?

Yes. The choice to set pre- or post-profiling can be made on a template-by-template basis.

However, you can't insert any iManage-related information like matter details or document number until the document is saved. If a mistake is made and the user saves the document again, or the document performs a Save As or Save As New Version, all relevant iManage information updates.

Q28. Can we choose not to map specific form data – like author information – to other systems, even if they are integrated?

Yes. You can choose not to bring in information from your systems. For example, author information can be brought in from Active Directory, a home-grown staff system, or typed manually.

veroDocs has an Author App you can use to store this information if you do not have another method.

Q29. If we don't integrate veroDocs with a CRM to automatically pull in data, can the user enter these details manually?

Yes. If you do not have a CRM, relevant text boxes would be added to the form for manual entry. This is also helpful if, for example, your CRM is integrated, but the contract has not yet been entered. You could enter these details manually in the meantime.

Q30. Is integration with DocID an additional cost?

No. It is a separate App but included with veroDocs. This means firms with DocID can install the App, while those without it are not required to.

Q31. Do you offer an API for document creation?

No, because an API is not necessary. The functionality to create documents is delivered via the veroDocs core software and New Document App.



Deployment

Q32. Is veroDocs hosted in the cloud or on an on-premises server?

It is hosted on-premises.

Q33. How is veroDocs deployed?

veroDocs is deployed as a Solution Package; a simple, lightweight MSI installed on a desktop, laptop, or virtual machine. veroDocs is architected so that a firm's specific functionality is layered on top of the core application.

Q34. What is included in a Solution Package?

A veroDocs Solution Package contains the bespoke elements required for document production within your organization. Typically, this includes:

- Microsoft Office Templates
- Microsoft Office Themes
- Apps
- Digital Assets
- Content Blocks (clauses, etc.)
- veroForms
- Configurations

Q35. How large is a typical veroDocs Solution Package? Can it be easily deployed via VPN?

Typically, the Solution Package is small. However, the size will depend on the types of assets included in the Content Manager.

Q36. Can veroDocs Solution Packages be distributed to devices automatically? For example, can templates be shared over the internet to a remote laptop that has veroDocs installed locally?

The Solution Package can be set up so that when the device is online, it will find the package and expand it onto the machine.

Q37. Other than English, in what other languages is veroDocs available?

veroDocs as an application is not offered in different languages. However, forms, text fields, and other content can be in whichever language(s) you require and translated if necessary.

Q38. Is veroDocs built via modern plugins for Word? How many add-ins does it load on Word start-up?

Yes, veroDocs is built via modern Word plugins and only loads one add-in on start-up.

Remote Working

Q39. How can we ensure remote staff who may or may not connect to the office network to create documents have access to veroDocs?

veroDocs is configured to run locally, so it will work offline, allowing users to create documents whenever and wherever they may be.

However, if you connect veroDocs with other applications, they will also need to work offline for the integration to function. For example, if you use a document management system or CRM with an offline facility, you can create and save documents offline.

Now that you have the answers you need, [contact us](#) to learn how veroDocs could help streamline document assembly and template management.