

## Working with Custom Clauses

### What are Custom Clauses?

Custom clauses are parts of your report that you can customize with your own wording. For example, you might have standard phrasing that you use that is required by your school district or state. Or you may have common ways of summarizing results and interpretation for certain areas of a report or recommendations that you frequently use. You may also have a letterhead that should appear at the top of the report for your school district or firm.

We allow you to create your custom clauses in Word documents (.docx files) and upload them to InsightFill so that you can select them into your reports. Custom clauses are organized into categories based on where they can be inserted into the report.

The categories are:

- Letterhead
- Attention Span
- Background History
- Cognitive
- Executive Functioning
- Fine-motor
- Math
- Memory and Learning
- Observations
- Reading
- Recommendations - Personal
- Recommendations - School-based
- Social Emotional
- Summary
- Writing

Once you have uploaded clauses they will be available to be selected by clicking a checkbox while preparing your report. Parts of custom clauses can be automated with placeholders for things such as the client's name or gender references such as "she/he" or "him/her".

### Organizing Your Custom Clauses Before You Upload Them

Before you upload any custom clauses you should prepare them for uploading. We recommend that you create a folder somewhere on your local computer where you will store your clauses. The folder could be called "Custom Clauses". You can create subfolders if you wish for the categories listed above, but you can also store all of your clauses in one folder.

In that folder you can create any number of documents. They must all be saved as Word docx files and have the extension ".docx". If you have Word files that are in ".doc" format but not ".docx", you should open them in Word and use **File > Save As** and choose the Word "docx" format. If you don't see that format as an option you will either need to install the Microsoft Office Compatibility Pack (see the separate topic **Microsoft Word DOCX Format Used by InsightFill** in the Help section of our site at <http://www.insightfill.com/assets/microsoft-word-docx-format-used-by-insightfill.pdf>) or you may have to upgrade to a later version of Word.

On our site there is a sample document that illustrates what a custom clause might look like with sample markup codes. You can download the document by clicking on the Custom Clauses link on the Navigation Bar of the website.



Then, click on the link with the word "here", to download the sample clause.

## Custom Clauses



You can then open the file and save it to the folder where you will manage custom clauses.

The file you download contains a sample paragraph that has been marked up. It looks like this.

«ClientNameFirst» was born in Canada and English is «Gender(ClientGender,1,'his,her')» native language. «Gender(ClientGender,1,'He,She')» lives with «Gender(ClientGender,1,'his,her')». Their home environment is considered happy, stable and family-oriented.

You will see that this sample clause has some standard text and that interspersed in that text there is some markup. The markup is denoted by the « and » characters (called chevrons). Between those characters are some variables. For example, the markup «ClientNameFirst» will insert the first name of the client at the beginning of the paragraph when the document is assembled. In the sample document we include a chart that gives example variables that you can use to insert the name of the client or include gender references in the document.

The above sample also illustrates that you can leave spaces or blanks in the clauses for text that you might insert after assembling the document.

## Name and Gender References in Clauses

First name of client	«ClientNameFirst»
Last name of client	«ClientNameLast»
He/She depending on gender of client (start of sentence)	«Gender(ClientGender,1,'He,She')»
he/she depending on gender of client (not at start of sentence)	«Gender(ClientGender,1,'he,she')»
him/her depending on gender of client (not at start of sentence)	«Gender(ClientGender,1,'him,her')»
His/Her depending on gender of client (start of sentence)	«Gender(ClientGender,1,'His,Her')»
his/her depending on gender of client (not at start of sentence)	«Gender(ClientGender,1,'his,her')»
his/hers depending on gender of client (not at start of sentence)	«Gender(ClientGender,1,'his,hers')»
himself/herself depending on gender of client (not at start of sentence)	«Gender(ClientGender,1,'himself,herself')»

If you want to use one of the markup samples in the table, you should copy the text in the second column of the table (be sure to copy all of the text including both of the « and » characters.

In Word, you can create one or more paragraphs of text and use standard Word formatting such as tables and styles. **Be careful not to leave extra hard returns at the end of your clause, because we insert one hard return after each clause. If you have extra returns it will create extra line spacing between the clause and the text that follows the clause in the report.**

When you have edited a clause in a Word document, save it to your Custom Clauses folder and **make sure it is saved as a docx file.**

## Special Note re Letterhead Custom Clauses

One of the categories of custom clauses is "Letterhead". You can create a letterhead clause that contains your logo and name/address of your company/school board. If you upload a letterhead

clause, you can select it into the top of your report and it will replace the standard letterhead that is included with the report template.

Some special notes about creating letterhead clauses:

1. **DO NOT put any part of your letterhead clause into the header or footer of the Word document. Any headers and footers are removed when the clause is inserted into the main report. If you have logos/graphics, place them in the body of the Word document, not in the header or footer.**
2. You can format the letterhead using logos, graphics, fonts or headings as you wish. Be careful not to use the Normal, Heading 1, Heading 2, etc. styles that come standard with Word, since they may format differently in your clause than they will in the assembled document. We recommend creating custom styles that format the text with font styles and sizes that you want and that are **not** based on Word's default styles (such as Normal). If you need assistance on this consult Microsoft Word documentation regarding creating and applying styles to text.
3. If you want extra space to appear before or after the letterhead add a few hard returns in the document to add extra lines. You can also insert a page break at the end of your clause if you want the letterhead to appear as a separate page (e.g. a cover page) for the report.

## Creating New Custom Clauses

After you login:

1. Click on "Custom Clauses" in the navigation menu.



2. If you have any existing clauses, they will be displayed in the list of clauses.

### Custom Clauses

Your clauses can include shortcut codes. If you need to download a sample file which demonstrates all of the codes, you can download it here.

Custom Clause# Search

Description	Sharing	Category	Actions
Cornerstone Letterhead	Personal	Letterhead	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Upload</a> <a href="#">Download</a>
Even V and P but poor BD	Personal	Cognitive	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Upload</a> <a href="#">Download</a>
Read slow along with WM and ADHD cant integrate	Personal	Reading	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Upload</a> <a href="#">Download</a>
Reading and phonics better than ortho	Personal	Reading	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Upload</a> <a href="#">Download</a>

[+ Add Custom Clause](#)

3. Click on the **Add Custom Clause** button.

New Custom Clause

**Description:**

**Category:**

Letterhead

**Sharing:**

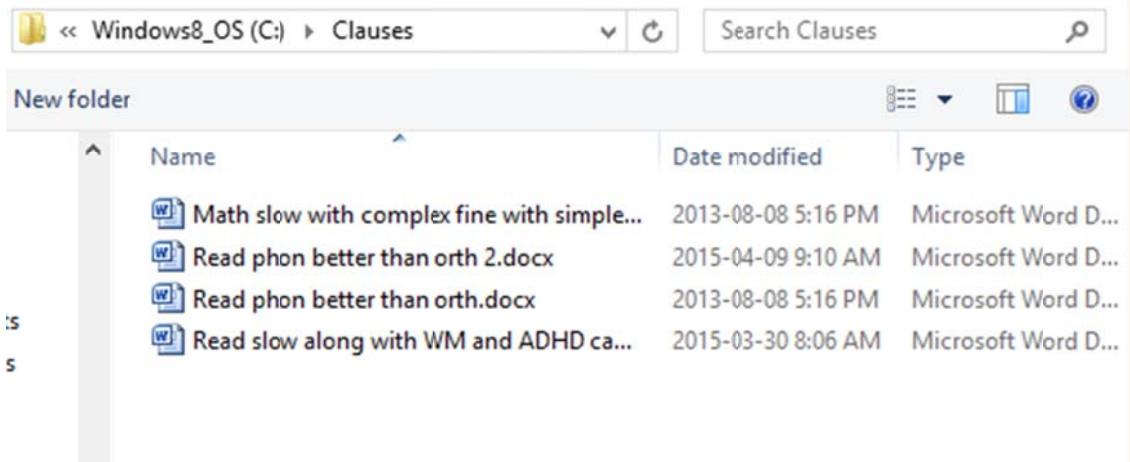
Personal

**File:**

Choose File No file chosen

Save Custom Clause

4. Fill out the information about the custom clause. You may want to click on the **Choose File** button near the bottom of the page first and choose the clause. Complete the other information in the fields above that. The Choose File dialog dialog allows you to select a file from your computer:



5. The **Description** field should be just a few words to describe the clause. This is what will appear in the list when you choose the clause into a report.
6. Choose the **Category** from the list of options.
7. Under **Sharing** choose "Personal" if you want the clause to be available only to you. If you are part of an Organization, you can choose "Organization" to make the clause available to you and other members of your Organization.
8. When you have completed all fields for the clause, click on **Save Custom Clause**. It will now appear in the list of custom clauses.

9. Clauses are displayed alphabetically, but you can search for any clause by entering text in the "Custom Clause" field above the list and clicking on the **Search** button

## Editing a Custom Clause

Once you have created a custom clause you may wish to change the settings for the custom clause such as its description, the sharing option and the category. You can revise those attributes as follows:

1. If you are not in Custom Clauses area, click on the **Custom Clauses** button in the navigation menu.
2. Locate the clause that you want to edit. If you don't see it you can use the Search option to find the clause.

Description	Sharing	Category	Actions
Reading and phonics better than ortho	Personal	Reading	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Upload</a> <a href="#">Download</a>

[+ Add Custom Clause](#)

3. Click on the **Edit** button to the right of the desired clause. You can now change the Description, select a new Category, or modify the Sharing option.

Edit Custom Clause

**Description:**

**Category:**

**Sharing:**

[Save](#)

4. Click on the **Save** button to save any changes you have made.

## Downloading a Custom Clause

You can download a clause from the server at any time to view and edit the clause. This is an alternative to opening the clause in your local Custom Clauses folder.

1. If you are not in Custom Clauses area, click on the **Custom Clauses** button in the navigation menu.

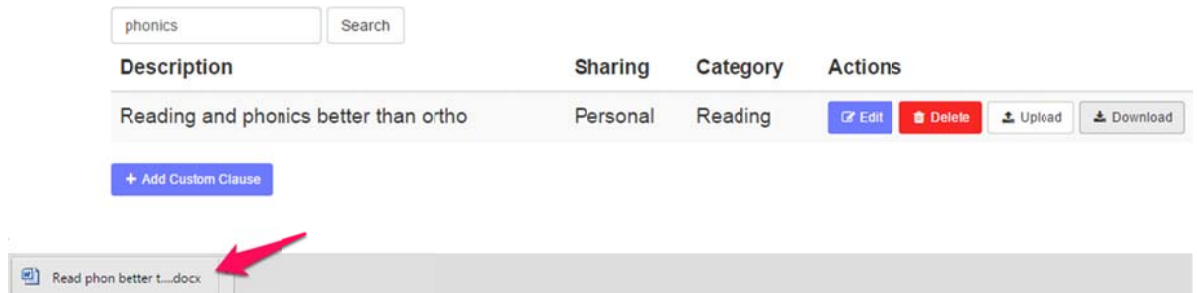
2. Locate the clause that you want to download. If you don't see it you can use the Search option to find the clause.



3. Click on the **Download** button to the right of the desired clause.



4. Depending on the browser you are using, the clause may be automatically placed in your Downloads folder or you may be able to click on a button to open the clause in Word.



5. From there you can edit the clause and/or save the clause to your local Custom Clauses folder.

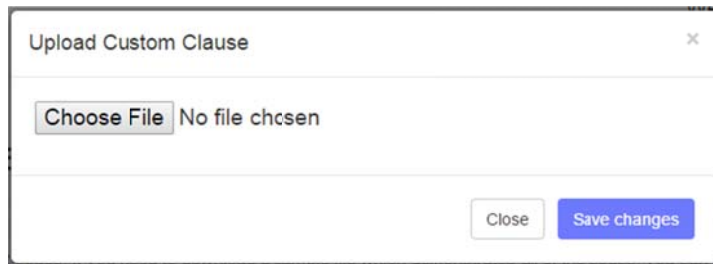
## Uploading a Custom Clause

If you have edited a clause on your local computer (either by changing it in your local custom clauses folder or after you have downloaded it) you can upload the revised version of the clause to InsightFill.

1. If you are not in Custom Clauses area, click on the **Custom Clauses** button in the navigation menu.
2. Locate the clause in the list of clauses that you want to upload to.
3. Click on the **Upload** button.



4. You will see a dialog that allows you to choose a clause from your local computer. Navigate to the folder where you have the revised version of the clause (likely your Custom Clauses folder). Click on the **Choose File** button.



5. Locate the clause on your local computer that you want to upload. It may be that the clause is located in the Custom Clauses folder that you created on your local computer.
6. Click on **Save Changes**. The uploaded clause will **replace** the clause on the InsightFill server with the one that you uploaded.

**WARNING: If you want to replace a custom clause on the server with a revised version you should do so using the Upload option. DO NOT use the Delete button and then the Add Custom Clause button because, if you do that, any reports that use the old version of the clause will lose the connection to that clause.**

## Deleting a Custom Clause

You can delete a custom clause. **You should only delete a clause if you created it in error and you have never selected it in a report.**

1. If you are not in the Custom Clauses area, click on the **Custom Clauses** button in the navigation menu.
2. Locate the clause in the list of clauses that you want to delete.
3. Click on the **Delete** button.

Reading and phonics beter than ortho

Personal Reading

4. You will receive a warning about deleting the clause. Confirm the deletion only if you are sure that it has never been selected in a report that you may wish to assemble at a later date.

**WARNING: If you want to replace a custom clause on the server with a revised version you should do so using the Upload option. DO NOT use the Delete button and then the Add Custom Clause button because if you do that any reports that use the old version of the clause will lose the connection to that clause.**



## Using Custom Clauses in Reports

When you are completing a report interview, there are several places in the report where you have an option to select one of the clauses that you have created.

For example, let's say you are in the Reading area of the Report interview.

1. Click on the choose icon to the right of the prompt that says "Choose one or more Reading Custom Clauses".

Client Reading Results and Interpretation

Organization or Firm Choose one or more Reading custom clauses

Letterhead

General Information General Reading Comments

Report Sections

Background and Observations Choose reading functional implication strengths

Cognitive/Intellectual Other Reading Functional Implication(s) - Strength(s)

Fine/Visual-Motor/Speed Integration Choose reading functional implication weaknesses

Memory and Learning

Attention Span Other Reading Functional Implication(s) - Weakness(es)

Executive Functioning

Reading

2. Choose one or more clauses from the Reading .

Cancel

Add selected rows to interview

Read slow along with WM and ADHD  Reading and phonics better than ortho cant integrate

1/1 200

3. If you decide not to select any clauses, click the **Cancel** button on the top right of the page. If you want to choose any clause, click on the checkbox to the left of each clause name. Choose as many clauses as you like, then click on the **Add selected rows to interview** link that is located either just above or below the list of clauses. **TIP: If you click on the Save button at the bottom of the screen it saves your answers up to that point but it does not add the selected rows to**

**interview. Click on the "Add selected rows to interview" link to save the clauses you have chosen and return to the main interview.**

When you return to the main interview, it will show how many clauses have been selected.

#### Reading Results and Interpretation

Choose one or more  
Reading custom clauses

1 item(s) selected



4. Continue by going to other tabs and selected custom clauses at those tabs.
5. When you assemble your report, any selected custom clauses will be inserted into the output document. Marked up areas of the clause will insert things such as the client name or gender-specific text. Custom clause text is generally inserted near the top of each section of the report before any clause text, functional implications or recommendations that you have selected. You can move the custom clause text wherever you feel that it is appropriate within that section or elsewhere in the document. If the clause contains some blanks you can fill those in while you are editing the final report.