

CASE Manager 5.2: Templates

USER MANUAL

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Overview

In Case Manager, from version 5.2.1, Crystal Reports files for printing reports or documents will no longer be accessed from the report folders on the server, but will rather be saved in the database. With this change, a user will no longer need access to the files on the server to print reports or documents, and consequently no longer require a client access for Windows¹.

The Crystal Reports-based printing has been a part of the Case Manager solution for many versions, and the structures supporting this functionality required re-thinking and refactoring. Even though there is much room for further improvements, this is a great leap forward. It does however impact how this functionality is used and supported by the Case Manager ships. In this document, I explain my suggestion on what should be done at a site and how we can still effectively support clients with custom reports and documents.

¹ There may still be another reason for the client access licence, such as case attachments, or ClickOnce files, which is not addressed in this document.

Upgrade process

During the upgrade to 5.2.1 structural changes are applied to how templates are stored, as well as changes to data currently in the database:

1. Due to a legacy product, the Stargate Portal, numerous references to (irrelevant) templates were stored in the database but were not visible. During the upgrade process those not visible in the current system (not referring to the visibility settings on the template) are deleted.
2. An external reference is also associated with each template that can be used in template portability to identify a template and prevent duplicates.
3. Template groups are also now open to be changed.

Printing from Case Manager

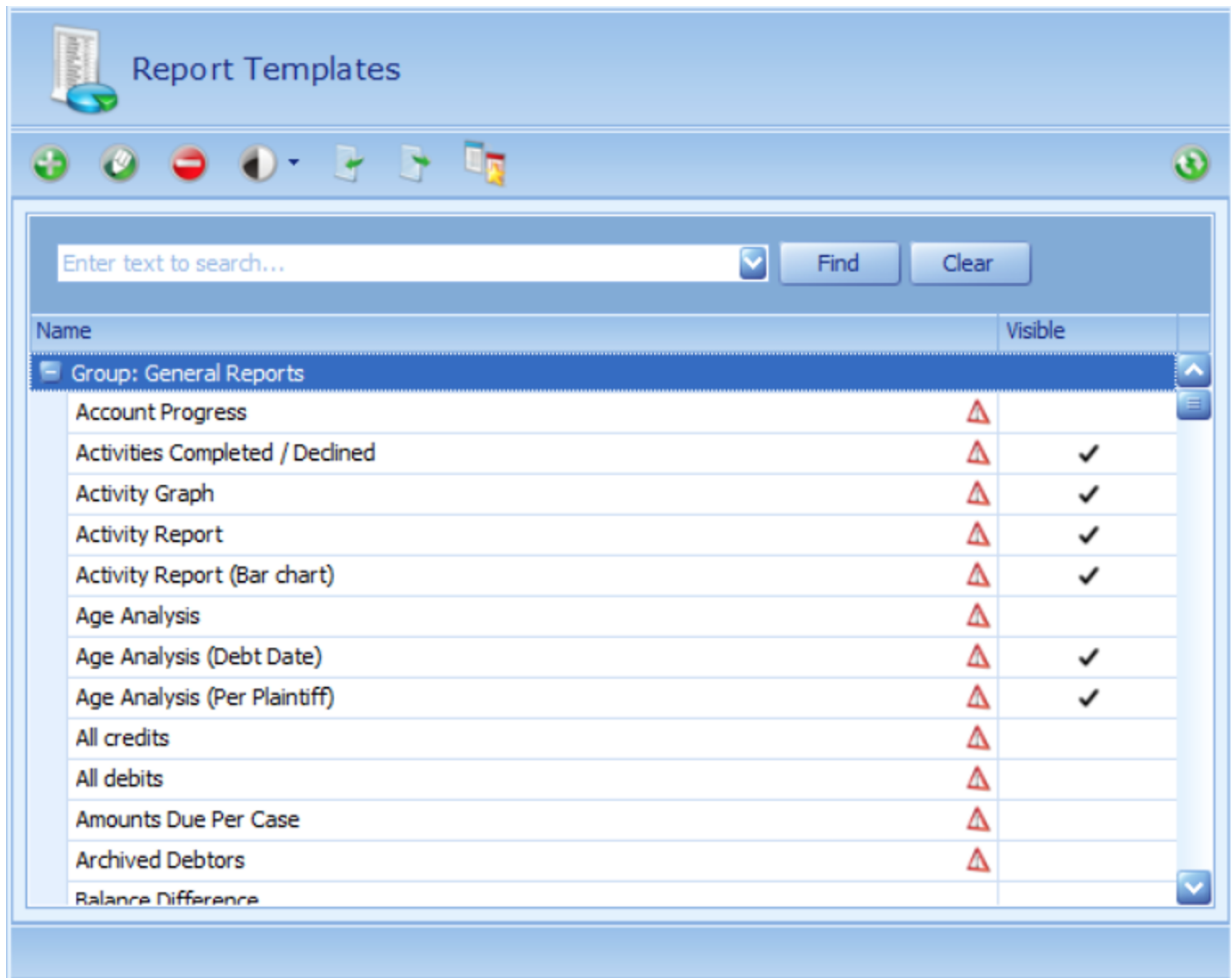
From a user's perspective printing a report or document remains the same. If during printing it is found that the template is still in the old format (that is, not stored in the database, but by loading the Crystal Reports file from the server) then the print process will first migrate the template (load it into the database) before continuing with the actual printing process.

The reports folder as set up in the Configuration Tool, will eventually not be used anymore. At this stage it is used for the migration of legacy templates.

Managing templates

Report Templates

From the Configuration Tool, a new view of the Report Template is accessible, showing the available templates as well as an indication of the template's visibility in Case Manager. A warning icon is shown on templates in the legacy format. A number of actions are now available for report templates. Most of these actions can be executed on multiple templates at a time. To select multiple templates, hold down the Control key (ctrl) on the keyboard and select the templates, before invoking an action.



Actions

- **Add template**

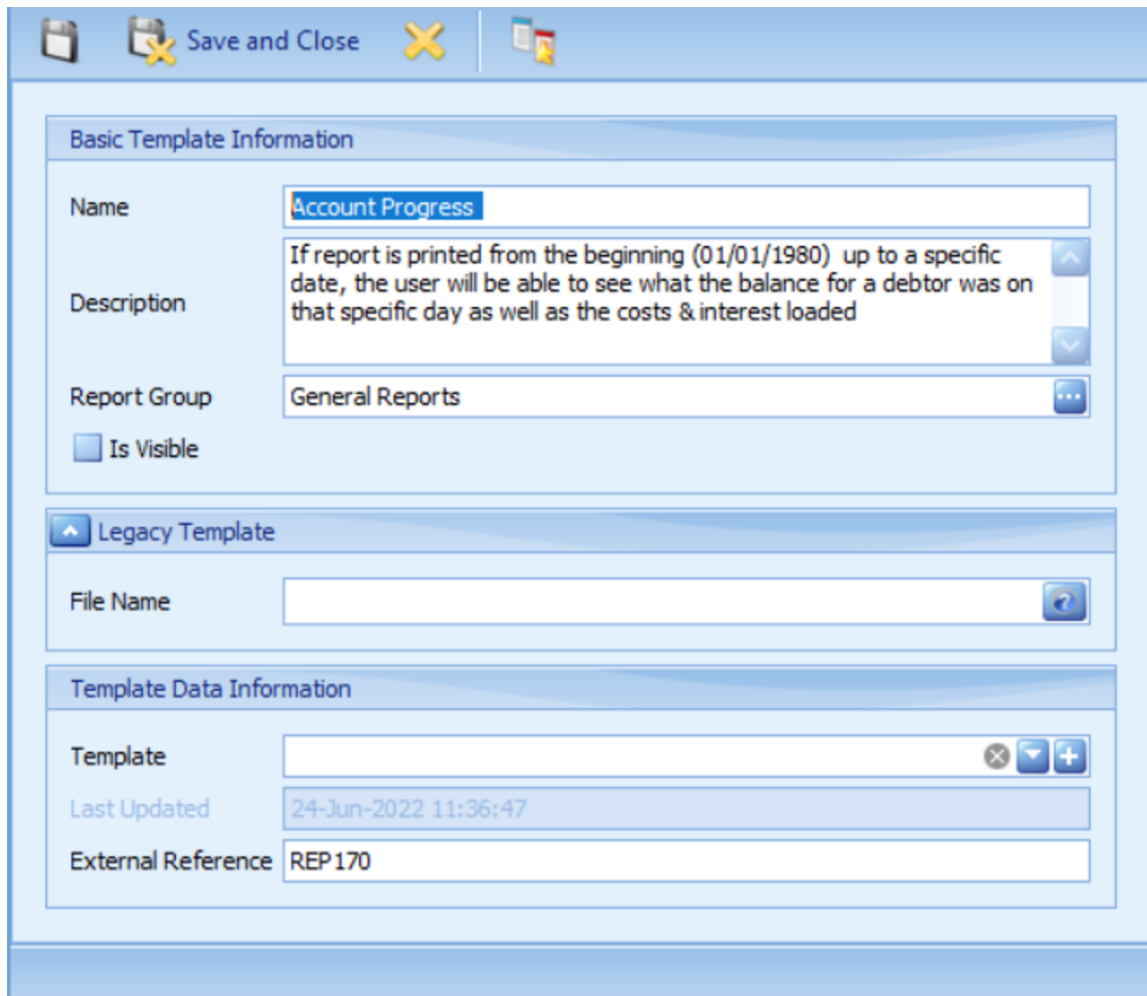
The add template action allows you to add a new template by specifying the details of the template, and upload the relevant Crystal Reports file. You will be required to upload a Crystal Reports file; the legacy format is not supported for new templates. The external reference is used to identify report templates for [Template portability](#).

- **Edit template**

Only one template may be selected for editing at a time. The edit window will show the template details, such as Name, Description, Group, IsVisible. By clicking on the ellipse on the Group field, you will have the option to change the Report Group or to create, edit, or delete Report Groups. The Group is only used when displaying lists of Report Templates. When the template is in a legacy format, the Legacy Template section will be visible. Once migrated (either by uploading a Crystal Reports file, or by running the migrate action on the form) this section will not be shown anymore.

There are three buttons on the Template control: Clear (removes the stored Crystal Reports file), Download (saves the stored Crystal Reports file as file), and Add (sets the Crystal Reports file for this template entry).

The external reference is an identifier used by the [Template portability](#) functionality.



The screenshot shows a software window with a title bar containing a 'Save and Close' button and a close icon. The window is divided into three main sections:

- Basic Template Information:**
 - Name:** Account Progress
 - Description:** If report is printed from the beginning (01/01/1980) up to a specific date, the user will be able to see what the balance for a debtor was on that specific day as well as the costs & interest loaded
 - Report Group:** General Reports
 - Is Visible:**
- Legacy Template:**
 - File Name:** (empty field)
- Template Data Information:**
 - Template:** (empty field)
 - Last Updated:** 24-Jun-2022 11:36:47
 - External Reference:** REP170

- **Delete template**

Deletes the selected templates from the database. These reports will no longer be accessible.
- **Set Visibility**

This action sets the visibility of the template in Case Manager on all the selected templates. After selecting the applicable templates, this action is invoked by choosing from its submenu to either set as visible or as invisible.
- **Import**

Templates can be imported from file, Case Manager Template (.cmt) files. More detail in [Template portability](#).
- **Export**

Export the selected templates to Case Manager Template (.cmt) file. More detail in [Template portability](#)
- **Migrate template**

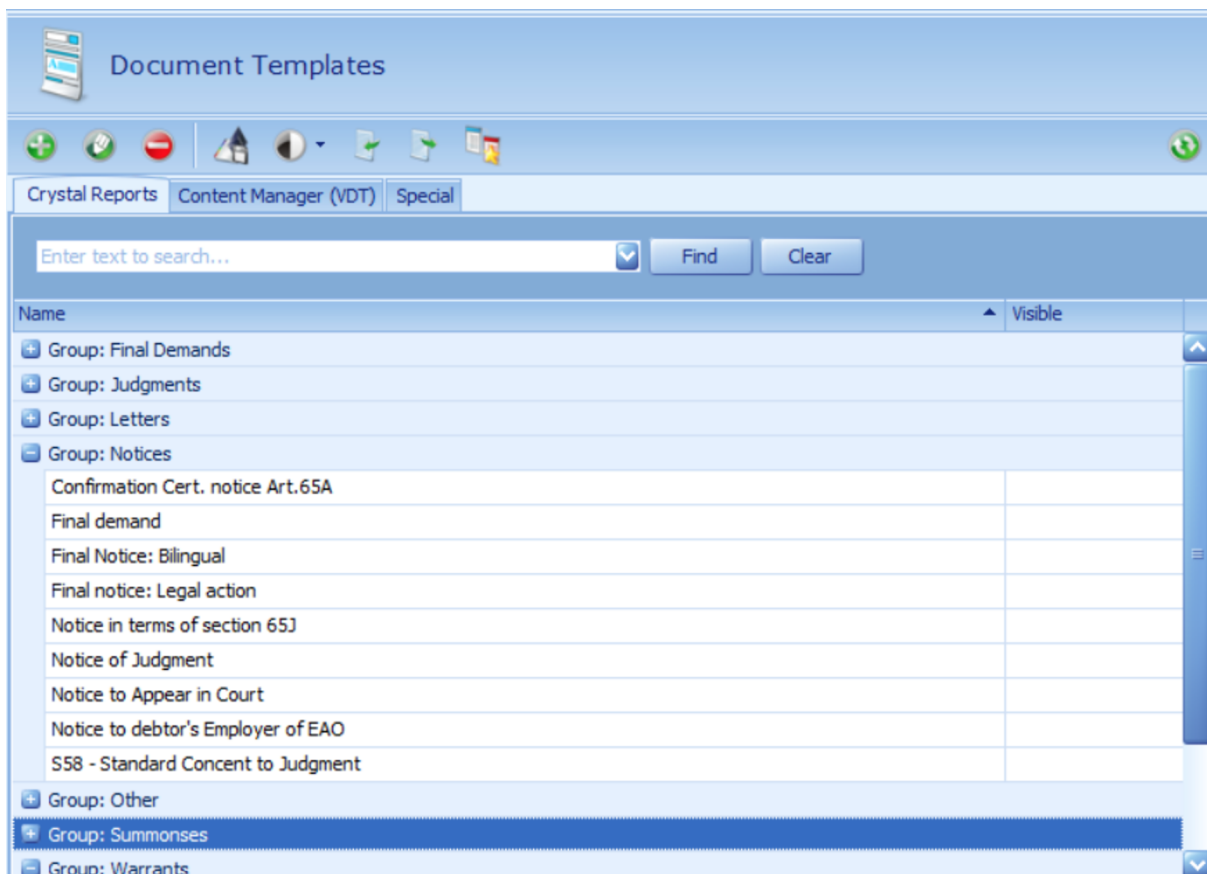
Migrate the selected templates in legacy format (that is, Crystal Reports file stored in shared reports folder) to the new in-database format.

Document Templates

From the Configuration Tool, a new view of the Document Template is accessible, showing the available templates as well as an indication of the template's visibility in Case Manager. The Document Templates shows three tabs:

- Crystal Report Templates: the most-used document templates based on Crystal Reports files.
- Content Manager (VDT): document templates created in the Content Manager.
- Special: document template with a specific function in Case Manager.

A warning icon is shown on templates in the legacy format. A number of actions are now available for document templates. Most of these actions can be executed on multiple templates at a time. To select multiple templates, hold down the Control key (ctrl) on the keyboard and select the templates, before invoking an action.



Actions

- **Add template**
The add template action allows you to add a new template by specifying the details of the template, and upload the relevant Crystal Reports files. You will be required to upload a

Crystal Reports file for printing documents in English. An optional alternative language template is also supported to print documents in the alternative language based on the debtor's language setting. The legacy format is not supported for new templates. The external reference is used to identify report templates for [Template portability](#).

- **Edit template**

Only one template may be selected for editing at a time. The edit window will show the template details, such as Name, Description, Group, IsVisible. By clicking on the ellipse on the Group field, you will have the option to change the Document Group or to create, edit, or delete Document Groups. The Group is only used when displaying lists of Document Templates.

When the template is in a legacy format, the Legacy Template section will be visible. Once migrated (either by uploading a Crystal Reports file, or by running the migrate action on the form) this section will not be shown anymore.

There are three buttons on the Template control: Clear (removes the stored Crystal Reports file), Download (saves the stored Crystal Reports file as file), and Add (sets the Crystal Reports file for this template entry). The English template is mandatory on each template entry. The Alternative template is optional: when this is not set printing will default to the English template.

Document Template: Summons commencing action

Save Close

Basic Template Information

Name: Summons commencing action

Description: RM2 Summons commencing action (Ordinary), between plaintiff and defendant. 146 Eng only (see also 044)

Document Group: Summons

Is Visible

Legacy Template

English File Name: DOC146E.RPT

Alternative File Name: DOC146A.RPT

Template Data Information

External Reference: DOC146E

English

Template: Template loaded

Last Updated: 22-Jun-2022 14:16:37

Has alternative language template

Alternative

Template:

Last Updated: 14-Jun-2022 11:34:16

- **Delete template**
Deletes the selected templates from the database. These documents will no longer be accessible. This action will only be allowed on templates not used in the system.
- **Set Visibility**
This action sets the visibility of the template in Case Manager on all the selected templates. After selecting the applicable templates, this action is invoked by choosing from its submenu to either set as visible or as invisible.
- **Import**
Templates can be imported from file, Case Manager Template (.cmt) files. More detail in [Template portability](#).
- **Export**
Export the selected templates to Case Manager Template (.cmt) file. More detail in [Template portability](#)
- **Migrate template**
Migrate the selected templates in legacy format (that is, Crystal Reports file stored in shared reports folder) to the new in-database format.

Content Manager (VDT) Templates

Content Manager (VDT) templates are basic document templates that can be created and maintained by a user of the system without Crystal Reports. Many references to these templates will be visible after the upgrade; it is recommended to remove the unused templates. The Content Manager application will allow you to create new templates should you require it.

Special Templates

In addition to the Crystal Reports document templates, and the Content Manager (VDT) document templates, you will also find a Special Document Templates section. These templates serve a specific purpose in the system. You will not be allowed to delete these templates, but will be able to update them with an import of the appropriate Case Manager Template (.cmt) file. Special templates include the Payment Receipt that can be printed upon receiving a payment, and the VDT base templates used by the Content Manager (VDT) templates.

Template Migration

In previous versions of Case Manager document and report templates were stored as Crystal Reports files accessed via a shared folder on the server. To remove the dependency of client workstations requiring a Client Access Licence to access these templates, templates are now stored within the database. Now, when a report or document template is required it is written out locally to a temporary file before commencing the print process.

Legacy templates refer to the template references where the actual Crystal Reports file is not stored in the database yet. The process of loading the existing file (in the reports folder from previous versions) into the database, is called template migration. This can be done from the Configuration Tool in the Document Templates and Report Templates sections, by selecting the templates to migrate and invoking the Migrate action. Legacy templates are indicated by a warning icon on the template entry. The appropriate Crystal Reports file may also be loaded manually onto template by editing the template, and uploading the file. When printing a report or a document from Case Manager, the system will first verify that the template is migrated. If not, it would first attempt migrating the template before printing.

Template Deletion

Since all the template information is now stored in the database, the system will allow a privileged user to delete unused templates. This will allow you to keep the database clean with only the applicable content templates. Template packages however should be maintained by the Case Manager Support Ships. With Document templates, for which references are kept in case history (as Print Document Activities), you will only be allowed to delete templates not used in the system. Should you no longer wish to see these templates as options when printing, you can make use of the visibility setting on a template.

Template portability

To simplify transferring templates between Case Manager systems, you are now able to save templates in Case Manager Template (.cmt) files. These files can contain many templates (either, Document Templates, Report Templates, or a combination of the two). In the Configuration Tool in the Document Template or Report Template sections select the templates to export. You will be prompted to select an export file name. If an existing Case Manager Template file is selected you will be given the option to merge the templates to be exported with the current contents of the file. The export contains the name, description, external reference, group, and actual template. When selecting a Case Manager Template (.cmt) file for import, all the templates in the file will be imported irrespective of the current section from where the import is invoked. Based on the external reference, existing templates may be updated with the new template and information. The template group and visibility will not be updated during an import.

Suggested actions for Support Ships

Upgrading the client

1. After upgrading the database, it is recommended to install the Special templates. The CMT file is distributed with 5.2.1 in the CaseManagerTools folder.

2. Many templates (both Reports and Documents) will be visible in the Configuration Tool after this upgrade. I recommend cleaning up the templates, deleting all not found and not applicable to the client's business.

Managing templates at a ship

1. I strongly recommend that Ships reevaluate how templates will be managed for their clients, since we will not have a single database with all the template references anymore.
2. Export client-specific templates in CMT files and safeguard.
3. Evaluate all the reports and documents we have available in general to clients. We should work towards a repository of these per industry.

Standardise template packages

With the new functionality in 5.2.1, we will be able to create packages of templates that address a specific subsection of clients. This can be based on locality, industry, or language. We should organise the available templates in such packages. In a future version of Case Manager, the clean database will no longer ship with any standard references to reports or documents. These packages will be the only way to import content templates in Case Manager.