

# Template Format

Certain features of our web service allow users to download files that other users have uploaded. This is a reference document for the template format available to all users. This document provides a list of valid placeholder tags that can be inserted into **DOCX files ONLY** as our system cannot handle other files. These placeholders will be replaced by the CATS web service with the appropriate information from our database upon download. They are designed to be used to create templates which can be uploaded to our system and shared with other users. The system does **NOT** keep a copy of the completed files, they are created on the fly and downloaded to the user's device. Any modification to the data is reflected the next time the file downloaded.

There are two types of placeholders which for the sake of this reference document will be called tags. Aliases have been given to some tags or groups of tags to make the template neater. They also make the tag easier to understand as you don't need to know the database column to use the alias.

**ALL TAGS MUST** start with “**#{**” and end with “**}**” and are **NOT** case sensitive. Failure to wrap a tag will cause it to not be replaced.

1. The first type of tag is a “complex” tag. This type of tag includes both a database table name and the column name of the data you wish to use. They are in the format:  
#{table name:column name}.  
More detail is given below in the list of tags.
2. The second type of tag is a “simple” or “single” tag. These tags are easier to understand than the complex tags since simple tags exist by themselves without a table name. They have the simple format of #{tag name}.

Our template system allows for inclusion of assessment results in reports. Due to the fact that every assessment is different, the tags available depend on the assessment. Assessment tags can be found on the assessment results tags.

You can also include other **DOCX** resources in your template with the use of the “section” tag. These files can be in either the “sections” folder or any folder in our resource system. **IMAGES AND SPECIAL FORMATTING are currently LOST when the file containing them is included.** In addition to this the “sections” folder is also not available to non admins. For a list of items in this file contact an admin or system administrator.

Our template system also allows for clinic specific logos and footer to be inserted by using our temp images. The temp images are available in two formats. The formats are PNG and JPG. The PNG version allows transparency while the JPG version does not. If the JPG version is used with an image with transparency the transparency will turn white. We also have support for therapist/staff signatures.

At this time the temp images are available through the “System Resources” Bubble. **ONLY** the temp images supplied through this bubble will work this feature.

## List of tables, for use in complex tags

Table Name	Description
client	Access fields in the client table.
staff	Access fields in the therapist table.
clinic	Access fields in the clinic table
data#	Access information passed to the template filler method. <b>(UNDOCUMENTED)</b>

## List of Single Tags

Tag Name	Description	Full Tag
Date	Insert current date	<code>#{date}</code>

## List of Complex Tags

Tag Name	Description	Clinic Table	Staff Table	Client Table
Full Name	Insert full name	<code>#{clinic:name}</code>	<code>#{staff:name}</code>	<code>#{client:name}</code>
First name	Insert first name	N/A	<code>#{staff:first_name}</code>	<code>#{client:first_name}</code>
Last name	Insert last name	N/A	<code>#{staff:last_name}</code>	<code>#{client:last_name}</code>
Unique Code	Insert the unique client Code	N/A	N/A	<code>#{client:code}</code>
Full Address	Insert full address. Includes address, city, province (if applicable) and postal code	<code>#{clinic:full_address}</code>	<code>#{staff:full_address}</code>	<code>#{client:full_address}</code> <code>#{client:full_address2}</code> <sup>i</sup>
Address	Insert address. <b>Street Address only</b> <b>Does NOT include city, province or</b>	<code>#{clinic:address}</code>	<code>#{staff:address}</code>	<code>#{client:address}</code> <code>#{client:address2}</code> <sup>i</sup>

	<b>postal code</b>			
City	Insert city	<code>\${clinic:city}</code>	<code>\${staff:city}</code>	<code>\${client:city}</code> <code>\${client:city2}<sup>i</sup></code>
Postal Code	Insert Postal Code	<code>\${clinic:postal_code}</code>	<code>\${staff:postal_code}</code>	<code>\${client:postal_code}</code> <code>\${client:postal_code2}<sup>i</sup></code>
Province	Insert Province	N/A	<code>\${staff:province}</code>	<code>\${client:province}</code> <code>\${client:province2}<sup>i</sup></code>
Date of Birth	Insert dob	N/A	N/A	<code>\${client:dob}</code>
Phone Number	Insert Phone Number	<code>\${clinic:phone_number}</code>	<code>\${staff:phone_number}</code>	<code>\${client:phone_number}</code>
Email	Insert Email	<code>\${clinic:email}</code>	<code>\${staff:email}</code>	<code>\${client:email}</code>
Fax Number	Insert Fax Number	<code>\${clinic:fax_number}</code>	<code>\${staff:fax_number}</code>	N/A
Rate	Insert Rate	<code>\${clinic:rate}</code>	<code>\${staff:rate}</code>	N/A
Associated Business	Insert Associated Business	<code>\${clinic:asscociated_business}</code>	N/A	N/A
Parents Name	Insert Parents Name	N/A	N/A	<code>\${client:parents_name}</code>
Age	Insert Age	N/A	N/A	<code>\${client:age}</code>
Subjective Pronoun	Insert Subjective Pronoun	N/A	<code>\${staff:he}</code> <code>\${staff:He}</code>	<code>\${client:he}</code> <code>\${client:He}</code>
Objective Pronoun	Insert Objective Pronoun	N/A	<code>\${staff:him}</code> <code>\${staff:Him}</code>	<code>\${client:him}</code> <code>\${client:Him}</code>
Possessive Pronoun	Insert Possessive Pronoun	N/A	<code>\${staff:his}</code> <code>\${staff:His}</code>	<code>\${client:his}</code> <code>\${client:His}</code>

## Section Tag Usage

Type of Include	Style of tag	Description
Include a section	<code>\${section:filename}</code>	This tag can be used to include a file in the sections directory. If the file is located it will be run through the template substitution system before being included. Where filename is the name of the file <b>INCLUDING</b> the extension.

Include another resource	<code>\${section:/folder/filename}</code>	This tag can be used to include ANY <b>DOCX</b> file in the resource system. If the file is located it will be run through the template substitution system before being included. Where folder is the folder name which the file is under. If you are unsure contact an admin or system administrator. File name is same as the above tag.
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<sup>i</sup> If parents are separate this references the 2<sup>nd</sup> address field. Otherwise it is the same as tag above