

FAQs, Hints, Bugs, and other things...

Known Defects...

- Printing a Header/Footer in the Document Template Editor shows the text and image running off the page.
 - ✘ **Workaround:** Attach the Header/Footer to a test page, then try printing that test page to view how the Header/Footer will look.

- Images are not printing or showing in the Print Preview screen (occurs in the Document Template Editor and the SSIS Workgroups). This could be one or all of the options listed:
 - The image was edited after dragging and dropping the image into the Document Template Editor workspace.
 - ✘ **Workaround:** Delete the image file from the Document Template Editor workspace and make any adjustments to it in the Tree View. Drag and drop the image into the workspace in the correct spot.

OR

 - PDF or Internet Explorer settings are not allowing for the image to display.
 - ✘ **Refer to Attached Image Pages:** PDF preferences should be set to "Display PDF in Browser"; Internet Explorer settings should be set to "Print Background Colors and Images."

- Several Adoption and Licensing documents are not currently available in the Chronology folder.
 - ✘ **Workaround:** Several of these documents are available in the SSIS External Documents or on the DHS website. SSIS is working on adding many of these documents back into the system.

- Font formatting in the Document Template Editor reverts to a different style, does not change when selecting a new style, and/or resizes when using the keyboard arrow keys.
 - ✘ **Workaround:** Save the template and Refresh the page.
 - ✘ **NOTE!** – There may be additional issues with font formatting not retaining changes. If the stated Workaround does not work, please contact the Help Line with specific steps leading to the problem.

Headers/Footers

- Why is the top line of my state document cutting off?
 - Did you add a Local Agency Header to your State Documents? The top margins on several state templates are set to 0" due to the underlying styles. Every county/tribe needs to add a Header to these documents in order to compensate for that margin. Every county/tribe needs at least two Headers:
 1. County/Tribe Letterhead OR enough blank space to allow for copying onto letterhead
 2. A blank space header that acts as a top margin.

- The Setup State Template Header list is empty or does not have the document I need. Where is the document, and how do I make the changes?

- Using this process is a one-time activity until SSIS changes a template in system update. If any template editor has Setup State Templates, then any future Header changes are done via the Change Headers/Footers options.
- Some State templates have a pre-determined Header. A Local Agency Header cannot be attached to the templates. These documents do not show up in the list. *(See sidebar for this list)*

- In the Setup State Template Headers box, the Local Agency Header created is not in the drop-down field. Where is it?
 - Was the Status field changed to "Active" on the Header? If not, change the Status field to "Active" on the Header Properties screen.
- How do I change the margins on my Header/Footer?
 - Header margins are not editable; however, default margins can be changed while on the Template List screen. While viewing the Template List (no document template open!!), click on the File menu and select Page Setup. Adjust the margins to 1"...remember that these are the **default margins for any Local Agency template** created. After adjusting the margins, start creating a new Header/Footer.
 - Headers/Footers directly affect the margins on documents to which they are attached. If the default margins (which govern Headers/Footers) are set to something other than 1", then the result is skewed margins on the side margins.
- The current template editor allows the user to "Change Headers/Footers" with a simpler tool. This function is for swapping Headers/Footers. Keep in mind that using this function will replace a designated Header/Footer in all of the attached document templates.
- Try testing Headers/Footers in a test document.
 1. Create a New Template (Type: Workgroup).
 2. In the template itself, adjust top margins to 0.01", and then type a line of text at the top of the screen.
 3. Click on Save and close the template.
 4. Activate the Header/Footer, then find the test template.
 5. Add the Header/Footer to the test template and open the test template.
 6. Click on the Print Preview option to see how the Header/Footer looks. The line of text will show where the bottom of the Header starts.
- Remember to change the Status field to "Active" on a Header/Footer before trying to attach it to a template (including "Set up State Template Header").

State Templates that do not need a Header

- Certification of Distribution - Social Worker Court Report
- Home Study Agency Process Checklist
- Home Study Assessment
- Home Study Assessment Update
- ICWA/MIFPA Social Worker Checklist
- Notice of Required Court Report - Child in Voluntary Placement Due Solely to Childs Disability
- Notice that Child Was Returned to the Care of the Childs Parent or Legal Custodian
- Outline for Health and Social History Narrative
- Report to the Court
- State Adoption Exchange Registration

General Document Template Creating/Editing...

- Why are the margins of [State Template] cutting off on the left/right side?
 - ✓ One possibility is that the Local Agency Header attached to the template has margins set to an incompatible size. *(See information above for tips on this.)*
 - ✓ The individual document was corrupted by something added to it. Check the text areas throughout the document to locate any pasted incompatible elements (e.g., tables, images). If one of these elements is found, delete the element from the text area and click on the Save Text button. Re-open the affected text area to re-paste necessary text, and then click on the Save Text button again.
 - ✓ Is the document a combined document (e.g., CPS Notice of Determination Letter)? If so, then the document may have hidden text areas with data entered in them. Try changing options in the Setup tab to find these hidden text areas, and delete the data.

- Tables are very useful for keeping text in line vertically and horizontally. Use the Create HTML Table function in the template editor to create a table. The function works best when the table width is set to 100%.

- Create separate sets of Input boxes with the width directly in the Label. It will be easier to find the needed elements when creating the template.
 - ➔ **Quick Tip:** Use percentages to adjust the width by adding the "%" symbol after the number entered in the Width Value field.

- During the template creation, set the Top and Bottom margins to 0.25" if you intend to add a Header or Footer. These margins delineate the amount of space between the Header/Footer and the document template text.

- When copying a template for editing, note any images that are in the original version. In the copied version, delete the image from the workspace (it should still be in the Tree View), then drag and drop it from the Elements list in the Tree View.

- List boxes are invaluable resources for making documents appear individualized.
 - ➔ **Hint:** Common List boxes to use include [Yes, No, N/A], [His, Hers, Theirs], [He, She, They], plurals, numbers, etc.

- When copying previous versions of templates for editing, the Type field cannot be changed. The Type field sets up the Style Sheet for templates, and is set when a template is saved.

- Make document templates very general with lots of input boxes and text areas for workers to add their information. Every worker has a different idea of what needs to be in a document.

- Merge field labels and Date element labels appear in the Setup tab for end users. Keep the labels generic enough to apply to different situations, but specific enough so end users know what to add.

Try this: Use a table to display titles next to a text area. Use columns to keep the title in line with the top of the any text entered in the text area.

Keep in Mind...List boxes are like other elements for formatting and copying. Format the list box text by dragging and dropping into a pre-formatted line of text. Copy the list box within the treeview, but do not copy list box elements that have already been dropped into the workspace.



- ➔ **Hint:** *These elements show up in the Setup tab in Numeric then Alphabetic Order, not the order they are created or placed in the template. Use naming conventions to ensure the fields appear in a logical order for end users, e.g., Begin Date versus Start Date.*



- ➔ Be sure to check the document template in the Print Preview before activating. The Preview tab does not show an accurate depiction of how the final document will look when printed.

- ➔ **Tip:** *Use the Preview tab to fill in some of the text areas and input boxes before trying the Print Preview. This gives an approximation of any spacing or formatting problems that may occur.*

- ➔ Text formatting does work in the template creation, but it is not always easily recognized. It works best to type text, then highlight that text and select the formatting preferred (e.g., Bold/Italics/Underline).



- ➔ **Hint:** *When trying to format font for a created element (e.g., input box, text area), type some text in the exact spot the element will go. Highlight the text and update the formatting as preferred. Click Save, then drag and drop the created element into the formatted text (text on both sides with no space). Click Save again and go through the Print Preview process (see above) to verify that the formatting worked.*

- ➔ State templates have some features that are not available for use in Local Agency templates. For example, there are prompts on the setup tab that give users the option to include specific fields on the document or leave them out. In order to incorporate some of these special features, the template editor would need to be familiar with JavaScript and HTML.

- ➔ Be sure to plan a document template fully, remembering to create it according to how the end users intend to use it. It will not matter how nice a document template looks if the end users cannot or will not use it.

- ➔ **Tip:** *Try the document template out in a workgroup (it will need be Activated) before making it available to all of the workers. Use a temporary name on the template to identify it as unfinished to avoid accidental use. Sometimes merge fields and elements fill differently than anticipated;*



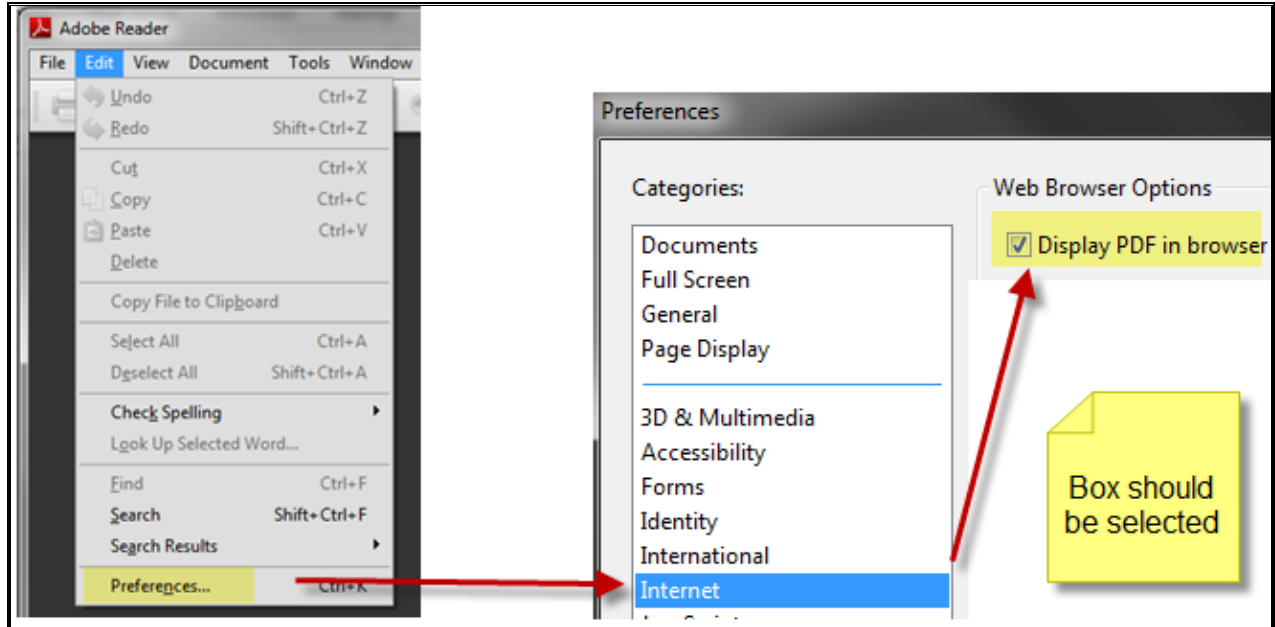
understanding the Setup Tab is extremely useful. If the template does not work, delete it from the workgroup and revert the status to Draft.

Try this: *Type information in the Value field for the Input boxes as prompts or standard text that may need changing in the future (e.g., N/A, other, phone numbers). This field displays for the end user, and will print if the user does not delete or change it.*

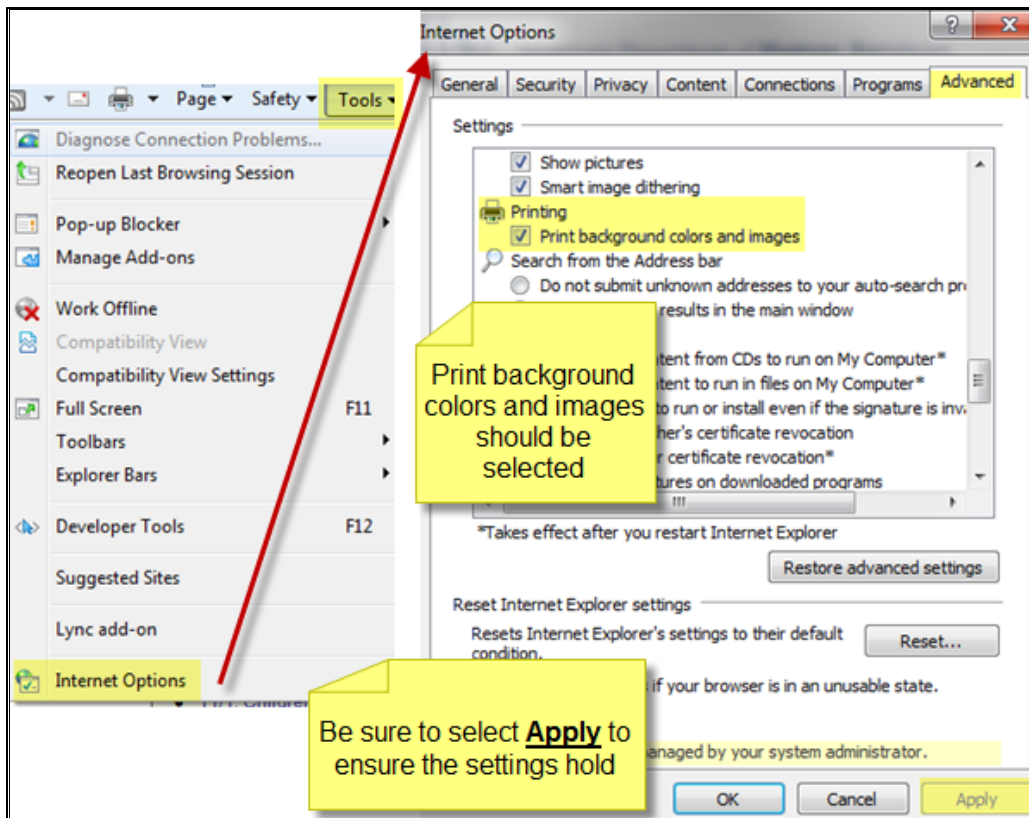
- ➔ Finally...don't take it personally. There will be complaints, problems, corrections, and changes to your templates. Be patient with yourself and your co-workers. Keep in mind that everyone has to change years of ingrained behavior to accommodate a new method of form completion.

Check Your Workstation Settings for PDF and Internet Explorer

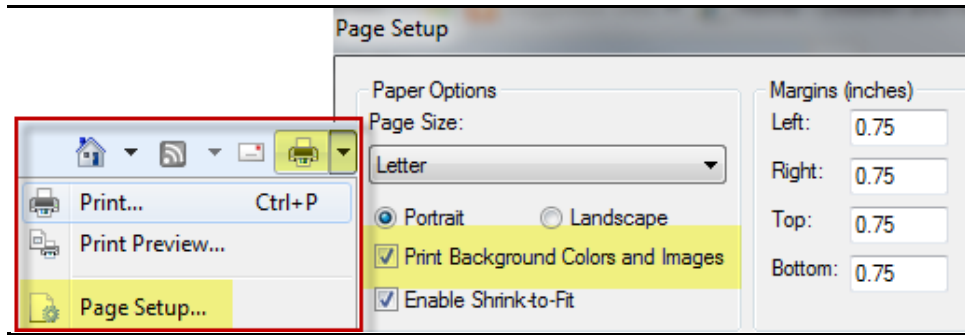
PDF Settings (Adobe Acrobat)



Internet Explorer Settings (IE 8)



AND...



Adding an Image (Logo) to a Header/Footer

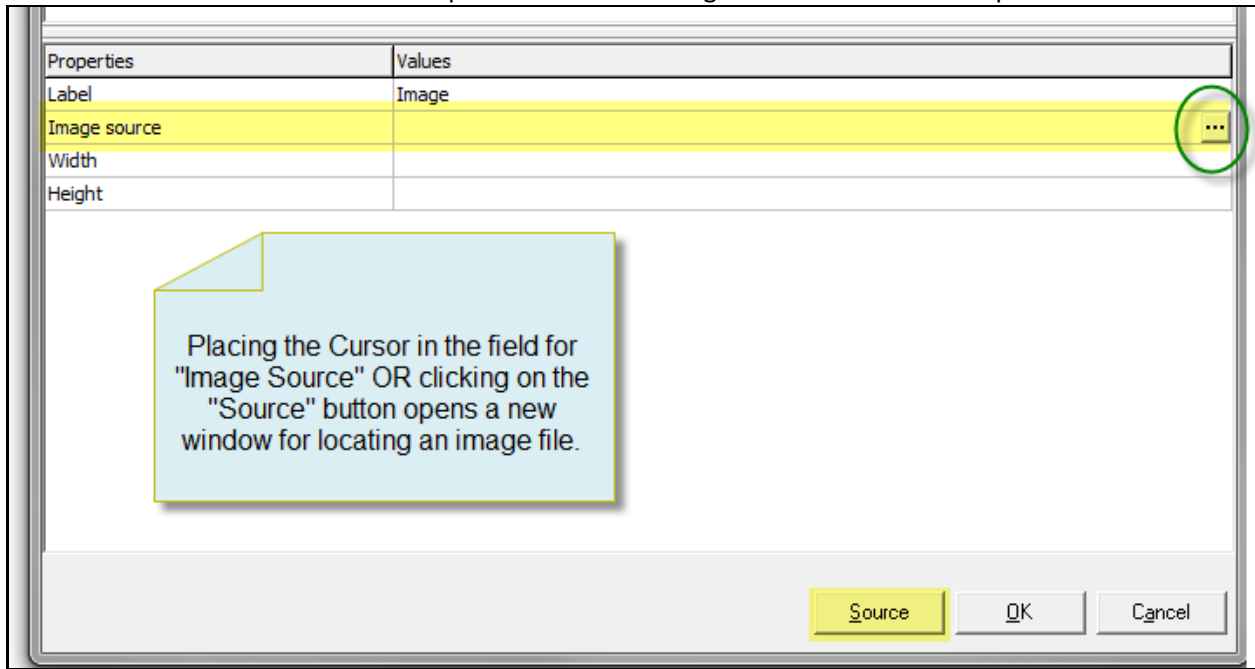
1. Use the **Add Field** option to insert an Image. **DO NOT** copy and paste an image into a template.

The image shows a screenshot of the 'Add Document Template Field' dialog box. The 'Image' option is selected in the list. A red arrow points to the 'Image' option. A callout box says: 'After clicking on "Add Field", this screen will display.' Another callout box points to the 'Elements' folder in the sidebar and says: 'Right-click on the "Elements" folder, and select "Add Field"'. A large yellow circle contains the text: 'Sidebar... Document Templates with Type: Headers/Headers, the only available option is "Image"'. The dialog box has a 'Properties' table with the following data:

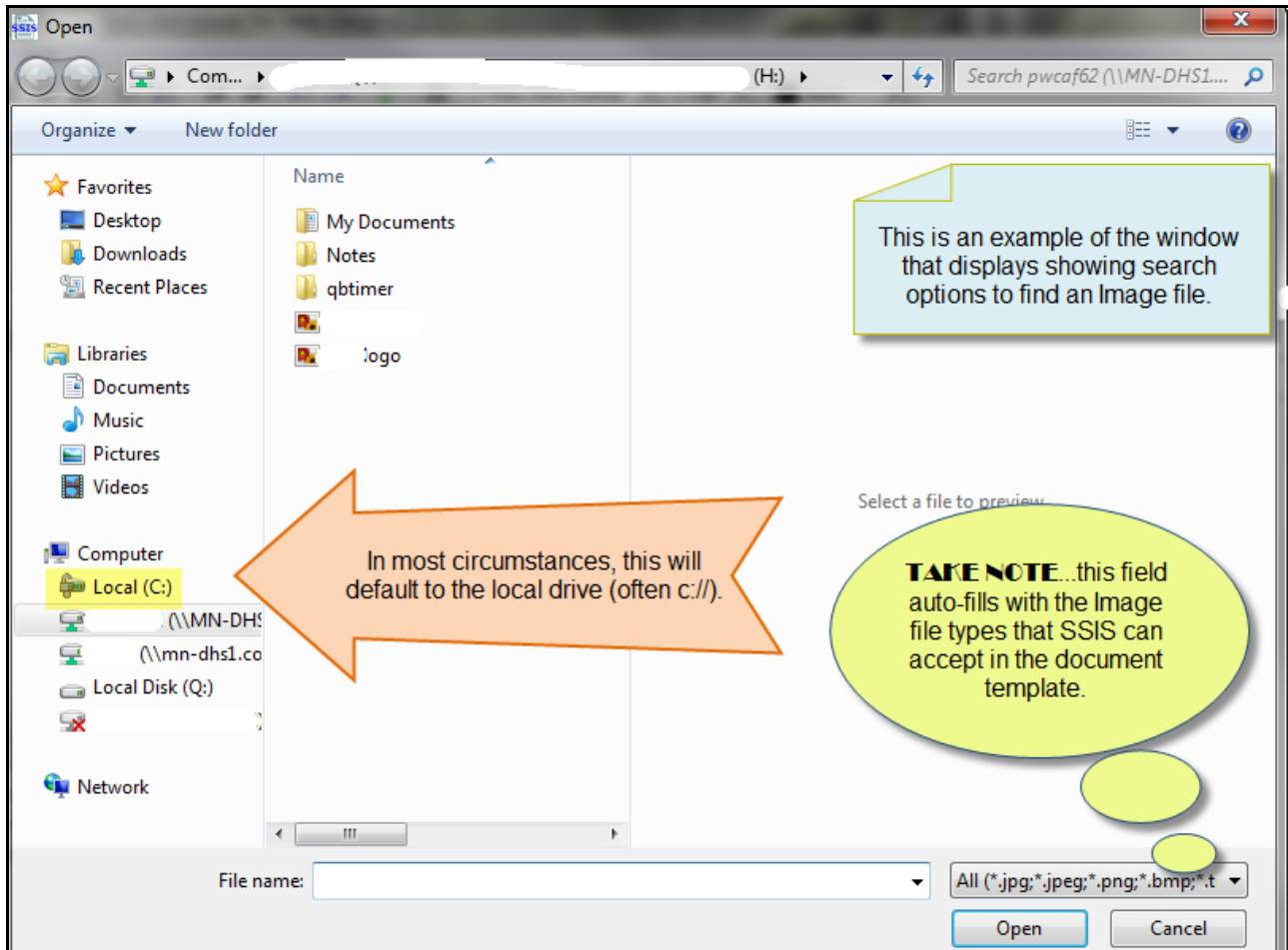
Properties	Values
Label	Image
Image source	...
Width	
Height	

Buttons at the bottom: Source, OK, Cancel.

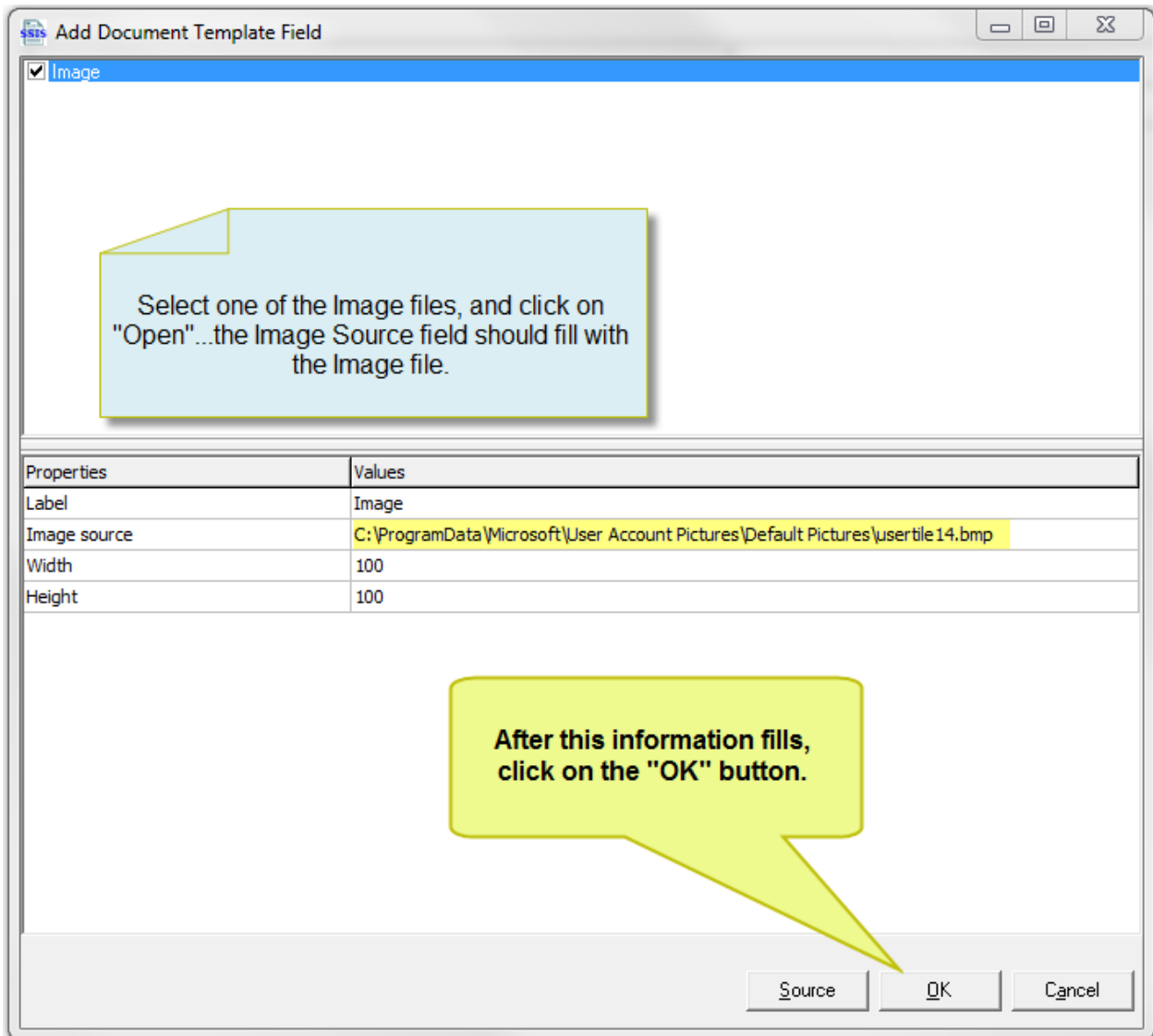
2. Fill in the Values column from the top down. Add the image itself via the **Source** options.



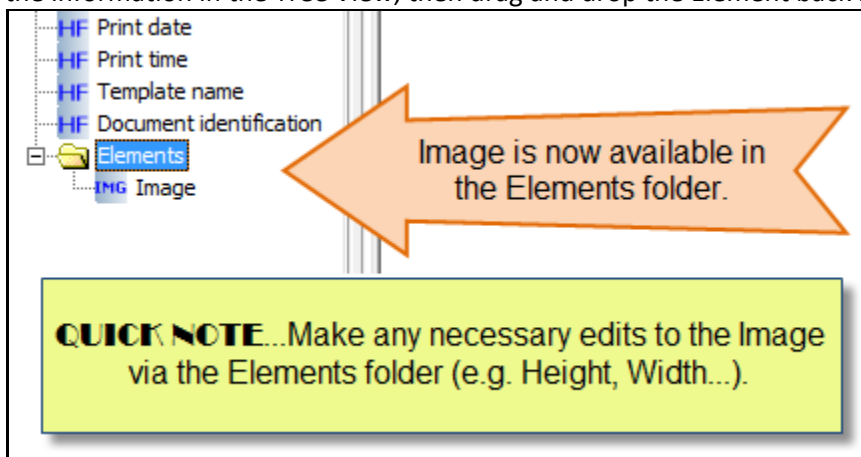
3. Clicking on the **Source** option opens the local drive for your computer. Use this starting point to locate the needed image/logo.



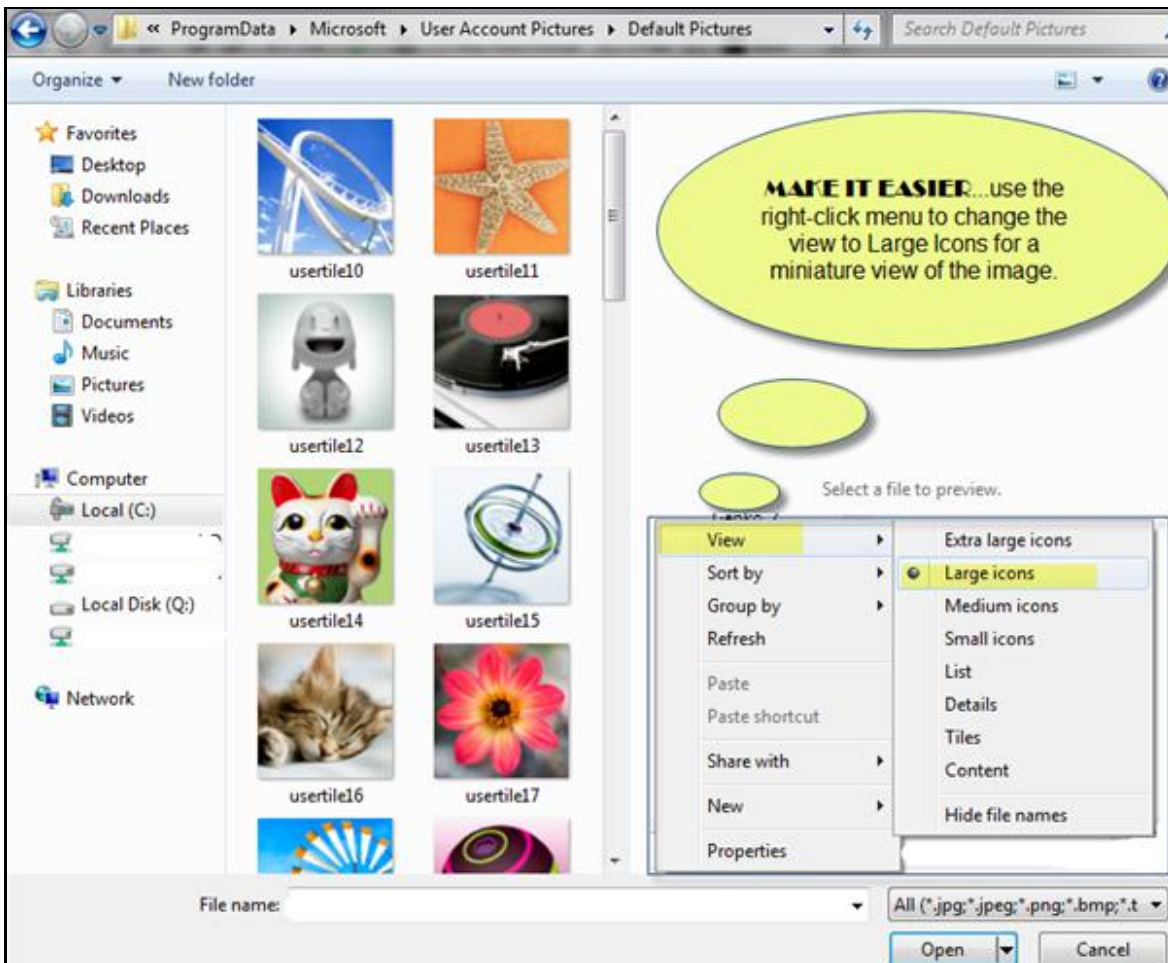
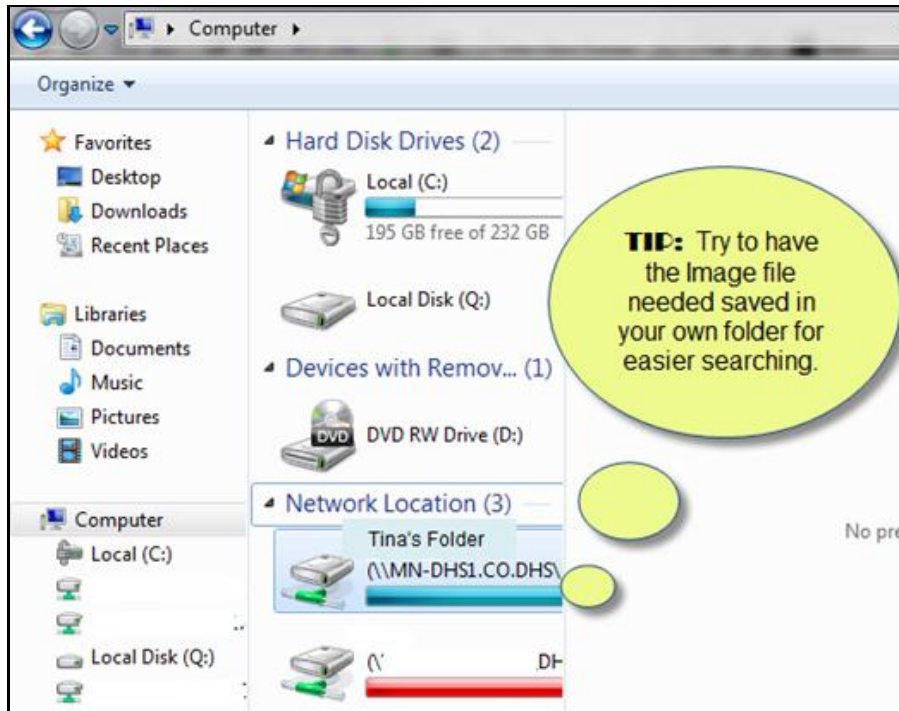
4. After adding the image/logo file to SSIS, fill in the remaining information then click the **OK** button.



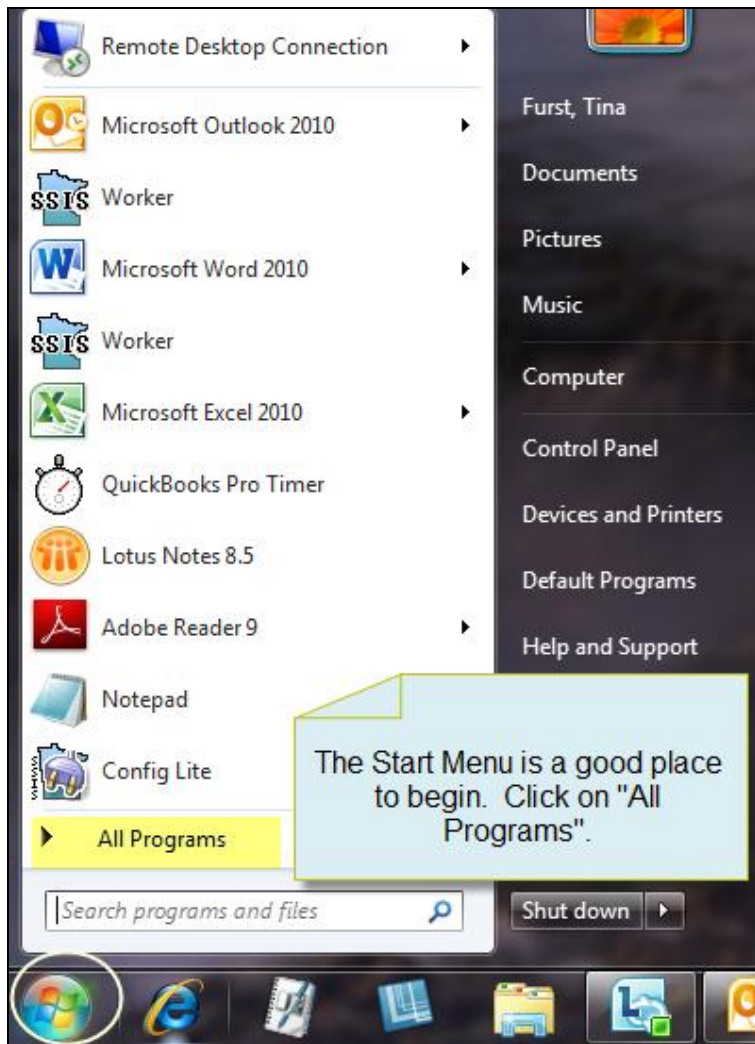
5. The image/logo is now an available Element. Drag and drop the Element into the workspace. If the image/logo needs to be moved around or re-sized, take note of the adjustments made before deleting the Element from the workspace. Update the information in the Tree View, then drag and drop the Element back into the workspace.



Quick Tips...



How do I ensure that I have an Image file available?



1. Find it. Agencies may have a logo already saved in the Public Folder/Shared Drive.
2. Open it and Save As to your own folder. **Remember** to keep the file format as a graphic (e.g., png, jpeg, tiff).