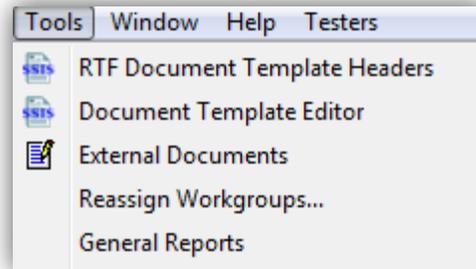


Create and Attach Headers

The new RTF Documents need new RTF Headers attached to them. The following is how to access, create, and attach new Headers.

Access

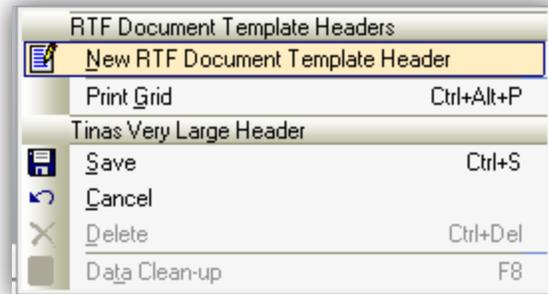
Access the Tools > RTF Document Template Headers menu item.



Create

1. From the Action menu, select “New RTF Document Template Header”.
2. Complete the field “Template Name” with a title for the Header.

Template Name:



3. Click on the blue E to expand the editor.
4. Add Header information in the editor.
5. Close the editor, and save from the Action menu or icon options.

Attach

1. Highlight the Header in the treeview or grid.
2. Select the checkbox next to each document that will use the Header.
3. Save the selections from the Action menu or icon options.

Tips

- To change the Header on a document, highlight the new Header in the treeview or grid. Select the checkbox next to the document to change the Header.
- To insert an image file (e.g. jpg, png, etc.), use the editor option “Inline Picture” instead of the “Picture”. This prevents overlapping that may occur when the document is created in Chronology or the Client folder.
- The user must have the security function “Create Document Template” in order to create a RTF Header.
- Use the option “Re-Merge Document” in order to update the Header on an existing document. This feature replaces the previously used “Refresh Headers/Footers” menu item.
- Do not copy and paste Headers used in the HTML Document Template Editor. Most of the fields used, including tables, do not translate into the RTF.

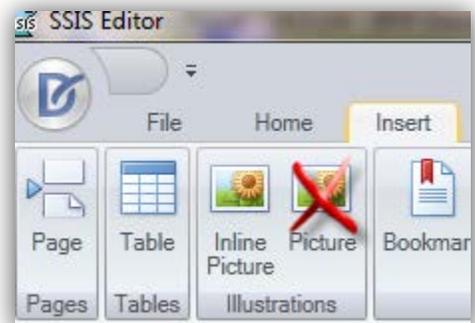


Image of the RTF Document Template Headers screen:

