



TIP OF
THE
MONTH



Using 'Custom Document' to help with Change Management.

There is an optional document available in Formpak, called 'Custom Document'. With it, you can report selected properties to the 'Custom Document'. It's regular use is to print ad hoc documents such as status or analysis reports.

You can also use Custom Document to monitor changes in regulations for your products. For example, you could report transport classification, allergens, IFRA or application limit and GHS labelling in a single document. Then each time there is a regulatory change, the document can be automatically revised and notify you. This means you have a simple way to track changes and to take action as needed.

Working with the Custom Document

When you Print 'Custom Document', it is designed to show any property (with a value) in the Property Group 'Custom Document Properties'. The following example shows an example of a basic Certificate of Analysis using this method.

The screenshot shows a web application window titled "View a Property Group - DS". The main content area displays details for a property group named "Custom Document Properties".

Select a Property Group
Property Group: Custom Document Properties

View a Property Group

Key Details

Sequence: 114
Name: Custom Document Properties
Description: [Empty text area]

Is Visible:
Can edit:
Creator: Administrator
Created Date: 20/02/2017
Modifier: RICHARD
Last Modified Date: 12/04/2021

Properties

Property Code	Abbreviation	Name	Is Calculated
FP		Flash Point (Celsius)	No
APPEARANCE		Appearance	No
RI		Refractive Index @ 20C	No
SG		Specific Gravity @ 20C	No
COO		Country of origin	No
AROMA		Aroma	No
SHEFLIFE		Shelf Life (months)	No
STORAGECOND		Storage Conditions	No

When printed, the Custom Document will show any of these properties that has a value:

CUSTOM DOCUMENT

PRODUCT: Fragrance 0012

PRODUCT CODE: F0012

Appearance: Pale Yellow Liquid

Shelf Life (months): 24 months

Storage Conditions: Dry, Cool Place

Note:

In relation to change management, you could show and automatically update key properties about different areas of regulatory affairs, e.g. the transport classification, allergens, IFRA limit and the GHS label details in a single Custom Document.

Step 1 - ensure the relevant properties are present in the Custom Document Properties Group

View a Property Group - DS Edit | View Property | Cancel | Help

On this page you can view details of a Property Group.

Select a Property Group
 Property Group: Custom Document Properties

View a Property Group

Key Details | Permissions

Sequence: 114
 Name: Custom Document Properties
 Description:

Is Visible:
 Can edit:
 Creator: Administrator
 Created Date: 20/02/2017
 Modifier: PENNY
 Last Modified Date: 05/05/2021

Property Code	Abbreviation	Name	Is Calculated
TRANSID	UN number	Transport Id	YES
TRANSPG		Packing Group	YES
TRANSPSN		Proper Shipping Name	YES
AGNINGINGS		Fragrance Allergens as a string	YES
IFRACA02		IFRA Category 2 Limit	YES
IFRACA04		IFRA Category 4 Limit	YES
GHSCATHAZSUMM		GHS Hazard Category and Statement Summary	YES

Step 2 - ensure the Custom Document has these properties as versioning properties

The screenshot shows the 'View a Document Type - DS' form. The 'Document Type' is set to 'Custom Document'. Under the 'Versioning Properties' section, several properties are listed with checkboxes and magnifying glass icons, indicating they are selected as versioning properties:

- GHSCATHAZSUMM GHS Hazard Category and Statement S
- TRANSID Transport Id
- TRANSPSN Proper Shipping Name
- TRANSPG Packing Group
- AGNINGINGS Fragrance Allergens as a string
- IFRACA02 IFRA Category 2 Limit
- IFRACA04 IFRA Category 4 Limit

Other visible fields include: Name (Custom Document), Description, File Name Template, Contact Role (Primary), Default Supply Condition (Custom Document), Default Design (Custom Document), Default Sender (DEFAULT), Sender Contact Role (Primary), and various radio button options for 'Relates to Application', 'Print For Dilution', and 'Dilution Item Rule Script'.

Step 3 - ensure the document 'Supply Condition' is set to update the version based on changes in properties, regardless of supply of the product. An example set up to achieve this is:

The screenshot shows the 'View a Document Supply Condition - DS' form. The 'Document Supply Condition' is set to 'Custom Document'. The 'Name' is 'Custom Document'. The 'Automated Supply for Sales' is set to 'First Supply and Resupply' and 'Automated Supply for Samples' is set to 'None'. The 'Supplying Item Period', 'Unsupplied Document Revision Period', and 'Unrevised Document Resupply Period' are all set to 24 months. The 'Document Requires Suitability Check' is set to 'No'. The 'Creator' is 'PENNY' (Penny Williams) and the 'Created Date' is '05/05/2021'. The 'Last Modified Date' is also set to '05/05/2021'. The 'Rule Script' field is empty.

This will now enable you to print an initial 'Custom Document' with useful status for any / all of your products. When printing, if you 'record supply' to yourself / your company, you can then be automatically updated on any changes.

The Custom Document title can be renamed and Notes can be edited in Manage Document Content.

Note: As you may know, automatic updating of any document is possible with this method e.g. to keep Safety Data Sheets, Specifications and other status documents up to date. You can additionally notify customers with appropriate updates.

Mini Tip

To increase the size of your Formpak text, on your keyboard press Ctrl and the + / - buttons to zoom in / out.

To see previous 'Tip of the Month' articles, please see [here](#).

All of our training and support material can be accessed from our **Support Centre**. The Support Centre is available 24/7 and is a great resource to use at your convenience. It includes:

- Over 100 training and support articles
- Links to training videos
- Quick Start Guides
- The Formpak Training Matrix

The Support Centre can be accessed on the Home screen of Formpak software or via the following link: https://www.formpak-software.com/Support_Centre/Pages/Support_Centre.html

Our **Support Team** are available:

Monday - Thursday: 8:30 - 17:00 (GMT)

Friday: 8:30 - 16:00 (GMT)

Email: support@formpak-software.com

Telephone: +44 (0) 1235 250 020

The Formpak **Help Centre** is included directly in Formpak software, just press the 'Help' button to access it. The Formpak Help Centre offers explanations for each function of the application as well as a glossary of the technical terminology used.

View our **YouTube** channel with lots of helpful guides and information about Formpak

<https://www.youtube.com/user/FormpakSoftware/videos>