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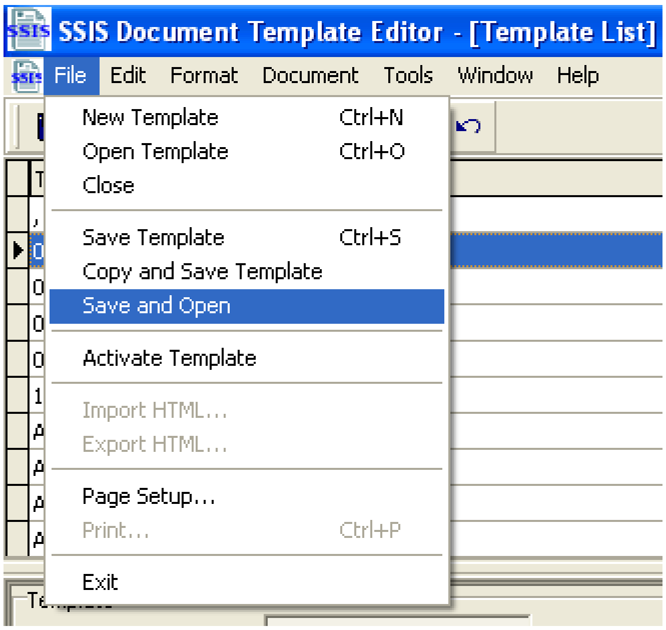
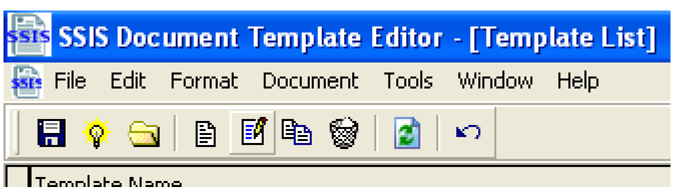
Template Tips

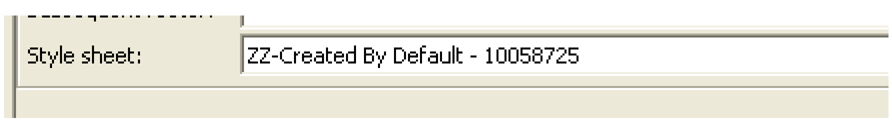
Getting Started

1. Always **Save and Open** a template before working on it. This ensures that a default style sheet, providing basic formatting, will be implemented for the template. The **Save and Open** function can be accessed from either the **File** menu or by clicking the icon of a pencil and piece of paper.



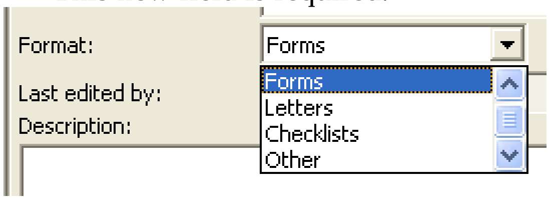


After clicking **Save and Open**, you may notice an option listed in the **Style Sheet** drop-down of the Layout section. This is only visible if you have the security function **Edit Document Template HTML** in your user role. Do not change or delete this default option unless you are going to create custom style sheets directly in HTML.

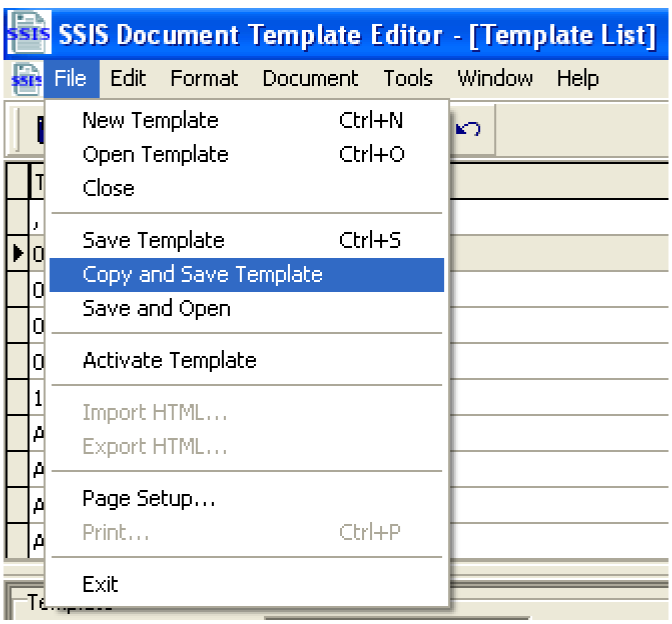


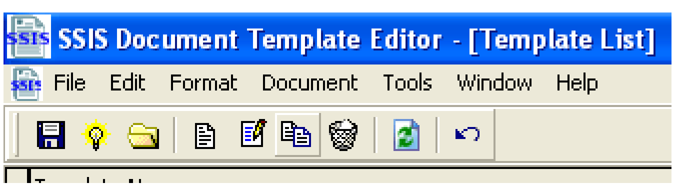
2. Keep templates in draft status while working on them. Templates in either active or inactive status cannot be edited.

3. Select the desired **Format** on the Properties screen when first working on a template. This new field is required.



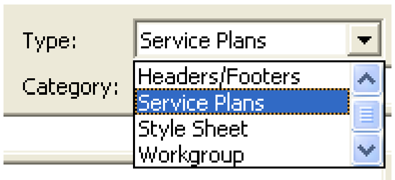
4. If you are uncertain about how to do something or are struggling with a template, use the **Copy and Save Template** feature to create a duplicate template. Add an identifier to the name such as *copy* or *test*. Use the duplicate for practice and if it turns out being what you want, you can go back and delete the original.
   Access the **Copy and Save Template** feature from either the **File** menu or by clicking on the icon of two pieces of paper.



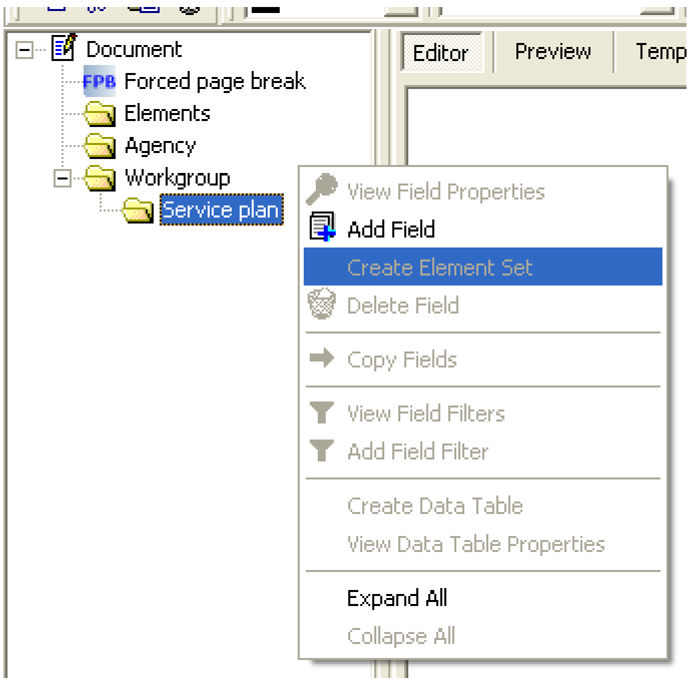


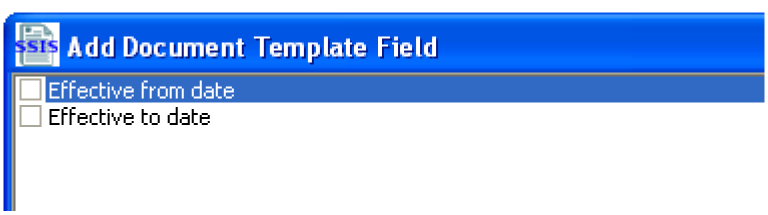
5. When starting to work on a template in the new editor, check the page setup of the original template in the legacy editor and use the same settings in the new template. This will be helpful as you are lining up items in the new editor.

6. If you want a template to act in a similar fashion as a state service plan, select **Service Plans** as the **Type** on the properties screen. The Service Plans folder includes **Effective from date** and **Effective to date** merge fields. The service plan template must include these two date-related merge fields and a client merge field before it can be activated.



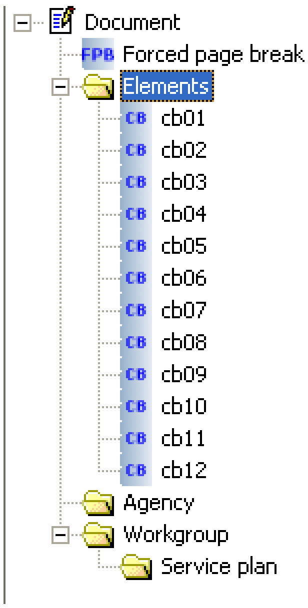
The Tree View for a service plan includes a specific service plans folder.





Elements

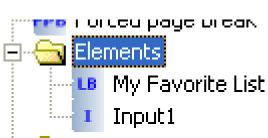
1. The labels assigned to various elements such as check boxes and list boxes are only viewed by the template creator, not the users.



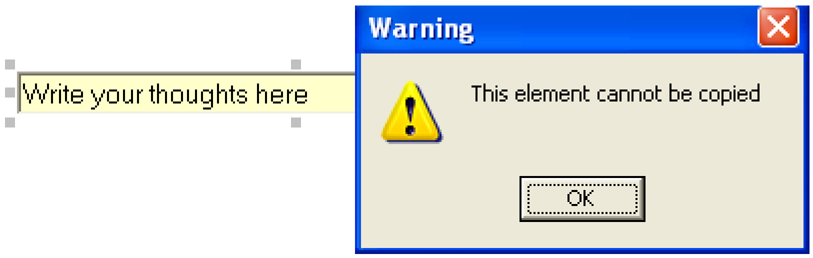
2. Input fields can have the *value* changed to prompt the user on what to enter:

3. Be sure to include an input field or text area in any section of the template where you need the user to enter text. An input field can hold a maximum of 256 characters and text areas can continue on indefinitely.

4. If using multiple list boxes, give them easy-to-identify values (labels) for quicker identification.

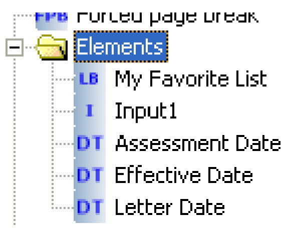


5. The V5.3 fix release implemented a warning message stating that an element cannot be copied via the copy/paste method. Use the **copy field** or **create element set** functionality instead of copy/paste.



6. Instead of dragging elements all over a template, try doing a cut/paste – not to be confused with a copy/paste.
   Note: Don't cut/paste the element/merge field more then one time. The HTML will not recognize the element/merge field if it is pasted multiple times.

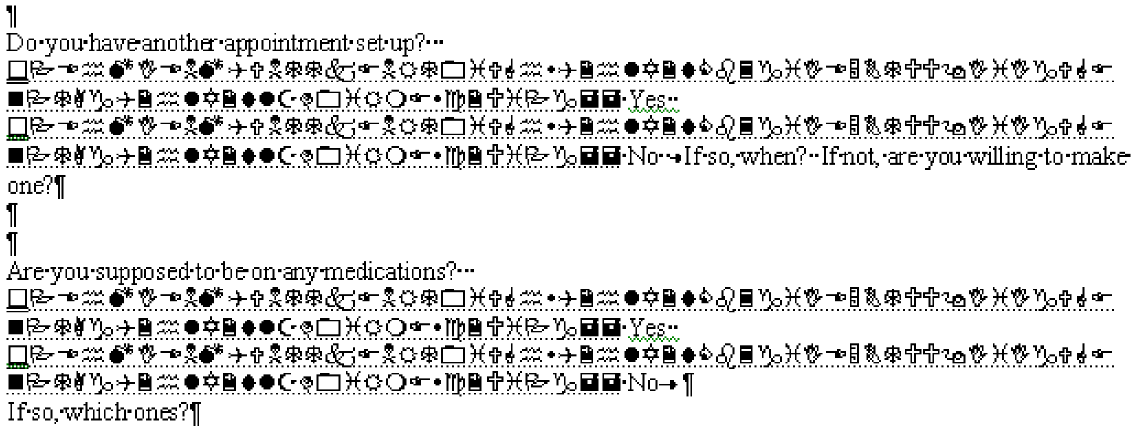
7. The **Date** element is the only element that will display on the Template Setup screen for the user. Label each Date with an easily distinguishable label for users.



8. There may be times when you are attempting to drag/drop an element into a template and the element does not appear in the template. There are typically two reasons for this:

   A. The element dropped to the bottom of the template. Scroll down to the bottom of the template and either drag/drop it back into the desired location or cut/paste it into the desired location.

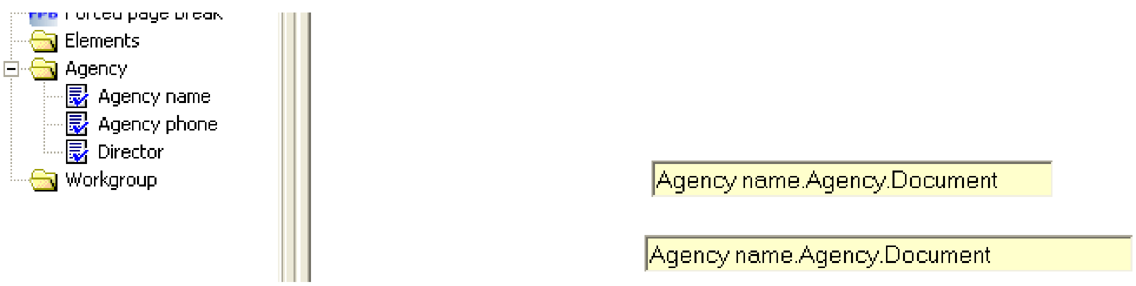
   B. The element did not drop into the template because of unseen formatting. This is related to the WPTools conversion. Find the same template in the legacy template editor and copy/paste it into Microsoft Word. After the template is pasted into Word, enable the **Reveal Format** option so you can see the paragraph markers.



Once the paragraph markers are visible, you will be able to see hidden tables and Wingdings as seen in the above example. Delete all Wingdings, including check boxes, and any hidden tables. Next, copy and paste the cleaned up template (with paragraph markers turned on) into the new template editor. Delete the original converted template from the new editor. Continue working in your cleaned-up template.

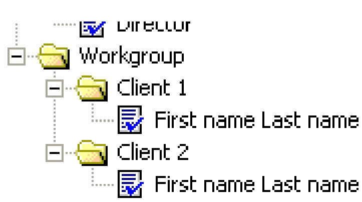
Agency Merge Fields

1. If you want any of the agency merge fields to display in a template multiple times, just drag/drop the same merge field from the tree into the template.

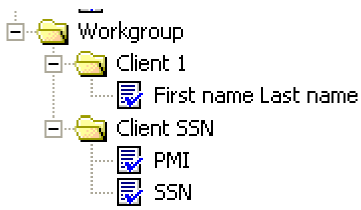


Workgroup Merge Fields

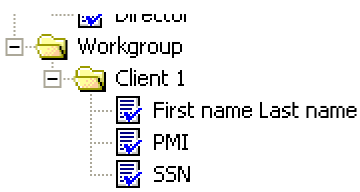
1. Don't create multiple client merge fields if the template is intended for only one client. For example, two client merge fields, as seen in the screenshot, have been created for this template. This means that there will be two client drop-downs on the Setup screen instead of only one. If you want any of the client-related merge fields to display in a template multiple times, just drag/drop the same merge field from the tree into the template.



2. When adding additional client-related fields, add them from the Client folder instead of the Workgroup folder. Adding the fields from the Workgroup folder will result in multiple dropdowns on the template setup screen listing all applicable fields from the workgroup instead of autofilling for a selected client.
   This screenshot provides an example. This Tree View selection will result in a client dropdown on the Document Template Setup screen which is expected, but also PMI and SSN drop-downs that will list applicable data for all clients in the workgroup.



Here's an easier approach: add the merge fields directly from the Client folder. This will result in a Setup screen with a client drop-down. The user will only need to select a client; the other data will autofill for that client.



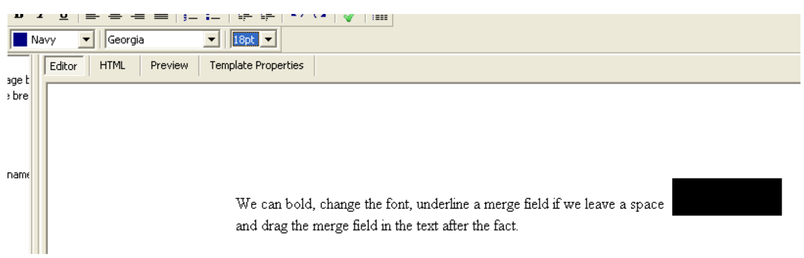
Template Previewing

The template's appearance can sometimes look different in the editor vs. print preview. The Preview tab is mainly for checking things such as list boxes and verifying that options are correct. Try the Preview tab for entering some sample data into each empty text area and input boxes. Next, click on **File>Print;** this will show any formatting errors that are not visible in the editor.

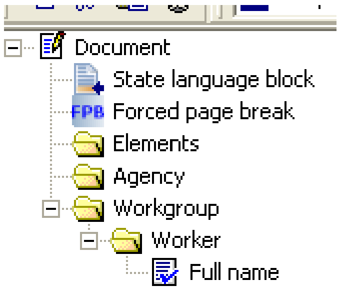
Formatting

Tips on formatting merge fields:

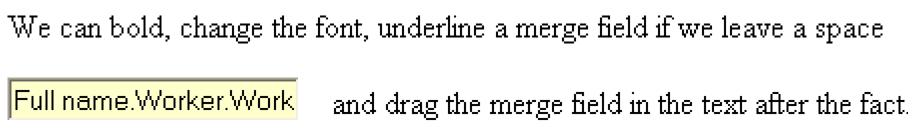
A. Make a space for your merge field in the template editor, highlight the area, then select your desired formatting such as font color, font, font size, bold, underline, etc.



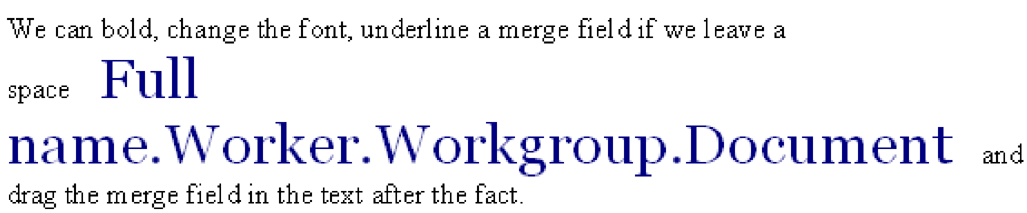
B. Create the merge field you want included in the template.



C. Drag/drop the merge field into the template editor.



D. Click on **File>Print** or the **Print** icon. The merge field label will reflect your chosen formatting.



Tip on formatting a list box that's inserted within a table column:

A. Delete the list box from the column.

B. Type two letters in the column (it doesn't matter which letters).

C. Highlight the letters and select the desired font and font size.

D. Redrag the list box between the two letters.

E. The list box will appear oversized in the editor, but you can verify the font change by doing a print preview from the editor.

F. Once the font size has been verfied, delete the two letters that you entered in the column.

G. After the two letters are deleted, do another print preview as a final verification of the change.

Tables

It is usually easier to delete tables and start over by creating a new table. Many have found that using cut/paste is the easiest way to incorporate elements and merge fields into the table. Others create tables in Microsoft Word. The table can be copy/pasted from Word directly into the template editor.

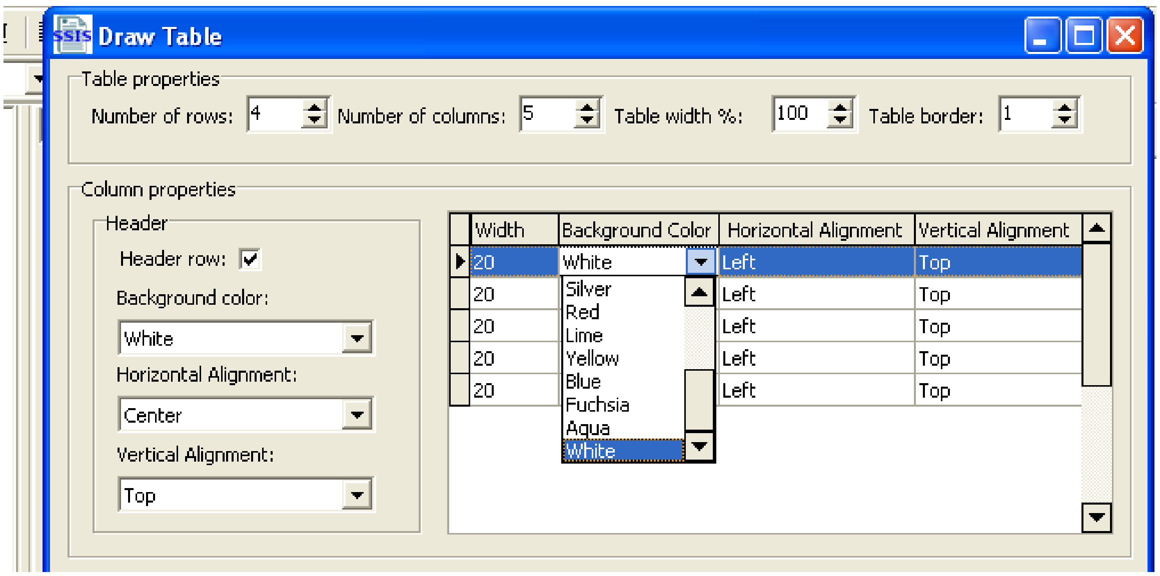
Drawing a Table:

A. Start by choosing how many rows and columns are needed in the table.

B. Change the **Table width %** to 100% to fill the page horizontally. It's more difficult to adjust the table if you start with a narrow width.

C. Verify that the size of the columns equal 100.

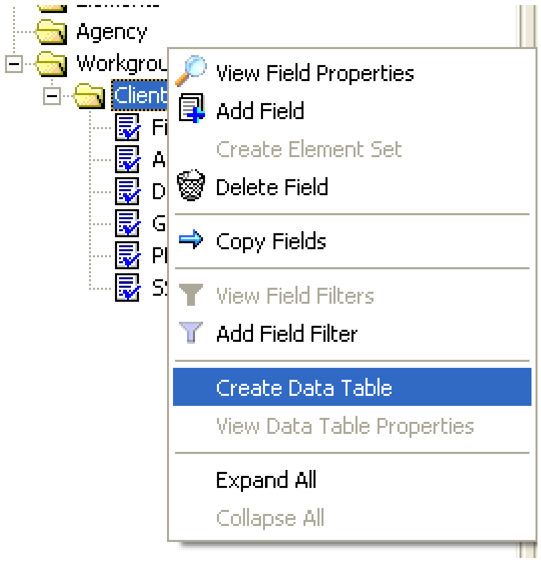
D. When you click on the default settings of White/Left/Top, a drop-down displays allowing you to change **Background color, Horizontal Alignment** and **Vertical Alignment.**



E. Review the settings and ensure all is what you want before clicking **OK** because once the table is in the editor all you can do is hide or show the table borders. Other table settings cannot be modified once the table is in the editor.

F. The table will display at the bottom of the editor. Click on the outside edge of the table so it is highlighted, select **Cut,** place the cursor in a desired location, and **paste**. It's easier to type inside the table with the borders turned on and just turn them off when you're finished.

For more complex tables, try using the **Create Data Table** menu option which is available from Merge Field folders in the treeview. Data tables are very useful if you want a varied number of rows available. For example, you may want a data table that represents every workgroup participant instead of one or two participants. Data tables will automatically create a row of data for each participant so you don't have to worry about manually creating a table with two rows, three rows, four rows, etc.



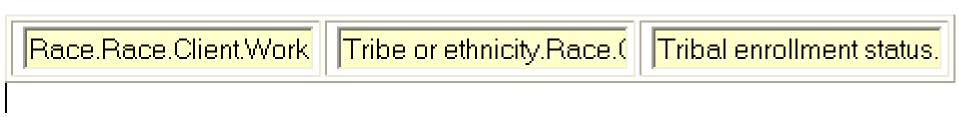
Tip for including Race information in document templates

Multiple races can be entered for a client in SSIS. If you want all the races entered in SSIS to autofill into a document, create a table for the race merge field. If the merge field is not in a table, only the first race entered for a client will autofill into a document.

Here's an example of putting the race merge field into a table:

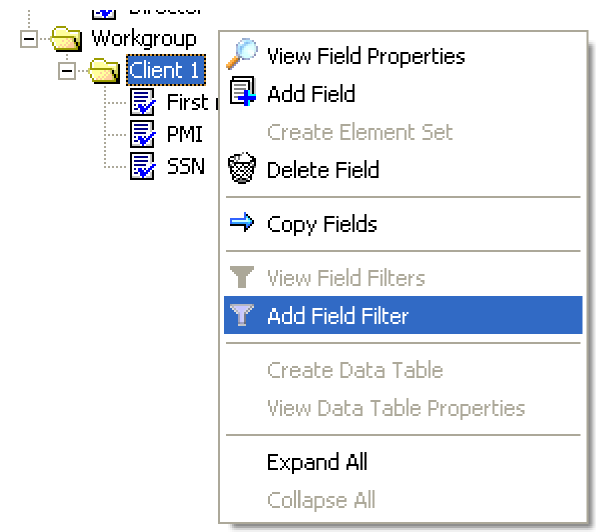
You can hide the borders of the table if desired – the race entries will display as a list.

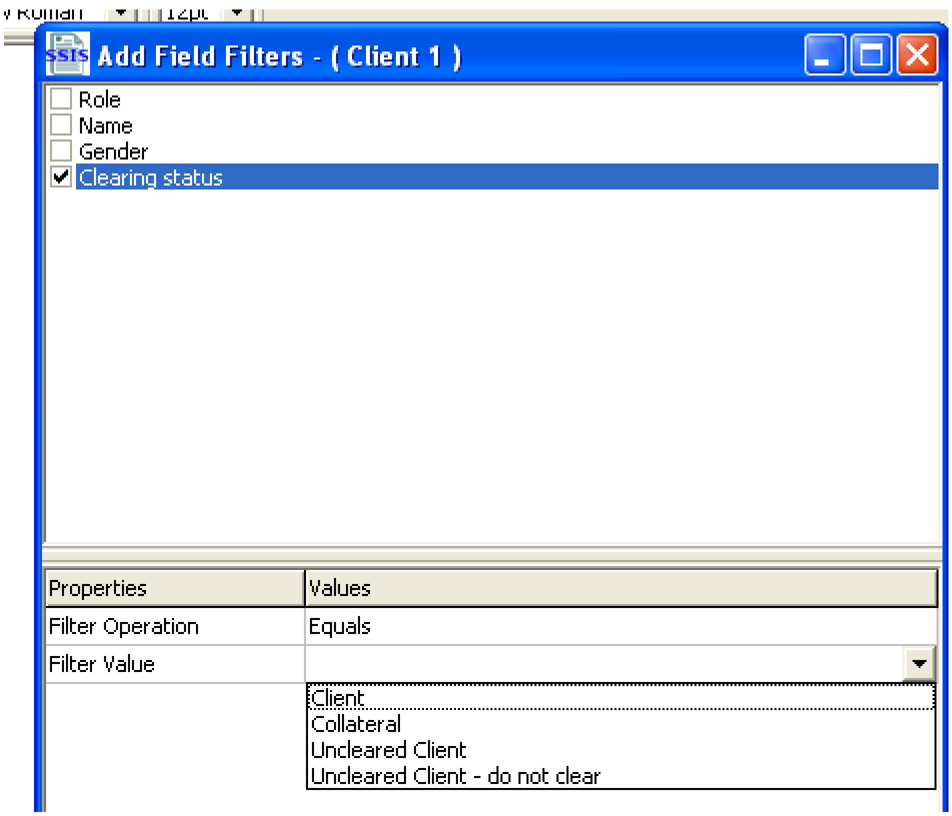
Here's an example of a table created to include the race, tribe or ethnicity, and tribal enrollment status. This will allow for multiple race entries. Again, the table borders can be hidden if desired.



Filters

Incorporating filters in your template will be helpful when the templates are available to users in V5.5. In this example, a filter was created so only cleared clients in the workgroup will be included in a **Client** drop-down instead of all the workgroup participants.





It will be helpful to review any filters when V5.5 is implemented so you can ensure the drop-downs on the document template setup screens are displaying the expected data.