

## Changing a revisioned templates file type in the next version (Platina LS 8.1.5 onwards)

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# Platina LS

### Summary

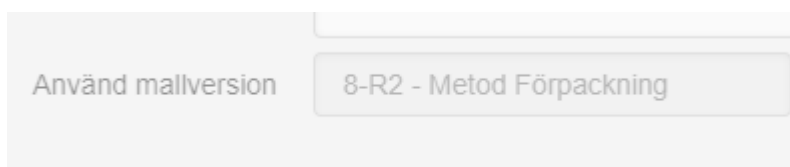
In Platina LS 8.1.x onwards it is possible to change a templates base format. So a document that has an excel template for example could move to a word template. Some points to note:

- This process is not standard controlled docs functionality and as such requires some database data changes to enable.
- The document that is going to change format **must have** a revisioned template
- A new version (draft/working copy) of the document must be created by the end user for the new template for be offered (or forced if that is set) to the end user.
- This change may work in 8.0.x / SP7 however we have not tested it.

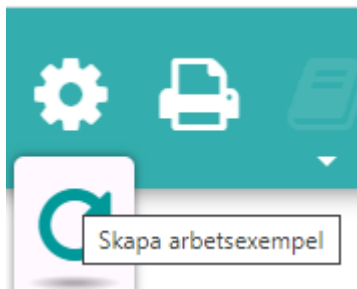
### Process as follows:

#### 1. As system administrator / document administrator

- Identify the template(s) to be changed



- Create a new working copy /draft of the revisioned template in Platina LS - this will create a copy of the old template in the document archive which we can replace.



## 2. As system administrator /Formpipe

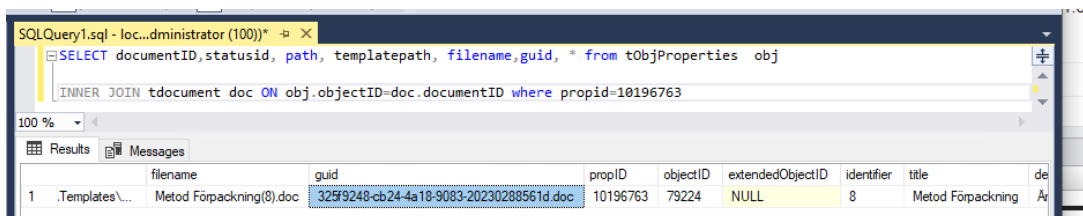
- Find propID details of the document template (open form and hover over the ID)



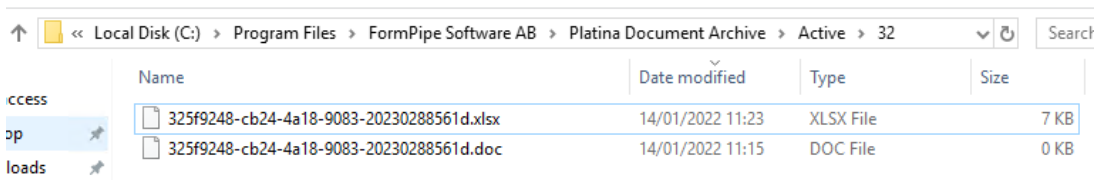
- Get the document details for the document template using the prop ID

```
SELECT documentID,statusid, path, templatepath, filename,guid, * from tObjProperties obj
```

```
INNER JOIN tdocument doc ON obj.objectID=doc.documentID where propid=10196763
```



- Add a file in archive with new template format document (Note: the first two letters of the GUID are the folder in Platina Document Archive/Active)



- Update template to use docx in database (document ID is changed here to match the documentID returned in the query in the step above)

```
declare @oldext nvarchar(6)
```

```
declare @newext nvarchar(6)
```

```
SET @oldext = '.doc'
```

```
SET @newext = '.xlsx'
```

```
UPDATE tDocument set
```

```
path=REPLACE (path,@oldext ,@newext),
```

templatePath=REPLACE (templatePath,@oldext ,@newext),

guid=REPLACE (guid,@oldext ,@newext)

where documentID=79224

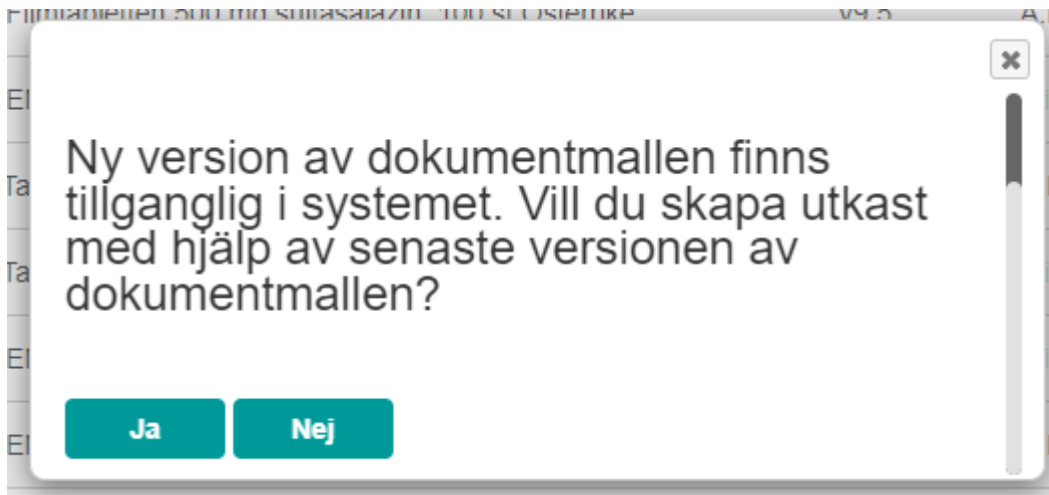
### 3. As system administrator / document administrator

- Approve new template revision



### 4. As end user (to get the new template / test the change)

- Create working copy of document
- User is asked to use new template



- Select Yes
- Working copy created with new template