eCon Planning Suite
e-Tutorial: Tips for Formatting Consolidated Plan Template

Hello and welcome to the eCon Planning Suite online tutorials. This is one in a series of video tutorials demonstrating the functionality and components of the eCon Planning Suite.

At the end of this tutorial, you will be able to –

- Format narrative in text boxes in the Con Plan template, and

- Customize and modify the Word version of the Con Plan Template

When developing your Consolidated Plan, You may find it easier to draft the narrative portions of the plan in Microsoft Word and then copy them into the Con Plan template. To download a copy of the template into Microsoft Word, click <Download as Word Document> near the top of the Menu screen and select the section of the Plan you would like to download. You can then work on the Con Plan narrative outside of IDIS.

Before downloading, make sure to open the homeless screens in the NA-40 Homeless Needs Assessment and MA-30 Homeless Facilities in the needs assessment and market analysis sections of the plan and save each screen. Otherwise, the tables on these screens will not appear in the downloaded template.

When the narrative is ready to be copied into IDIS, the information will need to be copied separately into each narrative field. To copy back into IDIS, use either the Paste as Plain Text or Paste as Word tool or Paste as Plain text tool.

The paste from word tool allows the pasted text to retain limited formatting, including Bold, Italics, Underline, and simple numbered and bulleted lists. However, Paste from Word will not retain more complex formatting, such as tables.

The Paste as Plain Text tool strips the text of all formatting. When you paste as plain text or enter narrative directly into the template, there are several formatting options that can be used in any narrative box. Above each narrative box there are several basic formatting options for text, including bold, italics, and underline. You can also create bulleted and numbered lists using the bullet and number list icons respectively. To format, copy or delete entire text boxes, you can use the Select All tool. This tool selects all of the text entered into the narrative box.

The next tool is the Show/Hide Visual Control Characters. This tool displays hidden formatting characters, such as paragraph marks. It's important as hidden characters and spaces count towards the 4,000 character limit in each narrative box.

The final editing tool is the Edit HTML Source. This tool opens a dialog box where you can edit the HTML Code to format the text in the narrative box.

Before downloading your Con Plan to post for review or public comment, you can add a cover page image, report header icon and page header icon. To add these graphics, click <AD-25 Administration> on the menu page. Scroll down to the first set of attachments. You'll see you have three options.

First, the Cover Page Image. Use the <Browse to Attach> link to add an image, such as the grantee's logo, to the cover page. Only one image may be loaded. Images are limited to 1 MB in size and must be in .jpg format. The cover page will not download in Word as its own page and will require some additional formatting when the word document is downloaded. Second, the Report Header Icon. Here you can add an image or logo to appear at the top of the printed report. Only one image may be loaded. Images are limited to 250 KB and must be in .jpg format. Finally, the Page Header. Here you can add an image, such as the grantee's logo to appear at the top of each page. Only one image may be loaded. Images are limited to 250 KB and must be in .jpg format.

After attaching any of these three images, click <View> or <Delete> to view or delete the image respectively. Once you have completed the plan and attached a cover page or header images, you can download the template by clicking the Download button at the top of the menu screen.

After downloading the template from IDIS, you may want to further format the document by editing section headers, removing page breaks, adding a table of contents or reformatting tables, maps and other graphics to align with the corresponding text. To automatically sequence figure numbers for any inserted maps, tables, or images in a numeric order, first select all the text in the plan by pressing Ctrl-A, then press the F9 key to automatically update them.

By using the formatting options built into the system as well as additional formatting edits you make to the Word version, you will be able to produce a final document for citizen participation and public review.

Thank you for participating in the online tutorial on formatting the Con Plan template. For additional tutorials and resources, please go to the OneCPD Resource Library.