claimspro

OpenOffice Usage Guide

Updated October 27, 2020
Revisions to this document will be applied as needed, based on frequently asked questions and support requests.

For questions, comments or feedback please file a **Client Information Work Order**

What is OpenOffice?

OpenOffice is a free **document editor** based on *Microsoft Word* which is available to the public for use in home and office environments. It provides the same features as Microsoft Word and a great deal of customization allowing for customizable and flexible document management.

You can download OpenOffice at home and on the road, to do your report writing anywhere and at any time. You just need internet access! You can also "Save As" a document to your desktop to work on it while on the road, and simply copy and paste the contents into a new report when in the office.

To access an OpenOffice template, you will need to follow these steps:

1. On the claim you are working with, go to the *Documentation* section and click on *Attachments*.
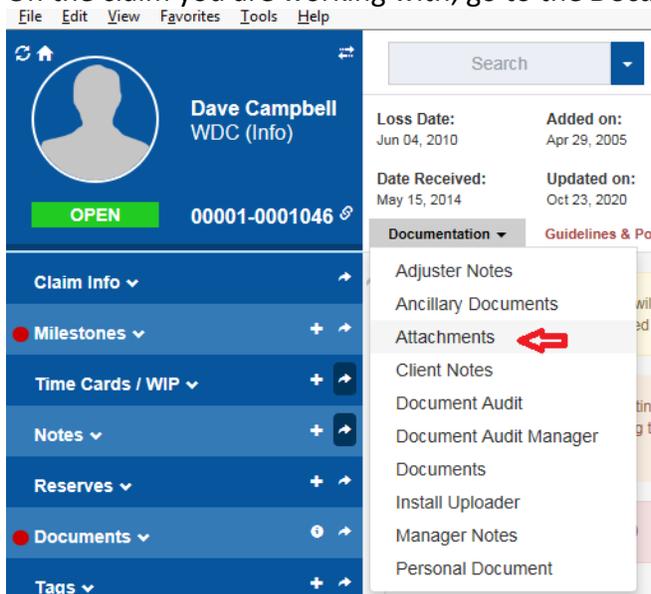
2. The *Uploader* window will open. Click on the *Documents* tab.

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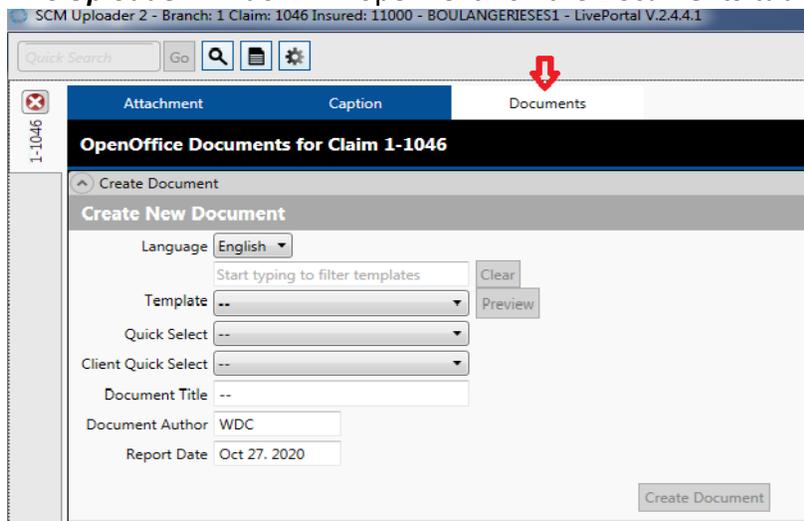
How do I use the document screen and OpenOffice?

- **New Document**

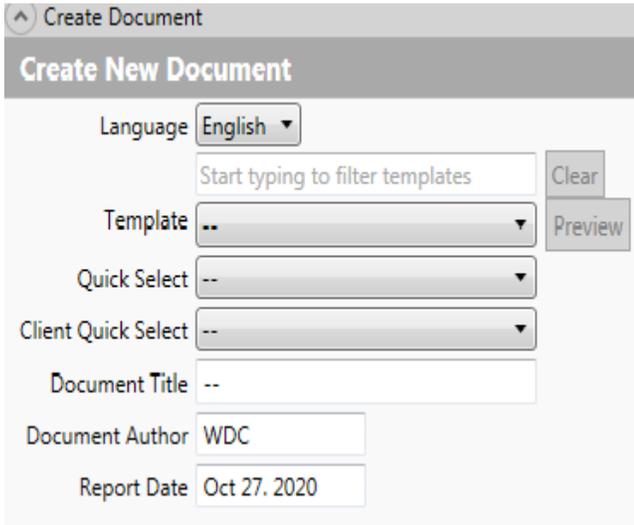Under ***Create New Document***, select the template language and the document template from the **full** list of templates and click on **"Create Document"**. The "**Quick Select**" option displays **your** top 10 most frequently used templates for easy access. The **"Client Quick Select"** option will display any templates which are specifically coded to the lead insurer or bordereau account on file. You may change the **"Document Title"** to a more relevant name for the claim. "Document Author" dictates the lead adjuster on file. In cases where multiple adjusters are involved, the initials of the adjuster responsible for the report/document should be provided.

<u>**How do I Manage Documents In OpenOffice?**</u>

If you've just created a document from "New Documents":
After you've created a document, or need to edit an existing one, a window will open advising you that it is loading OpenOffice. If it takes more than 30 seconds to load, you may have a technical issue blocking OpenOffice from working, and will need to open an IT Support Work Order to investigate the issue.

If you're editing an existing document:
Each document is listed in ascending date order on the document screen.

View	Edit	Clone	Rename	History	Delete	0 - Enclosures ap5 test test	Jun 20, 2013 by AP5
View	Edit	Clone	Rename	History	Save*	Delete	Adjuster's Confidential Report - Auto	Jun 11, 2013 by DPM
View	Edit	Clone	Rename	History	Save	Delete	0 - Enclosures ap5 test test	Jun 11, 2013 by WDC

- **View** opens a PDF copy of the document.
- **Edit** opens the document in OpenOffice for editing.
- **Clone** allows you to save the document to your personal folder or a copy to either this claim or a different claim.
- **Rename** changes the document name that will be used when final saving the document to the attachments.
- **History** reveals when the document was edited and by whom.
- **The red save**, if visible, will allow you to final save a document to attachments. If it has an asterix (*), it has the option of notifying the examiner of a new report.
- **Delete** allows you to remove the draft version of the document from the system (BUT not a final saved version – those must be removed through **Attachments**.

Do not click the red "Save" in the document list until you are ready to final save your documents and submit them to the client, as a notifier will be generated immediately in some cases, and all documents instantly appear on client access.

Once the document is fully loaded, a window like this should appear:
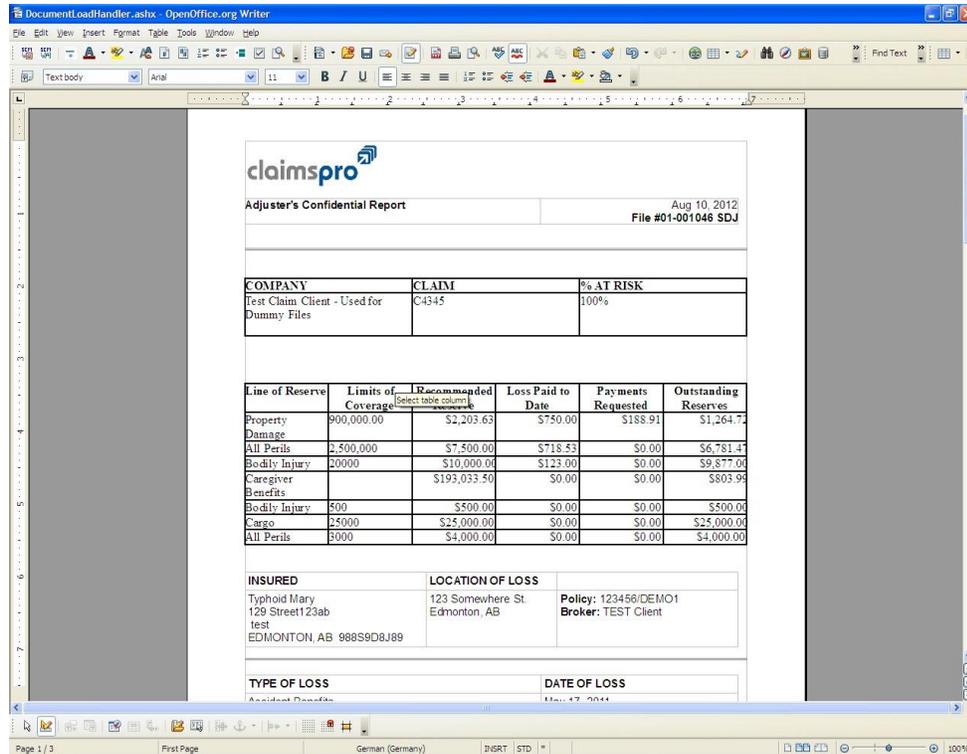
Please note that when you final save a document (using the same steps as you did on the old template system), it automatically converts it into a PDF for printing or submitting to the client. **You are able to continue amending a report after you final save the document, but it will create a** *second* **PDF document viewable to the client. You can delete the original from the Attachments.**

To work in the document, you simply need to hit "**F9**" to go to the first "–GOTO-", or click on any point in the document to begin typing. For 99% of templates, there should be very little adjustment needed. Please be aware that in this system, you can modify tables and fields using your mouse to select the line dividing the cells, and dragging them around. **Note: At this time the –GOTO-'s DO NOT get deleted when the document is saved or printed, and must be removed manually by hitting CTRL+F, putting – GOTO- in the search box and clicking "REPLACE ALL".**

Note: You can fully customize the application buttons, menus and window and these changes will be saved for all future usage, which allows you to fully personalize OpenOffice for your needs. You can submit a Client Information Work Order for advice on how best to do this if you have certain needs that would help you utilize this program most effectively. There are further instructions at the end of the document.

→ADDING PHOTOS AND AUTOTEXT←

INSERT IMAGE   INSERT AUTOTEXT
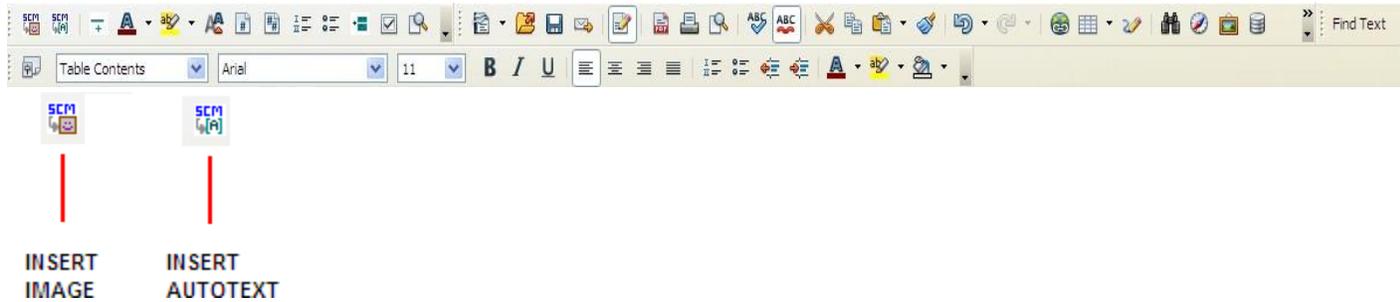
There are two icons in the far left corner of the tool bar which say "SCM".

The first one, with the SCM pointing at a smiley, allows you to insert images from the claim into the report. The second allows you to insert a system generated autotext like new reserve tables.

Please note that there may be a few here that are obscurely named or unnecessary to use – we are currently working on enhancements to display a more intuitive name instead. For the purposes of most claims, you'll likely need the "ReserveTable" autotext to update the document with new reserves. A document will be appended at the end of this tutorial which explains what each autotext code provides.

How do I find my personal autotext in this program?

Hit "CTRL+F3" while in any OpenOffice document. Under the "iadjust" section, it will list all of the iAdjust-imported autotext. Under "My Autotext", it'll list any you create inside OpenOffice yourself.

To use autotext, type in the shortcut for it – I.E., "signature" and hit "F3" for it to autopopulate. See the next page for more details.

How do I just add my autotext without using iAdjust?
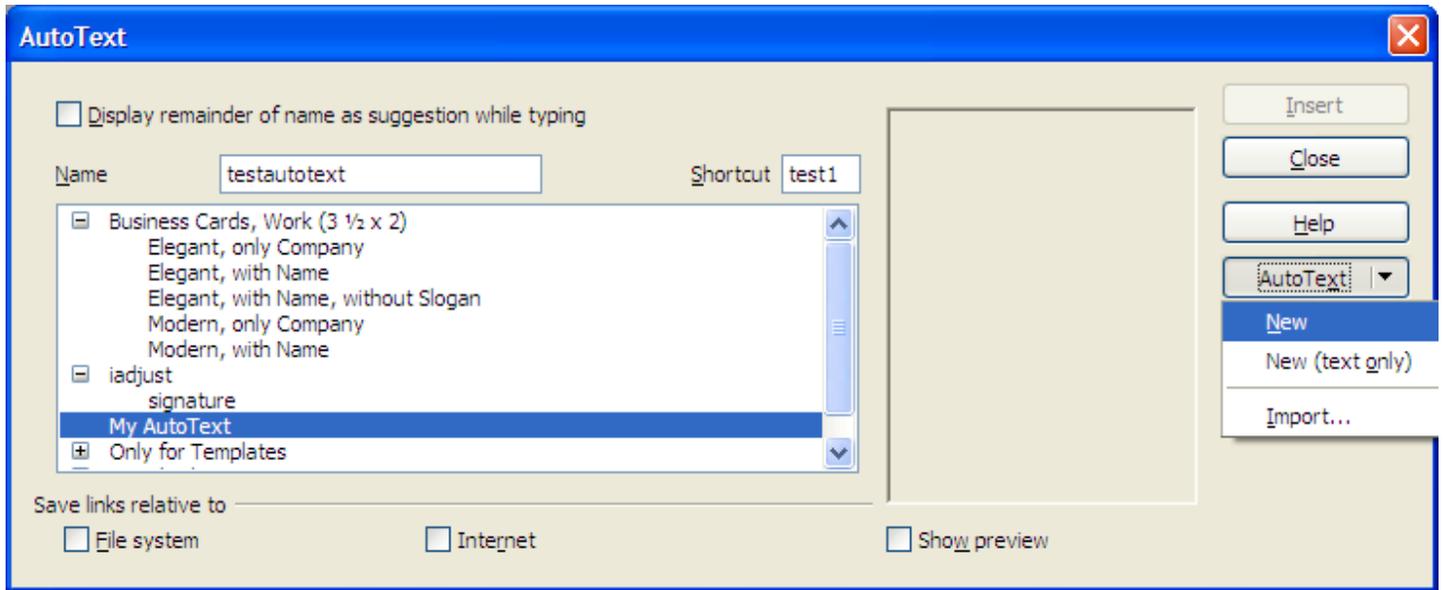
**Inside** any report or OpenOffice document that has been created, type out the text, tables, etc, that you wish to turn into an autotext (this has to be information that doesn't change – it won't populate from the claim). Select the block of information you wish to convert into an autotext. Then hit "CTRL+F3", and select "My Autotext". Type in a **name** (to identify it), a **shortcut** (for example, so you can type "ffgh" and hit F3 for it to popup) and then go to "Autotext" on the right hand side and click "New". See on the next page for what your screen should look like. **REMEMBER: The shortcut is what you're typing in the document to populate it, the name is only to keep them organized in the list.**

You can click the "Categories" button in the Auto Text window. Select "Business Cards" and click "Delete". You can add/remove any categories here to better organize and sort your autotext list.

"PLACEHOLDER" CODES

This section explains what most common codes do, that are found in the "Insert Placeholder" option.
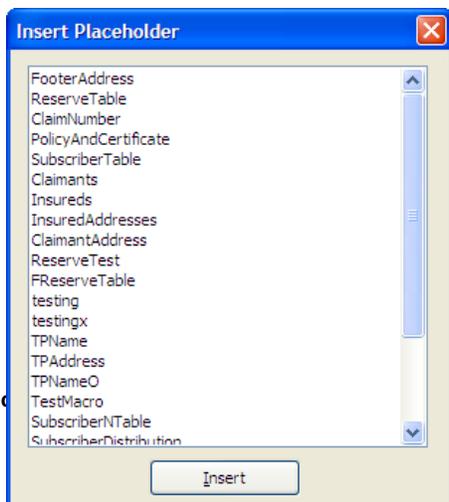
ReserveTable – creates a new reserves table

SCLPay - creates a PAYMENTS box/cheque request, for when there is only one insurer.

SCLSubscriberPay – Creates a PAYMENTS box/cheque request item for multiple insurers

ClaimNumber – Inserts the claim #

PolicyAndCertificate – Inserts the policy #

SubscriberTable – Inserts the list of subscribers from the claim including subscriber claim #s and risk percentages

SubscriberNTable – Inserts the list of subscribers and risk percentages WITHOUT the addresses

SInsurerNames – a list of all insurers by name only

Claimants – Inserts claimant list

Insureds – Inserts list of Insured's on file

InsuredAddresses & ClaimantAddresses – Inserts the list of addresses of the claimants and insureds in the claim

TPName, TPAddress – Third party's name and address.

Please do not use the other autotexts as they are used for testing purposes or special templates. This list will be improved in the future as we extend the system. If there is automatically populating information you require in this list, please let me know and I will add it for you.

FREQUENTLY ASKED QUESTIONS

This section will be updated as needed with new information, based on any feedback or questions that come through.

Why do my –GOTO-'s still print?

The new OpenOffice system does not have the ability to filter out specific text when printed, however it is very easy to remove yourself. In most documents, you will most likely have replaced every other – GOTO- while working on the document.

You can hit "CTRL" and "F" on your keyboard to open the text searching window. Put –GOTO- in the "Search for" box and put a blank space in the "Replace with" box. Hit "Replace All" and all of the – GOTO- fields in the document will be gone.
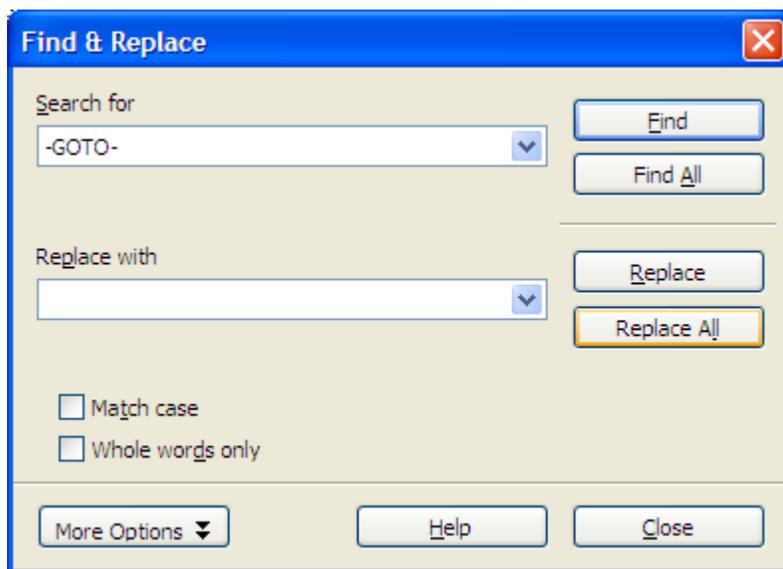

How do I adjust width and height in a table?

You can hover your mouse over any of the grey lines that divide the cells (it will turn into a black bar with two arrows pointing to the sides) and drag the column/row back and forth to change its size. You can also right click the table and click "TABLE" for more options.

How do I update my reserve tables?

NOTE: **You do NOT have to close the document or OpenOffice to update reserves. Click the "Reserves" button in the Document screen and update what you need. You can update the reserves without ever having to close OpenOffice or reload the document.**

1. You must remove the existing table in a document before adding a new reserve table. To delete the existing table, select the entire table (click in the top left cell and drag to the bottom right) and then right click anywhere in the highlighted area, go to "Row" and click "Delete".
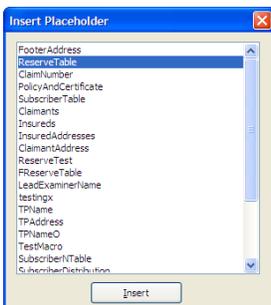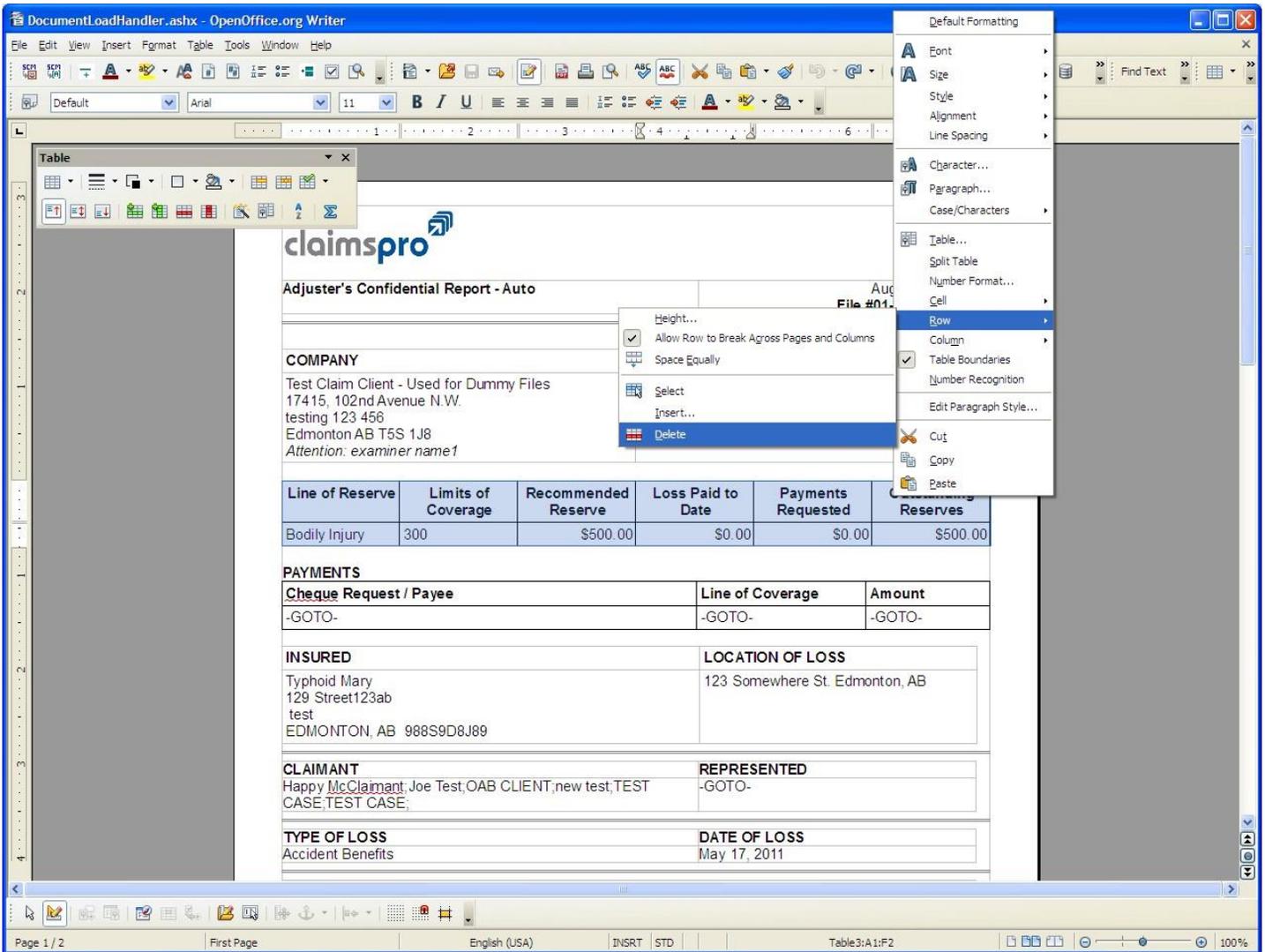
2. To add the new table, leave your cursor where it was when you deleted the reserve table. Click the SCM button in the top left with the green "A" on it so that the Placeholders window opens. Select the "ReserveTable" autotext and hit "insert". That's it!

How do I add rows to my tables?

OPTION A (fastest): When you get to the last cell in a table, hit "TAB" and it will create a new row automatically.

OPTION B: Right click in the table where you want the rows to be added, go to "Row" (or column if necessary) and hit "INSERT" then enter how many rows you wish to add. You now have all the rows you need!

OPTION C: At the end of this document are instructions on how to add shortcut keys which you can use to do any task with the touch of a button – including adding or removing rows.

How about that horizontal line on the Adjuster's Confidential Report? How do I make a new one?


Click the icon beside the "Insert Placeholder" SCM icon. It will look like the above button shown in the picture. Then select a style – ours is "Plain". Following that, you may notice a large gap between the ruler and your text. This is covered in the next section (which also covers what to do about abnormal spacing.)

To delete: You can click on it and hit "Delete" on your keyboard or click the row below it (even if it's a table) and hit "Backspace" to remove it.

I copied a document from iAdjust or created a letter and it adds a 0.5 space or a double space to everything!

To fix documents that have extra and unwanted spaces, either select the block of offending text *or* hit "CTRL+A" twice to select the whole report. Right click, and go to "Paragraph".
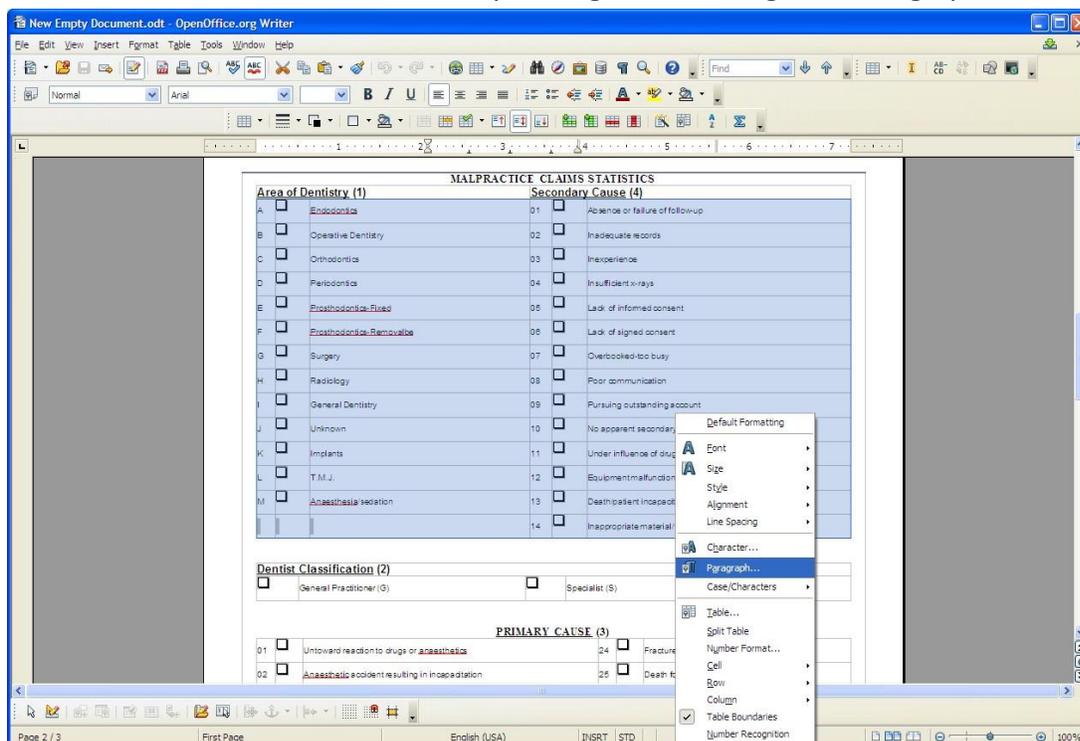
Now, go to "Indents & Spacing" (the first tab), and go to "Spacing", then "Below Paragraph" and put a "0" in the box.
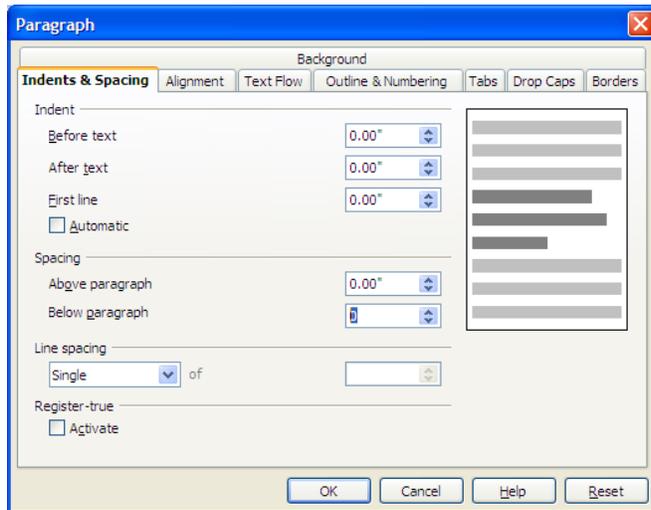
You can adjust this area if you need special formatting, such as to separate a text area or table from a horizontal ruler.

I was working in a document, but the program froze and now documents won't open!

Restart your computer, which will fix it. This happens rarely, but can happen on older computers, and will work fine after a restart.

!!!!If you're more computer savvy, right click your task bar, click "Task Manager", go to "Processes" and find "SOFFICE.BIN", and click "End Process".

"Error: Can't Write to Disk" or "Error: Unable to Save" or "Error: Unable to save to disk" type messages

When you receive these messages, this is often caused by someone else opening the document from their machine while you are working on it. To avoid losing your work, hit "CTRL+A" a couple of times to select the **entire** document. In the document screen, open the document again and paste over it. You can now save all of your changes without losing your work or having to retype anything.

Removing unwanted page breaks?

Sometimes you may see a report or document with a page break between two tables or blocks of text. IF you see a "blue line" at the top of the page (and are not in a table), ignore the next step and proceed to #2. If you do NOT see a blue line, and the very first line of the page is a table, start with #1.

#1) In the event that your document is page-breaked with a table beginning on the next page, as seen below, put your cursor in the front of whatever the first word on the page is and hit "**ENTER**" to drop the table down a line.

->
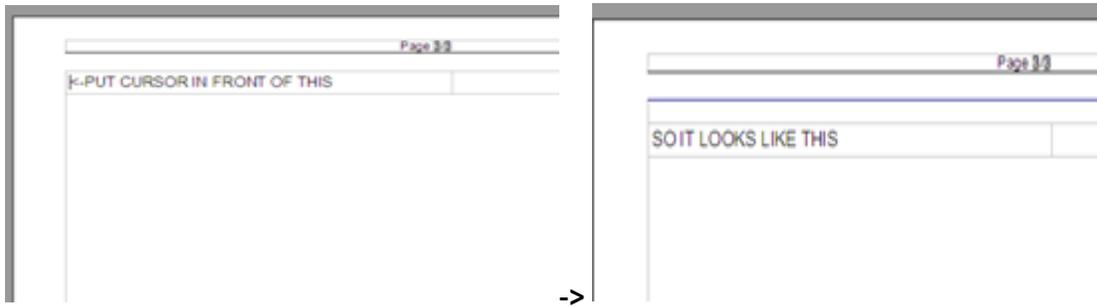
#2) Right click inside the space with the blue page break line, and hit "**Paragraph**". Go to "**Text Flow**" and uncheck the "**INSERT**" box under the "**Breaks**" section. (see below)
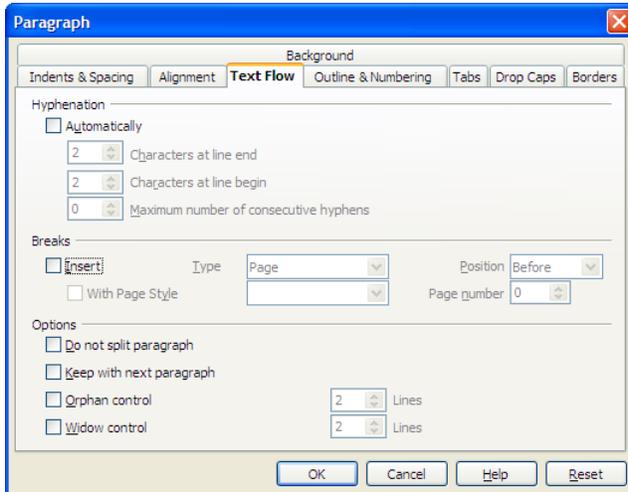
This will remove the page break. You could add one the same way, but it's easier to hit "CTRL" and then "ENTER"

  Sometimes there is a rare glitch which causes **the same table** to split out across two pages. It is currently unknown why this occurs for some people. Currently the solution requires several steps. Submit a template work order with the claim number, and it can be quickly fixed for you.

Autorecovery in OpenOffice and the History Function

For autosaving of documents in the event of a crash, so you can (hopefully) rescue them, you may change this setting from inside any document, including a document within a claim (it will apply to **all** documents that you edit on your computer):

Tools -> **OPTIONS** -> **Load/Save** -> **General**

Check "Always create a BACKUP copy" and set "Save Autorecovery Information" to 1 minute.
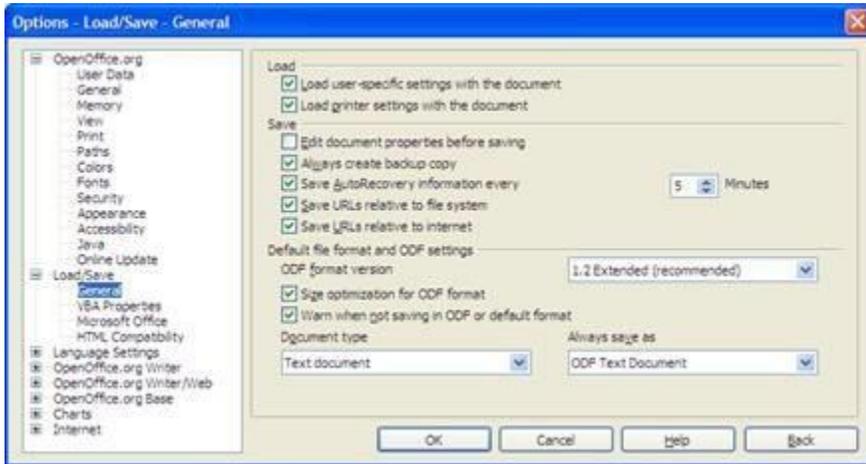
To access a backup in the event you have lost your work, **IMMEDIATELY DO THE FOLLOWING** before opening any document. This will save your hard work and allow you to copy it into your report.

Click this link: http://www.scm.ca/media/internalproj/restore.zip
Open the file, and then open the RESTORE file contained inside. This should open the most recent copy of your lost work.

USING ELECTRONIC SIGNATURES

Electronic signatures are an easy way for the support staff to add the adjuster's signature (and the branch manager's counter signature) without the adjuster having to sign every report that is done up.

When you submit an electronic signature, you will be provided a direct link to that signature which was previously utilized within a code in the autotext feature. This feature does not work with OpenOffice as the technology utilized is not similar enough to properly handle the code used.

When you receive the link to the signature, you may copy it in like any other image. From your web browser, email, a picture open on your computer, or really almost any source:

Option 1

1. Ensure that the signature is open and you can see it.
2. Right click the picture/signature/image and hit "COPY" or "COPY IMAGE" (whichever is available).
3. Inside the report, simply place your cursor where you want the image to appear, and hit "CTRL+V" on your keyboard.
4. You may rearrange and resize it as desired within OpenOffice.

Option 2

1. Place the signatures (image, text, etc) in a table in an OpenOffice document on your desktop. You can then highlight everything you need, copy it, and paste it into any document as necessary. This may be a more preferred method.

CREATING AND USING WATERMARKS
Thanks to Penny Repstock.

ClaimsPro

<u>**How to Create a Watermark**</u>

1. Open up Open Office Draw program by going to your "Start" menu ->"Programs"->"OpenOffice"->**OpenOffice Draw**
2. Click on the 'T' icon on the bottom options tray

3. Position your test box where you want it on the blank page
4. Type in 'Draft' (or whichever text you wish to use for the watermark)
5. Select text, change font size to '96'
6. Select 'format' – 'character' and chose font color. Click 'OK' when next screen pops up.
7. If you want to rotate your text, click on the text to open up the text box, click the 'effect' icon (swirled arrow) on the bottom options tray. This will change the look of your text box and show red dots along the border. Put your cursor on the top right red dot and move the text box to the desired rotation.
8. IMPORTANT – make sure you also click on the 'arrange' icon (two icons to the right of the 'effects' icon on bottom tray) and select 'behind object'
9. Once you have fine-tuned your 'Draft', go to File – Save. (Good idea to name this document something like 'Draft Template' in case you want to change the formatting down the road.
10. IMPORTANT - Go to File – Export and save as 'bitmap' file. Name this 'Draft' and remember where you saved this to.

NOTE: Formatting your watermark can only take place when it is in the Text 'box'. If you accidentally click outside of this box during formatting and lose these lines, you will need to click on the word again to bring up the 'text box' feature and then make sure that your changes are still where you left them. If you have lost some changes, you will need to re-create them again.

<u>**How to Add a Watermark to a Document**</u>

1. From whatever document you are working in, once you are ready to add the watermark, click on 'Insert'.
2. Choose 'page'
3. Choose 'background'
4. Change 'As' at the top from 'color' to 'graphic'
5. Click 'Browse' and select the bitmap Draft file you have created and saved.
6. Under 'Type' choose 'area' to center your Draft watermark.
7. Click 'ok'.
8. You're done! Watermark has been inserted.

NOTE: If your document is more than one page long, you will need to move your cursor to somewhere on each page and insert the watermark on each page individually.

SHORTCUT KEYS & CUSTOMIZING OPENOFFICE

If you are adventurous, you can customize your shortcuts using both autotexts, and by going to the "Tools" menu, selecting "Customize" and going to the "Keyboard" tab.

These are some of the useful default shortcuts:

CTRL+L – ALIGN text to LEFT
CTRL+R – ALIGN text to RIGHT
**CTRL+ENTER** – Manual Page Break
CTRL+HOME – Top of document
CTRL+END – End of document
CTRL+SHIFT+P – Superscript font
CTRL+SHIFT+F5 – Go to specific page

SUGGESTION: Most people need to add/remove rows, columns, etc. From the Customize Keyboard window, select a key combination that is *not* currently in use, then on the "**Category**" list, select "Table", and under "**FUNCTION**", you can add things such as: "DELETE ROW", "DELETE COLUMN", "ADD ROW", "ADD COLUMN". You can create a shortcut for *any feature* you want. Even sorting, centering the table, etc! There are a LOT of functions available, so you may want to explore a bit. When you have selected the function you want, hit "MODIFY". Make sure that the selection you're modifying is currently empty, or that you've deleted what was there! See screenshot below for an example.

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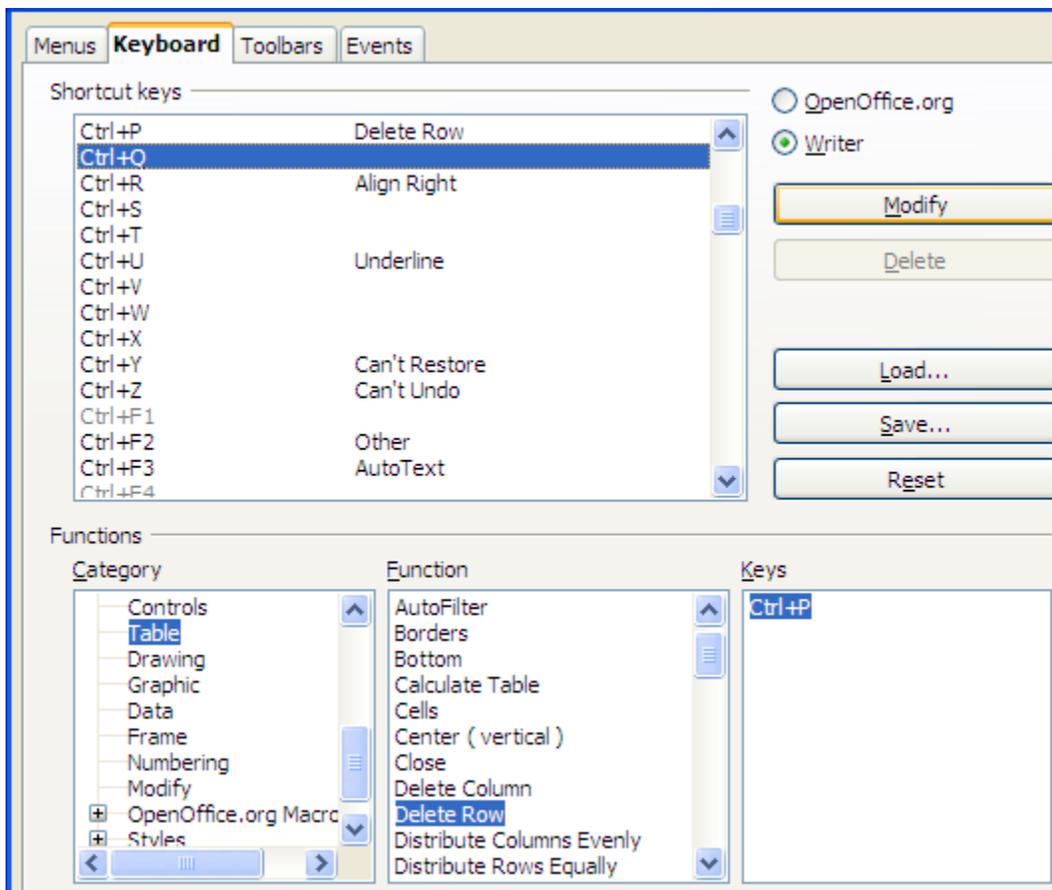
SHORTCUTS – SPECIAL CHARACTERS

For a full list of characters, go to "INSERT" and select "Special Characters".

° - **ALT+0176**
¢ - **ALT+0162**
¼ - **ALT+0188**
½ - **ALT+0189**
¾ - **ALT+0190**
é – ALT+0233