CaseAware
Insert Template Notes

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Contents

<u>Version History</u>

Version	Date	Author	Description
0.1	2/15/2011	PCS	Initial Draft
1.0	3/02/2011	KJR	Initial Release

1 Page Styles

When creating an Open Office document for use as a CaseAware document generation template, please pay attention to whether your template is using a custom page style. CaseAware document generation does not process page style information whether for standalone documents where it can be harmlessly ignored (except for manual page breaks) or insert template tags where it will also be ignored but can cause document generation failures.

Sample Page Style Setting (what not to do)
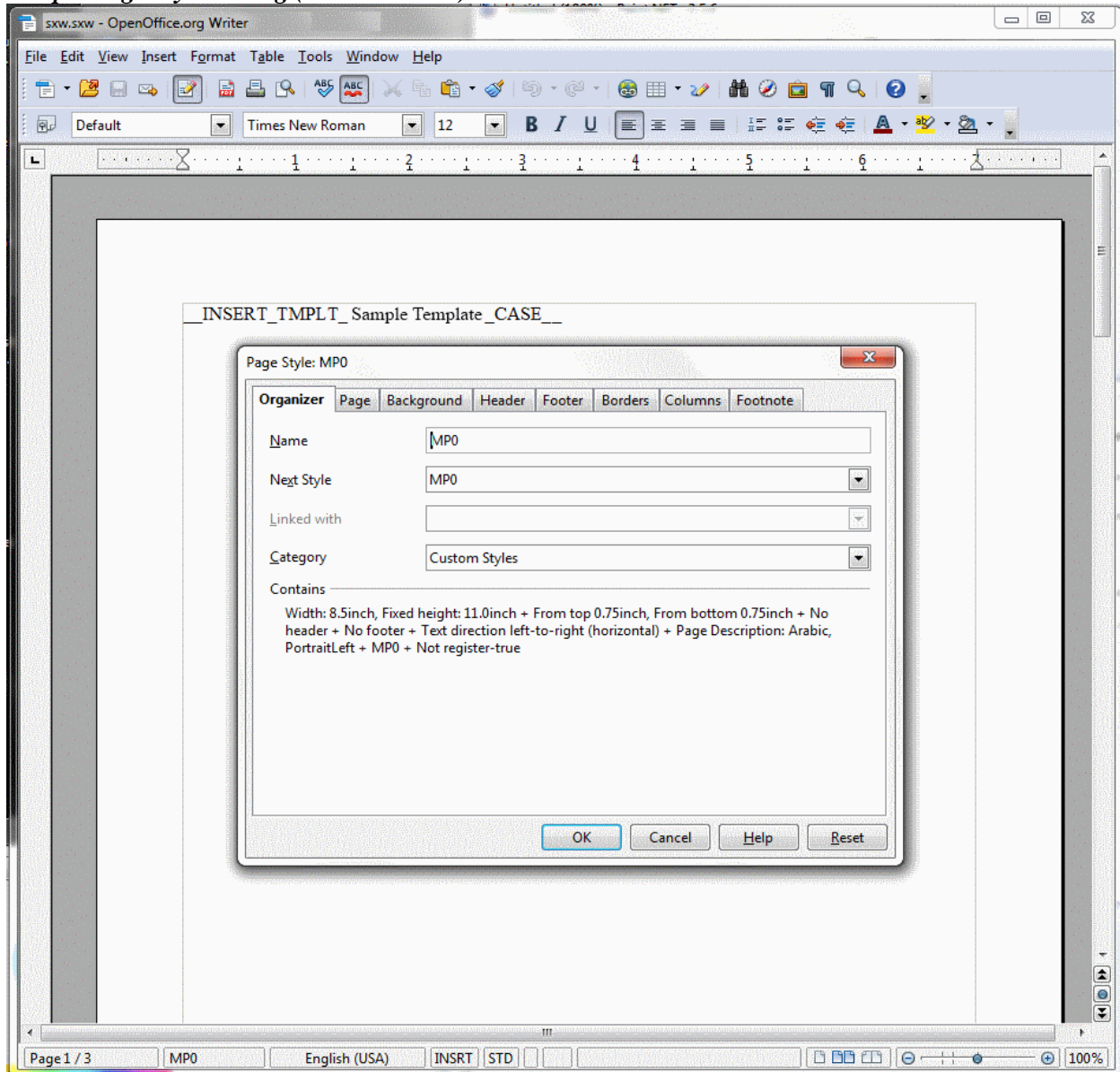
The above screen cut is for a parent template, one with insert tags. This template has several problematic qualities that can lead to an unsuccessful document generation. One of these is the "Page Style: MPO" window illustrated above. The "Category" dropdown has only the entry "Custom Styles" so there is no other option for this template except to open a new sxw document with the page style set to default, as shown next:

Correct Page Style (Default)

Notice that the name is "Default" and the "Next Style" is also "Default". The "Category" dropdown is grayed out and cannot be selected. It is useful that the default styles all be identical for all templates as well, especially for templates with insert tags, and templates to be inserted into other templates.

Open Office Help provides guidance on creating a default template from an existing document. It may be useful therefore that those users creating templates with insert tags and those users creating templates that might be used as inserts have the same default style settings and coordinate those settings (perhaps by passing around a single document with its page styles set to those desired and using that document as the basis of the default styles). Open Office Help will direct you to the menu "File->Templates->Organize" initially. Please see Open Office Help for details.

2 Manual Page Breaks (All Templates, Not Just Inserts)

When setting a manual page break in Open Office, it is important to set the style dropdown to default as well. If the Style dropdown is not set, Open Office will select something itself, which should be but is not always the default style, thus leading to unanticipated style changes within the document that may not be visible, but can cause document generation to fail. There are also limitations on what can be done with headers and footers on templates to be inserted. Those headers and footers found on the first template to be inserted will be displayed on all subsequent pages of the combined document UNLESS a manual page break is provided following the insert tag for the first template to be inserted. There is more on handling headers and footers later in this document.

Page Break Popup Window (No Style Setting)
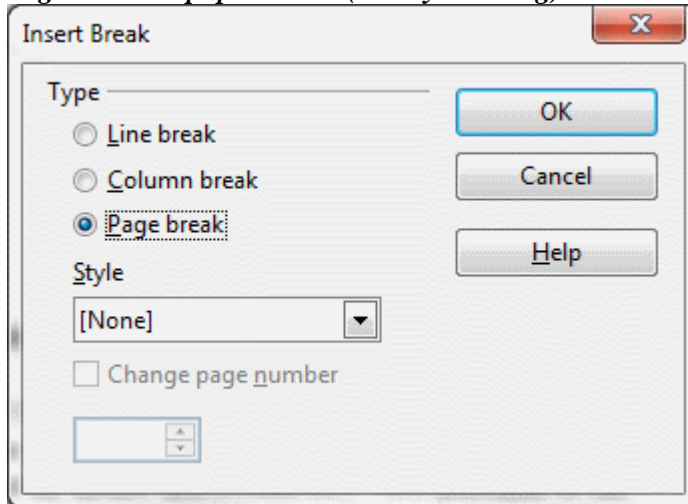
Note that the Style dropdown shows "[None]". It needs to be set by selecting "Default" as shown in the next illustration.

Page Break Popup Window (Setting Style Dropdown to "Default")
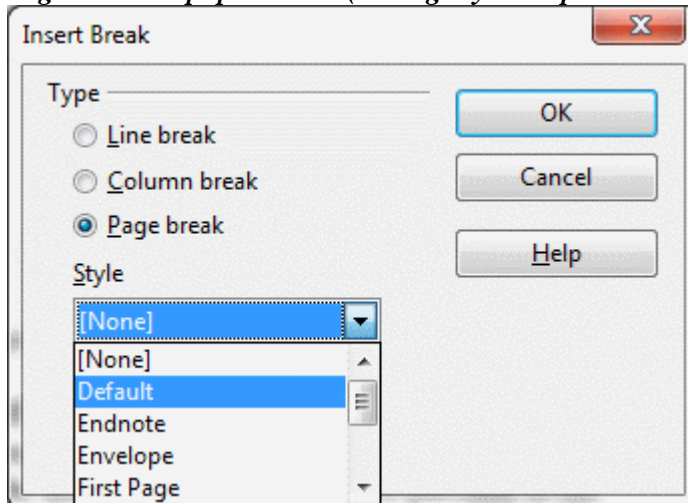
3   Unwanted Blank Pages From Template First Paragraph Formatting

If an inserted template is to begin a new page, insert a page break as outlined above. If the manual page break creates an unwanted additional line, the line can be removed and the page break will be incorporated into the paragraph format. On templates created from existing templates, or simply by oversight, it is possible that the template to be inserted already has a paragraph insertion specification in the formatting of the leading paragraph. This can lead to a blank page between the template to be inserted and the preceding text because there are now two page breaks, the one you inserted yourself, and the one that is part of the next template that you didn't know was there.

A second source of unwanted blank pages can be caused by blank lines at the end of a template when the data inserted into the template causes the blank lines to spill over onto another page. When creating templates, please check that there are no unnecessary blank lines at the end of the template.

Example: Two Unwanted Blank Pages in Generated Output
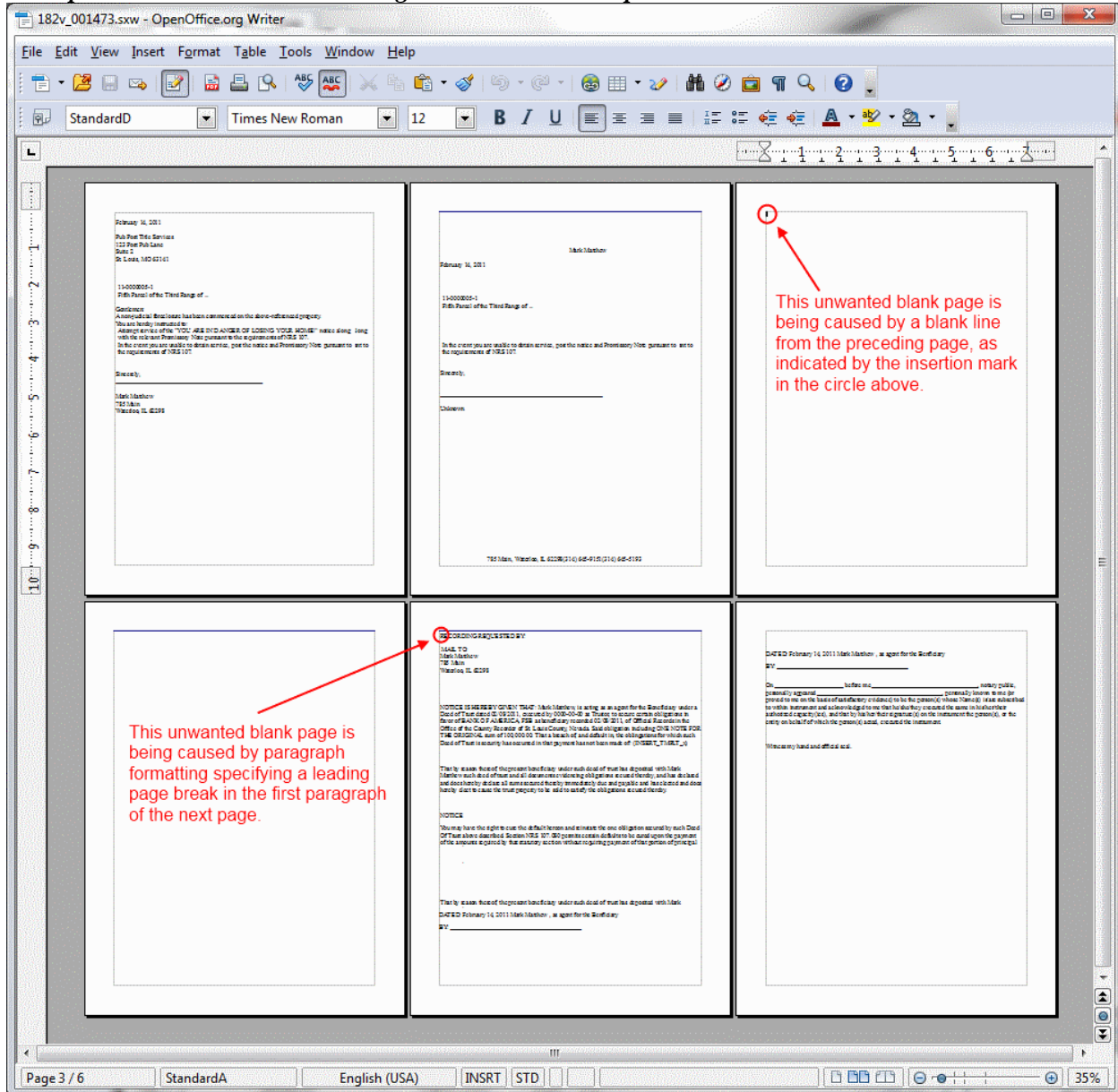
The parent template that generated the above output specified three template insertions with a manually inserted page break between each. The pages are from left to right, first, second and third pages in the first row. Fourth, fifth and sixth pages in the second row. The first two templates require only one page each and account for the first two pages of the first row in the screen cut above. The blank third page (first row) and blank fourth page (first page of the second row) were not expected.

The explanation for the two blank pages is different for each as indicated in the screen cut. To remove the blank third page, the user returns to the original template and removes the blank line from the bottom of the template. To remove the second blank page (first page of the second row), the user returns to the original template and clicks in the first paragraph, then selects the "Format" menu from the Open Office editor, and from the dropdown, selects "Paragraph..." The user then selects the "Text Flow" tab in the popup. In the section of the popup labeled "Breaks", uncheck the checkbox labeled "Insert". Save both templates and upload them to replace the current templates.

4   Blank Page Caused by Paragraph Format Specifying a Page Break

To remove the unwanted second blank page, choose Format, Paragraph from the Open Office menu. In the Paragraph format popup window, choose "Text Flow" and uncheck the "Insert" check box as highlighted in this screen cut.

This unwanted blank page is being caused by paragraph formatting specifying a leading page break in the first paragraph of the next page.
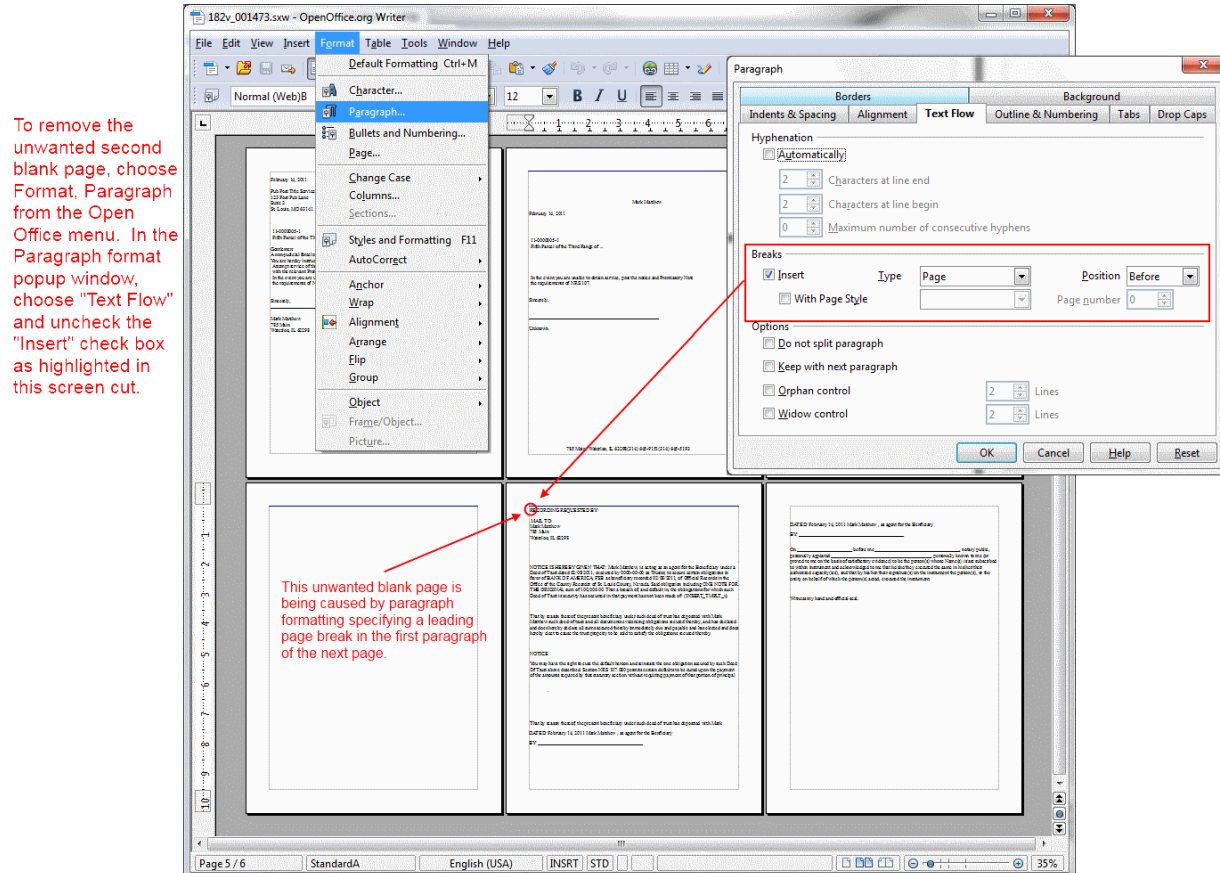
5 Output After Removing Blank Line and Reformatting First Paragraph of the Third Template.
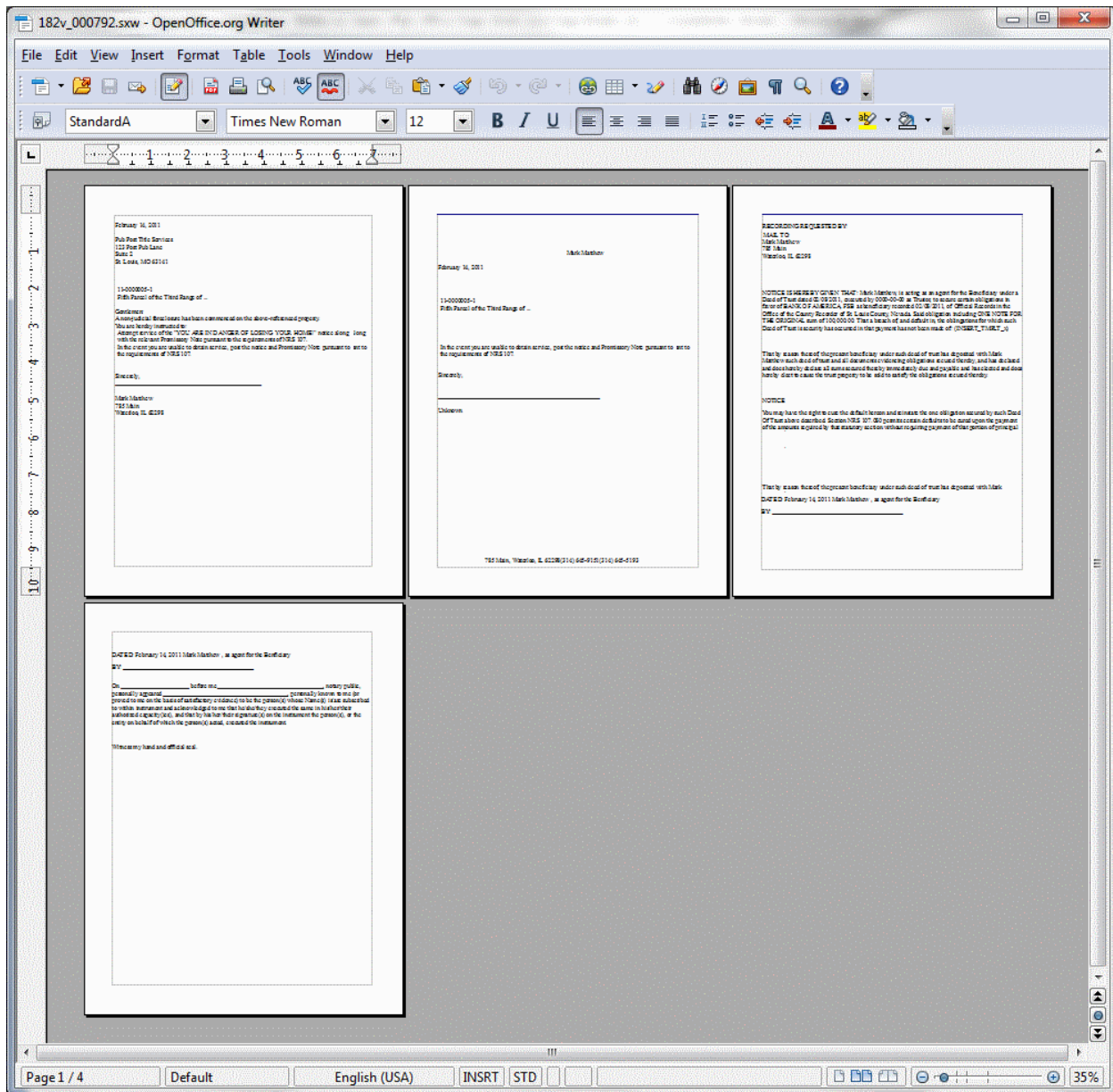

The above is the expected output, three templates, first two have one page each, third has two pages, and there are no blank pages.

6   Alternative Page Break Approach

The alternative approach to page breaks takes advantage of a template having the first paragraph format setting to include a page break. For example, the following parent template is a single page document with no page breaks specified by the user setting up the template. Instead, the template relies on the first paragraph for each template to be inserted to provide the page breaks. There is a caveat with regard to this approach. If the first template has headers and footers, those headers and footers will be displayed on all pages of the combined document. If the headers and footers are desired only on the portion of the combined document belonging to the first template, then place a manual page break after the first insert tag.

Parent Template (No Page Breaks Specified in Parent Template)
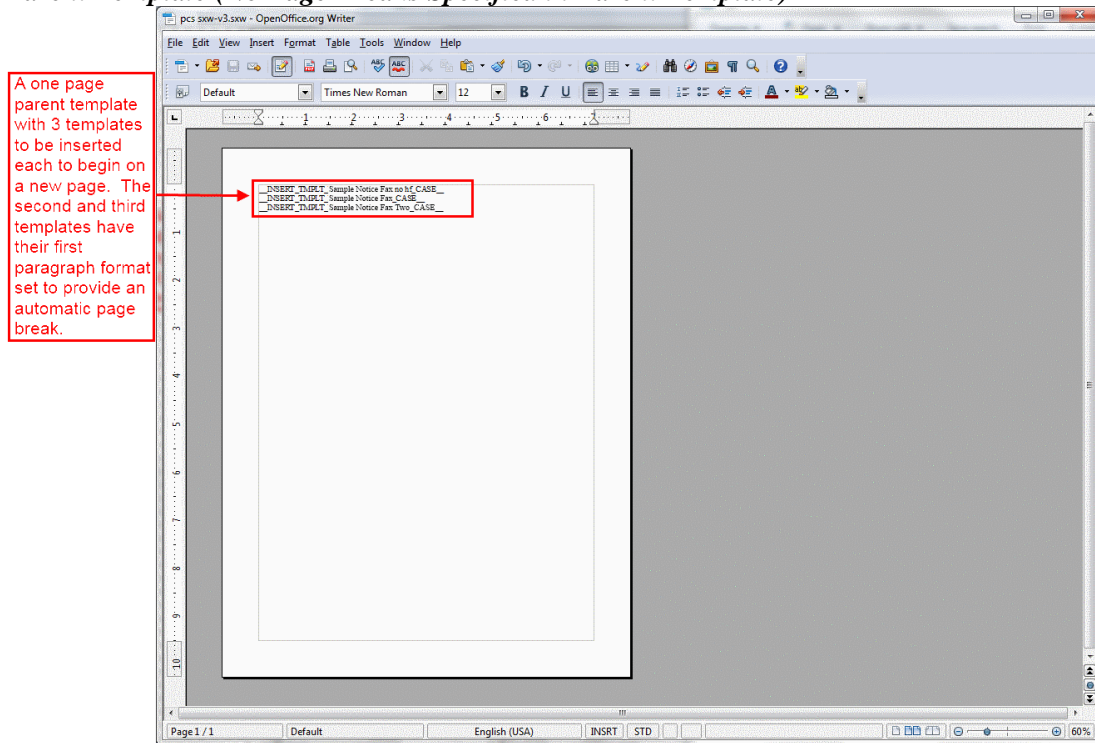
If in the above illustration the first template includes headers and footer, those headers and footers will appear on all subsequent pages of the combined document.

7 Template to be Inserted, First Paragraph Provides the Page Break
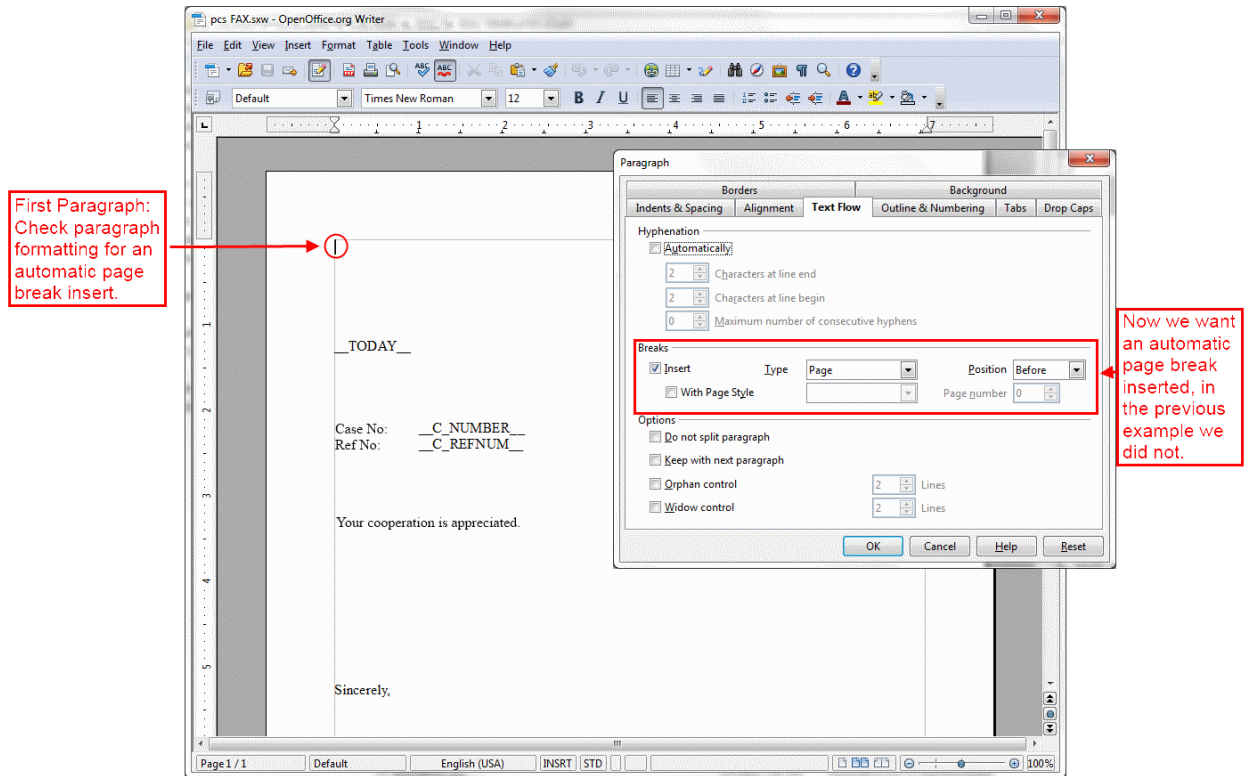
Paragraph formatting is accessed via the Open Office "Format" menu, then select "Paragraph..." from the dropdown list. As illustrated above, select the "Text Flow" tab. Then in the "Breaks" section of the popup, check "Insert", Type = Page, Position = Before.

8   Generated Output For Each Template Providing Its Own Page Break
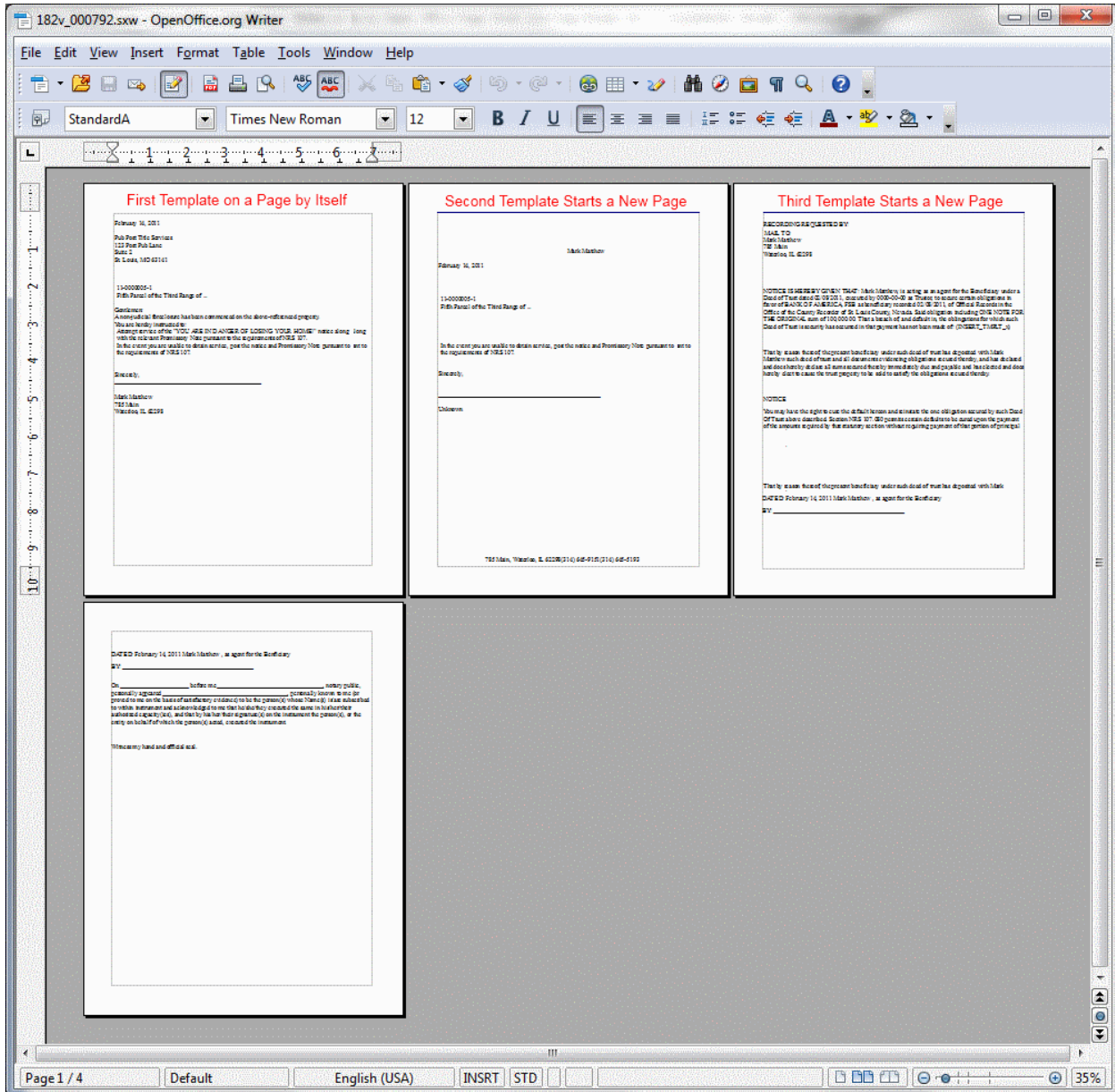
Each of the templates included in the parent template provided their own new page inserts in the formatting of the first paragraph in the template. As illustrated, the parent template does not need to have manually inserted page breaks if the inserted templates have their first paragraph formatted to provide the page breaks.

None of the above templates include headers or footers. Please review the topics on headers and footers later in this document.

# 9 Disappearing Inserts (When a New Line Is Not a Paragraph)

This example provides what appears to be a straight forward template insert in that the template insert tag appears on a line by itself as rules stated elsewhere say it should be. Unfortunately, Open Office provides a feature called a "line break" that is not a true carriage return. Hence the template insert tag is not seen to be on a line by itself and while processing actually does include the template, it becomes invisible to the user viewing the document. Users comfortable with unzipping the template file and reviewing the content.xml file will find all their inserted data.

Adding the Template Tag to an Existing Line on a Template
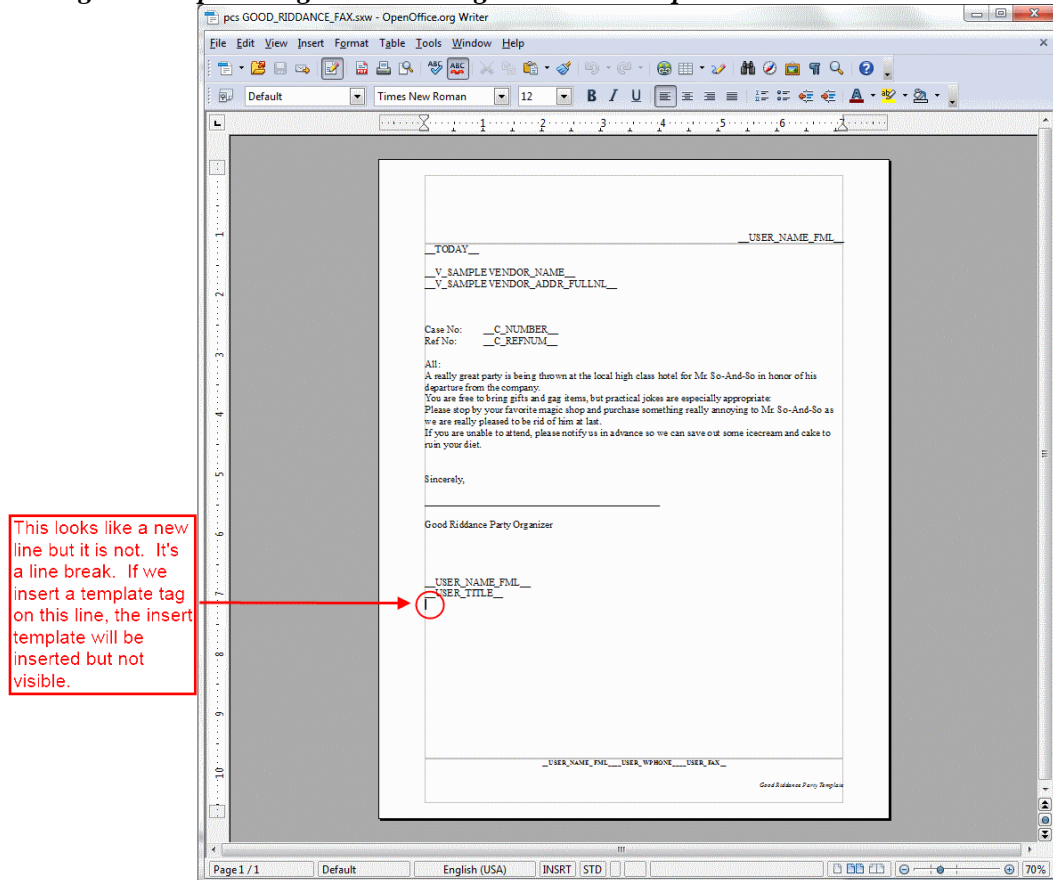
The insertion pointer in the above illustration appears to be on a separate line as insert tag requirements specify. This however, is not a what is needed. It's a line break. Open Office Help describes a line break as "Ends the current line, and moves the text found to the right of the cursor to the next line, without creating a new paragraph." Insert templates need a new paragraph.

10 Generated Output (Where's the Inserted Template?)
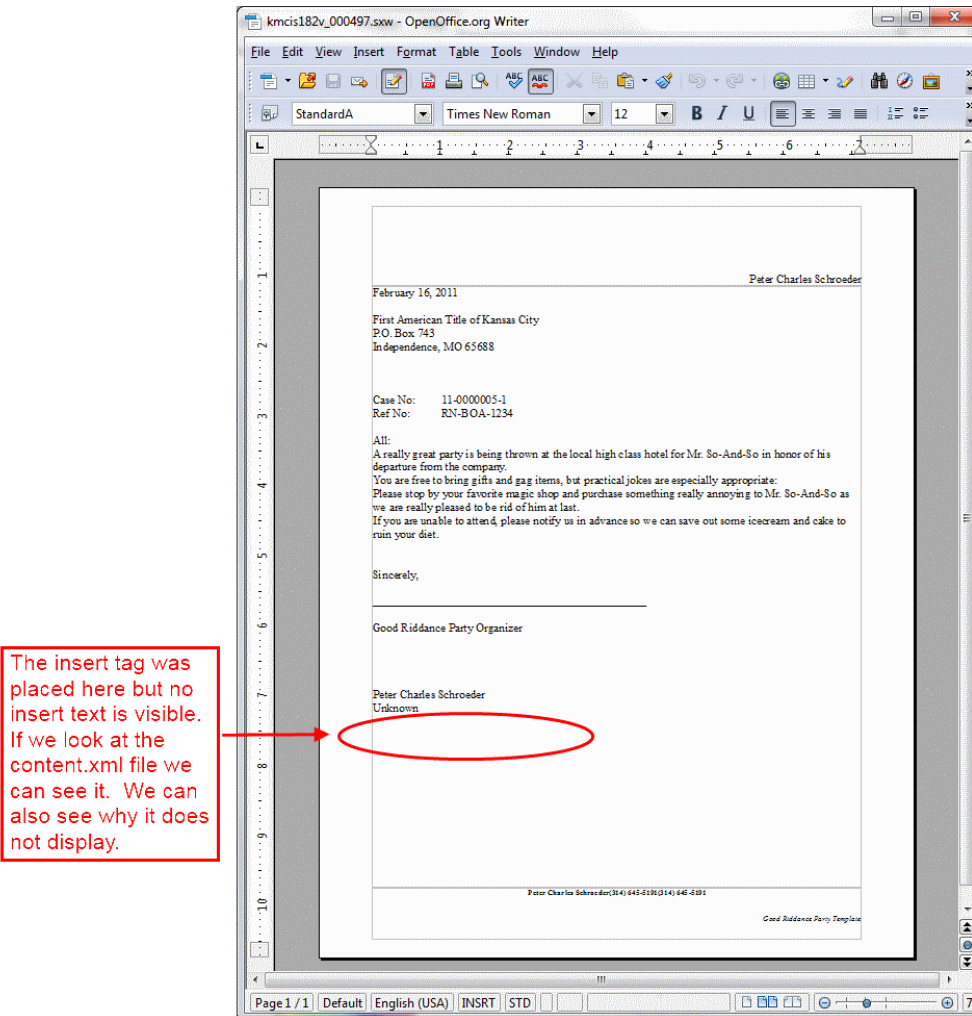
The template to be inserted was inserted but the processing did not see the expected paragraph delimiters.

11 Excerpt from Content.xml Showing Apparent Carriage Return Wasn't a Carriage Return
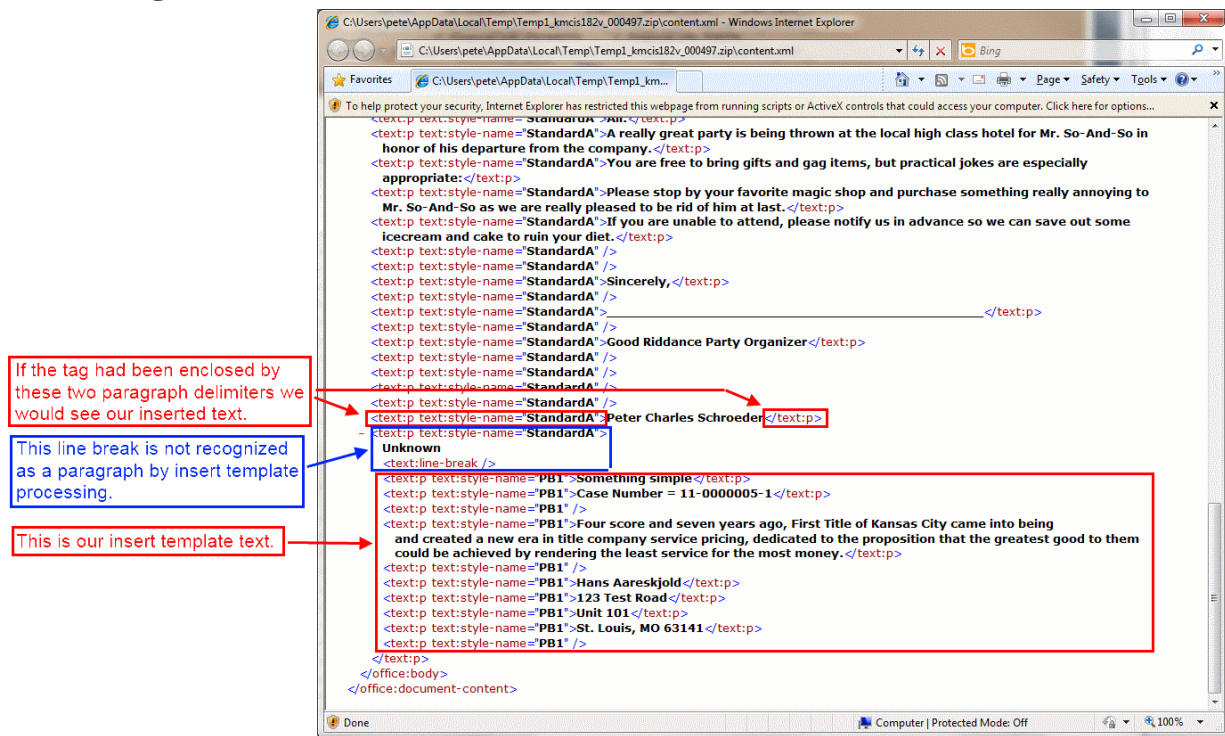
This is the inside of a Open Office template and is accessible to anyone who wishes to venture there. The culprit here is highlig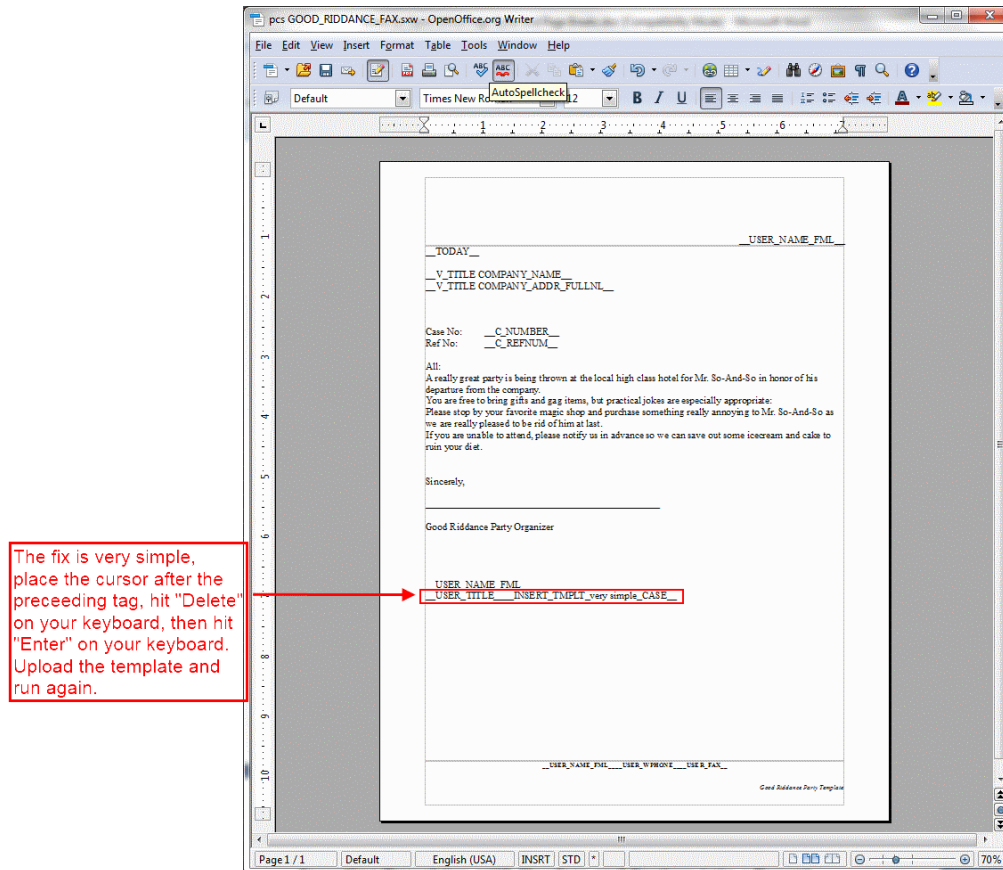hted in blue "<text:line-break/>" instead of the standard paragraph delimiters that enclose the user name immediately above.

12 Fix

The fix is very simple, place the cursor after the preceeding tag, hit "Delete" on your keyboard, then hit "Enter" on your keyboard. Upload the template and run again.
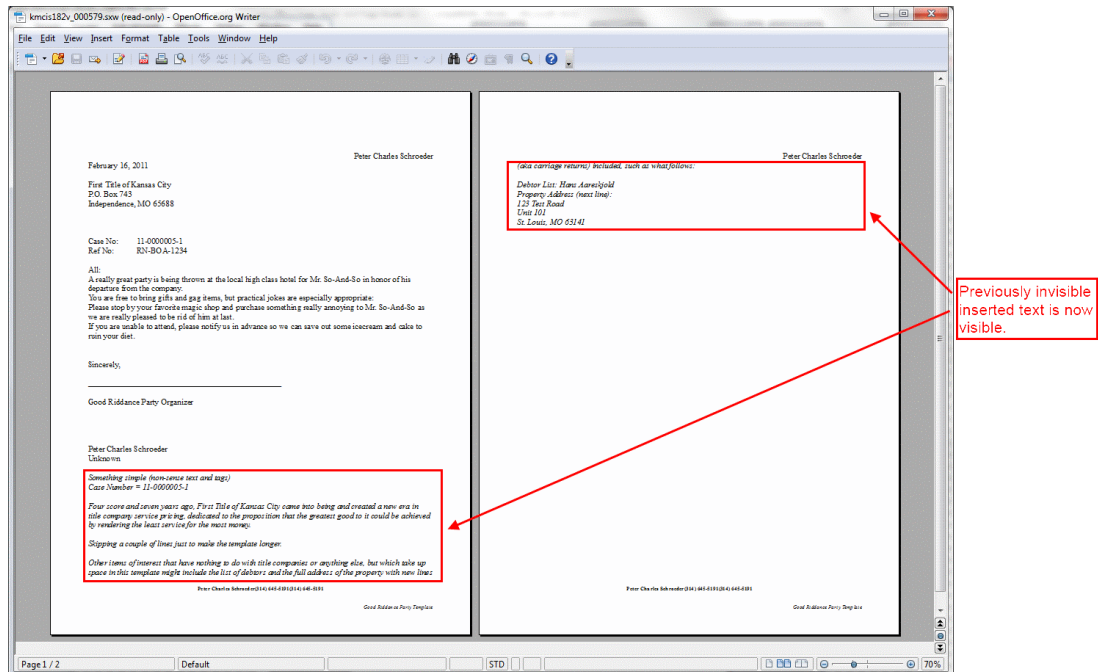
To remove the "line-break" simply place the cursor (insertion pointer) after the preceding tag (__USER_TITLE__ in this example) and hit the Delete key on your keyboard. Once both tags are on the same line, immediately hit your Enter key to create a genuine paragraph.

13 Generated Output after Fix

By deleting the line break following the __USER_TITLE__ tag, hitting Enter on the keyboard, and following up by re-uploading the template, the generated document now displays the text from the insert template.

14 Automatic Fields Intended to Display the Original Template Name

Inserting a field in a template such as the "File Name" field (choose menu "Insert->Fields->Other") will display the name of the file as it exists after the template has been generated into a document, not the original template name as might be expected. If the template is inserted into a parent template, the field will display the name of the generated combined document, by that point two times removed from the original template name. If the intent is to provide a reference to the original template name, a "File Name" inserted field will not fulfill the original intent. If the original template name is to be displayed, the name will need to be typed in manually.

15 Inserting Templates with Headers and Footers into a Parent Template

Headers and Footers are easily provided in standalone document templates and with some effort, section breaks allow specifying different headers and footers in different sections of the template. Some functionality in this regard appears to have been removed from more recent versions of Open Office, yet the previous functionality is partially supported in that older Open Office documents are displayed correctly but the ability to create new ones in the same manner as previously seems to have been attenuated. However, almost any combination of headers, footers and page orientation can be set up in Microsoft Word, the Word document saved in Word 97-2001 format, then opened using Open Office, and finally, saved as an Open Office 1.0 (sxw) document.
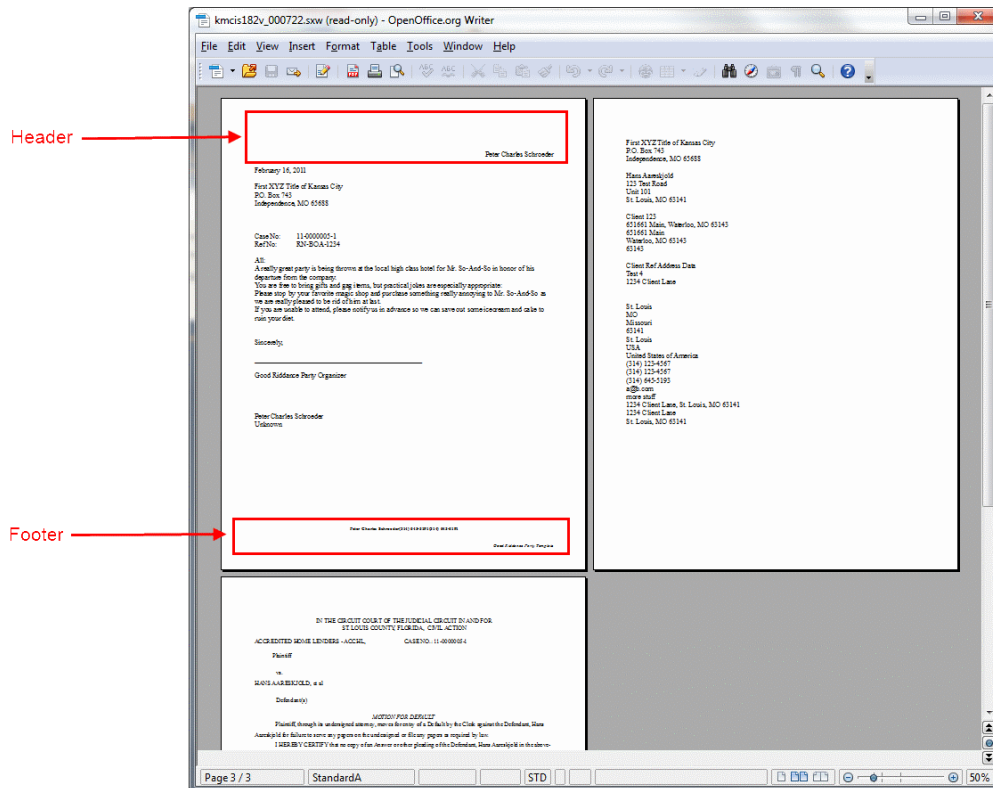
16 Templates Inserts with Headers and Footers

Presently, template inserts with headers and footers require special processing that limits their use to the first template inserted into the parent template. In the first example that follows, the first template has both a header and a footer which displays correctly - in part, it displays correctly because there are manually inserted page breaks between each of the templates. In the second example, the same template is the second template inserted and displays incorrectly - none of the documents display a header and footer.

Parent Template with Three Template Insert Tags - Manual Page Breaks between Each (First Template Insert Includes a Header and Footer)
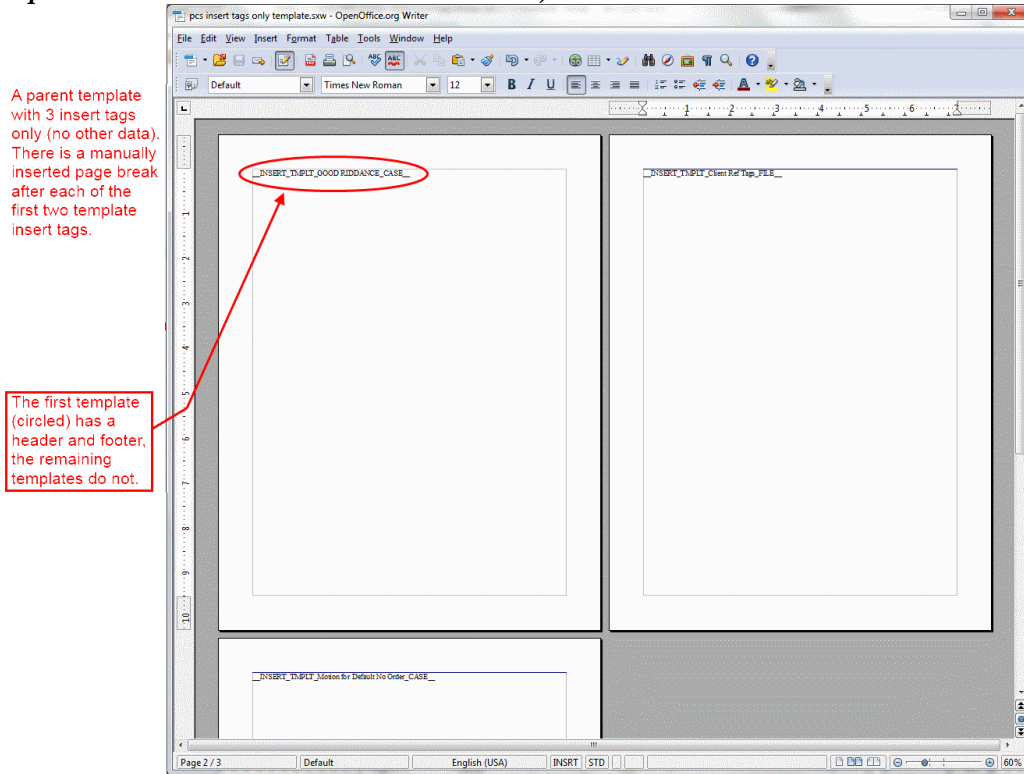
The above illustrates a parent template with three template insert tags, each followed by a page break. The order is from left to right, first and second pages on the top row, third page on the bottom row.

17 Generated Output Manual Page Breaks (First Template Insert Includes Header and Footer and Displays Correctly)


The highlighted areas of the first page above are the header and footer belonging to the first template. The first template requires just one page, so the header and footer appear only on the first page. Note that the remaining pages do not have headers and footers. Though the third page has text placed in such a manner as to give the appearance of a header, it is actually part of the document body.

18 Generated Output Manual Page Breaks (Previously First Template Insert is Now the Second)

The second template should have a header and footer but does not. In this example, none of the pages displays the header and footer associated with the second page.
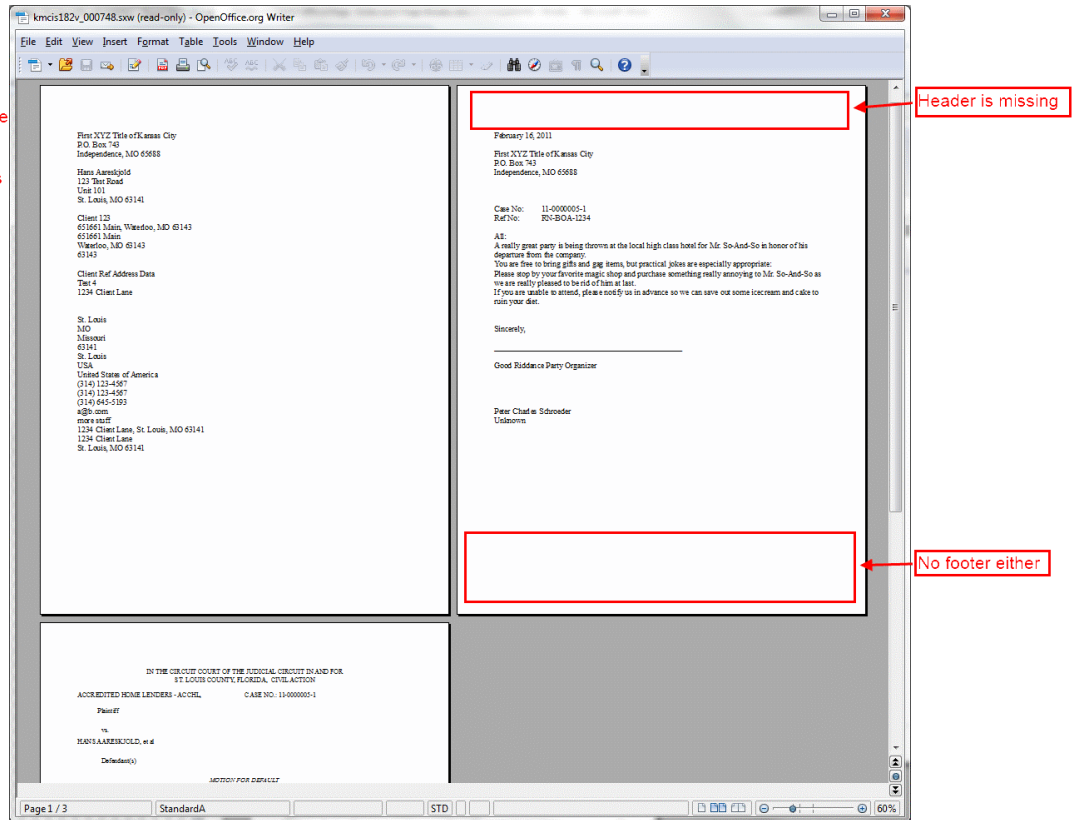
In this illustration, the first and second template insert tags are swapped one for the other so that the template with the header and footer is now the second template in the parent. As indicated, the second template output (second page in first row) no longer has its header and footer. None of the other pages display the header and footer for the second page either. In other similar template setups, headers and footers for the second template do display, but for the first template.

19 Parent Template with No Page Breaks, Relies on Template First Paragraph Format
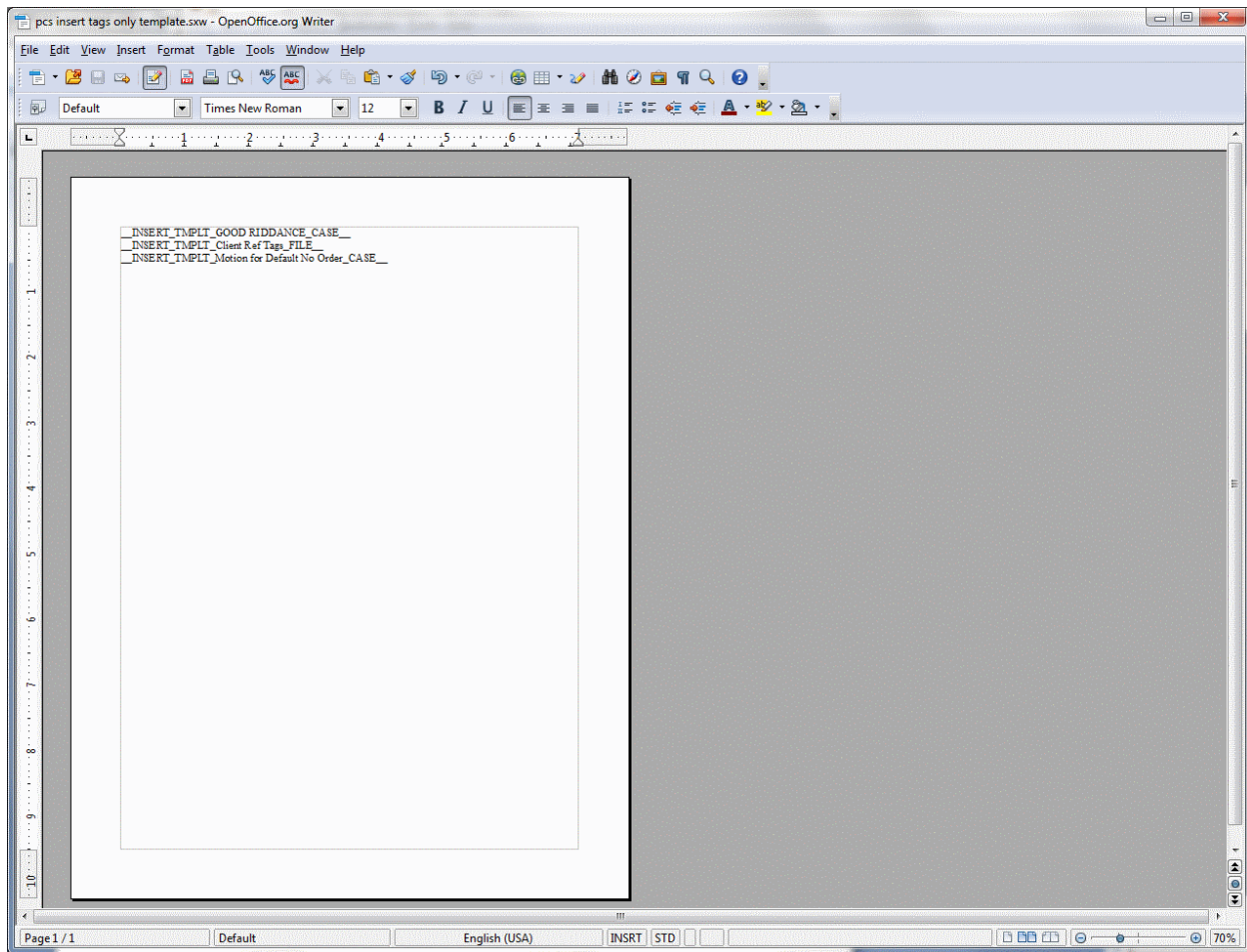

The above arrangement will work fine as far as page breaks are concerned for the first two templates. The third template begins with a table, and despite repeated attempts to set then upload the template with the table properties specifying a page break before the table, the third template will not respect the page break option specified for it.

The above arrangement will not work for headers and footers in the first template only. The headers and footers for the first template will display on all pages of the final combined document. Additionally, the table that begins the third template does not honor the settings to either place a page break before it, nor settings to keep it with the next paragraph in the template. The third template will begin a new page only if the above parent template is modified with a manual page break inserted in front of the template insert tag.

20 Output for the Preceding Parent Template, Misplace Headers/Footers
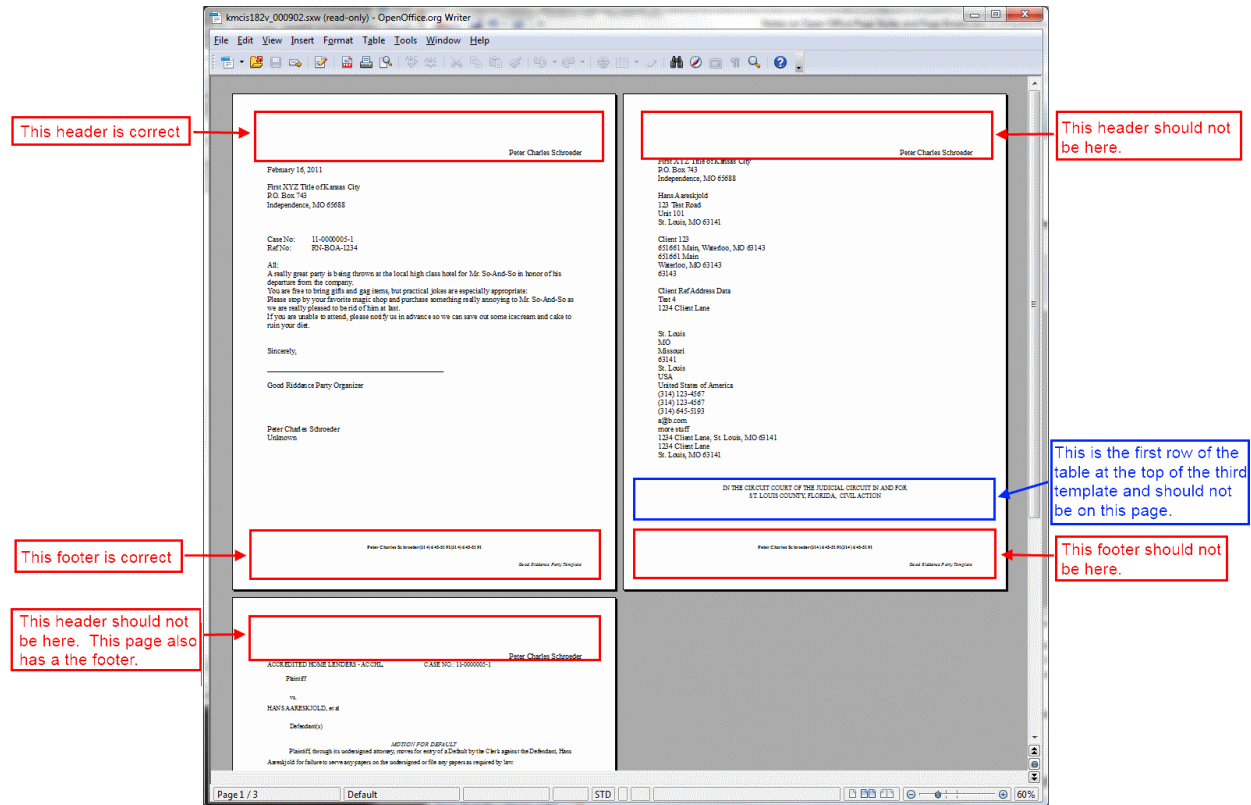
As noted previously, headers and footers associated with the first template display on all three pages instead of the first. As indicated, the headers and footers on the second and third pages should not exist. Additionally, the table beginning the third template does not respond to its settings specifying that a page break should precede it.

21 Basic Rules for Template Inserts with Headers and Footers

1. Limit insert templates with headers and footers to just one per parent template.
2. Make the template with the headers and footers the first template in the parent document.
3. Place a manual page break after the first template (the one with the headers and footers)
4. Multiple templates with headers and footers inserted into a parent template will only display the headers and footers of the first template if that template has headers and footers.
5. If the headers and footers of the first template are desired on all pages of the combined document, do not use manual page breaks in the parent template. Use paragraph formatting options on the first paragraph of each of the individual templates to be inserted to specify a page break.
While not strictly a header/footer topic, a fourth rule is to always place a manual page break before any template beginning with a table. (Users are encouraged to experiment however and inform CaseAware Support if success is achieved controlling page breaks via table settings for templates beginning with a table).