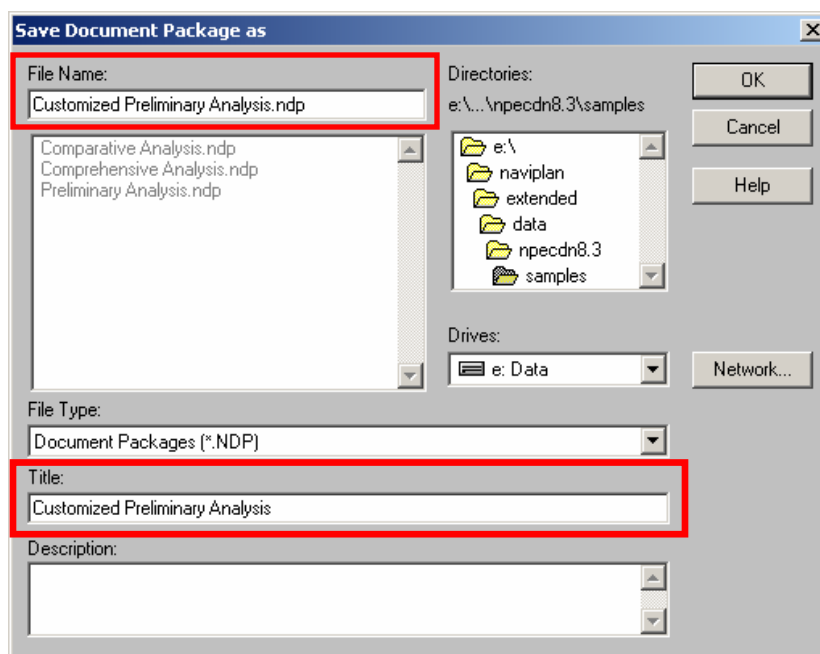


## Simplify editing document packages – removing the read-only attribute

Document packages pre-defined in NaviPlan have a read-only attribute. This read-only attribute can be removed from within NaviPlan. Remember, all document packages contain a document template that will also have to be renamed.

### Creating a customized .ndp file or document package

1. With your mouse, right click the document package that you want to edit, and then select **Save As**. The *Save Document Package as* dialog box opens.
2. Under *File Name*, you will be directed to save the document package (.ndp file extension). The name should be unique, so that you can differentiate it from the original document package. For this exercise, rename the file **Customized Preliminary Analysis.ndp**. Remember to also rename the file in the *Title* field so that it matches the *File Name*. This title will appear under the document package icon.



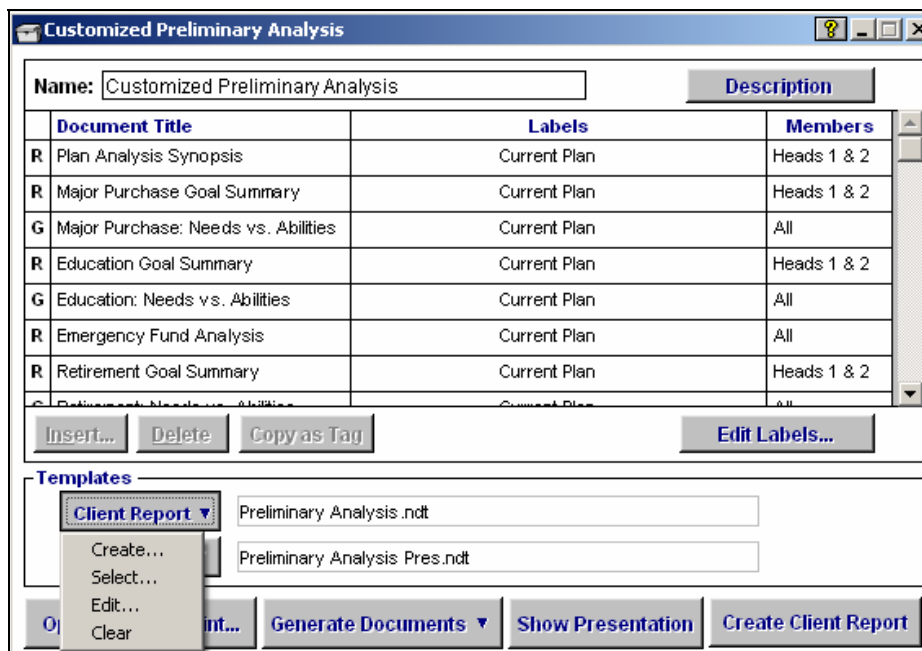
3. Once the file name and title have been changed, click **OK**. The *Customized Preliminary Analysis* document package icon will now appear on the NaviPlan desktop, alongside the existing document package icons.

Each document package is made up of an .ndp file or document package file, and an .ndt file or document template file. You created the .ndp file in the first three steps above.

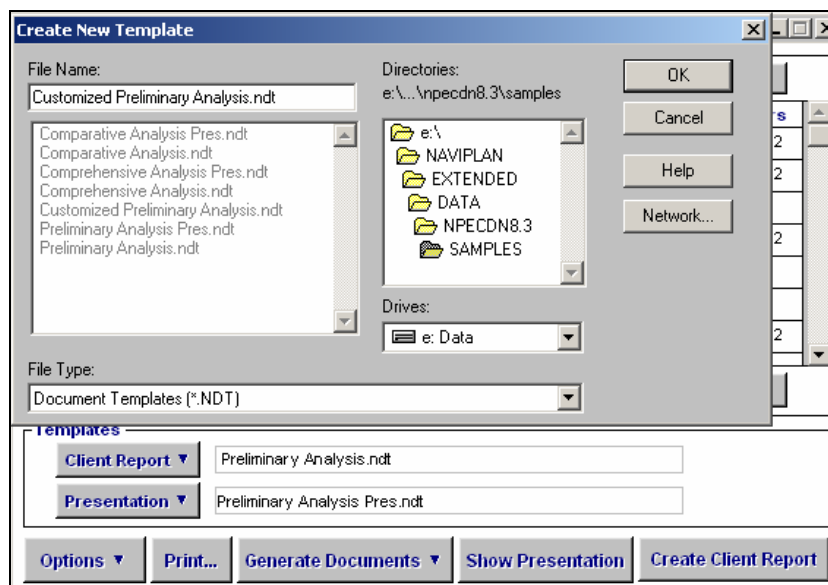
Next, create the .ndt or template file for the document package. This will allow you to edit text and graphs for this document package, making it truly customized.

### Creating the customized .ndt file or document template

1. To create the .ndt file for the *Customized Preliminary Analysis* document package, double-click the **Customized Preliminary Analysis** document package icon. The document package dialog box opens.



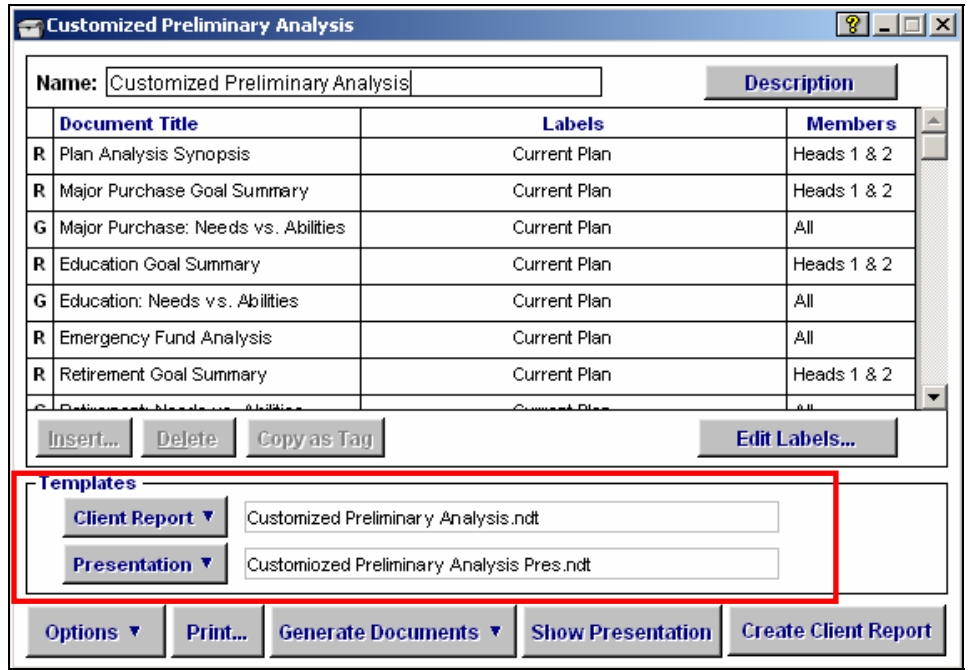
2. Under *Templates*, click the **Client Report** button, and then select **Create**. The *Create New Template* dialog box appears. Enter the same unique name for the template as you did for the .ndp file. Remember to use an .ndt extension for this file.



3. Once the template has been given a new name, click **OK**.

- If you are going to create a presentation, repeat these steps using the *Presentation* button.

Both the client report and presentation have been saved with a unique name.



You are now ready to edit the client report template for the *Customized Preliminary Analysis* document package.