Document Template Editor

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APPENDIX A: EDITOR COMPONENTS **53**

Document Template Editor Introduction

The Federal SACWIS requirements mandate that State SACWIS systems, such as Social Services Information Systems (SSIS), possess the ability to generate and maintain documents. Documents include service plans, case notes, checklists, letters and other documents that are stored in the database.

The purpose of document templates is to allow agencies to create document templates to supplement the state documents provided within SSIS. State document templates and state document categories can only be created, edited or deleted by State Users.

SSIS can insert case data directly into documents and all service plans with its autofill feature. The template editor allows the agencies to use the autofill feature in custom templates. The template editor provides the ability to insert fields into a template. Those fields include document elements, agency and workgroup merge fields. An element is an HTML element such as a checkbox or text area. A merge field is an element that gets its contents from the SSIS database, for example, a client's name or address. An agency address is an example of an element that can be included on a template.

Security Administration

A user with the assigned function of Create Document Templates can view, edit, delete or add document templates and categories.

There is an additional security function that is not available in SSIS Administration. If you are trained in JavaScript and need this access, contact the SSIS Help Line.

A user with the assigned function of Edit Document Template HTML can:

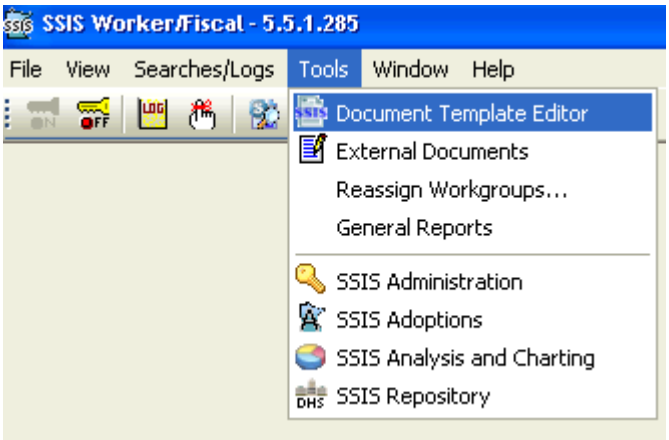
- Create custom style sheets
- Have the ability to use style sheets
- Enter answer sets
- Add/edit prompts
- Add conditions.

Warning: Use caution when assigning the role, Edit Document Template HTML. Only staff who know and work with HTML should have this role assigned since any changes could potentially corrupt active templates.

Access Document Template Editor

Document Template Editor function is accessed from the Tools menu.

Tools Menu



To Access the Document Template Editor:

1. From the **Tools** menu on the **Windows** toolbar, select **Document Template Editor**.
2. The **Template List** displays.

Template List

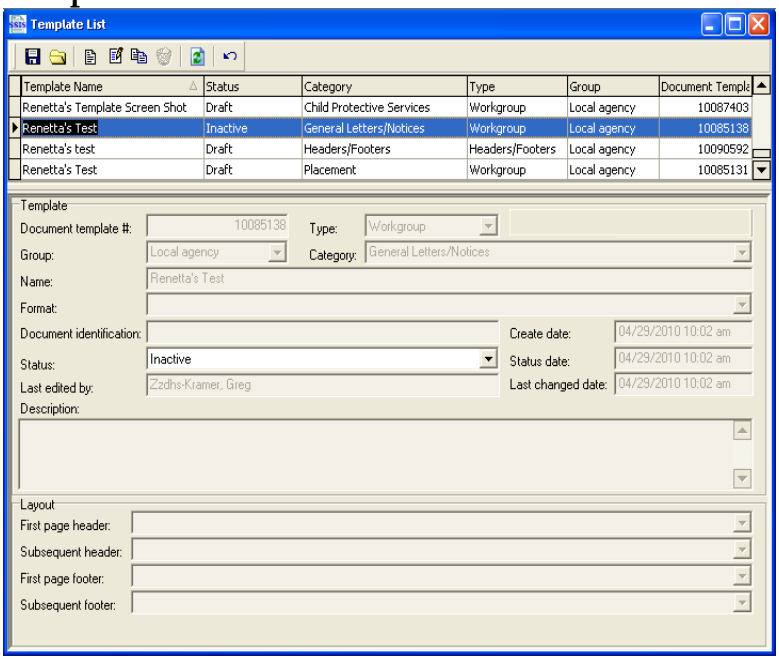
The Template List displays the agency custom templates and the state pre-loaded templates. Also, this is the place to begin creation of a new template. Template properties can be viewed by selecting a template in the grid. A template begins in draft status. Once a template is completed change the status to active. It becomes available to agency users in Chronology. Templates can be inactivated if they are no longer valid templates. For example, an inactive template remains in the system to reproduce any documents made with that version of the template.

To locate a template on the Template List, use the scroll bar or the type-ahead feature if the name of the template is known.

The template properties can be changed without opening the template. An agency can associate a new header or footer template to an existing template from the template properties screen. This is where users can activate or inacttivate a template.

The template status determines which fields you may edit on the Template Properties screen. Document Template Creators are not allowed to make changes to an active template, if that template has been used by workers via Chronology. Template properties can be changed on a draft template.

Template List



To Create New Template Properties:

1. From the **Document Template Editor** toolbar, click the **New Template** button.
2. From the **Template** detail screen, select the template type from the **Type** drop-down menu.
3. Select a category from the **Category** drop-down menu.
4. Enter a template name in the **Name** field.
5. Select a format in the **Format** drop-down menu, if applicable.
6. Enter a document identifier in the **Document identification** field, if applicable.
7. Enter a description of the template in the **Description** field.
8. Select applicable layout features in the **Layout** section.
9. Click the **Save and Open** button on the **Document Template Editor** toolbar.
10. The **Template Editor** displays the template.

To Edit Template Properties:

1. Select a template from the **Template List** grid.
2. Edit fields as appropriate.
3. Click **Save**.

Hints:

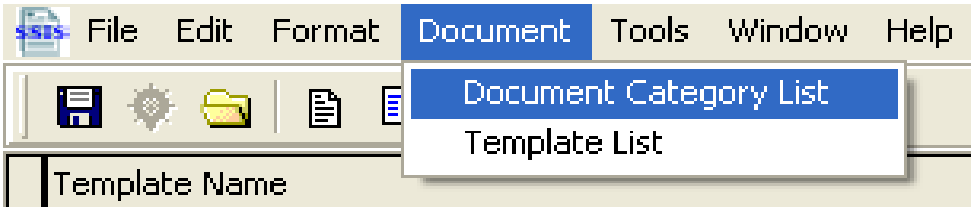
- *The Template Properties screen can also be viewed and edited from the Template Editor on the Template Properties tab.*
- *Template creators can have two active templates with the same name as long as the category names are different.*

Document Category

Document categories are used to group templates. There are state categories that are already pre-loaded and cannot be edited or deleted. Agencies should examine whether they would like to add categories if no state category exists. An agency category can be deleted, but only if it is not associated with a document in Chronology.

Once complete, the new category can be selected on the Template Properties screen for templates that belong in this category.

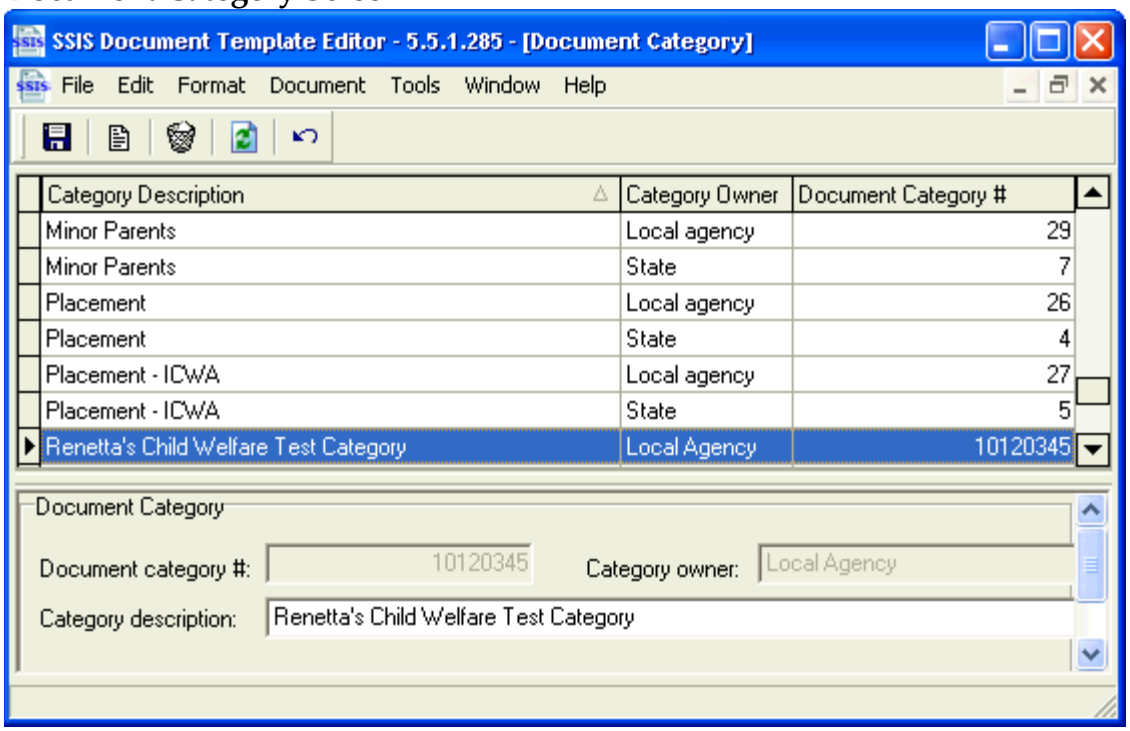
Document Menu



Access Document Category List:

1. Access the **Document** menu from the **Windows** toolbar.
2. Select **Document Category List**.
3. The **Document Category** screen displays the grid screen and the document categories properties.

Document Category Screen



To Create a New Document Category:

1. Access the **Document** menu from the **Windows** toolbar.
2. Select **Document Category List**.
3. Click the **New Document Category** button or right-click and select **New Document Category.**
4. Enter the category name in the **Category description** field.
5. Click the **Save** button.

To Delete a Document Category:

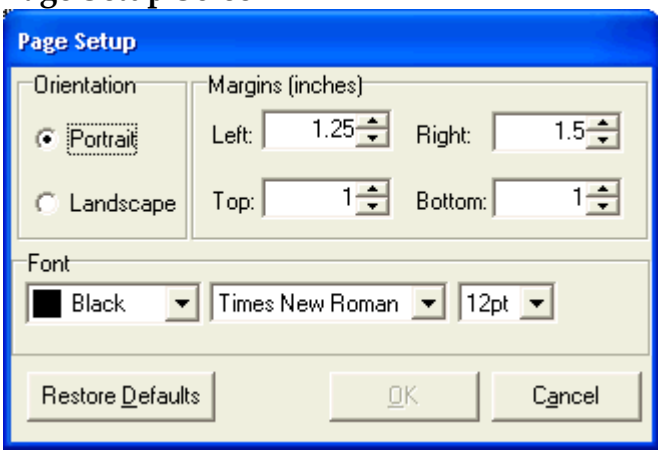
1. Access the **Document** menu from the **Windows** toolbar.
2. Select **Document Category List**.
3. Select the document category to be deleted.
4. Click the **Delete Category** button right-click and select **Delete Category**.
5. A **Warning diaglog** box displays to confirm the action.
6. Click the **Yes** button.

Page Setup

Use Page Setup to change the print settings of a template. The default style sheet for the template is created when the template is saved. The user may choose to create a template with different page setup options. E.g., changing the orientation from portrait to landscape.

Page setup changes made from the Template List become the default for all of the agency templates. Workers should change the page setup for a specific template while in the document template editor.

Page Setup Screen



To Change the Page Setup for All Documents in the Template List:

1. From the **Template List**, select the **File** menu on the **Windows** toolbar.
2. Select **Page Setup**. The Page Setup screen displays.
3. Change the page setup options to enable the **OK** button.
4. Click **OK**.

To Change the Page Setup of an Individual Document in the Template List:

1. From the **Template List**, double-click on the document template, select the **File** menu on the **Document Template Editor** toolbar.
2. Select **Page Setup**. The Page Setup screen displays.
3. Change the page setup options to enable the **OK** button.
4. Click **OK**.

Hints:

- *If using a specific template, users should save a copy of the template at least once prior to changing the page setup on that template.*
- *Headers/Footers autocalculate based on the template margins.*

Document Elements

There are numerous elements available in the editor. These elements include Check Boxes, List Boxes, Images, Input Boxes, Text Areas and Date. The Document Template Creator enters these elements that allow the worker to select or enter information directly into the template in Chronology. For example, workers can only type in areas designated by text areas and input boxes.

Each element is a distinct data element and must be uniquely identified in the tree for it to work properly. Users cannot copy and paste document elements in the template editor. Otherwise, a warning message displays stating "This element cannot be copied". However, there is a Copy Field feature that allows users to copy and rename an element.

Refer to the Create a Set of Document Elements section of this module to create multiple elements.

After creation, elements are represented in the Tree View by blue nodes labeled with abbreviations for the type of element represented.

Abbreviation	Document Element Type	Tree View Nodes
CB	Check Box	CB
LB	List Box	LB
IMG	Image	IMG
I	Input	I
TA	Text Area	TA
DT	Date	DT

Check Boxes

Some agencies have used lines or boxes where users could type an X. The editor uses a standard Windows check box.

Document Template Creators must enter a description for a check box in the Label field and identify whether the check box should default to Checked or Unchecked.

Old Check Boxes

☐A. Yes

☐B. No

_____ Mental Health Service Need

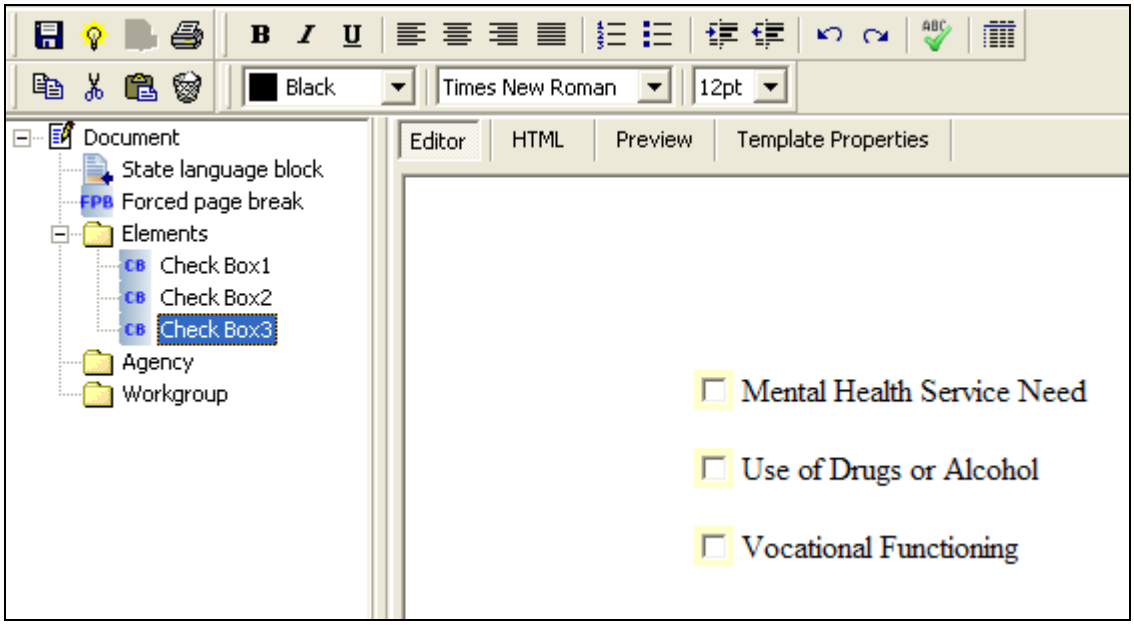
_____ Use of Drugs or Alcohol

_____ Vocational Functioning

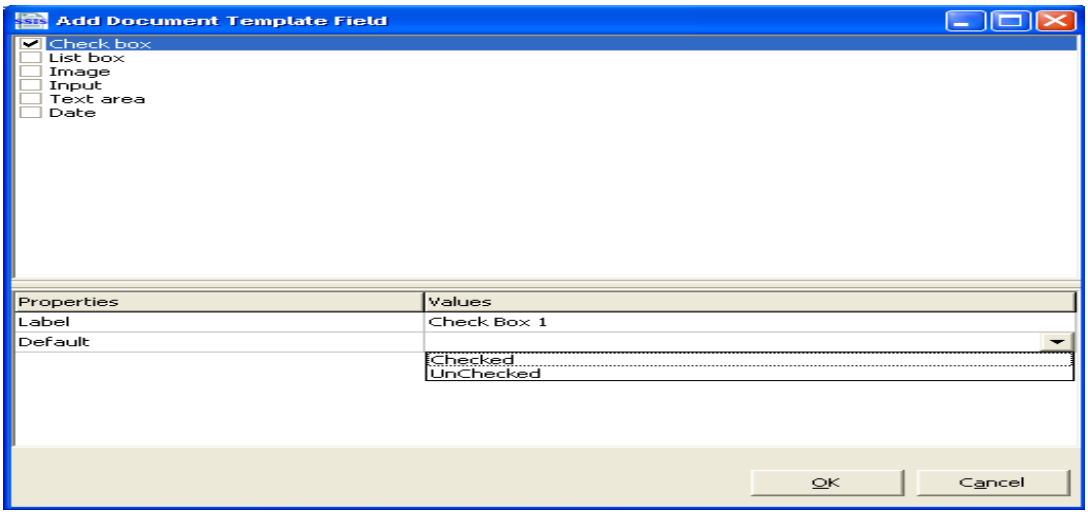
Individual characteristics

	Favorable attitudes toward problem beha
	Psychiatric symptomatology/Psychopathy
	Cognitive bias to attribute hostile intent to
	Substance abuse
	Limited leisure/recreational involvement

New Check Boxes



Add Document Template Field - Check Box



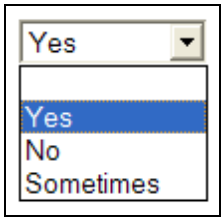
To Insert a Check Box in a Template:

1. Right-click on the **Elements** folder.
2. Select **Add Field**.
3. The **Add Document Template Field** screen displays.
4. Click in the box in front of **Check box**.
5. Enter an identifier under the **Values** column in the **Label** field.
6. Select whether the check box should default to **Checked** or **Unchecked** in the **Default** drop-down menu.
7. Click **OK**.
8. The new check box displays in the Tree View.
9. Drag and drop the new check box into the document.

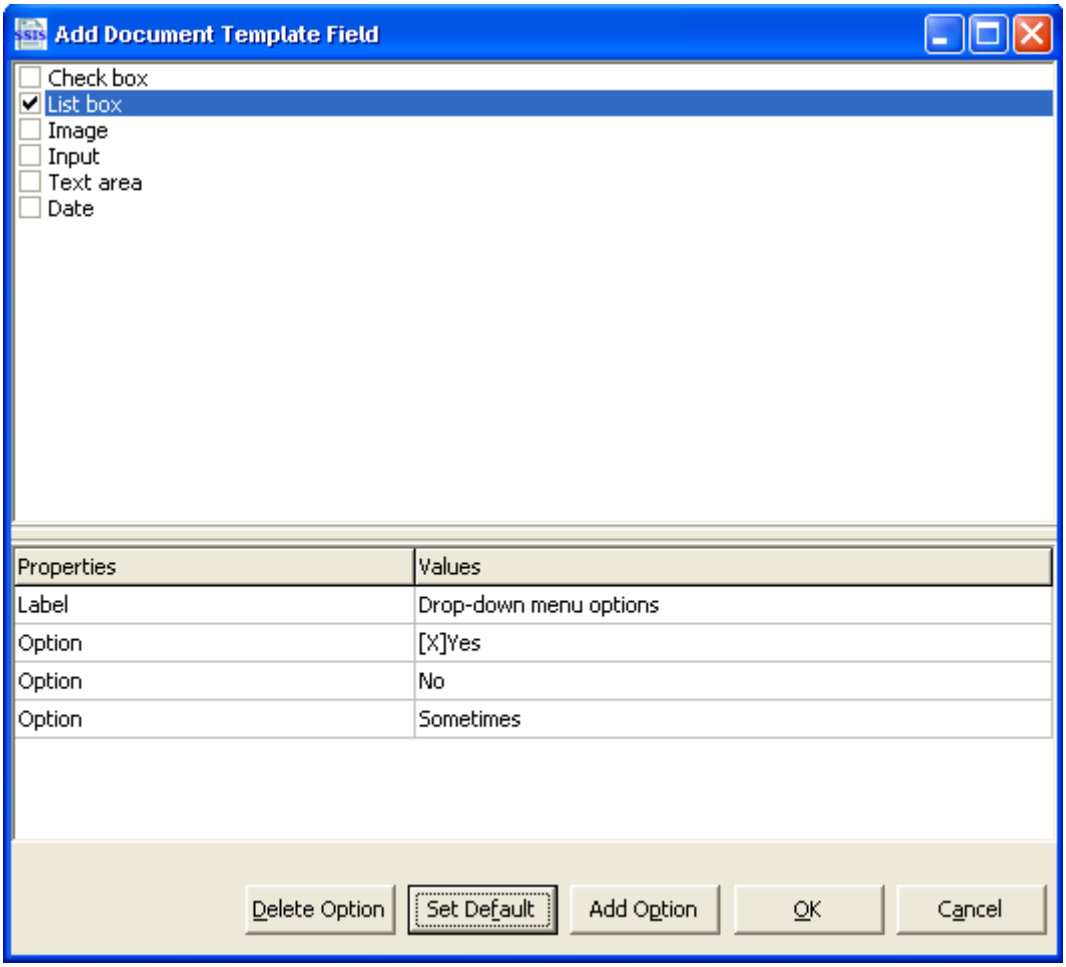
List Boxes

List boxes allows a fixed selection of text for the document and can be used any time there is need for the user to select one item from a list. For example, a list box may include an option to select mother, father, grandparent or sibling from a drop-down menu.

List Box



Add Document Template Field - List Box



Insert List Boxes in Template:

1. Right-click on the **Elements** folder.
2. Select **Add Field**.
3. The **Add Document Template Field** screen displays.
4. Click the box in front of **List box**.
5. Enter a name for the list box in the **Label** field.
6. Type a drop-down menu option in the **Option** field.
7. Click **Add Option**.
8. The **Add List Option** box displays.
9. Type in the next option.
10. Click **OK**.
11. Repeat steps 6-8 for each additional option in list.
12. If a default display option is desired, click on the option and then click **Set Default.**
13. Click **OK**.
14. The new list box displays in the Tree View.
15. Drag and drop the list box into the document.

Text Area

Text areas should be in documents whenever large amounts of text are to be entered. The worker has unlimited characters available to enter in information. For example, the worker may need the ability to enter a summary that may be three paragraphs in length verses entering a couple sentences in the document.

Old text areas are represented in old document templates as big spaces, generally preceded by an in-template prompt. In old templates, users could type anywhere on documents.

There is a scrolling option that allows text to wrap. If no selection is made in the Scrolling Values field, this field defaults to Auto. Thus, it automatically allows the text entered to scroll or wrap in the text area. The text area height and width default to a standard size if no values are chosen.

Template creators should not type information or labels into a text area as it will not save, or be visible, to the user of the template.

Old Text Area

I have the following thoughts:

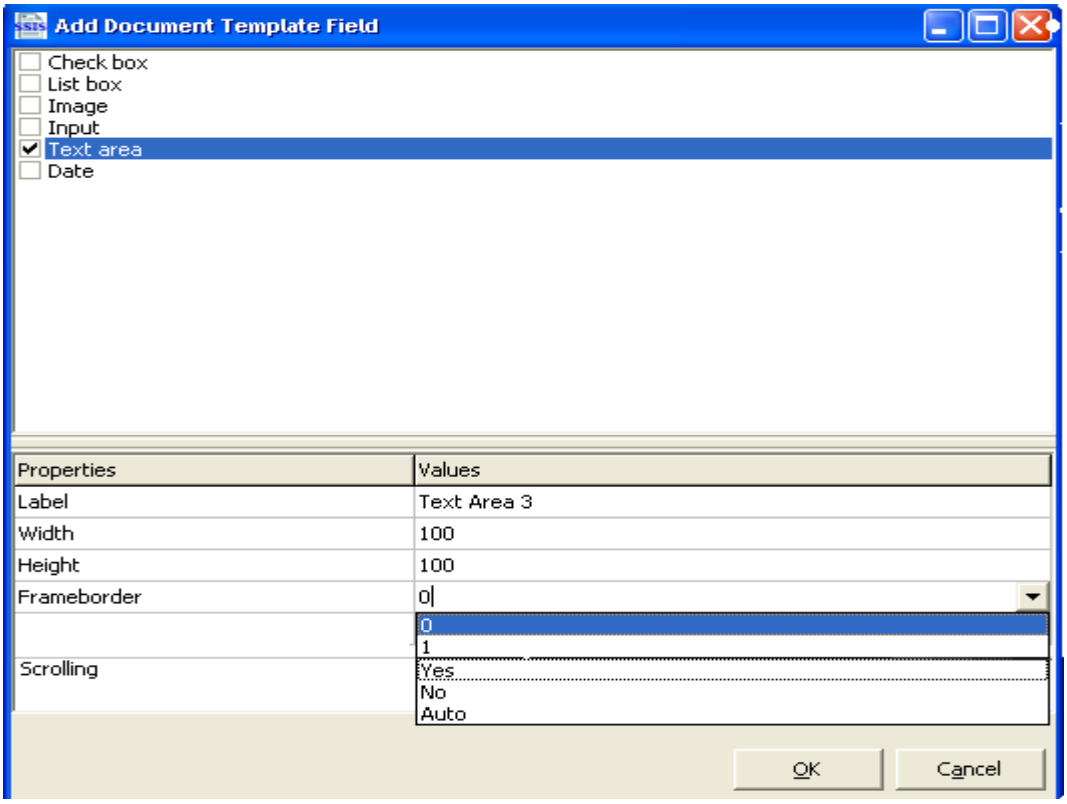
I would also like to go into great detail about the following:

Text Area

I have the following thoughts:

I would also like to go into great detail about the following, which is why I put in a scroll bar:

Add Document Template Field - Text Area



Insert a Text Area in Template:

1. Right-click on the **Elements** folder.
2. Select **Add Field**.
3. The **Add Document Template Field** screen displays.
4. Click in the box in front of **Text area**.
5. Enter a name for the text area in the **Label** field.
6. Select a Width and Height if desired in the **Width** and **Height** fields. Leave these fields blank if default settings are appropriate.
7. Select the desired frameborder option from the **Frameborder Values** drop-down menu.
    - Select **0** to have no frameborder around the text area.
    - Select **1** to have the frameborder displayed around the text area.
8. Select the desired scrolling feature for the text area in the **Scrolling** field.
9. Click **OK**.
10. The new text area displays in the Tree View.
11. Drag and drop the text area into the appropriate place in the document.

Images

Images can be inserted in the document. The image can be imported from saved images on the agency network. Certain files such as Portable Document File (*.pfd), Microsoft Office Open XML (*.docx) and others are not supported in the editor. To add a supported image file, users should select an image with a file extension of JPEG Image File (*.jpg.), JPEG Image File (*.jpeg), PNG graphics from DevExpress (*.png), Bitmaps (*.bmp), TIFF Images (*.tif), TIFF Images (*.tiff), Icons (*.ico), Enhanced Metafiles (*.emf) and/or Metafiles (*.wmf).

The default Height and Width is 100% and can be resized once the image is entered into the document. The height and width is entered as a percentage and/or pixels. Pixels is the default for these fields. To indicate a percent, type % behind the value.

Image

This is my cat, Mouse.

Insert Image in Template:

1. Right-click on the **Elements** folder.
2. Select **Add Field**.
3. The **Add Document Template Field** screen displays.
4. Click in the box in front of **Image**.
5. Enter a name for the image in the **Label** field.
6. Click in the **Image Source** field.
7. The **…** button displays.
8. Select the **…** button to open the browser or click the **Source** button on the bottom to select an image from a file.
9. Enter the height and width in the **Width** and **Height** fields.

10. Click **OK**.
11. The new image displays in the Tree View.
12. Drag and drop the image into the appropriate place in the document.

Input

There are many instances in document templates where the user needs to type a small amount of free text. Enter a prompt to tell the user what they should enter in the Input field. For example, the Document Template Creator can type *"Enter allegation here"* to direct users in how to use the field.

Users are limited to 256 characters in an input field. Use a text area described previously when large areas of free text are desired.

Below are examples of past input options for users verses the New Input field:

Worker had In-text Designation for Input

Please include %[Child 1_Name]'s full name, %[Child 1_Name]'s date of birth, your full name, your position as the residential facility representative, the name of the residential facility that you represent, %[Child 1_Name]'s case number, which is *(worker include the case number and any other identifying information necessary for the court administrator to accept the information and submit it to a judge with the agency's report)* and information that you want the

Worker had Short Line to Type Over

Behavior problems: (type) _____

Other: _____

New Input Field

Behavior Problems: type

Other:

Insert Input Field:

1. Right-click on the **Elements** folder.
2. Select **Add Field**.
3. The **Add Document Template Field** screen displays.
4. Click in the box inf ront of **Input**.

5. Type a label in the **Label** field so that the field can be identified in the Tree View.
6. Select a width in the **Width** field, or leave blank to resize in the document.
7. Type a prompt for the user in the **Value** field, if desired.
8. Click **OK**.
9. The **Input** field displays in the Tree View.
10. Drag and drop the **Input** to the appropriate place in the document.

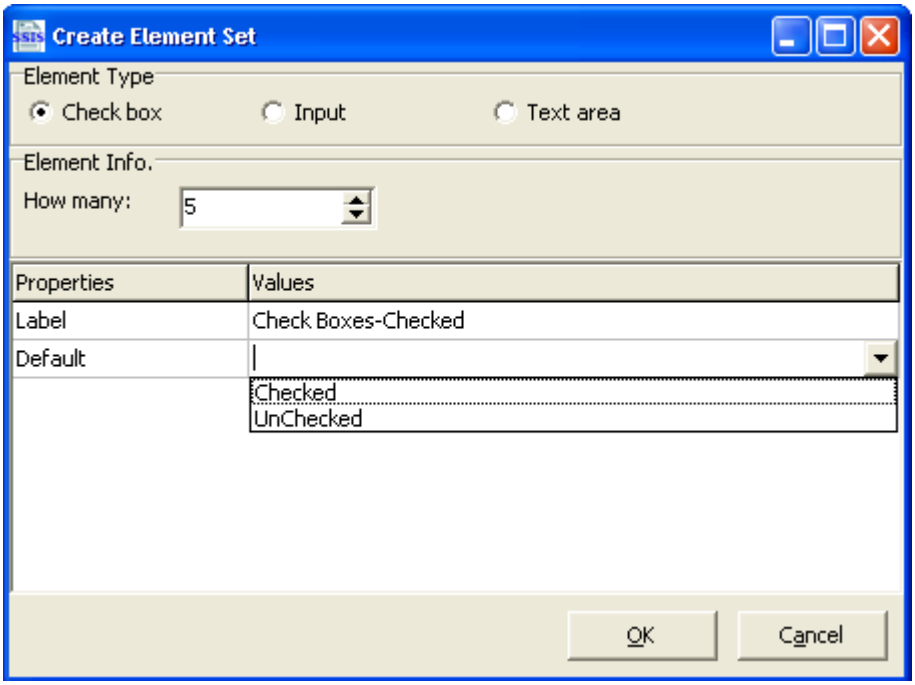
Create a Set of Document Elements

There are instances where the user may want to create several elements at once. Use Create Element Set to create multiple check boxes, input boxes and/or text areas. The Tree View displays multiple elements with a unique identifying number. The text typed in the Label field gets a number added to the end of it when the element set is created. For example, if the desired label is CB01, type CB in the label and it will become CB01.

The values entered on the Create Element Set screen apply to all items created. For example, the user wants 50 check boxes with 40 checked by default and 10 unchecked. In this situation, the user selects Checked as the default, and then all 50 check boxes are checked.

The maximum number of document elements that are created at once is 1000.

Create Element Set Screen



Insert Multiple Document Elements:

1. Right-click on the **Elements** folder.
2. Select **Create Element Set**.
3. The **Create Element Set** screen displays.
4. Select the desired Element Type: **Check box**, **Input** or **Text area**.

5. Enter the number of elements desired in the **How many** field.
6. Type a label in the **Label** field so that the field can be identified in the Tree View.
7. Enter additional properties:
    - Check box - In the **Default** field drop-down menu, select whether the check box should default to **Checked** or **Unchecked**.
    - Input - Select a width in the **Width** field, or leave blank to resize in the document. If desired, type a prompt for the user in the **Value** field.
    - Text area - Select a Width and Height if desired in the **Width** and **Height** fields. Leave these fields blank if default settings are appropriate. Select the desired scrolling feature for the Text area in the **Scrolling** field.
8. Click **OK**.
9. The new **Check box, Input** and/or **Text area** fields displays in the Tree View.
10. Drag and drop the **Check box, Input** and/or **Text area** fields to the appropriate place in the document.

Template Editor

The Template Editor is where the body of the template is entered and where the document elements and merge fields are dragged from the Tree View into the Editor to create or update the template.

There are four types of documents available in the editor. The Headers/Footers template allows template creators to create agency letterhead. The Service Plans template allows the template to function like a service plan and is located in Chronology. The Workgroup template provides the means to create several data elements such as check boxes, input fields, text areas and merge fields. While the Style Sheets template is used to control the page set up options using HTML language.

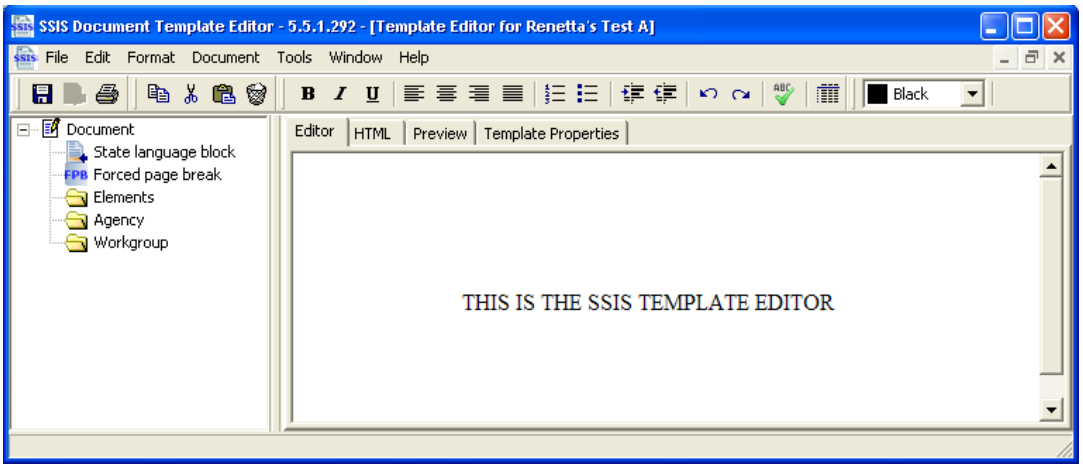
Style sheets do not display on the template properties screen as a Type unless the user has the security administration rights of Edit Document Template HTML. Agencies that do not have staff who write custom HTML should use page setup to edit the page settings such as orientation and font.

Template creators can only create local agency templates. Therefore, the Group field defaults to Local Agency. The template status defaults to Draft, until the template creator activates or inactivates the selected template.

The Create date, Status date, Last edited by, and Last changed date fields all autofill.

The appearance of the Tree View varies based on the template type selected on the Template properties screen. For example, if the template type of Headers/Footers is selected, an HF icon displays in the Tree View.

Template Editor



Create New Template Button

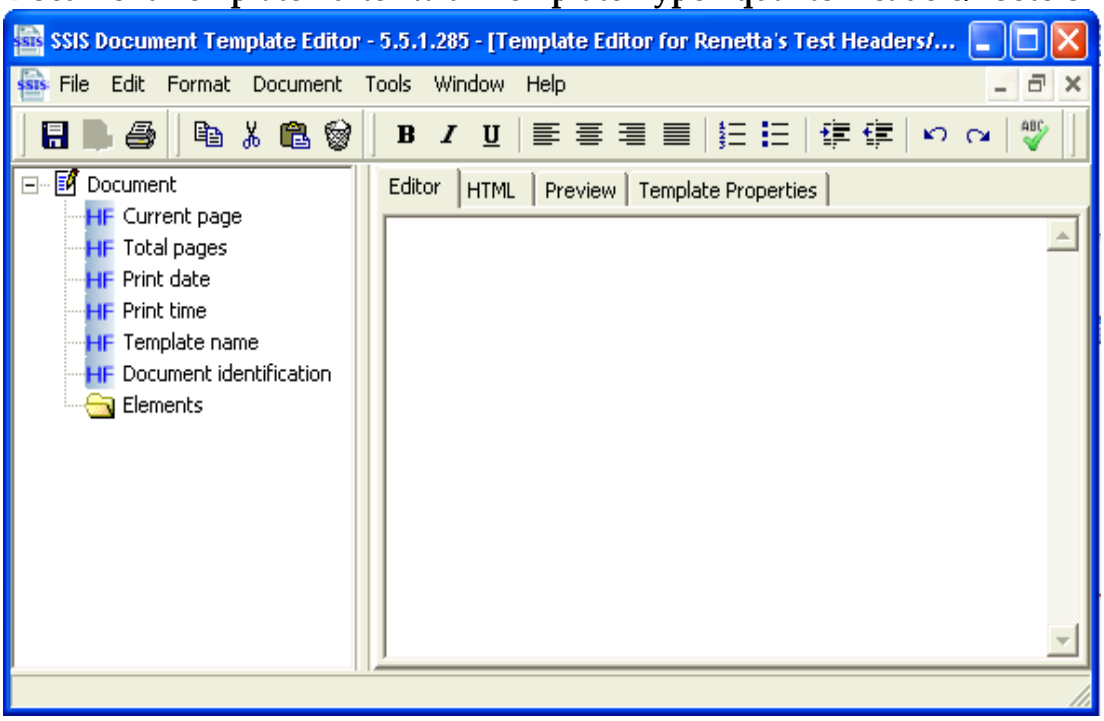
Save and Open Template Editor Button

Template Type Equal to Headers/Footers

Template Type equal to Headers/Footers allows agencies to create header and footer templates that contain agency information. For example, a header or footer template can be used to create an agency letterhead.

Once a header or footer template is created and activated, a header and/or footer can be selected as the header or footer for other local agency templates. Also, a header/footer template can be associated to some state templates.

Document Template Editor with Template Type Equal to Headers/Footers



To Create a New Header/Footer Template:

1. From the Template List's **Document Template Editor** toolbar, click the **New Template** button. A new, blank template displays in the grid and a new **Properties** screen displays below.
2. Select **Headers/Footers** as the **Type** from the drop-down menu.
3. The **Group** field defaults to Local Agency.
4. The **Category** defaults to **Headers/Footers**.
5. Enter the template name in the **Name** field.
6. Enter **Document identification**, if applicable.
7. The **Status** field defaults to Draft.

8. Enter a description of the template in the **Description** field, if applicable.
9. Click the **Save and Open** button.
10. The new template displays in the Template Editor.
11. Drag and drop appropriate merge fields and elements in the editor in the location they should display in the template.
12. Click **Save**.

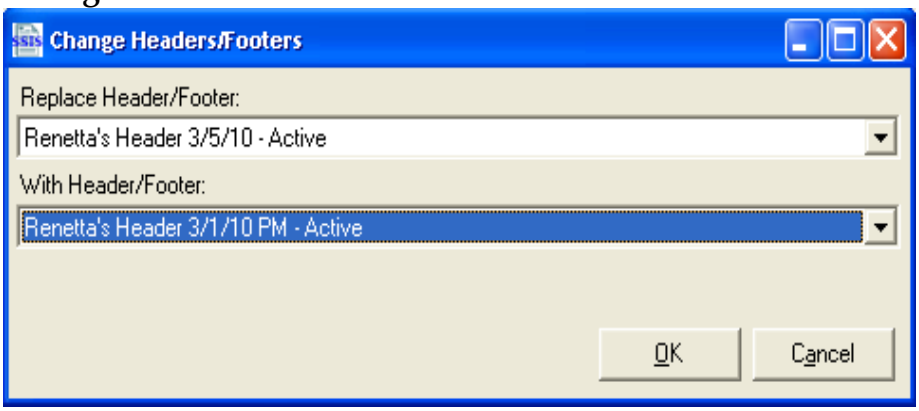
Hints:

- *If the document Type is set to Headers/Footers, the Format field is disabled on the Template Properties screen.*
- *The Orientation and Margin (inches) fields are disabled on the Page Setup screen for templates Type of Headers/Footers. The Orientation and Margins (inches) for headers/footers are determined by the template that it is associated with.*

Change Headers/Footers

Change Headers/Footers allows template creators to swap one header and/or footer with another header or footer. This change becomes effective on all templates associated with the header or footer. Once a Headers/Footers template is changed, the change becomes effective from that date forward. This is not a retroactive process. Documents already created with the previous Headers/Footers do not lose the original. For example, the agency created a template that is associated to an agency letterhead template. The agency moves location and needs to update its new address on the header template and all templates associated with that old letterhead.

Change Headers/Footers Screen



To Change Headers and Footers:

1. Click the **Tools** menu on the Document Template Editor toolbar and select **Change Headers and Footers**.
2. Select the header or footer template to replace from the **Replace Header/Footer** drop-down menu.
3. Select the new header or footer template from the **With Header/Footer** drop-down menu.
4. Click **OK**.

Setup State Template Header/Footer

Setup State Template Header/Footer allows the template creator the ability to add an agency letterhead to certain state templates.

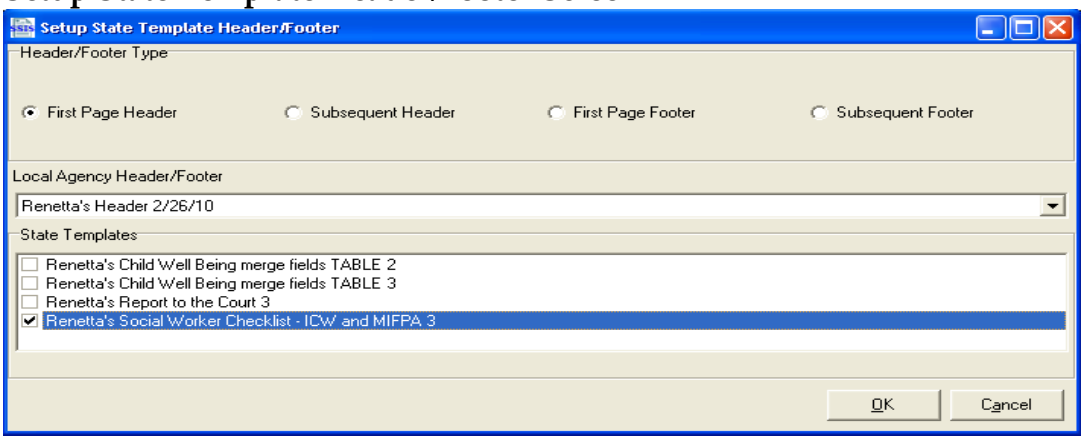
SSIS has predetermined which state templates can have a local header. This option is not available for state templates with an existing header. It is disabled on the Setup State Template Header/Footer screen.

The State Templates section autofills with the names of the state templates available based on the option selected.

If SSIS revise a new version of a state template, agencies will have to add agency headers to the new state templates again. If agencies use more than one header template for state documents, keep a cheat sheet for future reference as to which state template gets which header attachment.

Use Change Headers and Footers to edit header or footer associated with certain state templates. However, if a change is not needed on all templates, contact the mentor to request a database change from SSIS.

Setup State Template Header/Footer Screen



To Add a Header or Footer to a State Document:

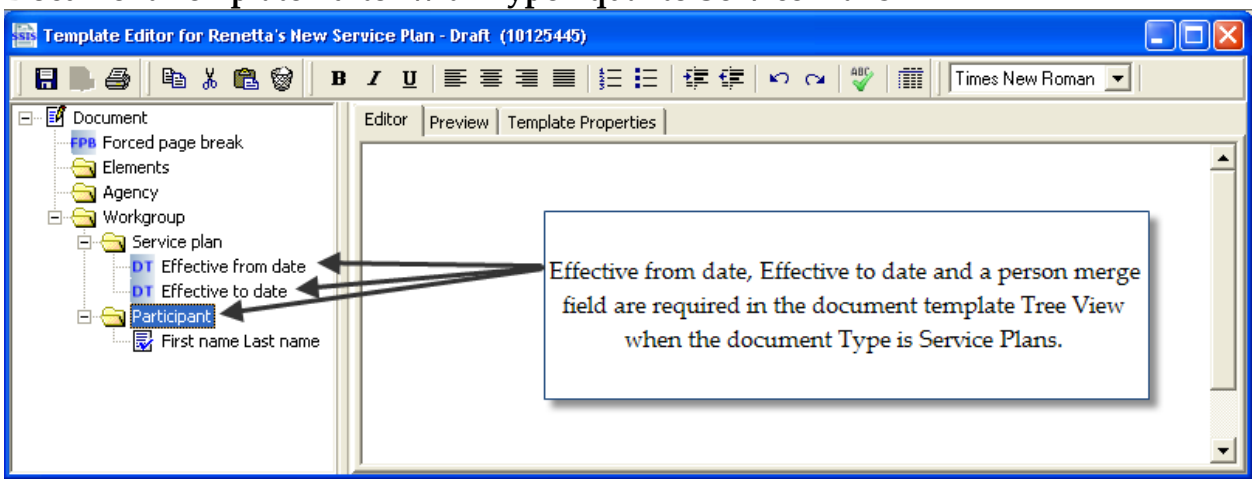
1. From the Template List toolbar, click the **Tools** menu and select **Setup State Template Header/Footer**.
2. Select the applicable header or footer option from the **Header/Footer Type** field.
3. Select the agency header or footer template from the **Local Agency Header/Footer** field drop-down menu.
4. Click in the check box to select the template(s).
5. Click **OK**.

Template Type of Service Plans

A service plan template can be created. These templates become available to the end user through Chronology and are located in the Service Plan folder on the Tree View.

Service Plans templates require effective from and to dates, and some person merge fields. The effective dates must be created, but are not required in the editor.

Document Template Editor with Type Equal to Service Plans



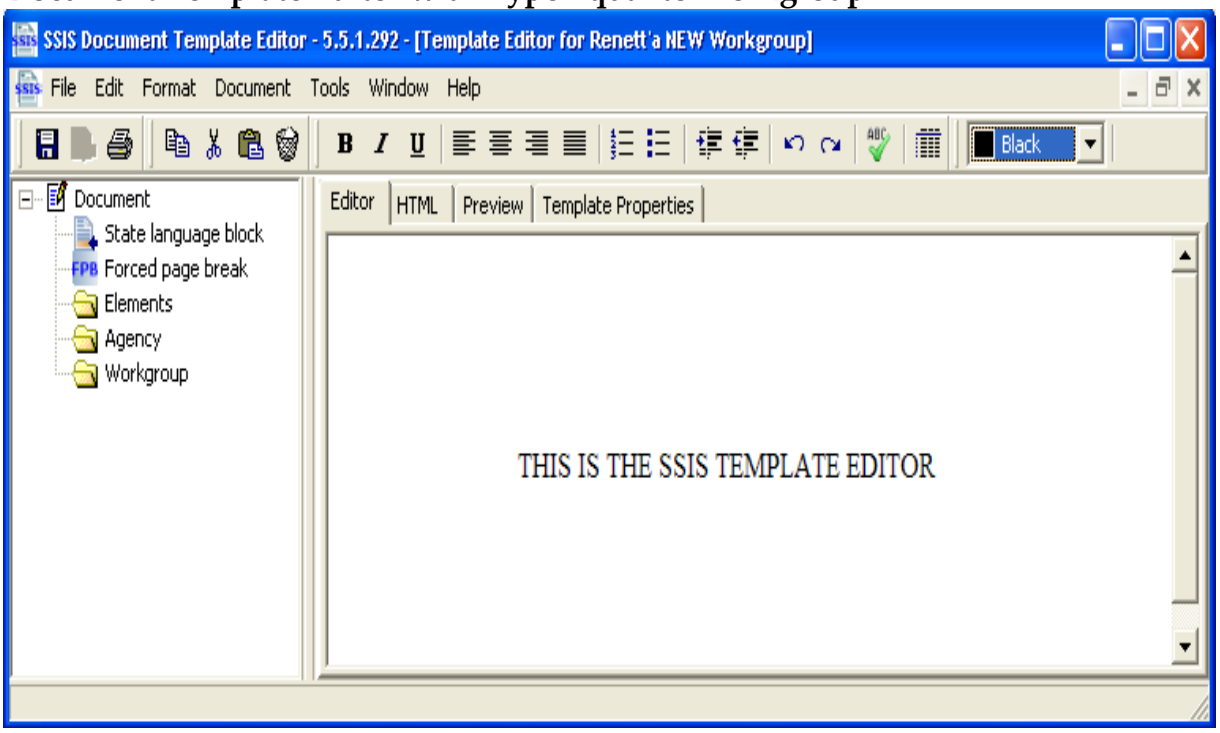
To Create a New Service Plan Template:

1. From the Template List's **Document Editor** toolbar, click the **New Template** button.
2. A new, blank template displays in the grid and a new **Properties** screen displays below.
3. Select the **Service Plans** as the **Type** from the drop-down menu.
4. The **Group** field defaults to Local Agency.
5. Select a **Category** from the drop-down menu.
6. Enter the template name in the **Name** field.
7. Select the template format from the **Format** drop-down menu.
8. Enter **Document identification**, if applicable.
9. The **Status** field defaults to Draft.
10. Enter a desription of the template in the **Description** field, if applicable.
11. Click the **Save and Open** button.

Template Type Equal to Workgroup

Use the template type of Workgroup to create several data elements such as check boxes, input fields, text areas and merge fields. For example, the agency may create a workgroup template to a parent or legal guardian identifying the specific services the agency is providing for each child.

Document Template Editor with Type Equal to Workgroup



To Create a New Workgroup Template:

1. From the Template List **Document Editor** toolbar, click the **New Template** button.
2. A new, blank template displays in the grid and a new **Properties** screen displays below.
3. Select **Workgroup** as the **Type** from the drop-down menu.
4. Select a **Category** from the drop-down menu.
5. Enter the template Name in the **Name** field**.**
6. The **Group** field defaults to Local Agency.
7. Select a **Category** from the drop-down menu.
8. Enter the template name in the **Name** field.
9. Select the template format from the **Format** drop-down menu.
10. Enter **Document identification**, if applicable.
11. The **Status** field defaults to Draft.
12. Enter a desription of the template in the **Description** field, if applicable.
13. Click the **Save and Open** button.

Hint: See Appendix A: Template Editor Components for further information.

Merge Fields

Merge fields are data available within the application. There are workgroup level merge fields that are based on information entered at the workgroup level. For example, participant name, addresses, diagnosis, etc. Additionally, there is agency level merge fields that are based on information entered in SSIS Administration about the agency. For example, agency address, director's name, agency name, etc.

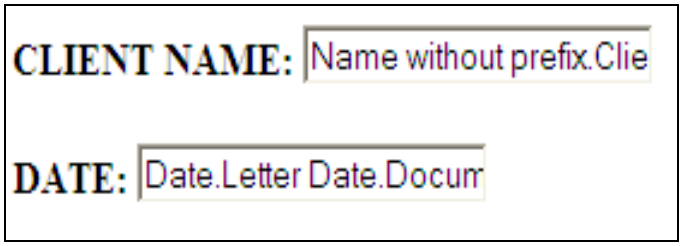
Template Creators can add merge fields to a template. This allows the merge field data to autofill with actual information entered in the application. For example, when a worker opens a template from Chronology, all merge field data displays as designated by the template creator.

Merge fields with a plus (+) sign designate that more merge fields are found below that folder in the Tree View. Merge fields without plus signs can be multi-selected from any level during the creation of a template.

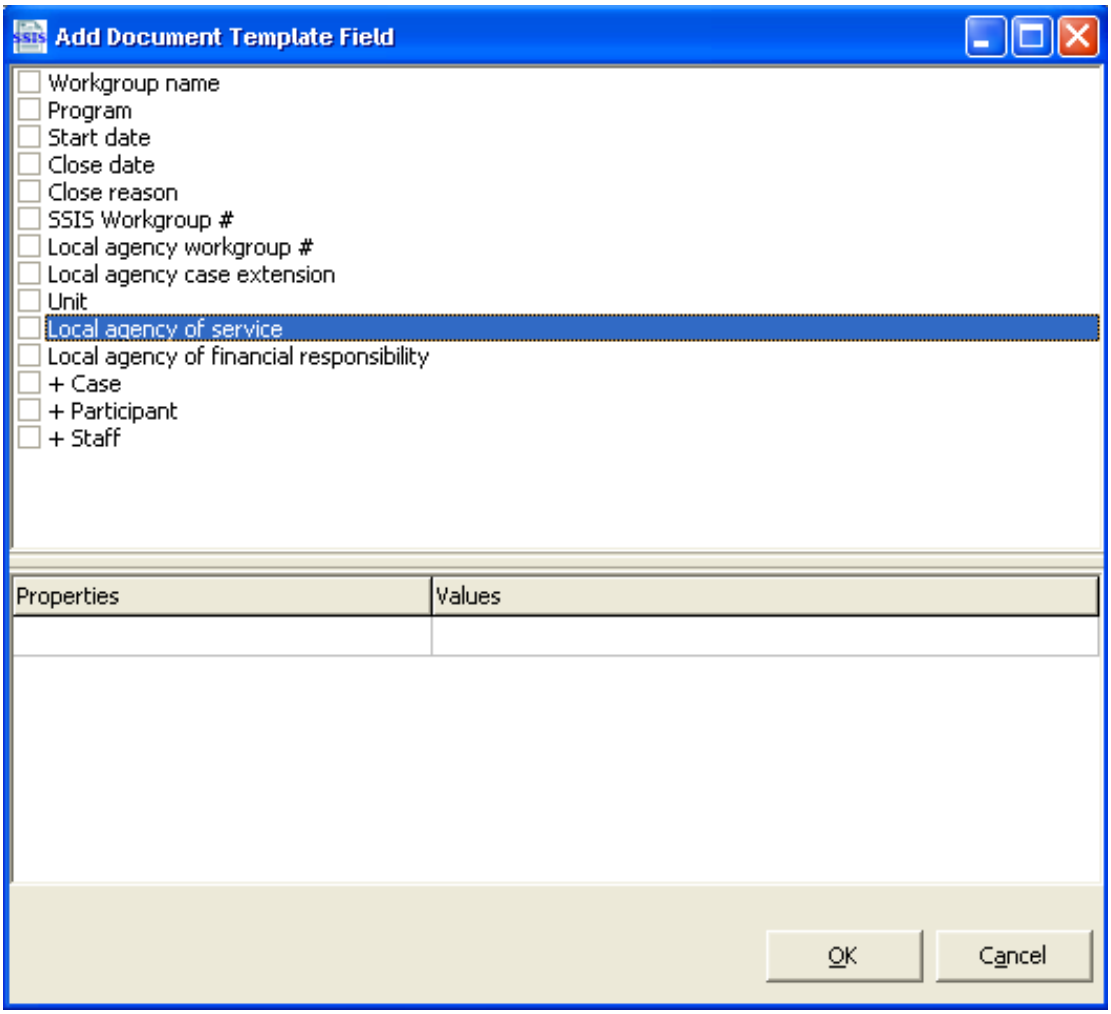
The Generic Date field can only be dragged into the document once.
A new node in the tree must be created each time the generic date is used in the document. This will allow the answers to be saved to the database correctly when an end user creates a document from the template.

The end user cannot edit data from merge fields in the document at the time of generation. However, data cleanup is available to help workers correct data during document setup.

New Merge Fields (HTML)



Add Fields: Workgroup



To Add a Merge Field:

1. Right-click on the **Workgroup** folder.
2. Select **Add Field**.
3. The **Add Document Template Field** screen displays the lists of fields which may be added.
4. Check the merge field to add.
5. When a merge field is checked, the **Properties/Values** section displays additional information needed for the field.
6. Complete each property as desired.
7. Click **OK**.
8. The new merge field displays at the appropriate level in the Tree View.
9. Drag and drop the merge field into the appropriate place in the document.

Hint: Common merge field properties:

Properties	***Value/Description***
Required to complete document setup	*This field is available on most merge fields. A designation of Yes requires a selection from the user at the time of template creation. Template creators should use this designation sparingly to allow for unique situations.*
Label	*In most merge fields, a label should be entered that easily identifies the intent of the field. For example, if the user selects a parent for a particular Name field, the creator should attach a label of Parent so that it provides a meaningful cue upon setup.*
Date Format	*Needed for all date merge fields, this allows the template creator to designate the format for dates in the document template.*

Conditional Text

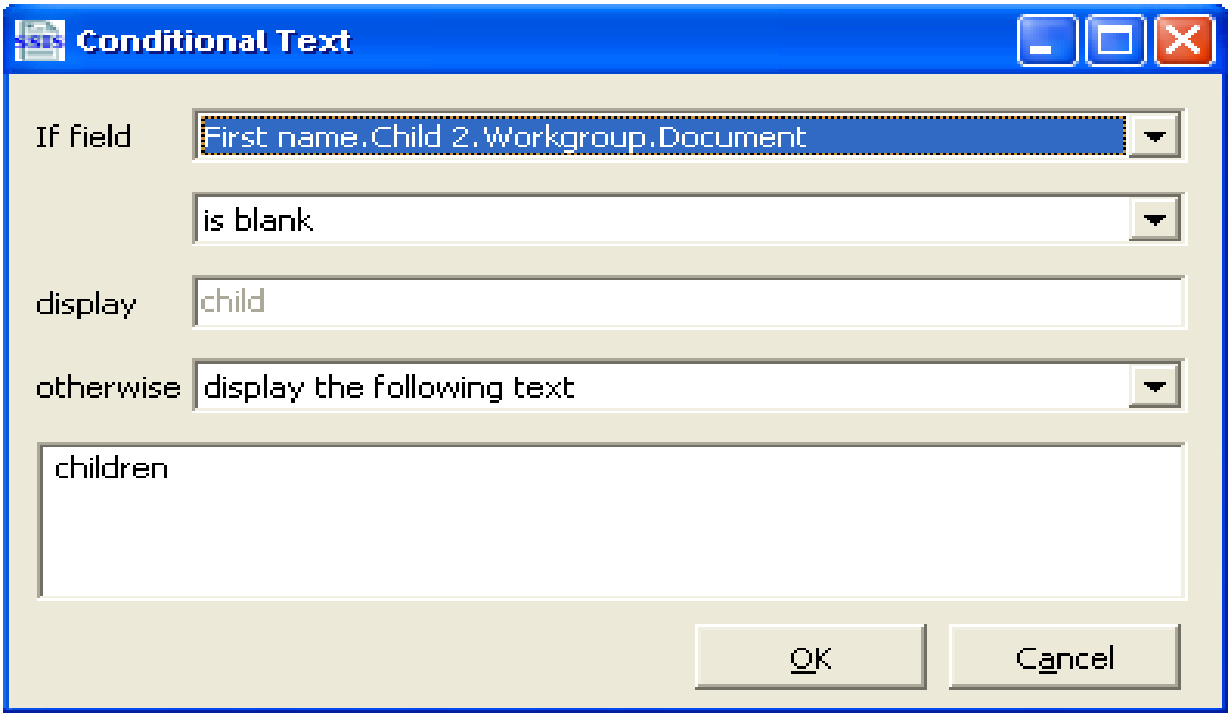
Conditional text replaces text according to the values from merge fields so that the text flow has continuity. For example, in a letter, the template creator may want the text to read

This letter is regarding your child
or
This letter is regarding your children

In this case, the text would be conditional on whether one or two children were merged in the document.

To use conditional text, template creators must enter both conditions in the tree. In the example above, the tree must contain at least two merge fields that represents a child.

Conditional Text



Adding Conditional Text:

1. Highlight the conditional text. In the example above, the conditional text would be the word child.
2. Right-click on the highlighted text.
3. Select **Set Conditional Text**.
4. The **Conditional Text** entry screen displays.
5. Develop the correct conditions for the action. In the example above, the conditions are set correctly according the number of children in the two merge fields.
6. Click **OK**.
7. The new conditional text is highlighted in grey and displays in the editor.

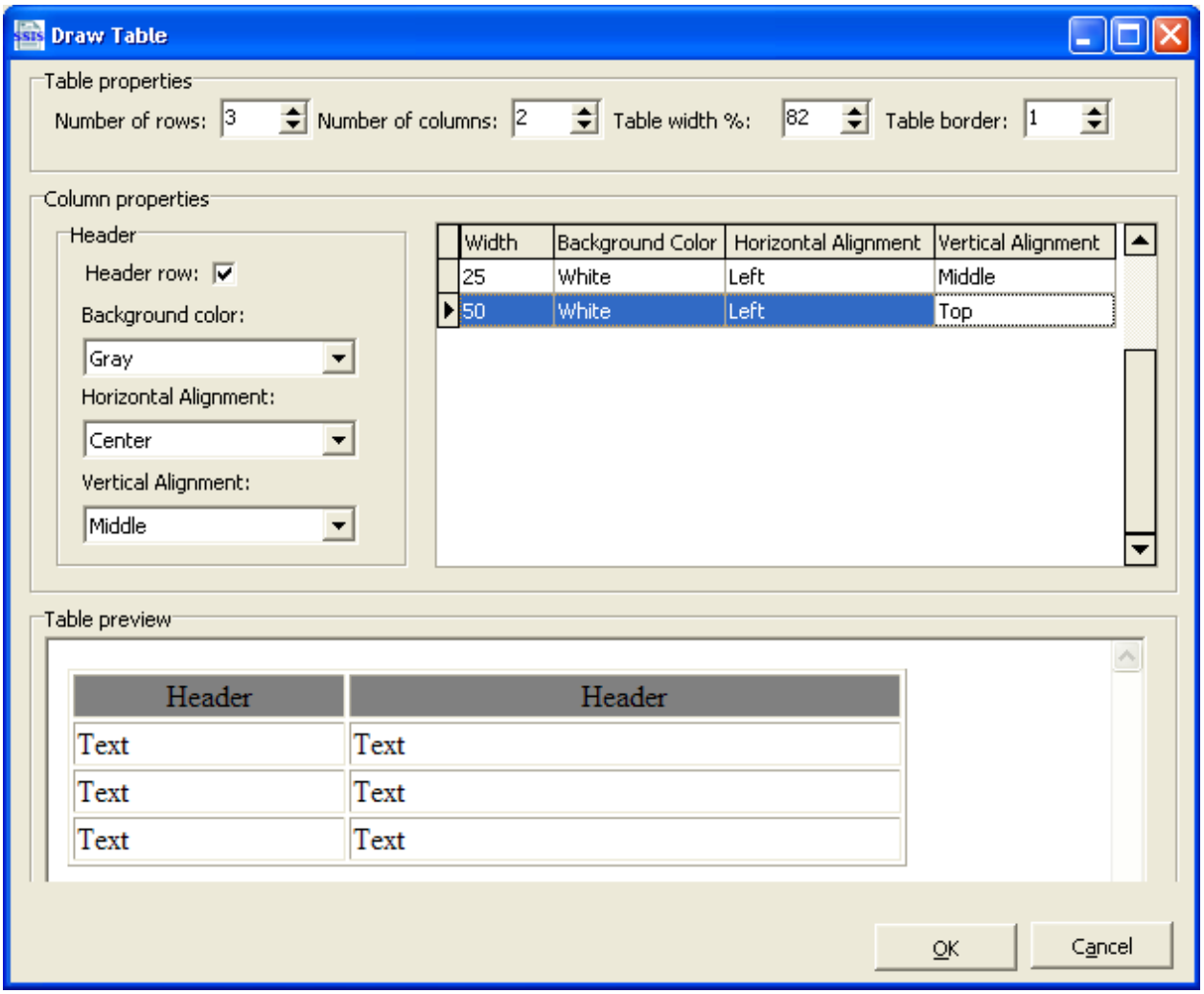
Create a HTML Table

Use create HTML table to create simple tables. This allows template creators to set a consistent column width in a newly-created table, add merge fields or document elements such as input fields and/or text areas to the grid.

Tables constructed in an outside word processing program can be cut and pasted into the template editor. Creators may find this to be a helpful shortcut when there are extensive and/or complicated tables in the document. If this option is used, creators must return to the word processing program to make modifications to the table and then add the updated table to a document.

Create HTML Table Button

Create HTML Table Screen



Table

Date	Reason For Referral

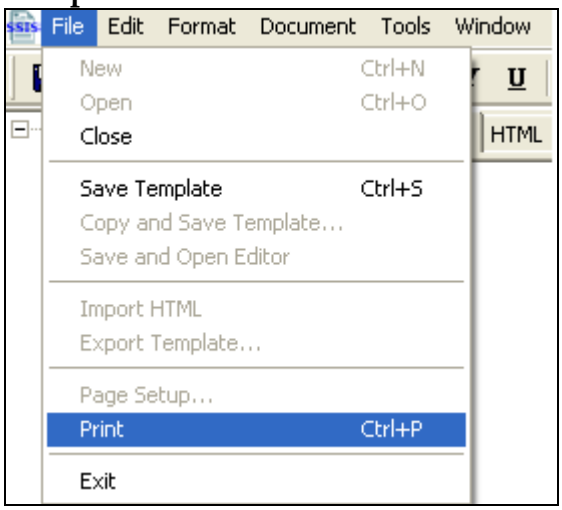
To Create an HTML Table:

1. Click the **Create HTML Table** icon on the Template Editor Application toolbar.
2. The **Create HTML Table** screen displays.
3. Select the number of rows for the table in the **Number of rows** field.
4. Select the number of columns for the table in the **Number of columns** field.
5. Select the percent of the page for the table in the **Table width %** field.
6. Select the table border width in the **Table border** field.
7. In the **Column properties** section, designate whether a header row is desired by checking the **Header row** check box.
8. Designated characteristics of the **Header row** by making a selection in the **Background color**, **Alignment** and **Vertical Alignment** drop-down menus.
9. In the grid, designate the **Width**, **Background Color**, **Alignment**, and **Vertical Alignment** of each column.
10. Changes to **Table** and **Column** properties display in the **Table preview** section.
11. Click **OK**.

Print Preview

Users may preview a template prior to activating or printing the template to view the page layouts.

Template Editor Windows Toolbar



Print Preview Toolbar

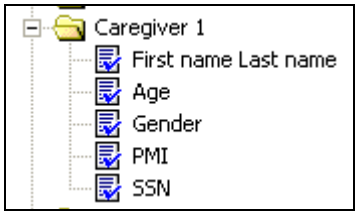
To Access Print Preview:

From the **Document Template Editor** toolbar, click the **Print** button. The Print Preview screen displays.

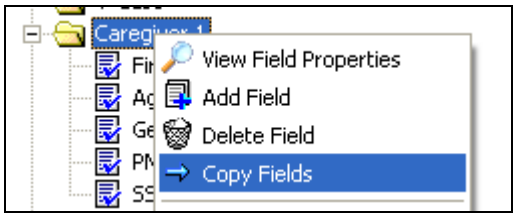
Copy Fields

This feature allows the template creator to copy the setup of desired merge fields. For example, if the template creator would like to have the name, DOB, address, and phone of each distinct participant in the document, it is possible to duplicate those fields and ensure consistancy in the document.

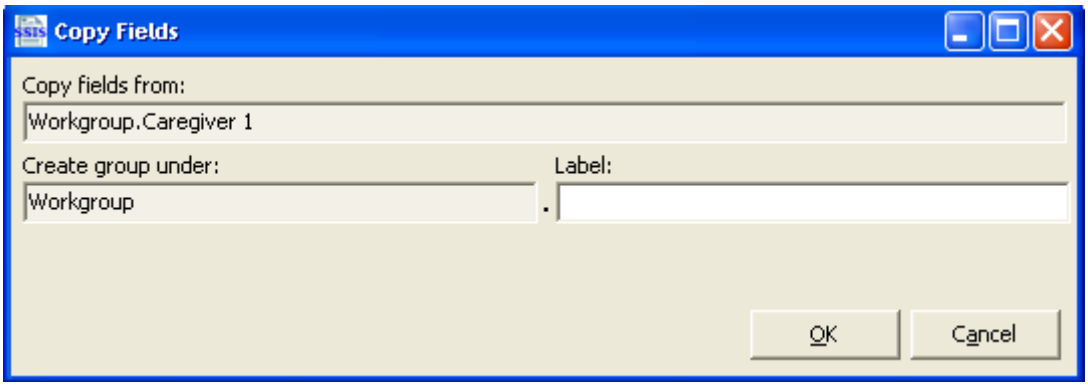
Merge Field Set



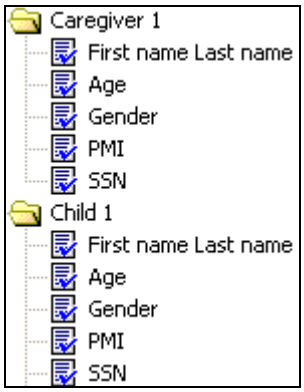
Copy Fields



Copy Fields



Duplicate Field Lists



Copy Fields:

1. Right-click on the appropriate **Element** node to copy the entire list of fields.
2. Select **Copy Fields**.
3. The Copy Fields dialogue box displays.
4. Enter a label for the duplicate set of fields.
5. Click **OK.**
6. Both sets of fields display in the Tree View.
7. Drag and drop the copied fields into the document template.

Hint: Copy Fields does not function on the Workgroup, Case or Agency folders since there can only be one workgroup, case and agency folder per document.

Add Field Filters

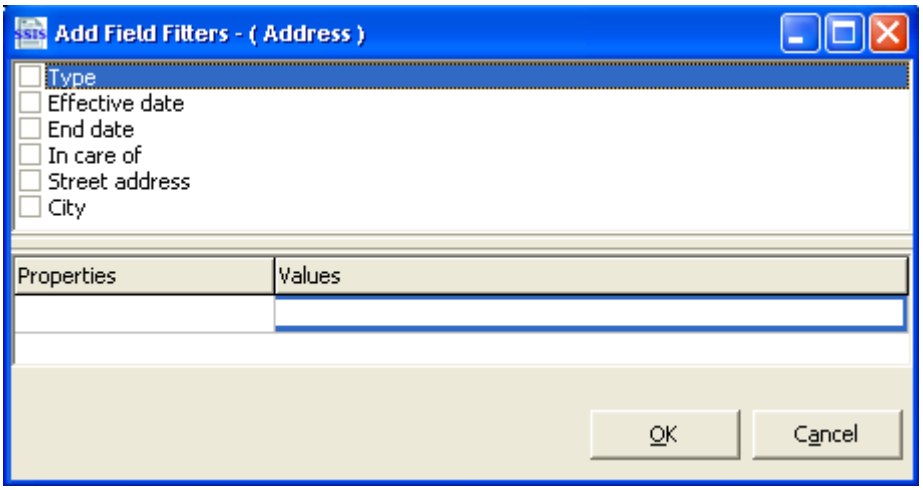
Users can create a field filter to specify what information displays for selection in the drop-down menu on the document properties screen for the end user. For example, if the user adds a merged field for address , the user can specify the most current address by using field filters to identify the type and effective date of an address. Each field filter generates a list of specific filtering options. In the example below, if the user checked Type on the Add Field Filters screen, the type of address (e.g., Home, Work, Physical location), displays for selection as the filter option.

The user can select one field filter at a time, but may need more than one filter option per merge field in some situations. In this case, the user should repeat the steps above to add additional field filters.

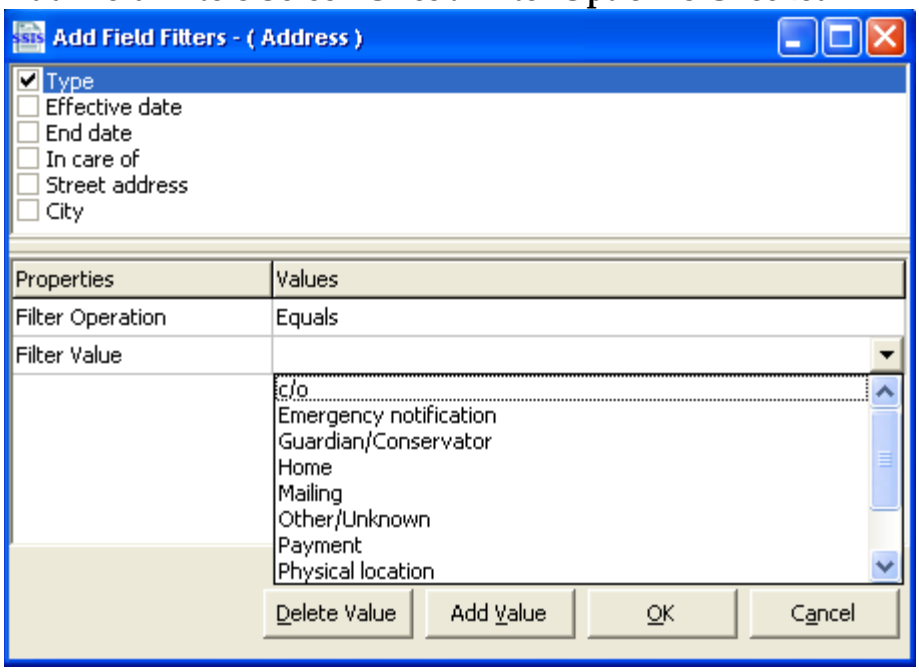
The user should review the field filters available for the merge field since each merge field has unique filter options. The user can view field filters by right-clicking on the filtered field in the Tree View and select View Field Filters.

To remove a field filter, the user should uncheck the filter by clicking in the check box to the left of the appropriate filter and then click OK.

Add Field Filters Screen



Add Field Filters Screen Once a Filter Option is Checked



Add Field Filters:

1. Right-click on the appropriate **Workgroup** node; select **Add Field Filter**.
2. The Add Field Filters screen displays.
3. Select a filter option by placing a check in the box next to the desired filter option.
4. Enter the desired **Filter Operation** and **Filter Value** in the Properties/ Values section. The user may select these values from the drop-down menu, if one is available.
5. Repeat steps #4 and #5 to select any other field filter that displays on the **Add Field Filters** screen.
6. Click **OK.**

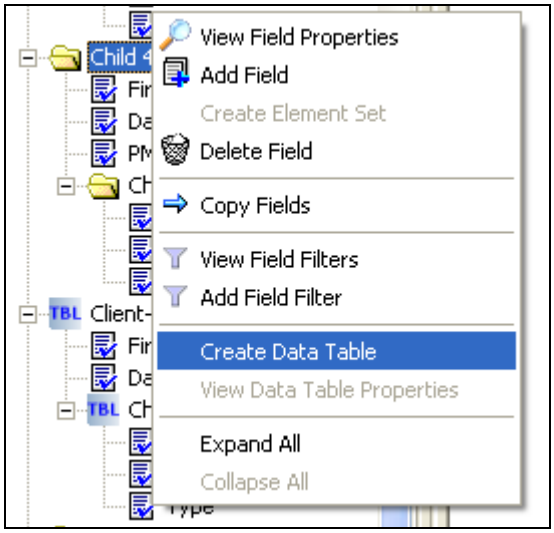
Tables of Data

The data tables are used to create a list of data that autofills with information entered in the application. These tables can vary in length according to available data. For example, users may create a table of data that includes all children, the date of birth and age of each child in the workgroup.

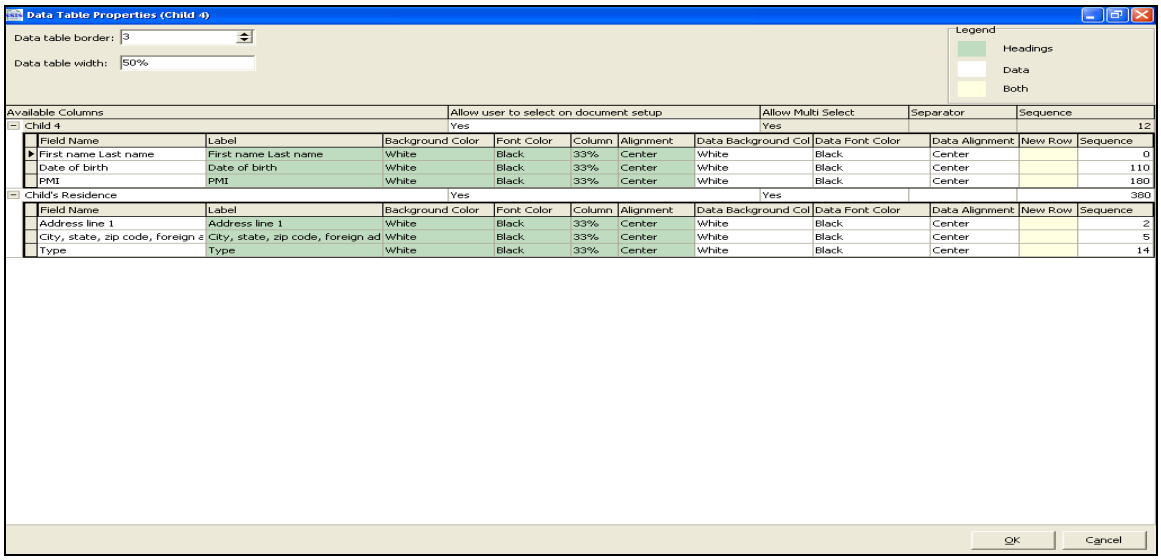
If the table has been added to the template, then the template properties do not change. If table properties are changed, then the template creator must drag and drop the table into the template again and delete the old table.

Fields that are part of a table cannot be dragged individually into the editor. For example, the TBL icon displays to the left of fields that are a part of a table.

Create Data Table



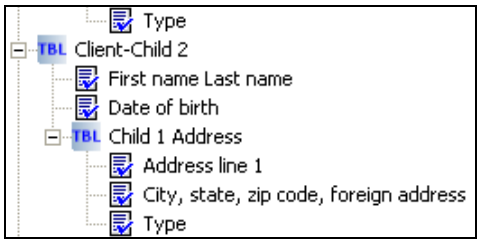
Data Table Properties



Table

First name Last name	Age	Gender (M or F)
[First name Last name]	[Age]	[Gender (M or F)]

Tree View Screen Shot



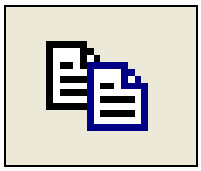
Create a Table of Data:

1. Create a folder that could have more than one selection in the document (e.g., Children).
2. Add merge fields to that folder which will be columns in the table of data (e.g., First Name, Last Name, Age, Gender).
3. Right-click on the node level.
4. Select **Create Data Table**.
5. The Table Properties screen displays.
6. Adjust table properties if desired.
7. Click **OK**.

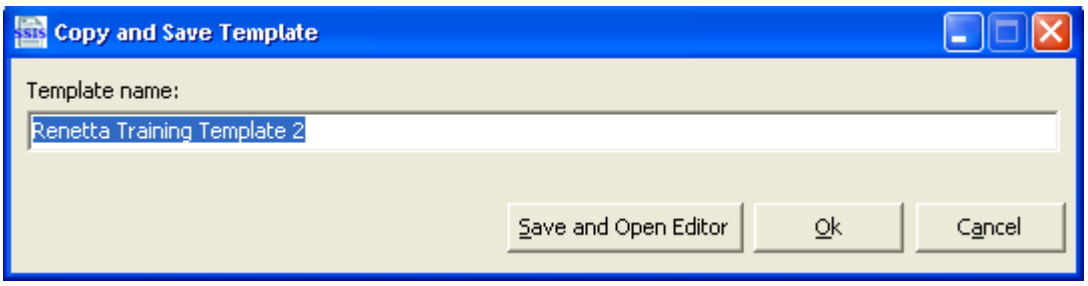
Copy and Save Template

Template creators can create copies of templates. This is useful when creating new versions of old templates. It is also useful to have a template that contains frequently-used merge fields and/or document elements. The template creator can copy that template as often as necessary to generate other templates without recreating the same merge fields and/or document elements.

Copy and Save Template Button



Copy and Save Template Screen



To Copy and Save Template:

1. Select the template to copy from the **Template List**.
2. Click the **Copy and Save Template** button from the **Document Template Editor** Toolbar.
3. The Copy and Save Template box displays.
4. Type a new name for the copy of the original template in the **Template name** field.
5. Click the **OK** button or **Save and Open Editor** button.
6. The copy of the template displays in the grid or editor depending on your selection in Step #5.

Import/Export a Template

Local agencies can share templates using the Import or Export template feature. Only Local Agency templates can be imported or exported. Templates with Yes selected for Allow JavaScript cannot be exported. Local Agency images will not be included in the export. If the local agency wants to share an image, e.g., UCare language block, the exporting agency can send a copy of the image to the importing agency. The importing agency can then edit the image and set the path to the location of the image.

Active, Inactive and Draft templates can be exported. However, the template cannot be opened at the time of export.

To prevent corruption of a template, do not open or change the contents of the template file. The file is saved to the agency network drive prior to exporting. The exported file name defaults to the template name and is saved to the network drive with the file extension .ssis. For example, the file is saved as The Original File Name.ssis. Once exported, this file is attached to the email sent to the importing agency.

Template creators cannot import a template to the editor with the exact same name as an existing template in the editor. The importing agency can rename the template prior to saving it to its network drive, but should not open the file.

The document category field is set to Imported. The importing agency can change the category as appropriate after the import is completed.

Headers and/or footers do not import with a template since the importing agency may want to add a header or footer template specific to the importing agency. If the importing agency would like to use the header and/or footer used by the exporting agency, the header and/or footer must be exported and imported individually.

A new style sheet will be created in the importing agency with the exported style sheet data and linked to the imported template. The style sheet will have a default name and have the category of Style Sheet.

The Tree View remains and functions the same as that of the exported template. Except the exported image embedded in a template does not import.

To Import a Template:

1. Open the email from the exported agency and save the template to the network drive.
2. From the Template List screen, click the **File** menu and select **Import Template**.
3. From the network drive, select a template to import and click **Open**.
4. Change the template properties, if applicable.
5. Click **Save** or **Save and Open** or **Copy and Save**.

Hints:

- *Create date, Status date, and Last changed date defaults to the date and/or time that the imported template is saved for the agency importing the template.*
- *Last edited by defaults to the user who saves the imported template for the agency that is importing the template.*

To Export a Template:

1. From the Template List screen, highlight a template in the grid and click the **File** menu.
2. Select **Export Template**.
3. Save the template to the network drive.
4. Open email and attach the template to the email as an attachment prior to sending to the importing agency.

Preview Tab

The Preview tab is available to preview the template. Currently, users can preview the layout of the template with the document elements entered, view the options available in an input box, check and/or uncheck check boxes and view images. However, headers/footers are not viewable from the Preview tab. Template creators must use the File menu print option to preview the headers/footers as part of the template..

Template Properties Tab

The Template Properties tab offers the user quick access to the Template Properties screen to review and/or change the template properties, if desired.

Authorization to Allow JavaScript

Due to the complexity involved, SSIS is currently requiring all requests for permission to Allow JavaScript to be approved. Contact the SSIS Helpdesk at 651-431-4801.

Hint: Agencies with the authorization of Yes to Allow JavaScript, cannot export templates. However, agencies can export and import HTML templates to other agencies with authorization of Yes to allow JavaScript.

Template Troubleshooting

Troubleshooting provides quick solutions to formatting problems that users may experience when updating converted templates.

How to View Changes to the Fonts for Inputs and Text Areas

When the user types into the inputs or text areas, the font displays as the default font on the Preview tab. The user must select Print Preview to view how the font displays in the document.

How to Format a Merge Field

1. Select the desired merge field in the Tree View.
2. Drag and drop the merge field into the template.
3. Highlight the same merge field in the Template Editor.
4. Click on the desired formatting option, e.g., underline icon.

Hint:

- *The user must complete the steps above for the underline formatting on the merge field to work. These steps must be completed before the template's initial save or it will not underline.*
- *Click the File menu on the Windows toolbar and select print to view a print preview of the formatted merge field.*

How to Apply Formatting to an Entire Section of Text That Includes Merge Fields

1. Type all of the desired text for the section.
2. Highlight the section of text and complete all of the formatting (e.g., underline, bold, italic, font and font size changes).
3. Click on the merge field in the Tree View and drag and drop the merge field into the text.

Hint: To place merge field into the formatted section, the user should drop the merge field above the section of text when first dragging the merge field in from the Tree

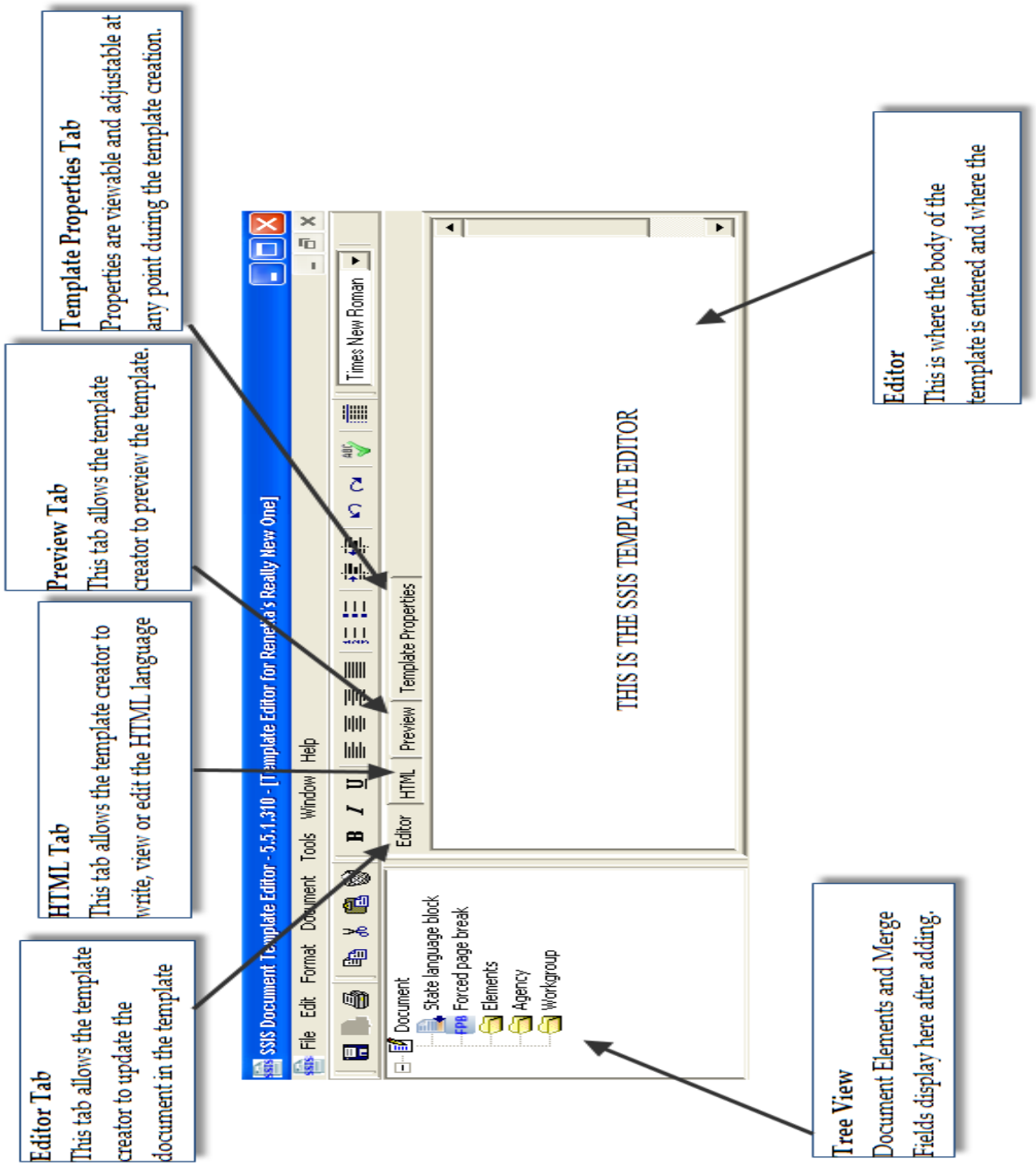
View. Next, move the merge field from the dropped location in the editor to the right spot in the text.

How to Group Merge Fields in the Tree View for Use With Autofill Tables

The desired autofill merge fields must be located under the same folder in the Tree View. For example, from the workgroup level in the Tree View, create the merge field, e.g., Client. From the Client folder, create additional merge fields, e.g., First name Last name, PMI, SSN. This allows all of the fields under the Client folder to autofill in the template when the Client merge field is dragged into the table in the Editor.

How to Have Multiple Races, Already Enter in SSIS, Autofill into a Template

To have all of the races entered in the application autofill into a document, create a table and drag the race merge field into the table. If applicable, drag the tribe or ethnicity and Tribal enrollment status merge fields into the table as well.

Hint: Be sure to create a table with the appropriate number of cells for one merge field per cell. Also, hide the table borders as necessary.

Appendix A: Editor Components