

# **CM14: Office Automation**

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## **1.1. Introduction**

Office automation is the process by which Word documents are automatically pre-filled with information that already exists within the Florida Safe Families Network (FSFN) system, thereby reducing the effort required to complete these forms. The CM14: Office Automation topic describes the manner in which FSFN pages access the following components: RTFServlet, RTFManager, RTFForm, RTFDynamicTable (on the server side), and FSFN.dot and OfficeAutomation.ocx (on the client side.) These components are responsible for the methods employed in creating and maintaining text, along with the production of documents associated with FSFN business functions. The server side components retrieve the document, populate it with specific application data, and ship it to the browser. At that time, the client side components take control and display the formatted document in Microsoft Word.

DCF/Community-Based Care/ Sheriff's Office employees process numerous forms, letters, and notifications that are automated in conjunction with FSFN. Office Automation tools, such as Microsoft Word, allow DCF/Community-Based Care/ Sheriff's Office users to capture, store, and report detailed information that supplements or enhances data stored in FSFN. The components listed above allow DCF/Community-Based Care/ Sheriff's Office to capture and present textual information in hard copy using tools that are best suited to do so.

In FSFN, Microsoft Word documents come in two varieties:

- Text Templates; and
- Notifications.

The first variety of FSFN documents is Text Template; they are created by FSFN business processes. Information from the FSFN database may be transferred to the Word document through functionality provided by the components. The information transferred is determined by the characteristics of each Template. These components associate each Microsoft Word document with a single FSFN template row. For example, Text Templates can be associated with Adoption Plans, Case and Provider Activity Notes, Child and Adult Intake, Investigations, and Meetings.

These components rely upon the FSFN page that is invoking the components to determine which Word Template to access. In some instances, the page invokes a particular Text Template; in other instances, the user selects the appropriate option through the Options dropdown list to launch the Word document.

Text Templates are typically accessed from FSFN through the Options dropdown list that appears on numerous pages in the application. Selecting the appropriate Text option in the Options drop down and clicking the Go button transfers the worker from the FSFN business process pages into a new instance of Microsoft Word. Once such a document is created and saved, and the Save button on the calling page where the text template was accessed from has been selected, the Template is automatically recalled again when launched from the FSFN



desktop. Templates are typically employed for information that is used repetitively or on an ongoing basis, or where it constitutes a legal or official part of the case record. Such text may be associated with a formal structure such as a pre-defined form, or it may be free-form, depending on its function.

For the second variety of FSFN documents, Notifications, the components allow certain documents to be created, completed, and printed, but without being saved and associated with FSFN data. These documents are accessed in the same manner as templates, and transfer the worker to the word processing document with necessary information prefilled, if appropriate.

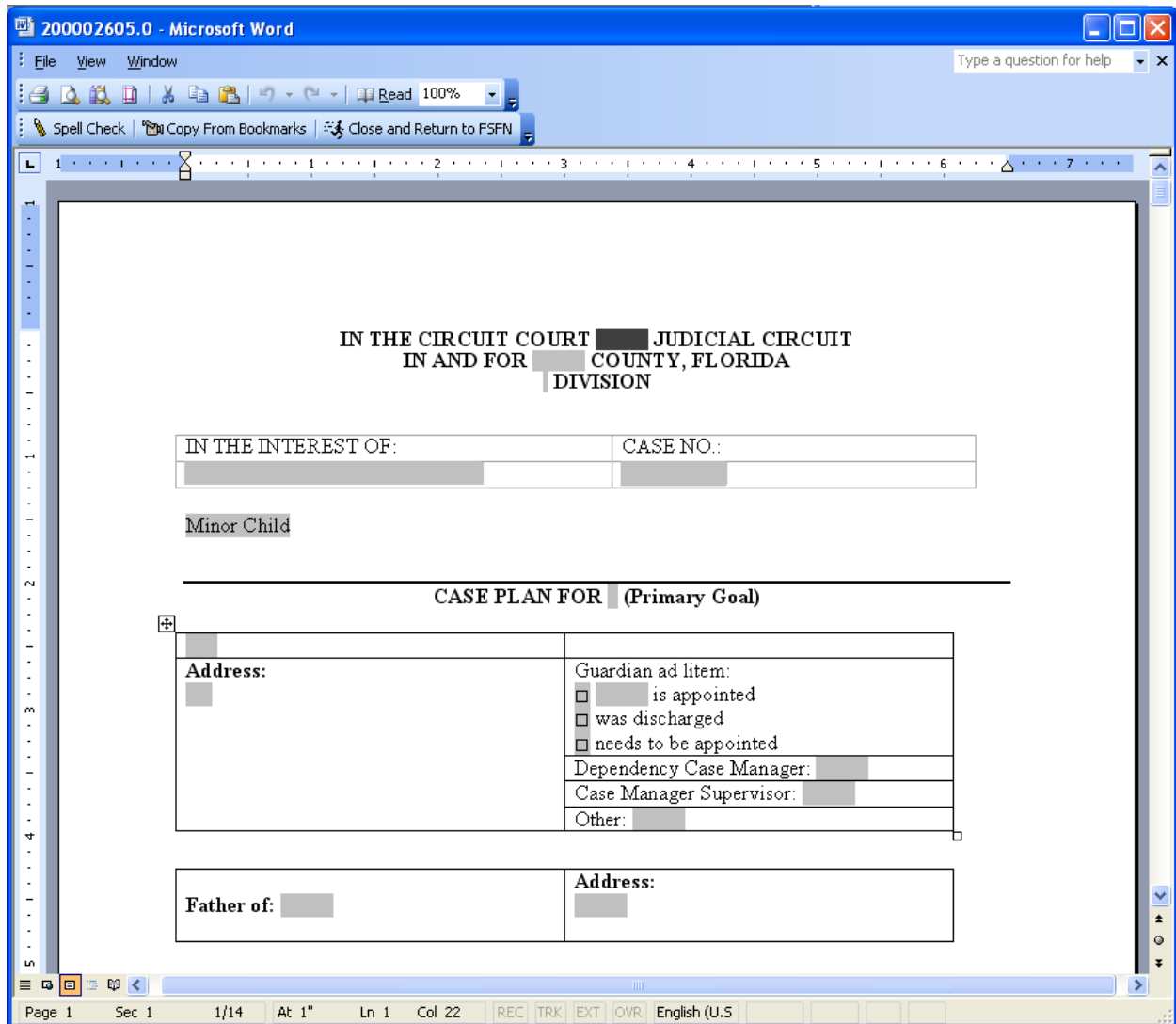
Both Text Templates and Notification functionality accommodate pre-filling of specified fields on documents with data passed from FSFN. This is accomplished through the use of pre-defined bookmarks in the word processing document. An internal FSFN process passes the necessary data using an array structure to transfer the bookmark values to the word processing software. Information not available in FSFN can then be added by the worker where appropriate before printing the document.

Text Templates associated with business processes in FSFN can be frozen once a particular event takes place on the connecting page. Once a document is frozen, it is accessible in read-only mode. For example, once an Intake has been linked to a case the contents of the associated word processing document are frozen for the record.

Office Automation documents created in FSFN is related, by the application, to a database entity type. Consequently, only documents created within FSFN are electronically linked to DCF/Community-Based Care/ Sheriff's Office casework. A DCF/Community-Based Care/ Sheriff's Office user may create Microsoft Word documents outside of FSFN, but the FSFN application will not know of the existence of this independent document or its data.

An example of an open template is shown below. In order to complete the link between Microsoft Word and FSFN, the workers must click on the “Close and Return to FSFN” button available on the menu bar or via the File menu, and click the Save button on the connecting FSFN page to store the completed template or notification to the FSFN database.

Note: The ‘Close and Return to FSFN’ button is the recommended means of closing a template as it ensures that it is correctly stored in the system.



The fundamental business requirements of the Office Automation functionality are listed below:



1. Documents are created as part of FSFN business processes. Information from the FSFN database may be transferred to the document to assist the user with filling out the document.
2. Both Text Templates and Notification functionality accommodate pre-filling of specified fields on documents with data passed from FSFN.
3. The system provides the ability to protect pre-filled fields, or allow the user to modify pre-filled fields.
4. The system must provide the ability to save a document, and later allow the user to resume work on the document (living documents).
5. The documents are stored as Binary Large Objects (BLOB) within a common table on the FSFN database.
6. Some documents associated with business processes in FSFN can be frozen once a particular event takes place on the connecting page (Approval). Once a document is frozen, it is accessible in read-only mode. For example, once an Intake has been linked to a case the contents of the associated word processing document is frozen for that record.
7. The standard text of the documents cannot be modified. These areas must be protected so that the user cannot change the content.
8. Provide the ability to spell check editable fields in documents that are not Frozen
9. Allow users to copy text from Pending and Frozen text templates
10. Ability to launch FSFN documents concurrently with the MS Word application running on the client PC

## **1.2. Pages**

None



### **1.3. Inventories**

#### **1.3.1. Table Descriptions**

None

#### **1.3.2. Reference Data**

##### **1.3.2.1. Drop Downs**

None

##### **1.3.2.2. List Boxes**

None

#### **1.3.3. Automated Messages**

None

#### **1.3.4. Checklists**

None

#### **1.3.5. Ticklers**

None

#### **1.3.6. Notifications**

None

#### **1.3.7. Templates**

None

#### **1.3.8. Reports**

None

#### **1.3.9. Triggers**

None

#### **1.3.10. Batch Programs**

None



## 1.4. Requirements

SEI-002

SEU-012