

eFORMz Mini-Manual

Document Template

Minisoft® eFORMz™

Version 10.0

Minisoft, Inc.
1024 First Street
Snohomish, WA 98290
U.S.A.

1-800-682-0200
360-568-6602
Fax: 360-568-2923

Minisoft Marketing AG
Papiermühleweg 1
Postfach 107
Ch-6048 Horw
Switzerland

+41-41-340 23 20
info@minisoft.ch
www.minisoft.ch

Internet access:

sales@minisoft.com
support@minisoft.com
<http://www.minisoft.com>
<http://www.minisoft.us>

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eFORMz 10.0 - January 2014

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IF A CUSTOMER IS PURCHASING AN UPGRADE FOR AN EARLIER VERSION OF THE PRODUCT, THEN THIS AGREEMENT SHALL SUPERSEDE THE TERMS AND CONDITIONS OF THE LICENSE AGREEMENT THAT APPLIED TO THE EARLIER VERSION AS TO THE USE OF THE UPGRADE PRODUCT AS OF THE DATE OF INSTALLATION OF THE UPGRADE.

NOW, THEREFORE, in consideration of the foregoing provisions and the terms and conditions herein contained and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the following terms and conditions apply:

A. License Grants

1. Upon MINISOFT's receipt from the Customer of the one-time license fee and further subject to the other terms and conditions herein, MINISOFT grants the Customer a non-exclusive and non-transferable perpetual license: (a) to install and use the Product on only one host computer or business server in the Customer's business organization; and (b) to install the client portion of the Product on a network server for access by more than one personal computer and on any personal computer client accessing the host server program.
2. You may not: (a) allow access to or use of the Product to anyone outside of your organization; (b) decompile, reverse engineer, decrypt, disassemble, or otherwise attempt to copy or replicate the source code; (c) modify or translate those portions of the Product that are provided in an object or source code form, or alter, merge, modify, reverse engineer or adapt the Product in any way including disassembling or decompiling; (d) copy, loan, rent, lease or sublicense, assign, convey, sell, mortgage, pledge, dispose or in any other manner transfer to a third-party any part of or all of the Customer's rights and obligations under this Agreement or in the Product; or (e) otherwise copy, distribute, rent, loan, disseminate, publish, sell or transfer any portion of the Product in any way inconsistent with or contrary to the terms and conditions of the Agreement.
3. Any attempt to violate any prohibitions described in this Agreement shall be considered a material breach of this Agreement, and no attempt to violate section 2(c) or 2(d) in the immediately preceding paragraph shall have any effect, and any prohibited act described therein shall be void and of effect if made by the Customer.
4. You may make one copy of the Product for use as a backup copy (the "Copy") provided that: (i) the Copy includes all notices of copyright and all other proprietary rights appearing in and on the Software Product; (ii) the Copy and the original Product are not in use at the SAME time; (iii) Customer establishes a procedure for accounting for the Copy at all times; and (iv) Customer destroys or returns to MINISOFT the Copy when it is no longer required or when the license grants made hereunder are terminated for any reason, whichever occurs first.
5. This Agreement grants to the Customer a license for use of the Product on the terms and conditions set forth in this Agreement; and (ii) the Customer may not install, copy, perform, execute, display, or use in any other fashion the Product except in accordance with the terms and conditions of this Agreement. By any use of any element of the Product, the Customer shall be deemed to have accepted and be bound by all the terms and conditions of this Agreement.
6. MINISOFT retains and reserves all rights to the Product. Nothing contained herein shall be deemed to convey to the Customer any title to, or an ownership interest in, the Product or any of the intellectual property rights contained in the Product. Upon termination of this Agreement, all rights granted to the Customer herein shall automatically revert to MINISOFT.

B. Termination

The license grants made hereunder shall automatically terminate on the date of any breach by the Customer of any of the terms and conditions of this Agreement. In any such termination, you shall discontinue using the Product. You further agree to return the Product to MINISOFT or destroy all components of the Product and to certify in writing that the Product is no longer in use and that you have kept no copies of the Product. In any such termination of the license grants, none of MINISOFT's rights in law or equity shall be barred, discharged, released, or otherwise impaired by such termination, and MINISOFT reserves all such rights described herein.

C. Confidential Information

The Product also contains MINISOFT's commercially valuable, proprietary and confidential information and trade secrets (collectively "Confidential Information"). You are obligated to preserve and hold in confidence any Confidential Information and may not use any of it except in accordance with the terms and conditions of this Agreement. Confidential Information shall not include what is already public at the date of its disclosure or what later becomes lawfully public through no fault or responsibility of the Customer.

D. Limited Warranties and Limitations on Damages and Remedies.

1. Only the limited warranties expressly described in this section are made to the Customer purchasing this Product. No warranty of any kind, whether express or implied, is made to any third-party or other transferee or successor of the Customer.
2. MINISOFT warrants that it has the right to grant the licenses contained in this Agreement.
3. MINISOFT warrants that this product will execute its programming instructions when properly installed on a properly configured computer for which it is intended. MINISOFT makes no warranty of any kind, implied or express, that the Product will meet Customer's requirements or that the Product will be uninterrupted or error-free.
4. MINISOFT, Inc. warrants the media upon which this Product is recorded to be free from defects in materials and workmanship under normal use for a period of 90 days from the date of purchase. During the warranty period MINISOFT will replace media that prove to be defective. Customer's exclusive remedy for any media that proves to be defective shall be to return the media to MINISOFT for replacement.
5. MINISOFT's only obligation, liability and/or remedy, with respect to the warranties set forth in this Agreement shall be one of the following, which MINISOFT shall have sole discretion to choose: (1) as described above, to provide replacement media (whether in the form of the current release or otherwise) for the Product; (2) to replace, without charge, the Product with a functionally equivalent software product; or (3) to refund the applicable license fees paid to MINISOFT by Customer.

These are the sole and exclusive remedies for any breach of warranty.

6. MINISOFT shall have no obligation, liability or any other kind of responsibility for the costs of restoring any destroyed or defective data, installation of replacement media, or software conversion work made necessary by replacement media, even if MINISOFT had been specifically informed by Customer of the possibility or probability of any such consequences. During the ninety (90) days warranty period for the media, MINISOFT will replace, without charge, on an exchange basis, any media which is not as warranted. Customer must return the defective item postpaid to MINISOFT, postmarked within the time period stated above. Customer must either insure the defective item being returned or assume the risk of loss or damage in transit. Any claim under the above warranty must include a copy of Customer's receipt or invoice or other proof of the date of delivery.

7. Year 2000 Warranty. MINISOFT warrants that the Product will accurately process date/time data (including, but not limited to, calculating, comparing, and sequencing) from, into, and between the twentieth and twenty-first centuries, and the years 1999 and 2000 and leap year calculations, in accordance with the Product's documentation BUT ONLY to the extent that other technology and systems (e.g., software and operating systems, hardware and firmware) used in combination with the Product properly exchanges date/time data with it. In addition to the limitations of liability and remedies described above in this Section, the Year 2000 warranty made herein is made only for ninety (90) days after the date of delivery of the Product and only if any noncompliance is discovered and made known to MINISOFT in writing within such ninety (90) days. The Year 2000 warranty expires after such ninety (90) day period and shall not extend to any events occurring after the expiration date.

8. MINISOFT makes no other warranty, expressed or implied, with respect to the Product.

9. NOTICE. THE WARRANTIES, OBLIGATIONS AND LIABILITY OF MINISOFT AND THE RIGHTS AND REMEDIES OF CUSTOMER SPECIFICALLY SET FORTH IN THIS AGREEMENT ARE THE CUSTOMER'S EXCLUSIVE REMEDIES. MINISOFT DISCLAIMS, AND CUSTOMER HEREBY WAIVES, DISCHARGES AND RELEASES MINISOFT, ITS OFFICERS, DIRECTORS, EMPLOYEES AND AGENTS, FROM ANY AND ALL (1) OTHER WARRANTIES, OBLIGATIONS, OR LIABILITIES AND (2) RIGHTS, CLAIMS, CAUSES OF ACTIONS, EXPRESS OR IMPLIED, ARISING BY LAW OR OTHERWISE IN CONNECTION WITH, REGARDING, OR ARISING FROM THE PRODUCT OR ANY RELATED SOFTWARE, TANGIBLE OR INTANGIBLE ITEMS OR SERVICES PROVIDED UNDER THE AGREEMENT (INCLUDING, WITHOUT LIMITATION, ALL DOCUMENTATION SUPPLIED WITH THE PRODUCT). THE WAIVER, DISCHARGE AND RELEASE INCLUDE, BUT ARE NOT LIMITED TO: (1) ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A SPECIFIC PURPOSE; (2) ANY IMPLIED WARRANTY ARISING FROM COURSE OF PERFORMANCE, COURSE OF DEALING, OR USAGE OF TRADE; AND (3) ANY OBLIGATION, LIABILITY, RIGHT, CLAIM, OR REMEDY, WHETHER IN TORT, CONTRACT, OR OTHERWISE. IN NO CASE SHALL MINISOFT BE LIABLE FOR ANY INCIDENTAL, INDIRECT, SPECIAL, CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, LOSS OF USE, REVENUE, PROFIT, OR DATA), PUNITIVE DAMAGES, EXEMPLARY OR OTHER STATUTORY DAMAGES, EXPENSES, COSTS (INCLUDING ATTORNEY FEES). IN ADDITION, IN NO CASE SHALL MINISOFT'S LIABILITY EXCEED THE FEES PAID BY CUSTOMER FOR THE PRODUCT.

E. Updates

Customer is entitled to updates and enhancements to licensed software if under a current Minisoft software update and subscription service. The cost of the update and subscription service will be 20% of the purchase price of the licensed software. The update and subscription service is for twelve (12) months and can be renewed at the customer's discretion.

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A customer that has purchased annual support entitles them to any and all software updates for their licensed product(s) as well as technical support via phone and email. Software Updates are available from our web site, www.minisoft.com. Included with the purchase of support is the use of our Toll Free 800 number, and support email. Days and Hours of support coverage are Monday through Friday 7:30am (Pacific) until 5:00pm (Pacific). When support is purchased or renewed, an update may be downloaded from the Minisoft Website. In cases where support has expired, back-support is charged to bring the support account current. Any supplemental software code provided to you as part of the Support Services shall be considered part of the SOFTWARE PRODUCT and subject to the terms and conditions of this License Agreement.

G. Miscellaneous

1. Governing Law. This Agreement is made for the sole benefit of the parties hereto, and there are no third party beneficiaries to this Agreement. This Agreement shall be interpreted under the laws of the State of Washington, notwithstanding the application of any jurisdiction's choice-of-law rules to the contrary.

2. Independent Contractors. No agency, partnership, joint venture, or employer-employee relationship is created hereby, and neither party nor any of its agents or employees shall have any authority of any kind to bind the other party in any respect whatsoever. Each party is an independent contractor to the other party.

3. No Assignment by Customer. This Agreement shall be binding upon and inure to the benefit of MINISOFT and any successors and assigns. Customer shall have no right to assign or otherwise transfer its rights or obligations under this Agreement except with the prior written consent of MINISOFT, which MINISOFT in its sole discretion and for any reason or no reason provide or withhold.

4. Entire Agreement. This Agreement contains the complete understanding between the parties and shall as of the date the Product is first installed supersede all other agreements, whether they are written or oral, between the parties concerning the particular subject matter. The language of this Agreement shall for all purposes be construed as a whole, according to its fair meaning, not strictly for or against either party, and without regard to the identity or status of any person who drafted all or any part of it. No purchase order or any other purchasing instruments issued by Customer, even if such purchase order or other purchasing instrument provides that it takes precedence over any other agreement between the parties, shall be effective to contradict, modify, delete from or add to the terms of this agreement in any manner whatsoever.

5. Severability. In the event that any one or more provisions of this Agreement is found by a court of competent jurisdiction to be unenforceable or invalid, then notwithstanding any such finding the remainder of this Agreement shall remain in full force and effect, and such provision that is found to be unenforceable or invalid shall be deemed severed.

6. Waiver. Neither party's right to require performance of the other party's obligations hereunder shall be affected by any previous waiver, forbearance, or course of dealing, nor shall any waiver or forbearance or other course of dealing at any time with respect to any term or condition in this Agreement be effective unless evidenced in writing signed by the waiving party as to such waiver, forbearance or other course of dealing. No waiver or modification of this Agreement or any covenant, condition or limitation herein contained shall be valid and no evidence of waiver or modification shall be offered or received in evidence in any proceeding, arbitration or litigation between the parties hereto arising out of or affecting this Agreement or the rights or obligations of the parties hereunder, unless such waiver or modification is in writing duly signed by both parties.

7. Headings, Sections - The various headings in this Agreement are inserted for convenience only and shall not affect the meaning or interpretation of this Agreement or any Section or provision hereof.

8. Disputes; jurisdiction and venue. Customer and MINISOFT consent to personal jurisdiction, subject matter jurisdiction, and venue in the state and/or federal courts sitting in King or Snohomish Counties, State of Washington. Any action relating to this Agreement must be brought in the state or federal courts located in King or Snohomish County, Washington.

9. Attorney's Fees. In the event legal action is brought by either party to enforce any of the provisions of this Agreement, the prevailing party shall recover its reasonable attorney's fees, costs, and expenses, including but not limited to fees, costs and expenses of collecting any judgment.

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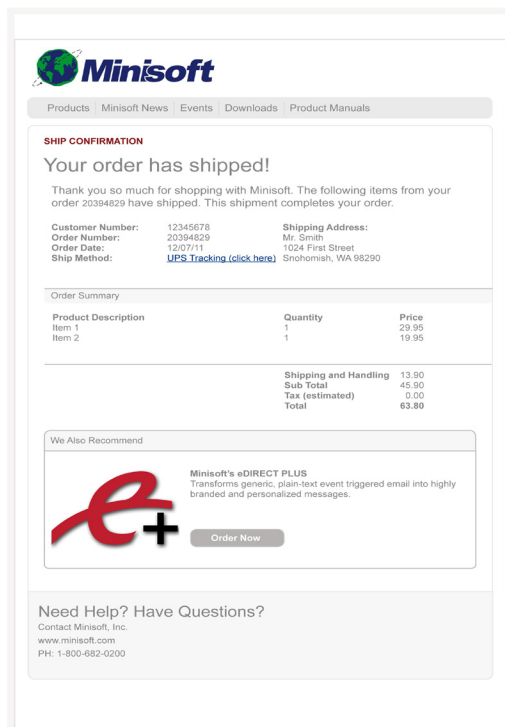
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Introduction

The Document Template can create forms that move with incoming data or can be used in conjunction with creating HTML output. For example, a dynamic form can take a standard text file output and turn it into a custom order confirmation that may be emailed to a client. The customized dynamic forms for HTML output can be customized with urls, links, pictures, and tables:



The screenshot shows a web page for Minisoft. At the top left is the Minisoft logo, which includes a globe icon. To the right of the logo is a navigation menu with links for 'Products', 'Minisoft News', 'Events', 'Downloads', and 'Product Manuals'. Below the navigation is a 'SHIP CONFIRMATION' header in red. The main heading is 'Your order has shipped!'. A paragraph of text thanks the customer and states that the items from order 20394829 have shipped. Below this is a table of order details with two columns: 'Customer Number:' and 'Shipping Address:'. The 'Customer Number:' column lists '12345678', 'Order Number: 20394829', 'Order Date: 12/07/11', and 'Ship Method: UPS Tracking (click here)'. The 'Shipping Address:' column lists 'Mr. Smith', '1024 First Street', and 'Snohomsh, WA 98290'. Below the order details is an 'Order Summary' table with three columns: 'Product Description', 'Quantity', and 'Price'. It lists 'Item 1' with quantity 1 and price 29.95, and 'Item 2' with quantity 1 and price 19.95. To the right of the items is a summary of charges: 'Shipping and Handling 13.00', 'Sub Total 45.90', 'Tax (estimated) 0.00', and 'Total 63.80'. Below the order summary is a 'We Also Recommend' section featuring a red 'e+' logo and a button labeled 'Order Now'. The text next to the logo describes 'Minisoft's eDIRECT PLUS' as a service that transforms generic emails into branded and personalized messages. At the bottom of the page is a 'Need Help? Have Questions?' section with contact information for Minisoft, Inc., including the website 'www.minisoft.com' and phone number 'PH: 1-800-682-0200'.

Minisoft

Products | Minisoft News | Events | Downloads | Product Manuals

SHIP CONFIRMATION

Your order has shipped!

Thank you so much for shopping with Minisoft. The following items from your order 20394829 have shipped. This shipment completes your order.


Customer Number:	12345678	Shipping Address:	
Order Number:	20394829	Mr. Smith	
Order Date:	12/07/11	1024 First Street	
Ship Method:	UPS Tracking (click here)	Snohomsh, WA 98290	

Order Summary

Product Description	Quantity	Price
Item 1	1	29.95
Item 2	1	19.95

Shipping and Handling	13.00
Sub Total	45.90
Tax (estimated)	0.00
Total	63.80

We Also Recommend


 Minisoft's eDIRECT PLUS
Transforms generic, plain-text event triggered email into highly branded and personalized messages.

[Order Now](#)

Need Help? Have Questions?
Contact Minisoft, Inc.
www.minisoft.com
PH: 1-800-682-0200

SECTION 1

Dynamic forms can also be used to create free-flowing forms. Free-flowing forms contain headings that move with data based on how much data is contained within the data file:



Minisoft Inc. Minisoft (509) 965-6033 ISO 9001 Certified
 Minisoft, Inc. Toll Free (800) 965-6030 Customers
 1024 First Street Fax (509) 968-2929 Snohomish, WA 98290

RETURN MATERIAL AUTHORIZATION

RMA Number: ABC00035
This RMA is valid until: 02/15/11

<p>B XX1235 I MINISOFT, INC L Papierenmühlweg 1 L Postfach 107 C CH-6048 Horw T SWITZERLAND O</p>	<p>S XX1234 H MINISOFT, INC I 1024 FIRST STREET P SNOHOMISH, WA 98290 T USA O</p>
--	--

Date: 02/01/11 Entered By: MRH Status: C Warranty: NO
 Due: 02/15/11 Assigned To: QA Type: DP Credit Terms: N30
 Closed: 02/23/11 Authorized By: MM Disposition: DP

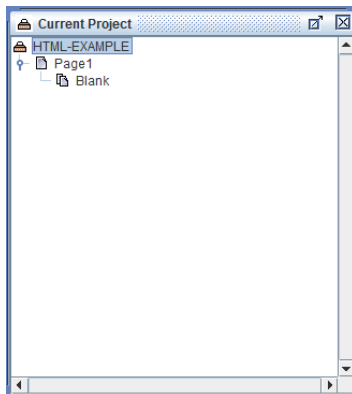
Comments:
 Fred Flintstone
 CUSTOMER REQUESTS REPLACEMENTS?: YES
 RECEIVED 2/15/2011 MM

Sales Order	Line	Purchase Order	Part Number	Quantity	Unit Price	Extended Price
XXX12345	2	XXX-XXXXXX	XXX.XX.XXX.XXXXXXZ Lot No: 1330814	2	28.16	56.32
TOTAL:						56.32

All RMA numbers are good for 30 days.
 Only product returned within the 30-day period will be accepted against this RMA.
 All returned products must be in original packaging and condition.
 Products exposed to blood-borne pathogens will NOT be accepted into LEMO USA facility.

Implementing a Dynamic Form

1. Create a new project that includes a page and blank form using the default settings:



NOTE: Since we will be creating variables and rules to reposition the data dynamically, when the Form Properties appears, select *Exclude Data* from the General tab.

2. Open the data file you would like to use to create your dynamic form. The data will appear in the Data Viewer.

SECTION 1

3. Assign the necessary variables you would like to add to your dynamic form:

The screenshot displays the Minisoft eFORMc Composer interface. The main window shows a dynamic form with the following content:

SHIP TO:
JANE DOE
1024 FIRST STREET
SNOHOMISH, WA 98290

QTY	DESCRIPTION	AMOUNT
1	ITEM 1	10.99
2	ITEM 2	19.99
1	ITEM 3	34.50
1	ITEM 4	16.50

The interface also includes a Project pane on the left showing a tree view of variables and a Variables pane at the bottom with the following data:

Variable	Value
EMAILADDRESS	JANE@JUNO.COM
TRACKINGNUM	12A20WY00117255
ORDERNUM	0015437395
SHIPTO(0)	JANE DOE
SHIPTO(1)	1024 FIRST ST
SHIPTO(2)	SNOHOMISH, WA
QTY(0)	1
CITY(1)	
QTY(2)	4

Basics

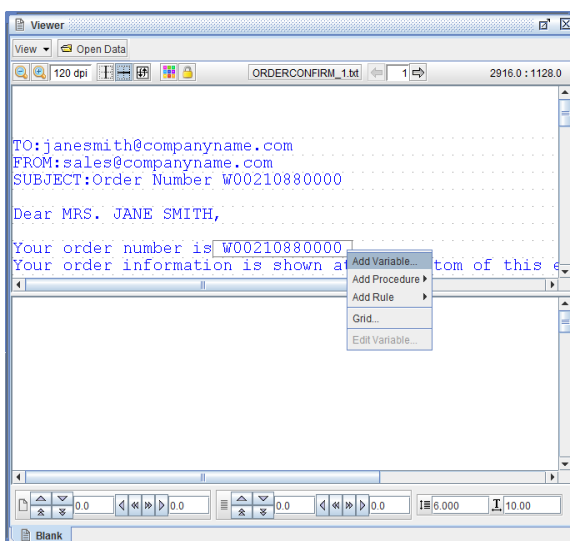
Variables

A Variable stores data for later use for Rules, Functions, Procedures and Conditions. Any one Variable can be used multiple times within a particular project. eFORMz has the ability to add variables based on a position or node value (xml).

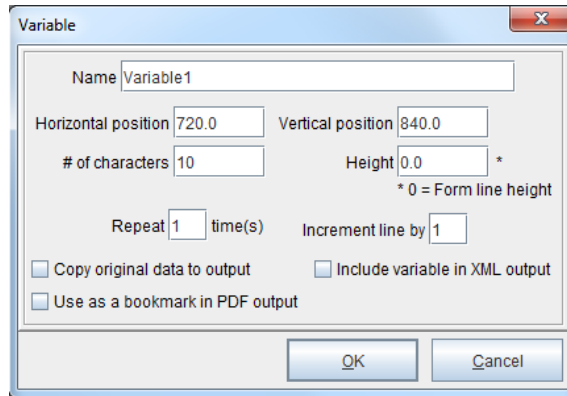
Variables by Position

To create a Variable based on a specified position in the Data Viewer:

1. From the top pane of the eFORMz Viewer, the Input Data Viewer, select a string of characters with your mouse (left click + drag), right mouse click and select Add Variable.



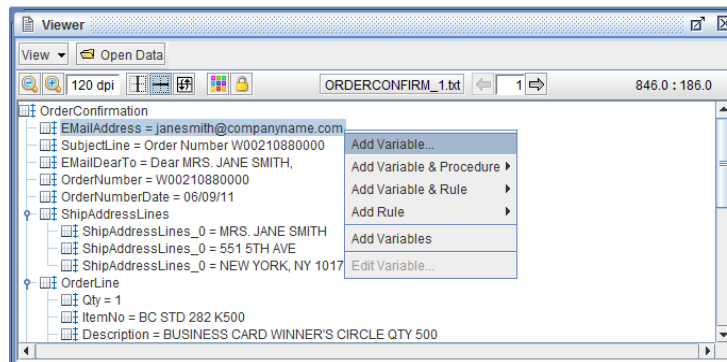
- The Variable dialog box will display. Enter a name and click OK to proceed.



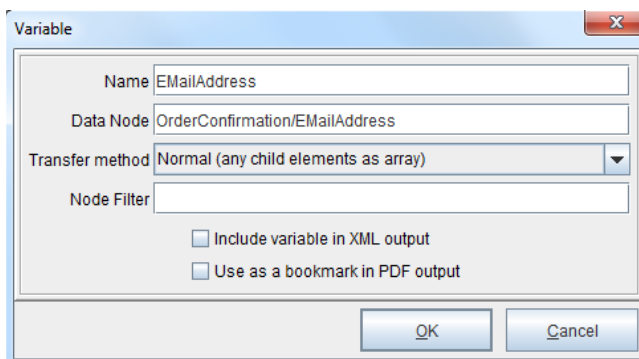
Variables using Data Node

Create Variables from XML nodes.

- To create a Variable, right click a data node and select Add Variable.



2. The Variable dialog box will display. Click OK to continue.



The image shows a dialog box titled "Variable" with a close button (X) in the top right corner. The dialog box contains the following fields and options:

- Name:** EMailAddress
- Data Node:** OrderConfirmation/EMailAddress
- Transfer method:** Normal (any child elements as array) (dropdown menu)
- Node Filter:** (empty text field)
- Include variable in XML output
- Use as a bookmark in PDF output

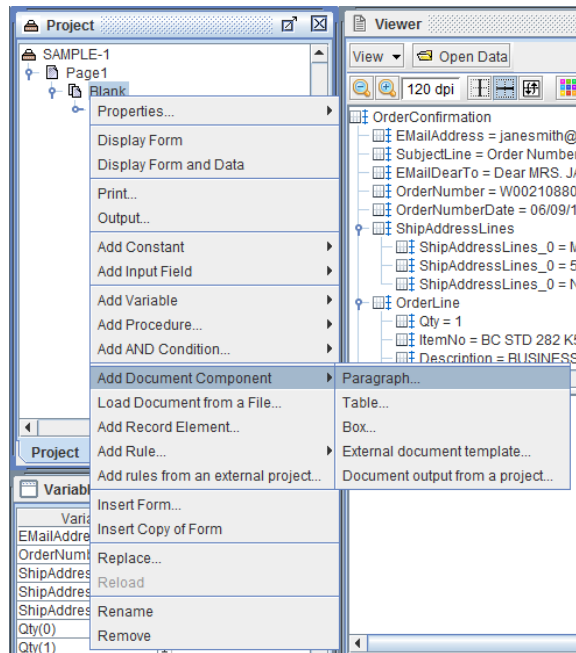
At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Components

A Document Component is a descriptor that defines particular layout properties. There are four Document Components: Paragraphs, Tables, Boxes and External Document Templates.

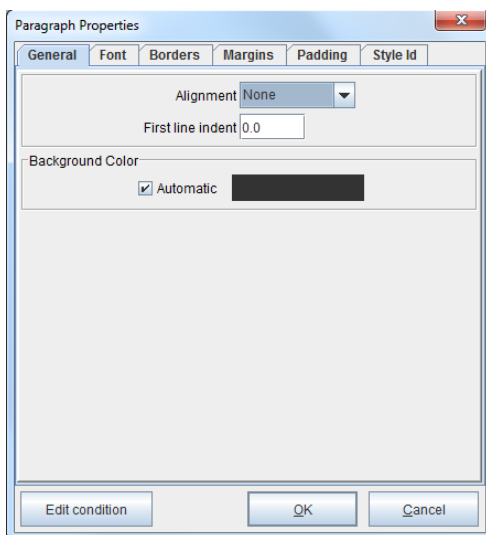
Paragraph

1. To add a Paragraph, right click the form and select Add Document Component > Paragraph.

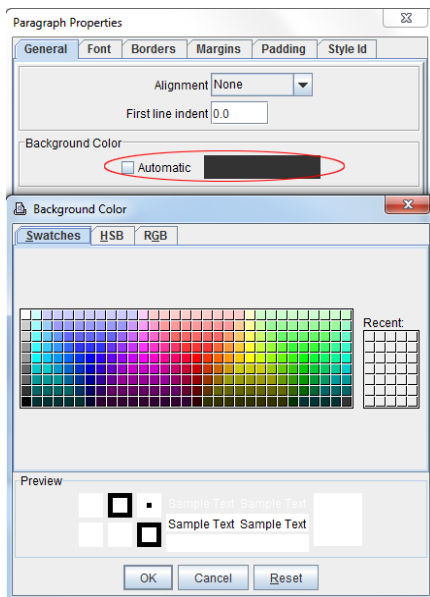


NOTE: Paragraphs can be added to a Table. The result is to create a Row for each line in the Paragraph.

2. The General tab of the Paragraph Properties dialog box will display.

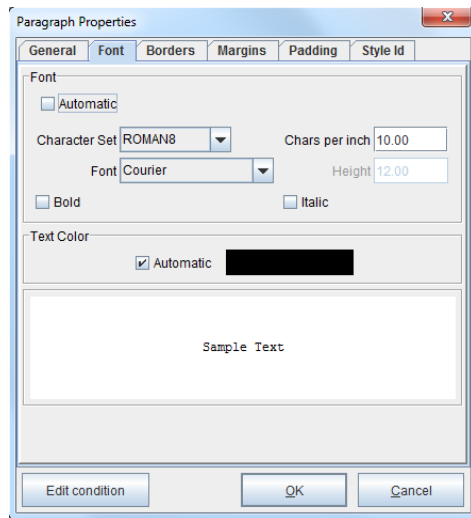


3. To adjust the Background Color, uncheck the Automatic box and left click the color bar. The Background Color dialog box will display. Select one of the Swatches or create a custom color with HSB or RGB.

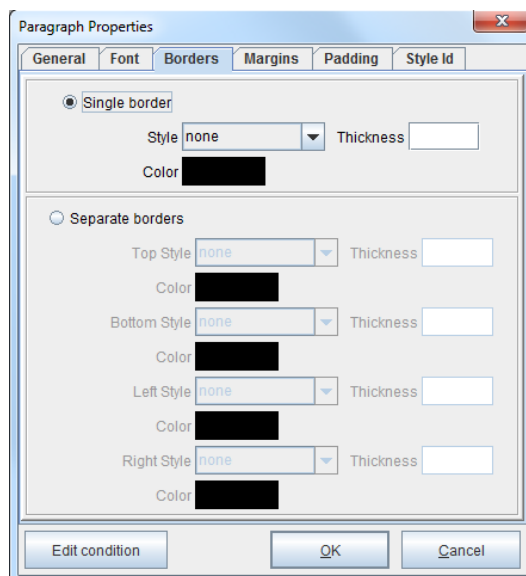


SECTION 1

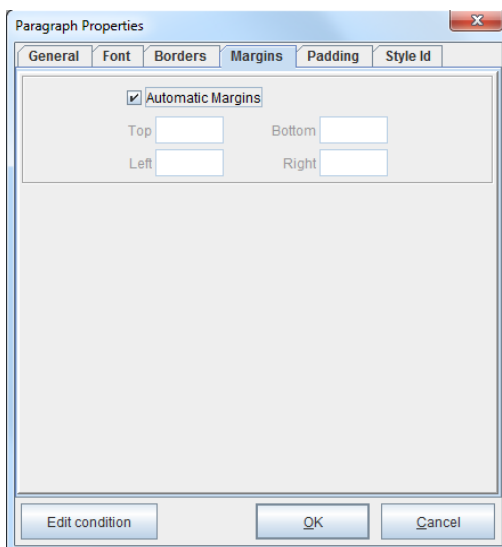
4. Navigate to the Font tab. To adjust the Background Color, uncheck the Automatic box and left click the color bar. The Background Color dialog box will display. Select one of the Swatches or create a custom color with HSB or RGB.



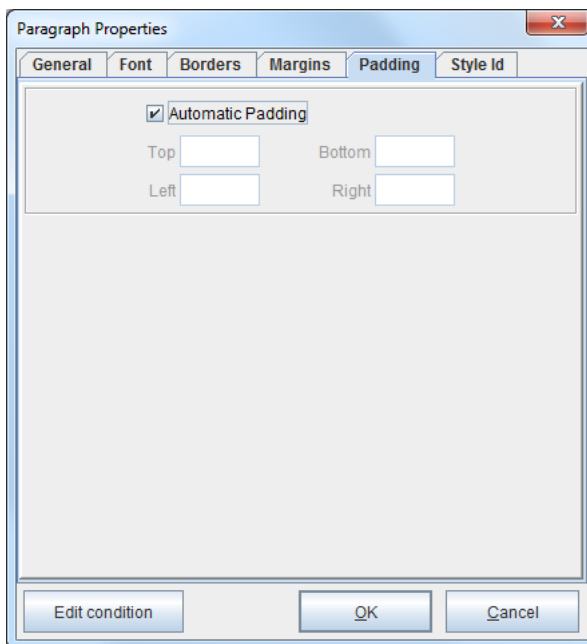
5. Next, navigate to the Borders tab.



- The adjacent tab is for Margins.



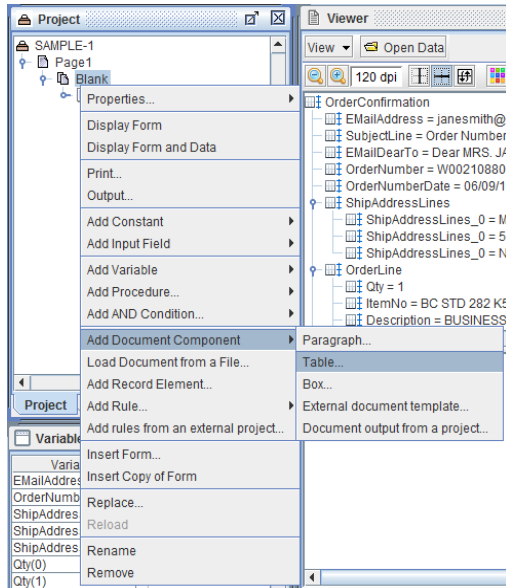
- Select the Padding tab. When complete, click OK.



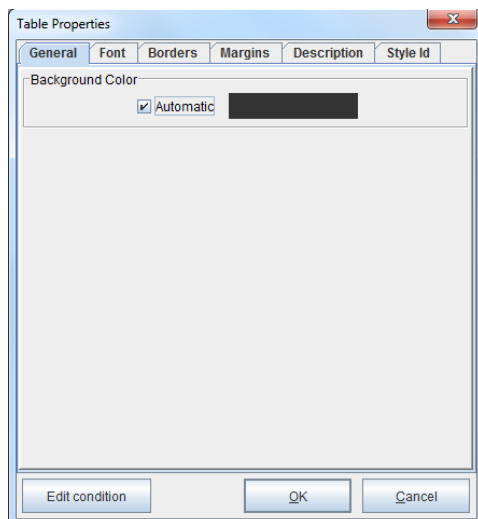
Table

To add a Table:

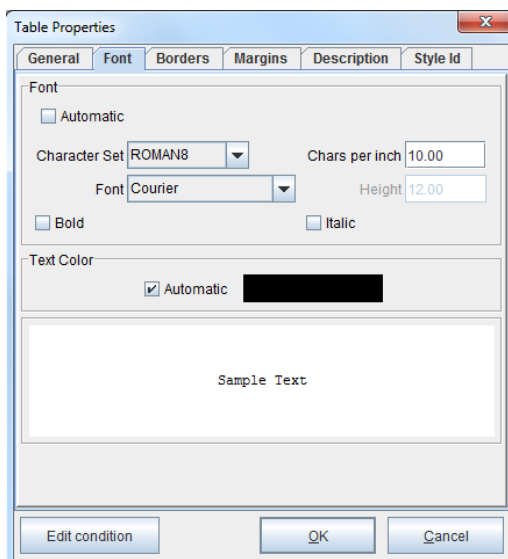
1. Right click the form and select Add Document Component > Table.



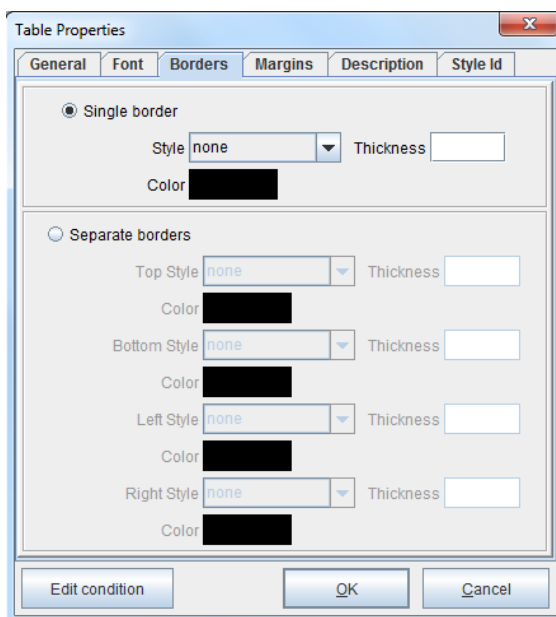
2. The General tab of the Table Properties dialog box will display.



3. Navigate to the Font tab.

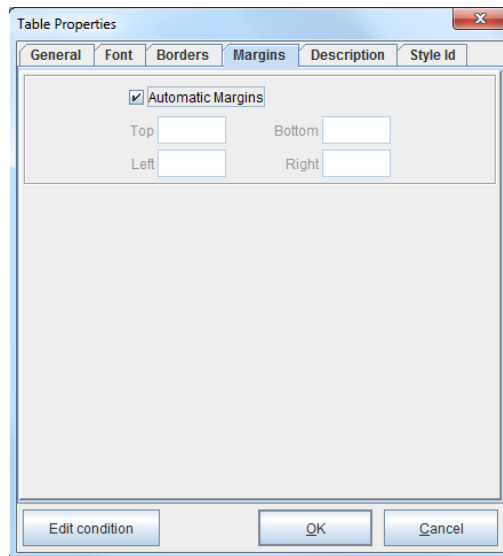


4. From there, select the Borders tab.

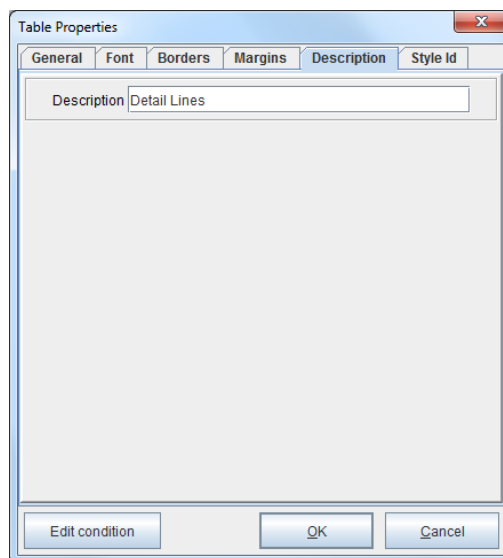


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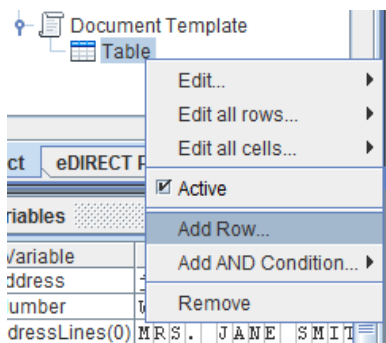
5. Navigate to the Margins tab. When complete, click OK.



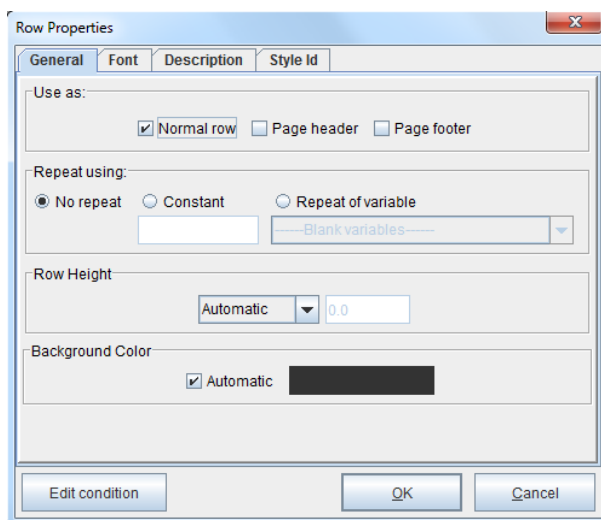
6. Navigate to the Descriptions tab. Enter a value that describes the contents of the Table.



- Next, right click the Table and select Add Row.

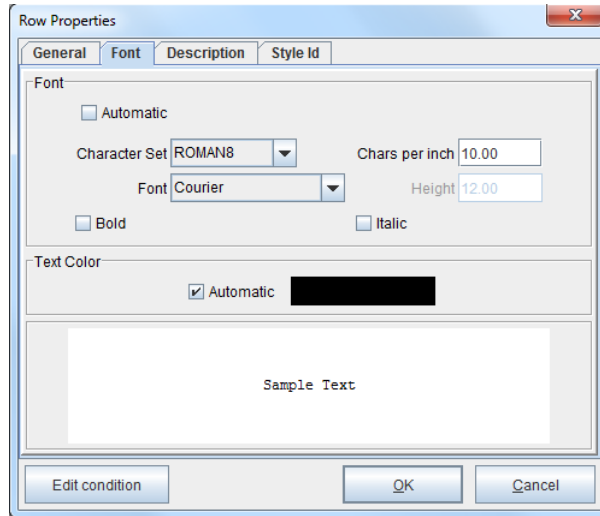


- The Row Properties dialog box will display. Navigate to the Font tab if necessary.

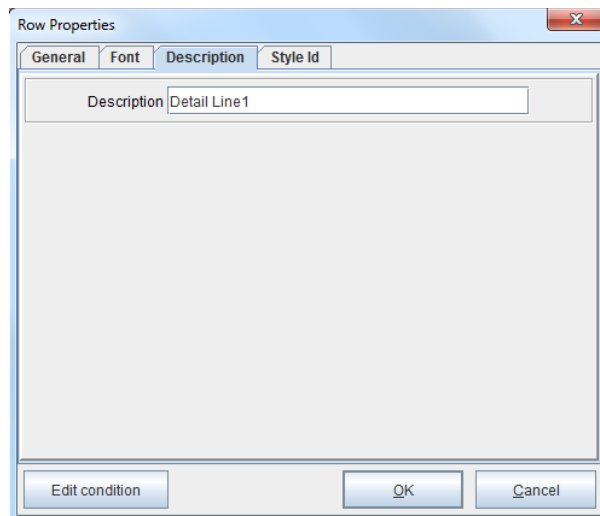


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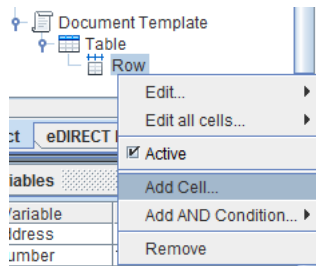
9. Make any modifications to the font. If adding a description for the Row, navigate to the Description tab. When complete, click OK.



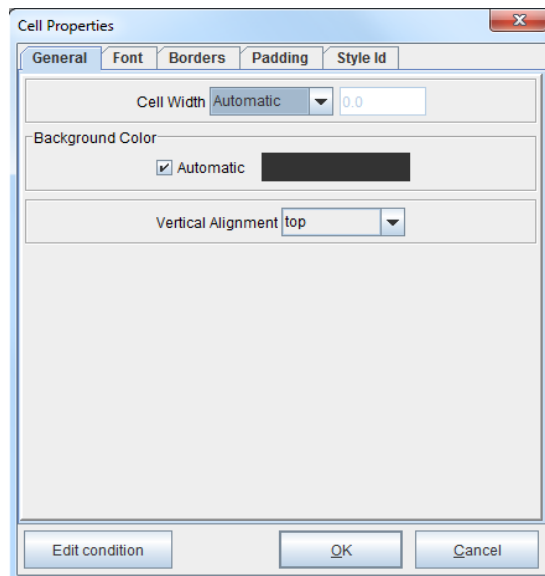
10. Make any modifications to the font. If adding a description for the Row, navigate to the Description tab. When complete, click OK.



11. Right click the Row and select Add Cell.

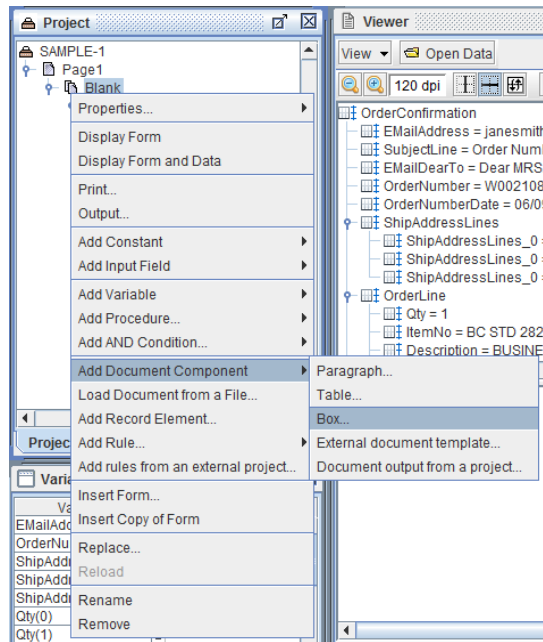


12. Make any modifications to the cell width, color, font, borders and padding as seen fit. When complete, click OK.

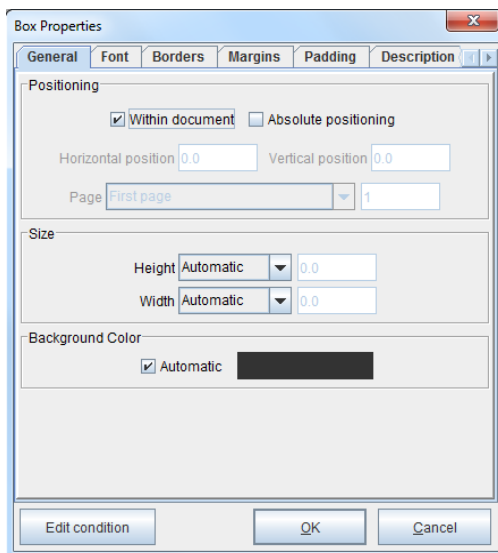


Box

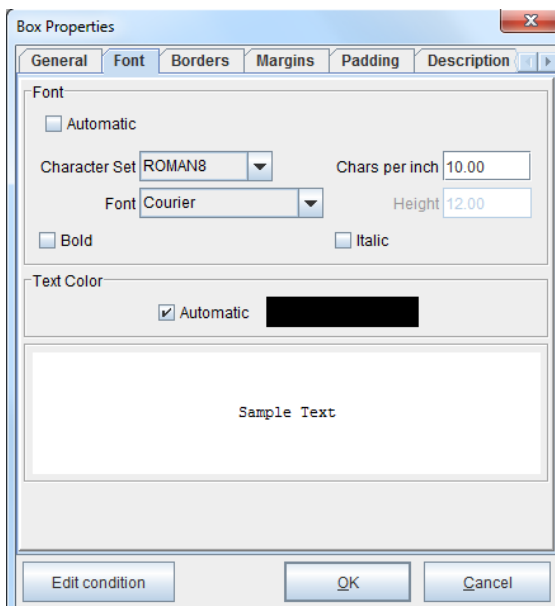
1. Right click the form, highlight Add Document Component and pick the Box option.



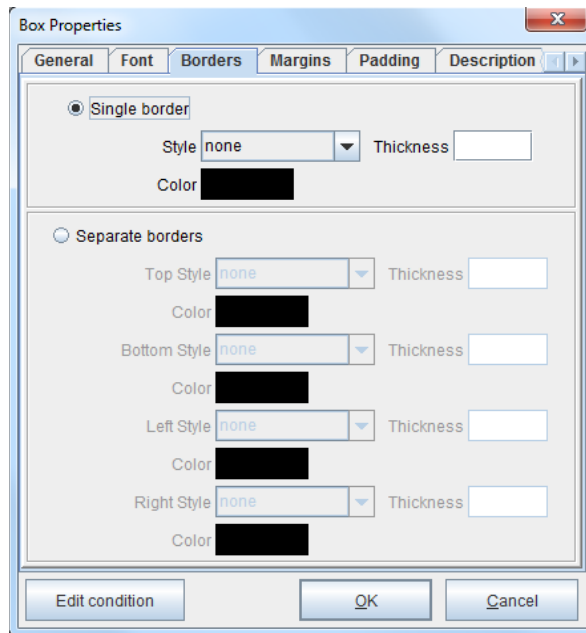
2. The General tab of the Box Properties dialog box displays.



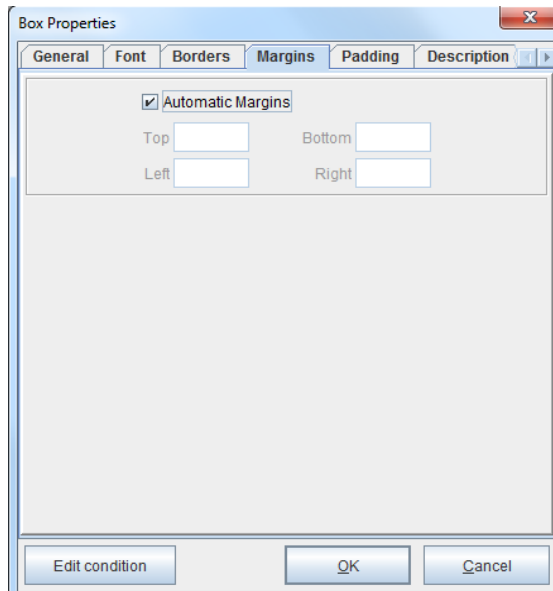
3. Navigate to the Font tab.



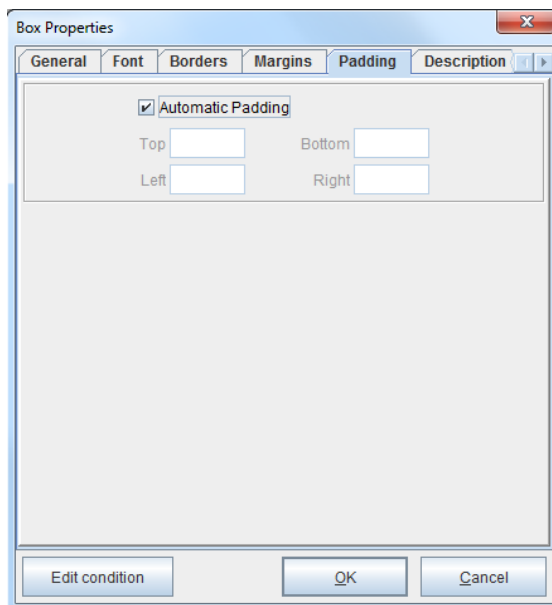
4. Select the Borders tab.



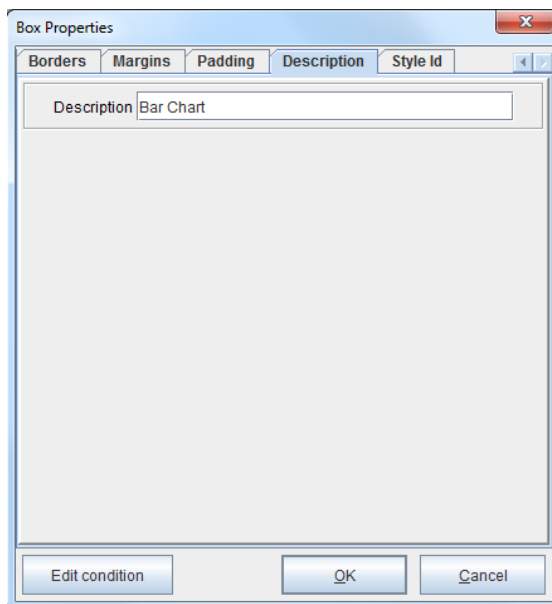
5. Move to the Margins tab.



- Navigate to the Padding tab. .



- Finally, move to the Description tab. When finished, click OK.



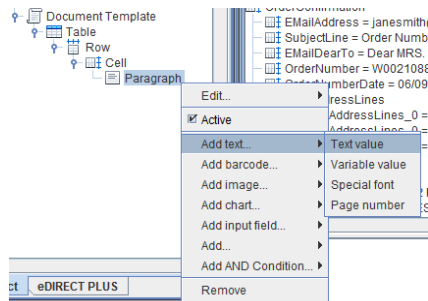
Elements

Document Elements are part of a Document Component. A Document Element can be dynamic or static content, such as Text, Variables or Barcodes.

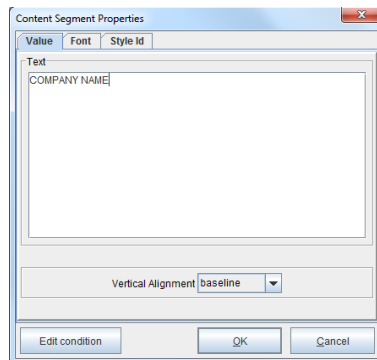
Adding Text

Text Value

1. Right click a Paragraph Component and select Add text > Text value.

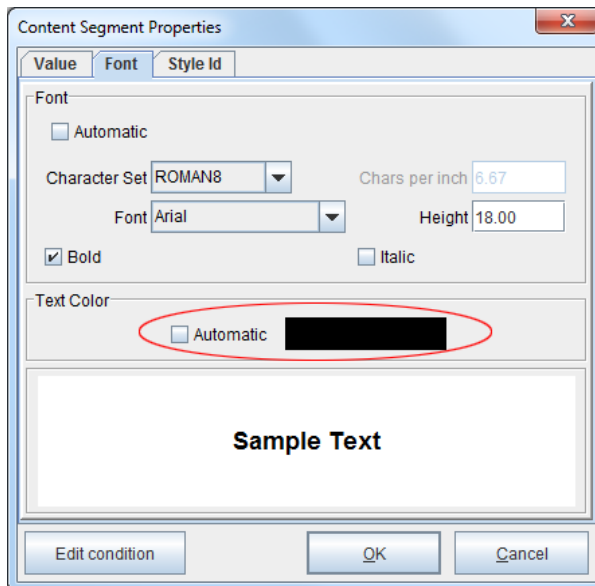


2. Enter a value into the Text field.

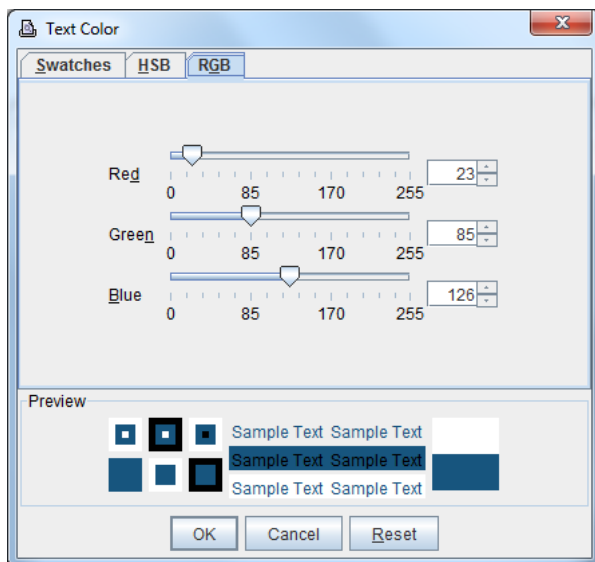


3. To modify the Text Color, uncheck the Automatic button and left click the color bar

next to it.

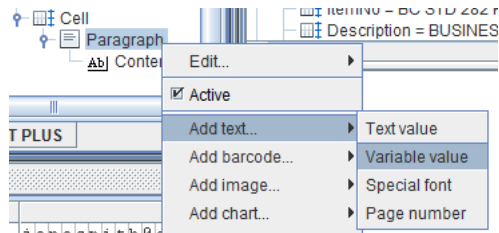


4. Select from one of the Swatches or create a custom color. When complete, click OK.

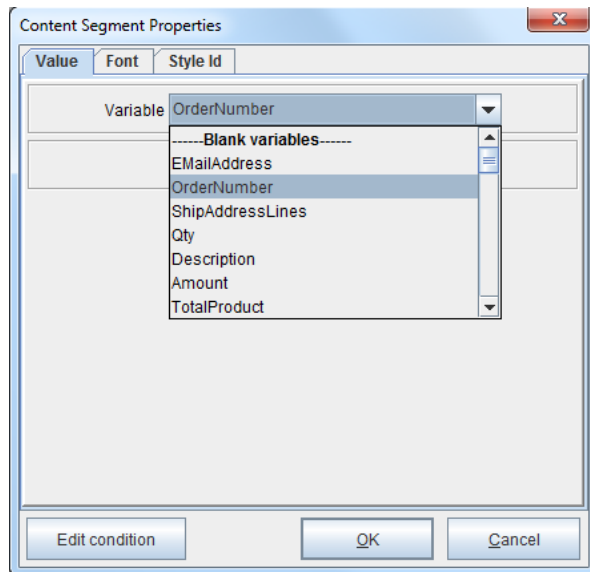


Variable Value

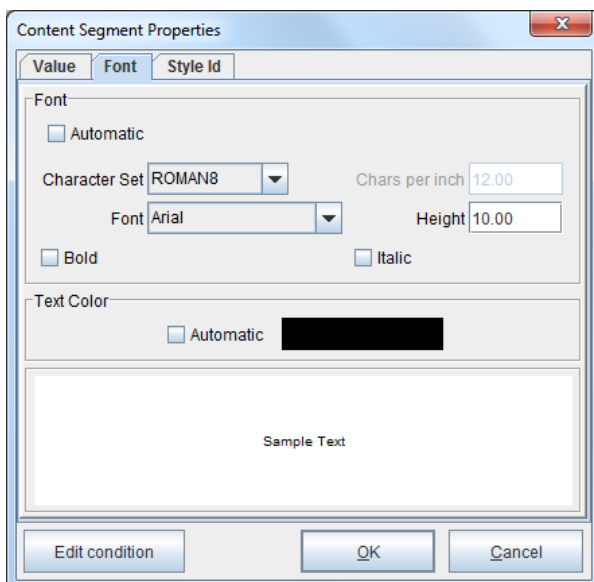
1. Right click a Paragraph Component and select Add text > Variable value.



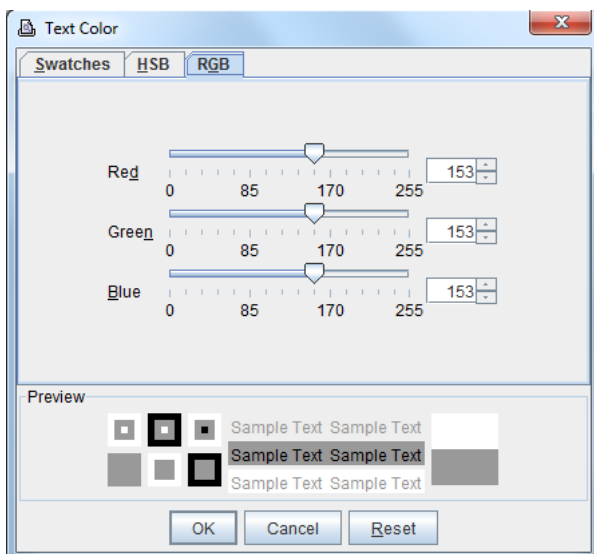
2. Select a Variable from the Variable drop-down menu and navigate to the Font tab.



3. Make any necessary modifications. To adjust the color, uncheck the Automatic box and left click the color bar next to it.

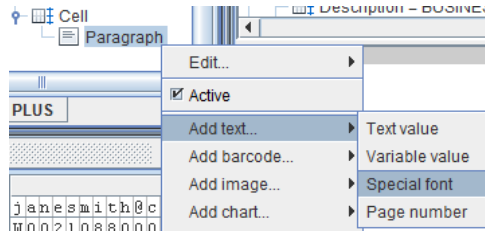


4. Select from one of the Swatches or create a custom color. When complete, click OK.

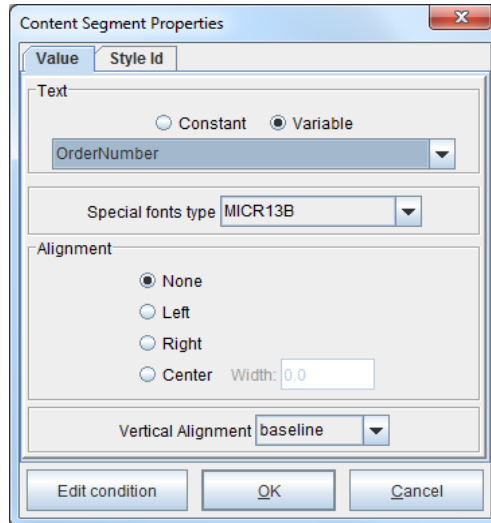


Special Font

1. Right click a Paragraph Component and select Add text > Special font.

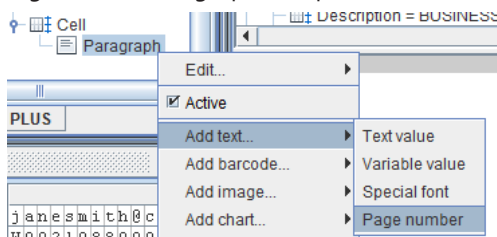


2. Enter a Constant value or select a Variable from the Variable drop-down menu. Pick the Special font type from the drop-down menu and click OK.

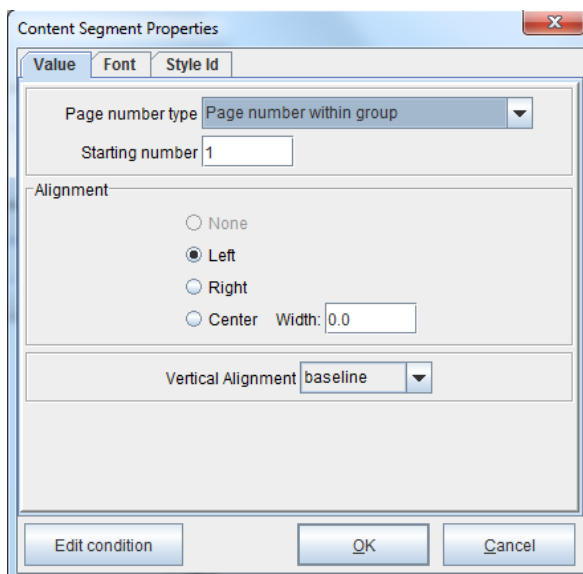


Page number

1. Right click a Paragraph Component and select Add text > Page number.

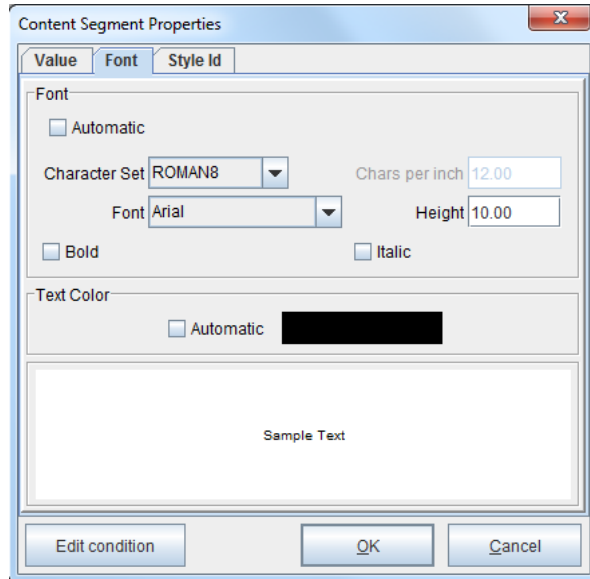


2. Select the Page number type from the drop-down menu. This will place the page number of a form or document based upon the number of pages it contains or its location within a series of pages. Options include Page number within group, Number of pages in group, Page number within document and Page number in document. The Starting Page property determines the number of the first page placed. The Default is 1. Switch to the Font tab when done.



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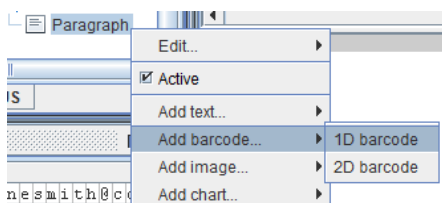
3. Make any necessary modifications. To adjust the color, uncheck the Automatic box and left click the color next to it.



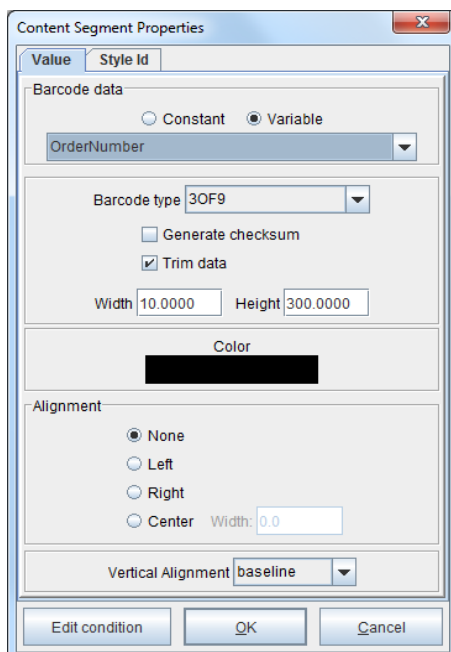
Adding Barcodes

1D Barcode

1. To add a 1D Barcode, right click a Paragraph Component and select Add barcode > 1D barcode.

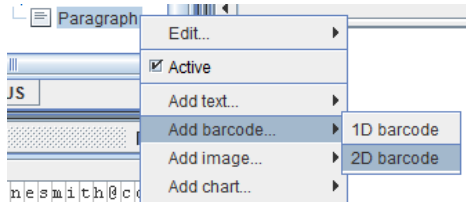


2. Select the Variable from the drop-down menu or enter a Constant value. Select the Barcode type and make any necessary configuration adjustments. Click OK when complete.

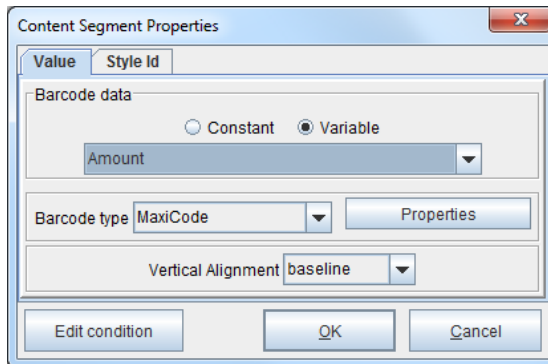


2D Barcode

1. To add a 2D Barcode, right click a Paragraph Component and select Add barcode > 2D barcode.



2. Select the Variable from the drop-down menu or enter a Constant value. Select the Barcode type and make any necessary configuration adjustments. Click OK when complete.

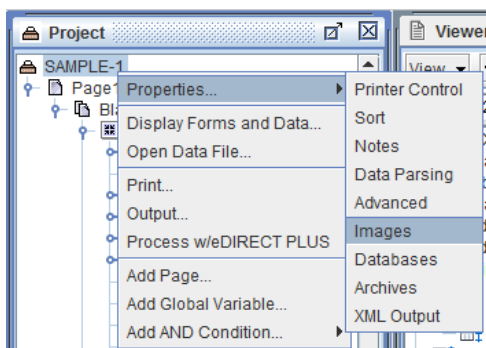


Adding Images

Images from Project

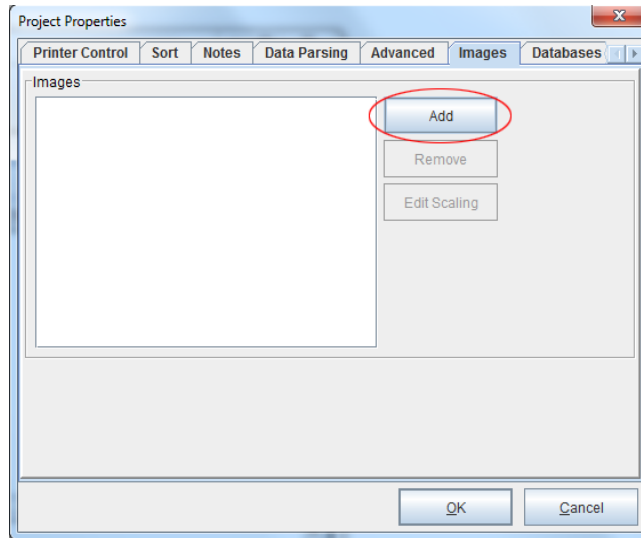
To import an Image into a project for use with a Dynamic Template:

1. Right click the project and select Properties > Images.

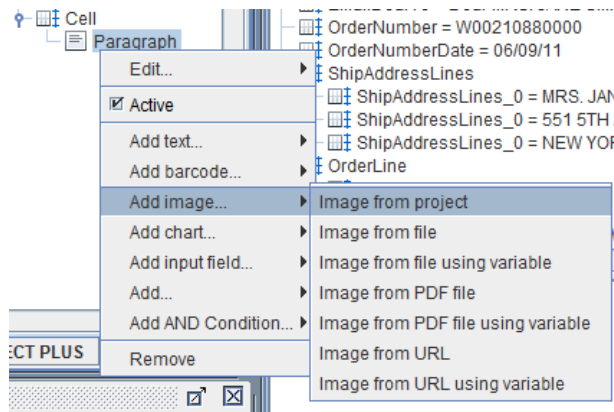


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2. Select the Add button and choose an Image. Once the Image is imported into a project, it will remain with that project until it is manually removed. Click OK when complete.



3. To add an Image from a project, right click a Paragraph Component and select Add image > Image from project.



4. Select an Image from the Image from Project drop-down menu. Click OK.

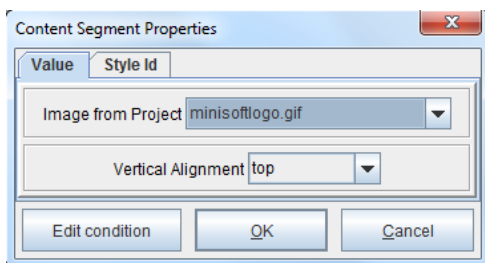
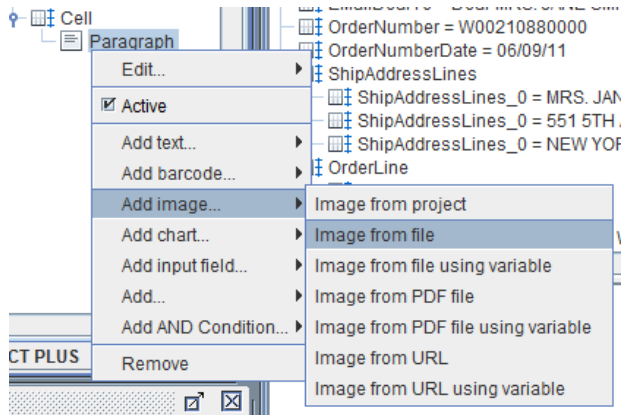


Image from file

1. To add an Image from file, right click a Paragraph Component and select Add image > Image from file.



2. In the Image from File field, select the browse button (...) and pick the appropriate Image.

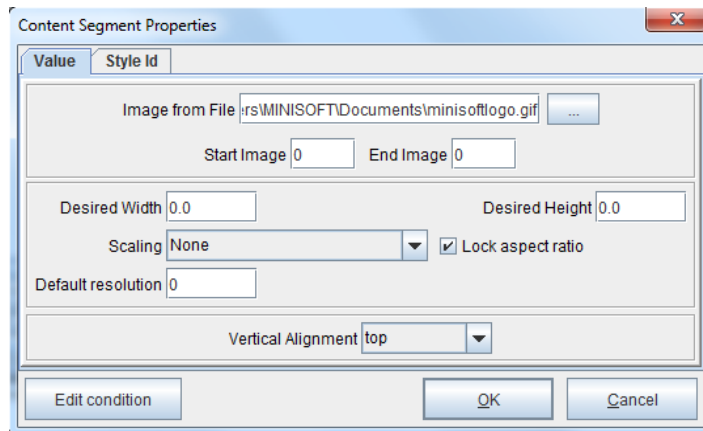
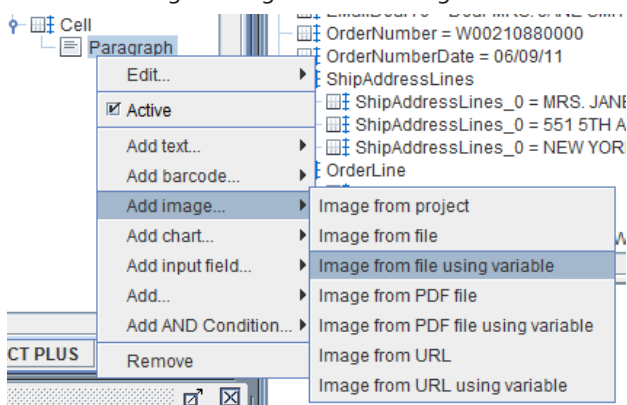


Image from file using variable

- To add an Image from file using a Variable, right click a Paragraph Component and select Add image > Image from file using variable.



- From the Variable containing image file name field, select the appropriate Variable. Make any necessary adjustments and click OK.

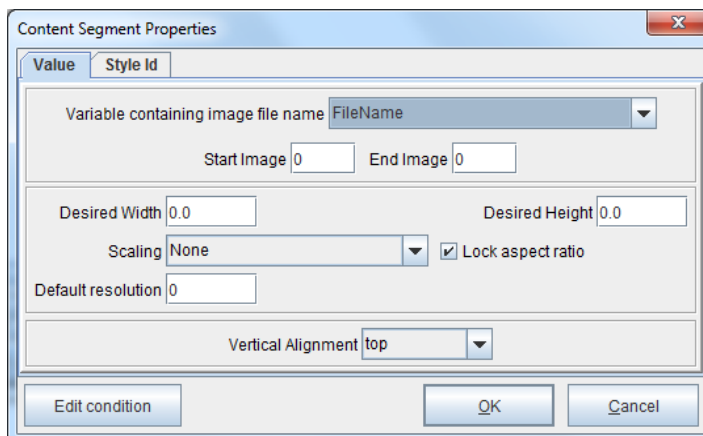
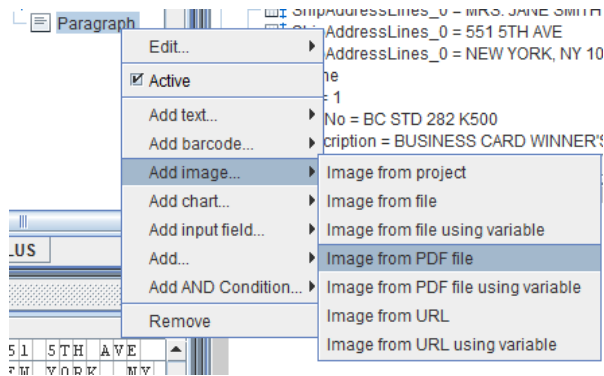


Image from PDF file

1. To add an Image from a PDF file, right click a Paragraph Component and select Add image > Image from PDF file.



2. In the Image from PDF File field, select the browse button (...) and pick the appropriate Image. Make any necessary modifications and click OK.

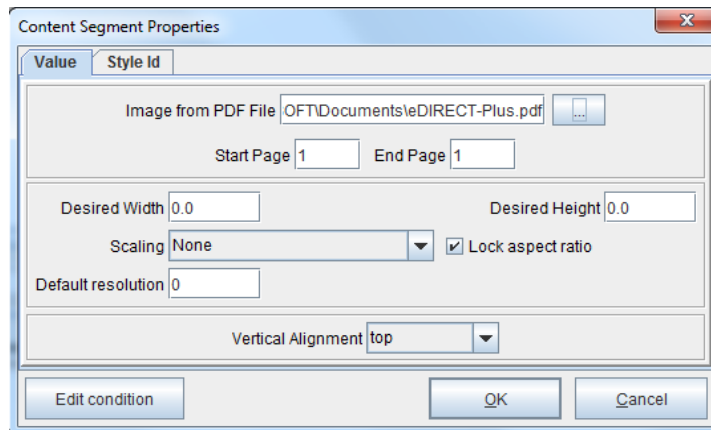
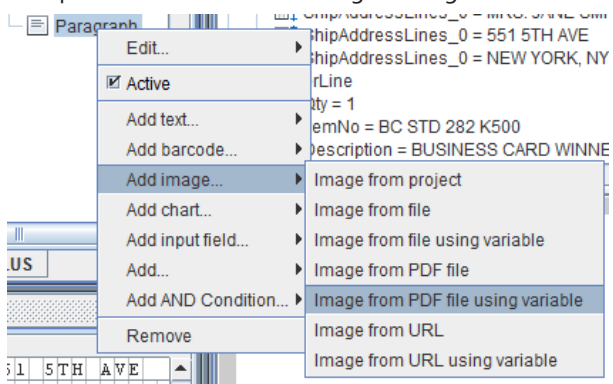


Image from PDF file using variable

- To add an Image from a PDF file using a Variable, right click a Paragraph Component and select Add image > Image from PDF file using variable.



- From the Variable containing PDF file name field, select the appropriate Variable. Make any necessary adjustments and click OK.

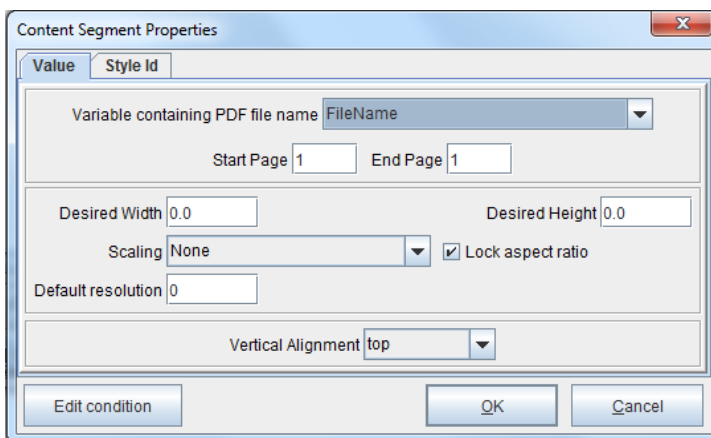
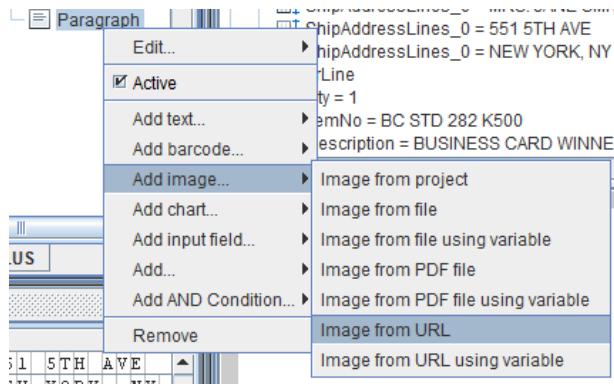


Image from URL

1. To add an Image from a URL, right click a Paragraph Component and select Add image > Image from URL.



2. Enter the URL in the Image from URL field. Make any necessary alterations and click OK.

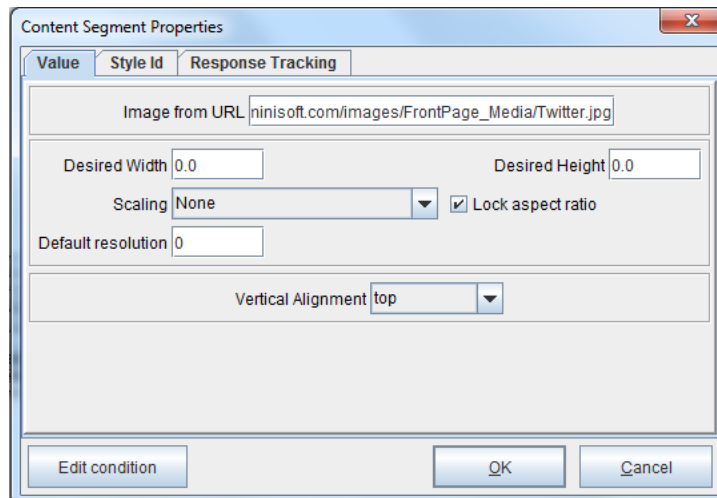
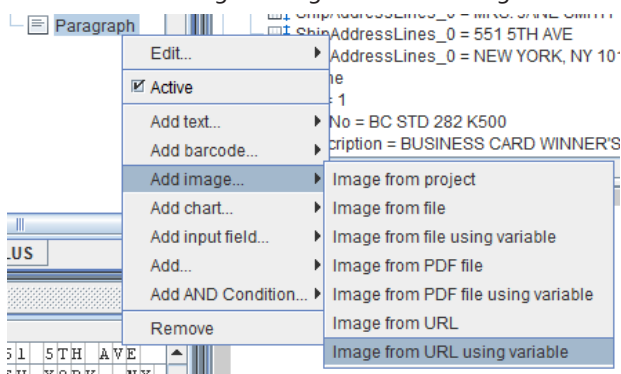


Image from URL using variable

1. To add an Image from a URL using a Variable, right click a Paragraph Component and select Add image > Image from URL using variable.



2. From the Variable containing URL field, select the appropriate Variable. Make any necessary adjustments and click OK.

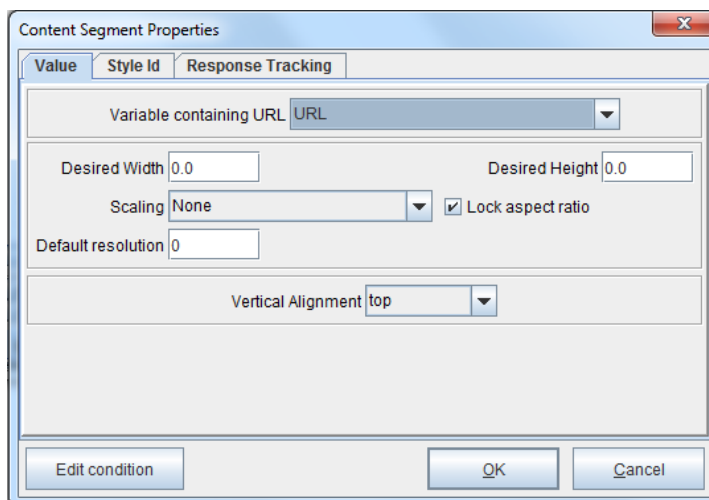
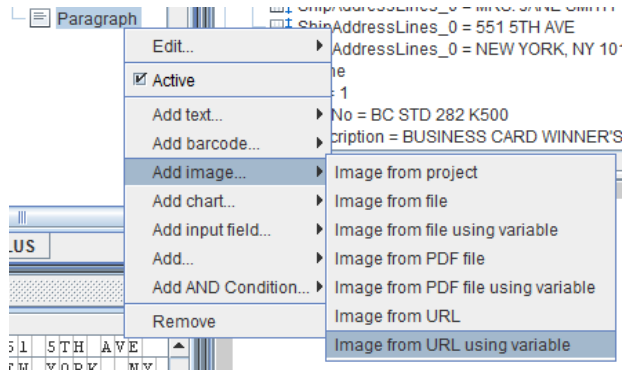


Image from component

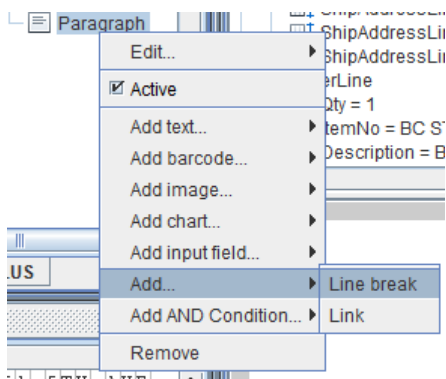
1. To add an Image from a URL using a Variable, right click a Paragraph Component and select Add image > Image from URL using variable.



Adding Line Breaks and Links

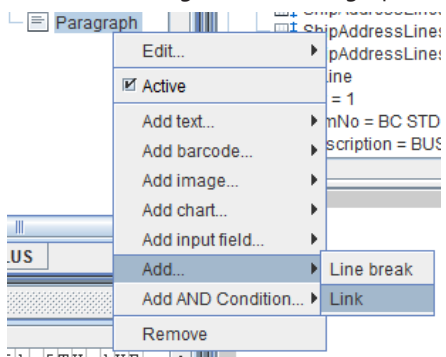
Line break

1. To add a Line break, right click a Paragraph Component and select Add > Line break.



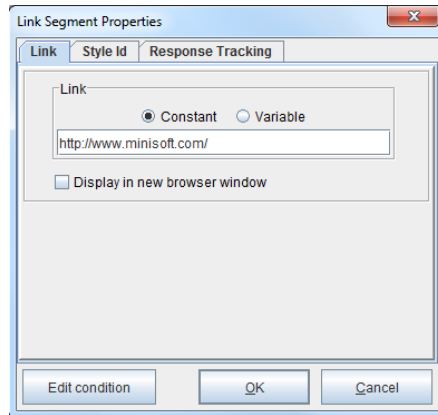
Link

1. To add a Link, right click a Paragraph Component and select Add > Link.

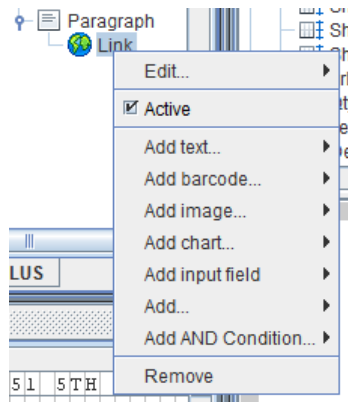


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2. Enter the URL or select a Variable which contains the relevant URL. Checking the Display in new browser window box will ensure that when the Link is selected, it will pop up in a new window. The default is unchecked.

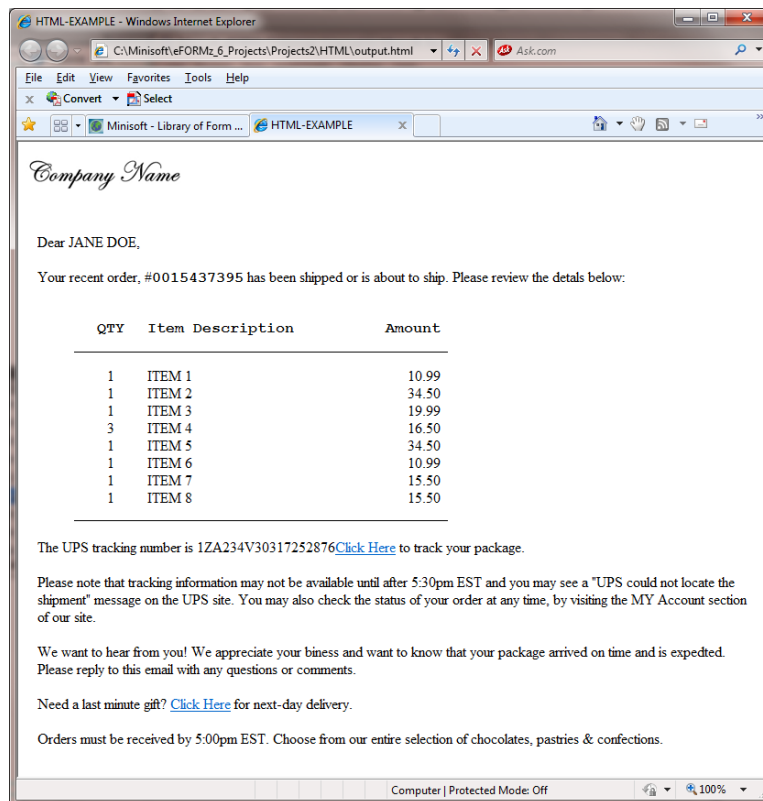


3. To add a Document Element that will be linked, right click the Link and select a Document Element.



Creating a Dynamic Document Template

The following example will demonstrate the process of implementing a dynamic document template to create an HTML output file.

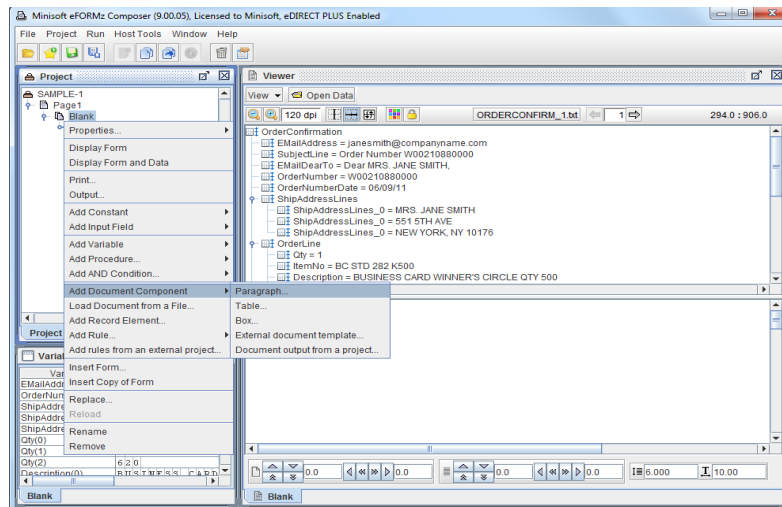


NOTE: To successfully output in HTML format, make sure the incoming data is excluded, a blank form is used, there aren't any constants or rules and the same number of cells are used in each row.

Adding an Image

To include an image on a dynamic form, for example, if you would like to include a company logo:

1. Right click your form and select *Add Document Component > Paragraph*:

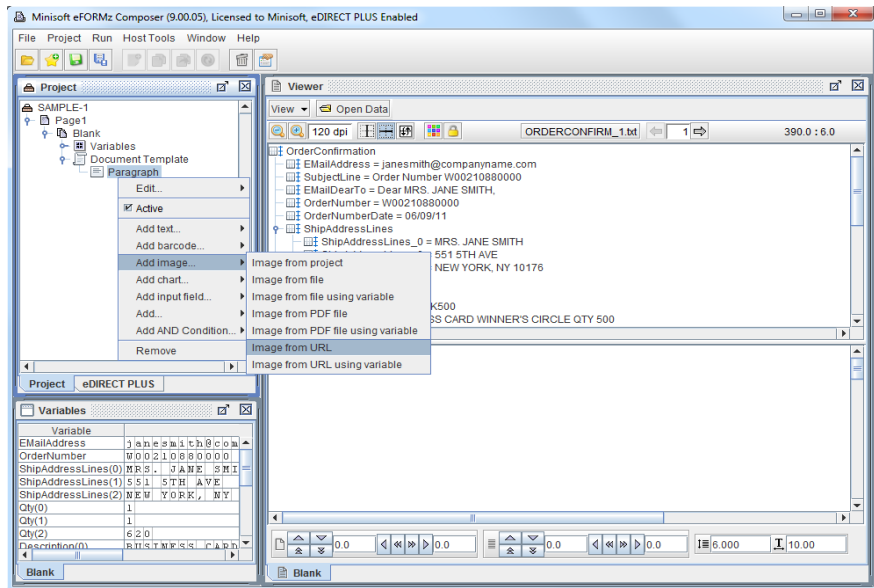


2. The Paragraph Properties dialog box will display. Select *OK*.
3. To the *Paragraph* element we are going to add an image. An image can be added in one of the following ways:

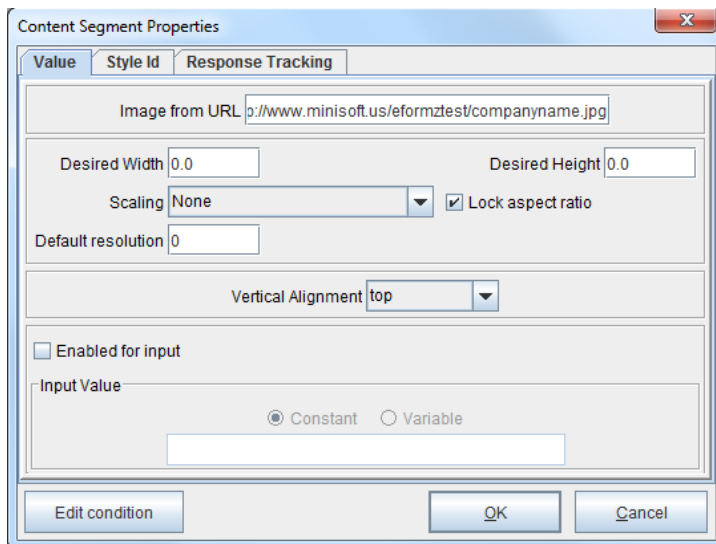
- Image from >
 - Project
 - Image From File
 - Image From File using variable
 - PDF file
 - PDF file using variable
 - Image URL
 - Image URL using variable

For this example we are going to add an Image from a *URL address*.

- From the Paragraph element select **Add > Image from URL**:



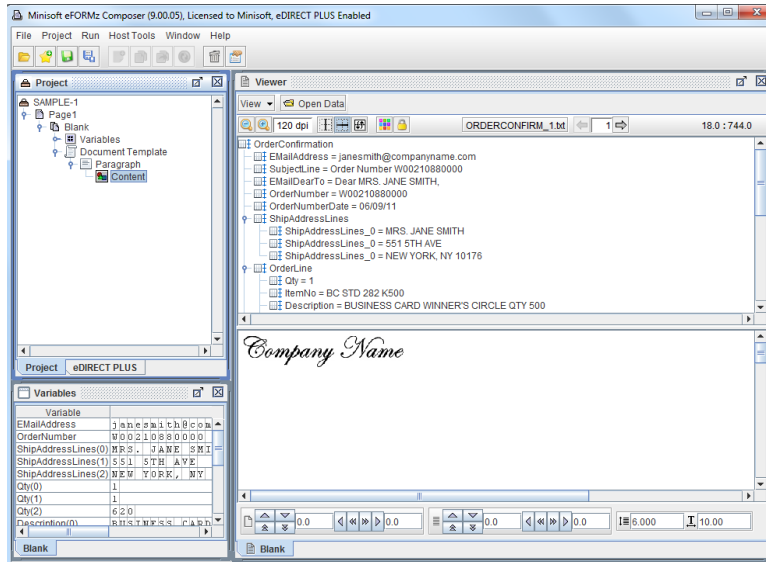
- The Properties dialog box displays. Enter the URL address for retrieving your image:



TIP: Calling an image from a URL for email HTML output allows an email to be attachment free.

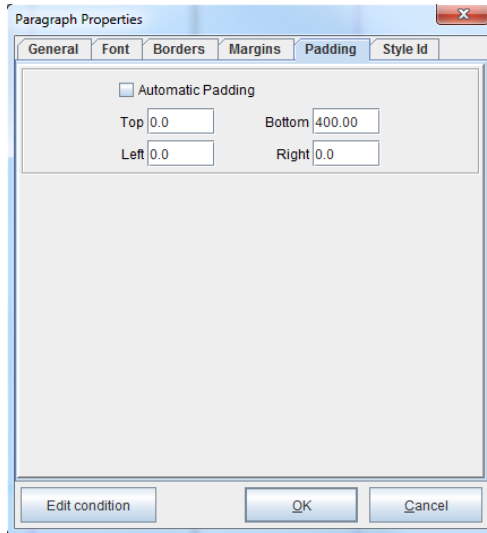
NOTE: Values are in decipoints. 1 pixel = 7.5 decipoints.

6. Your image will now appear in the Form Viewer:



7. Before adding the next element, an adjustment can be made to the paragraph containing the image element. For example, we would like to add padding to the paragraph so that the text following the image will be spaced apart from the image element.

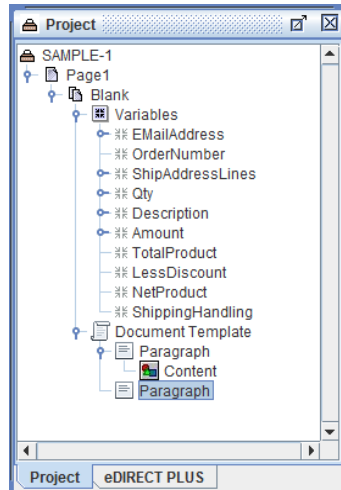
From the Paragraph element, right click, select *Edit > Padding*:



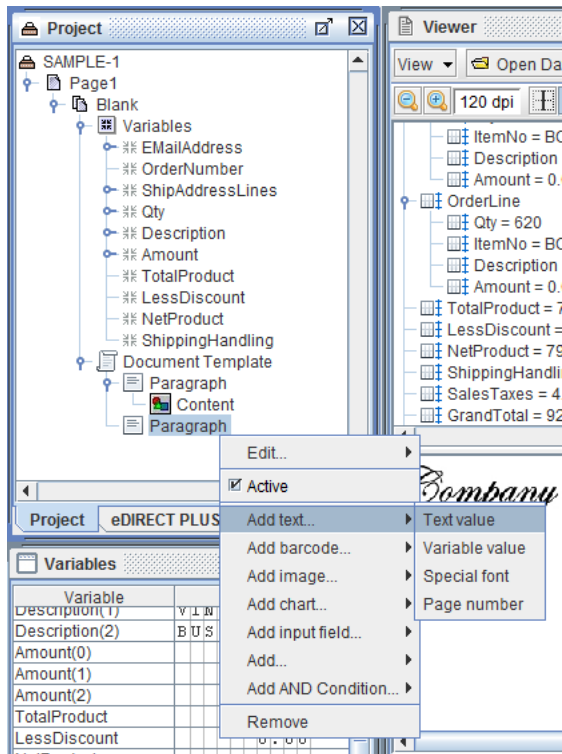
SECTION 2

8. The next element to be added is a text paragraph. To add a text paragraph, right click your Document Template and select *Add Document Component > Paragraph*.

Note: A new paragraph component could have been added to the existing paragraph that contains the image logo, but since padding had been set for this component a new component that does not have padding specified will be added.

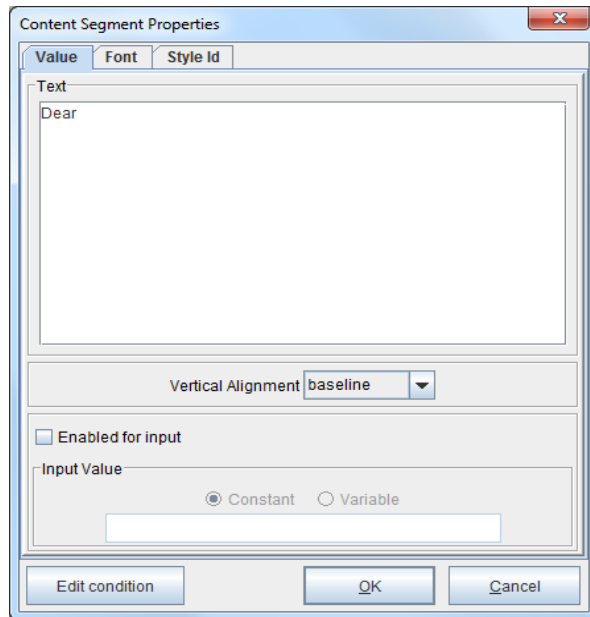


- Right click *Paragraph* and select *Add > Text Value*.



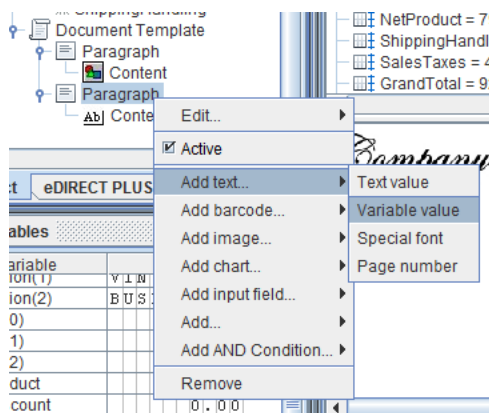
SECTION 2

10. The Text Properties dialog box will display. Enter your contents:

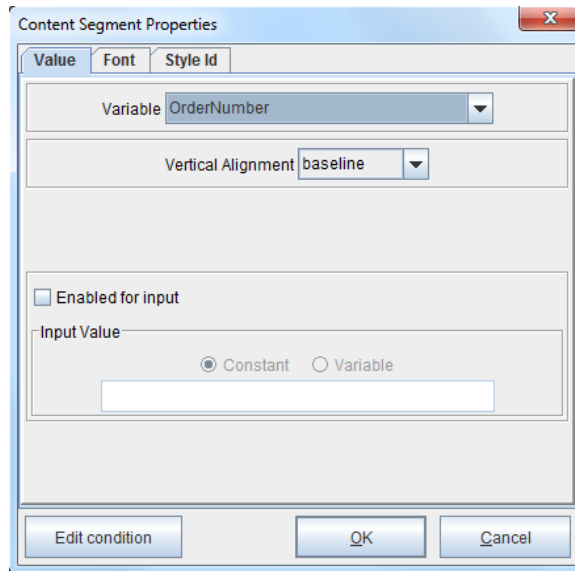


For this example we will add the clients name to the opening comments. To dynamically implement this new variable content segment to the opening comments, perform the following:

11. Select the *Paragraph* segment you would like to add the variable to, *right click*, and select *Add > Variable value*:



12. The Content Segment dialog box displays. Select the Variable you would like to add to your Paragraph element:

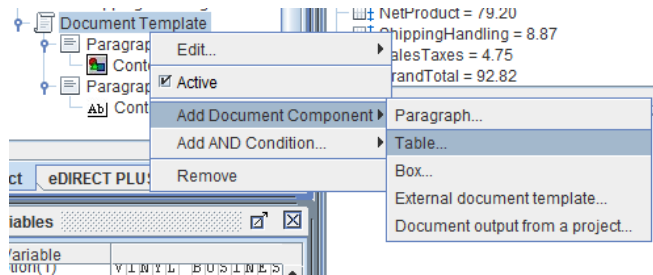


13. As your project develops you will come to have multiple content elements with variables or image segments.

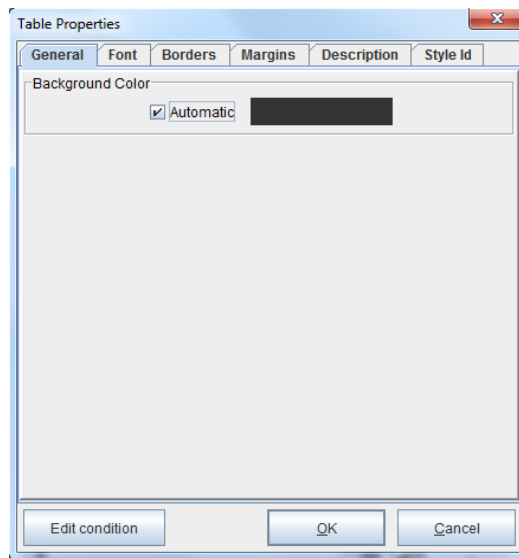
Creating a Table

To add a table to your Document Template:

1. From the *Document Template*, right click, and select *Add Document Component > Table*:



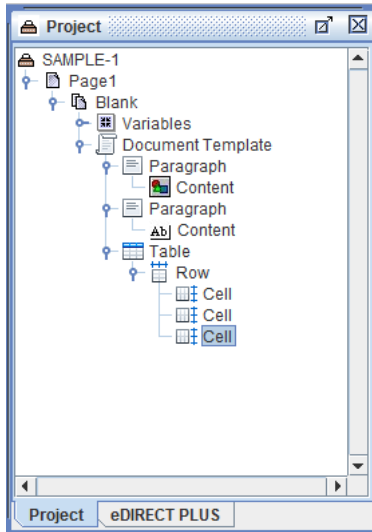
2. The Table Properties dialog box displays:



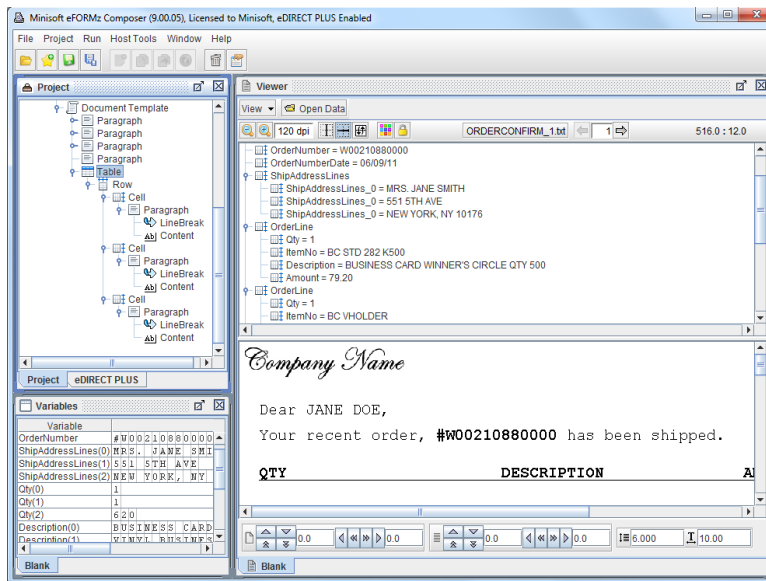
For this example, a table with 2 rows and 3 columns will be created. The second row will contain variables that format the specified data into columns. *Qty*, *Item Number*, and *Item Description* are the column headings. Create the first table row with these headings:

Creating a Document Template

1. From the Table element, *right click* and select *add row*. Once a row has been added create the three new cells that will contain your column headings:



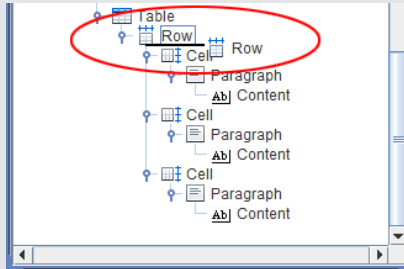
2. Once the cells have been created a *Paragraph* element will need to be added along with a *Content* Text which will allow you to create the headings, as shown below:



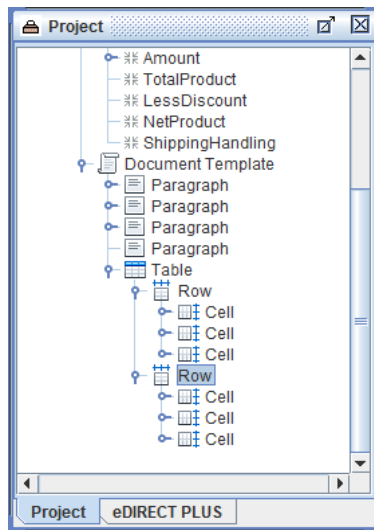
SECTION 2

3. To create the second row, simply copy the previous row as shown below. You can then remove the Content elements so that you can now implement the different variable calls.

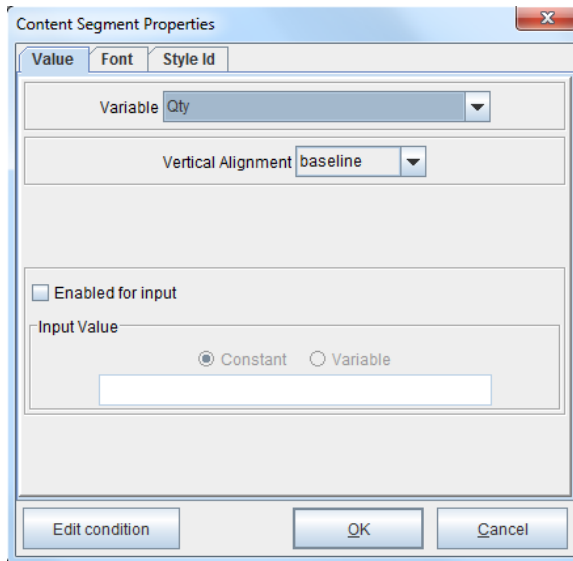
TIP: To create a copy of your previous row, select the row you would like to copy, hold down your CNTL key and then begin to drag the selection. Drag the selection and let go of your mouse and CNTL key. Dragging your selection will display a black horizontal line followed by two plus symbols. Once the below is seen, let go of your mouse:



4. Next, add each variable to their respective headings. From the *Paragraph* element, right click and select *Variable value*:



- When the Value Content Segment Properties dialog box displays, select the variable you would like to place in this column.

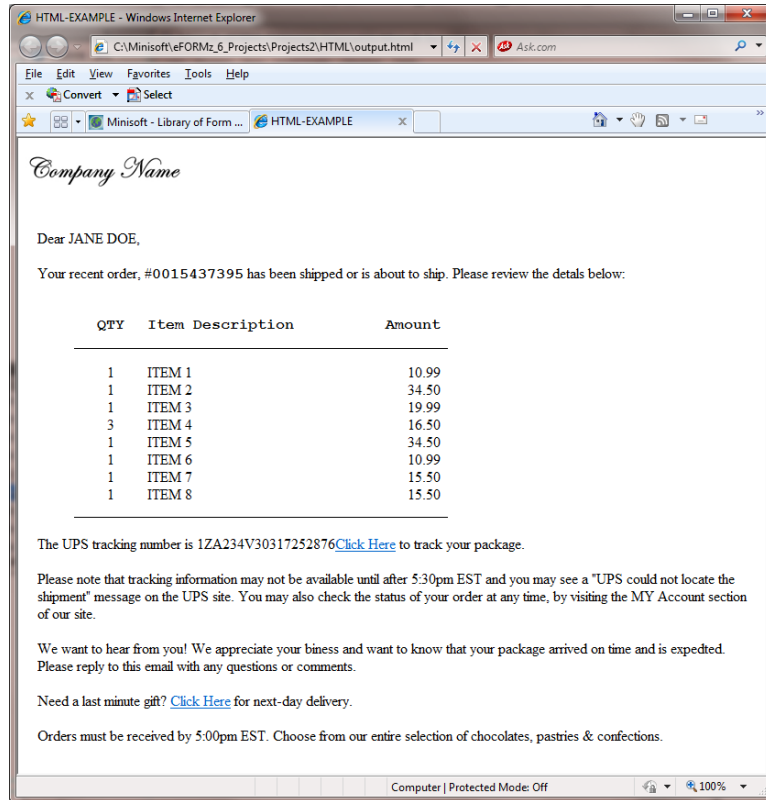


- Once your variables have been added they will immediately start appearing in your table:

1	ITEM 1	10.99
1	ITEM 2	34.50
1	ITEM 3	19.99
3	ITEM 4	16.50
1	ITEM 5	34.50
1	ITEM 6	10.99
1	ITEM 7	15.50
1	ITEM 8	15.50

SECTION 2

7. As your project begins to build you will see results like the following:

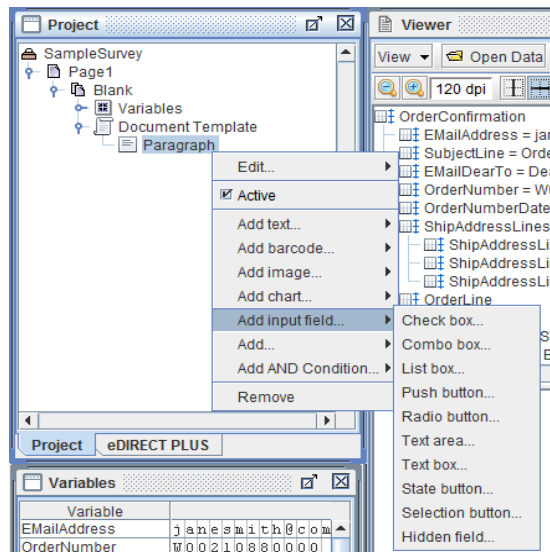


Advanced

Input Fields

Available input field types include:

- ◆ Check Box
- ◆ Combo Box
- ◆ List Box
- ◆ Push Button
- ◆ Radio Group
- ◆ Text Area
- ◆ Text Box
- ◆ State Button
- ◆ Selection Button
- ◆ Hidden Field



Check Box

General Tab

The screenshot shows a dialog box titled "CheckBox" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Options", "Font", and "Style Id". The "General" tab is selected. Inside the "General" tab, there is a "Name" field containing "CheckBox1". Below it are "Width" (700.0) and "Height" (175.0) fields. There is an "Opaque" checkbox which is unchecked. Below that is a "Background Color" field. There are three checkboxes: "Enabled" (checked), "Include in tab order" (checked), and "Event Enabled" (unchecked). Below these is a "Tip text" field. At the bottom of the dialog, there is a "Vertical Alignment" dropdown menu set to "baseline". At the very bottom of the dialog are three buttons: "Edit condition", "OK", and "Cancel".

Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enabled

(Default checked) When unchecked, the text box input field will become shaded.

Include in tab order

(Default checked) If kept checked, this option will include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

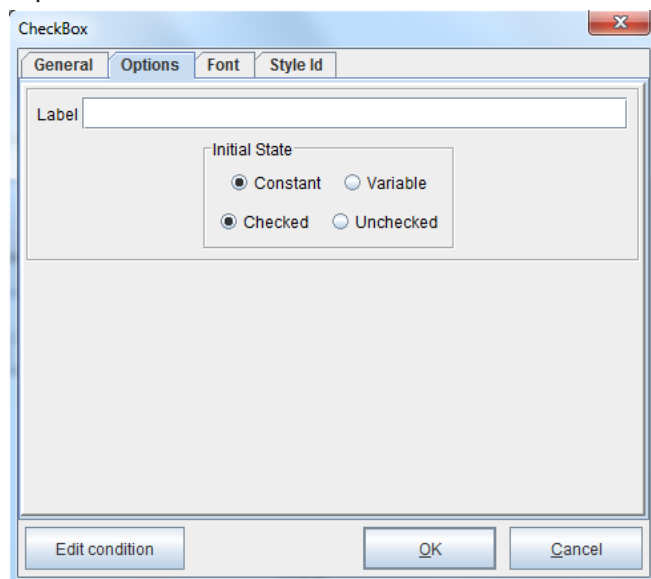
Tip Text

Include a text tip when the mouse scrolls over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Options Tab

**Label**

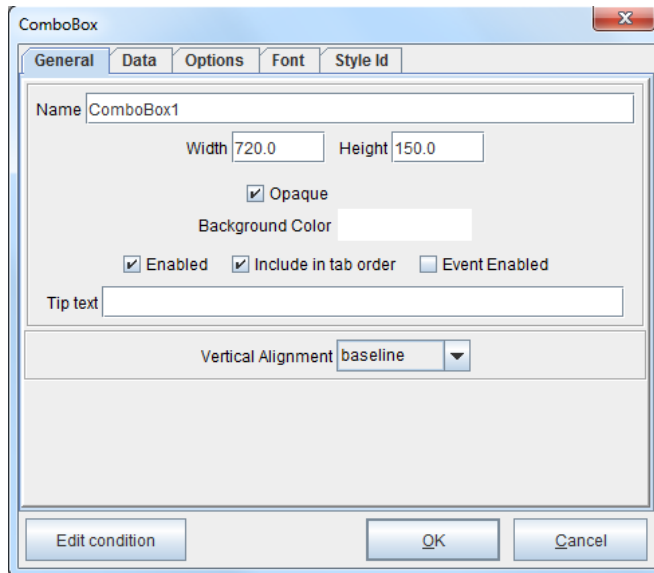
The text that will be displayed next to the check box.

Initial State

Indicates whether the check box is to appear checked or unchecked.

ComboBox

General Tab

**Name**

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enabled

(Default checked) When unchecked the text box input field will become shaded.

Include in tab order

Check this option if you would like to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Data Tab

The image shows a dialog box titled "ComboBox" with a close button (X) in the top right corner. It has five tabs: "General", "Data", "Options", "Font", and "Style Id". The "Data" tab is selected. Inside the dialog, there are two sections. The first section is labeled "Values" and contains two radio buttons: "Constant" (which is selected) and "Variable". Below these radio buttons is a large, empty rectangular text area. The second section is labeled "Value" and also contains two radio buttons: "Constant" (selected) and "Variable". Below these radio buttons is a smaller, empty rectangular text area. At the bottom of the dialog, there are three buttons: "Edit condition", "OK", and "Cancel".

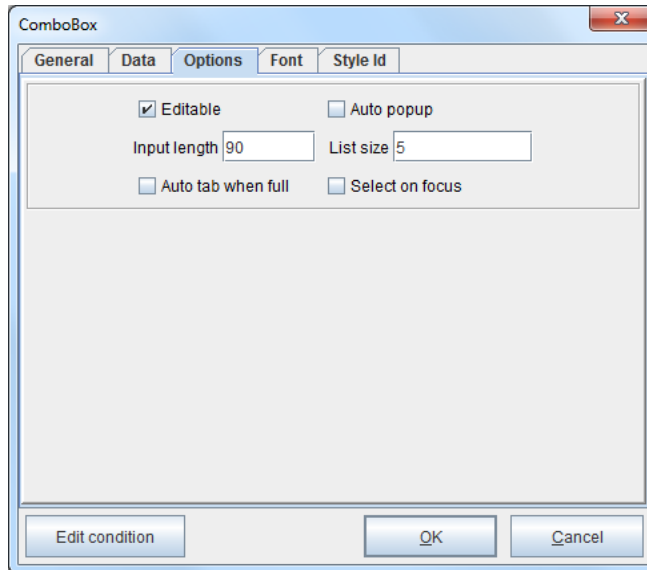
Values

List of data items that can be selected from a drop-down list.

Value

The text that will initially be displayed in the combo box field.

Options Tab

***Editable***

Enables the user to enter a value into the combo box field to perform a search. Note that options must be in alphabetical order.

Auto Popup

Displays the list of values to choose from in the combo box. Note that options must be in alphabetical order.

Input Length

Limits the number of characters displayed in the combo box after an item has been selected.

List Size

Limits the number of items displayed in the combo box.

Auto tab when full

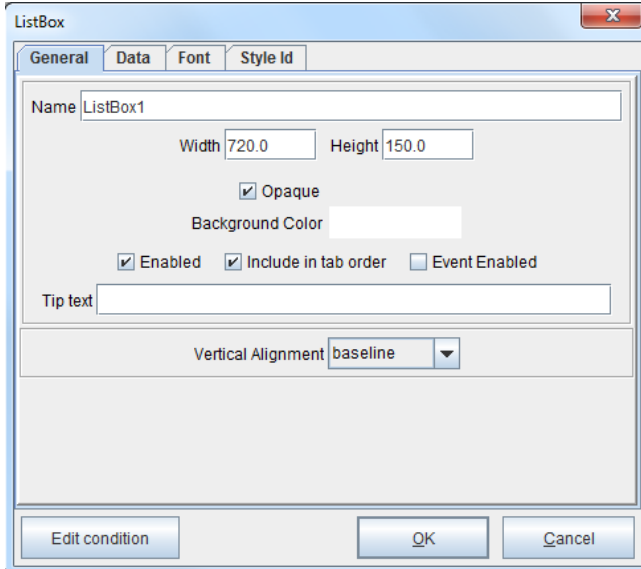
Once the combo box has reached the specified limits, an auto tab to the next item will be issued.

Select on focus

Causes the text in the field to be selected (highlighted) when a field gets the focus.

ListBox

General Tab



The screenshot shows the 'General Tab' of the 'ListBox' dialog box. The dialog has a title bar with 'ListBox' and a close button. Below the title bar are four tabs: 'General', 'Data', 'Font', and 'Style Id'. The 'General' tab is selected. The 'Name' field contains 'ListBox1'. The 'Width' field is set to '720.0' and the 'Height' field is set to '150.0'. There is a checked checkbox for 'Opaque'. The 'Background Color' field is empty. There are three checkboxes: 'Enabled' (checked), 'Include in tab order' (checked), and 'Event Enabled' (unchecked). The 'Tip text' field is empty. The 'Vertical Alignment' dropdown menu is set to 'baseline'. At the bottom of the dialog are three buttons: 'Edit condition', 'OK', and 'Cancel'.

Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

SECTION 3

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Data Tab

The screenshot shows a dialog box titled "ListBox" with four tabs: "General", "Data", "Font", and "Style Id". The "Data" tab is active. It contains two columns of lists: "Choices" and "Values". The "Choices" list contains WA, CA, ID, and OR. The "Values" list contains Washington, California, Idaho, and Oregon. Below these lists is a "Value" list containing Washington, California, Idaho, and Oregon. To the right of the "Value" list is a checked checkbox labeled "Single selection" and a text box labeled "Maximum Output Lines" with the value "1". At the bottom of the dialog are three buttons: "Edit condition", "OK", and "Cancel".

Choices

List of items by which the user can select from.

Single Selection

Check box permitting the selection of only one item from the list of choices.

Values

Data placed in document corresponding to the user selected index(es). Note, if there are no items in "Values" then the items in "Choices" is used.

Value

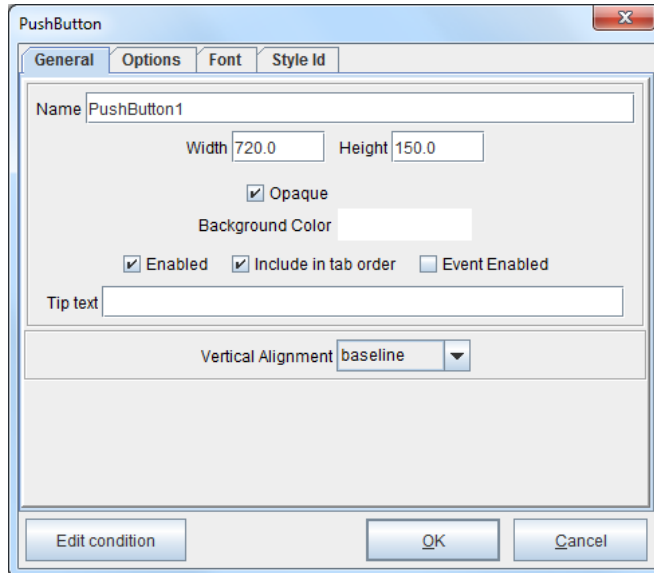
Allows one to specify the initial selection(s) of the ListBox field.

Max Output Lines

Set the number of line the value of the input field will take when in .efd format and used as a data file.

PushButton

General Tab



The image shows a dialog box titled "PushButton" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Options", "Font", and "Style Id". The "General" tab is selected. Inside the dialog, there is a "Name" field containing "PushButton1". Below it are "Width" and "Height" fields, both containing "720.0" and "150.0" respectively. There is a checked checkbox for "Opaque" and a "Background Color" field with a white color swatch. Below these are three checkboxes: "Enabled" (checked), "Include in tab order" (checked), and "Event Enabled" (unchecked). A "Tip text" field is empty. At the bottom, there is a "Vertical Alignment" dropdown menu set to "baseline". At the very bottom of the dialog are three buttons: "Edit condition", "OK", and "Cancel".

Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

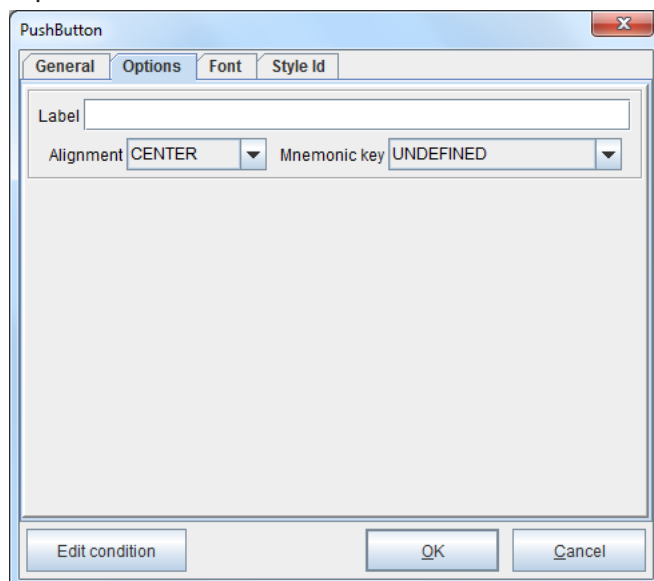
Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Options Tab

**Label**

Information displayed in the input field.

Alignment

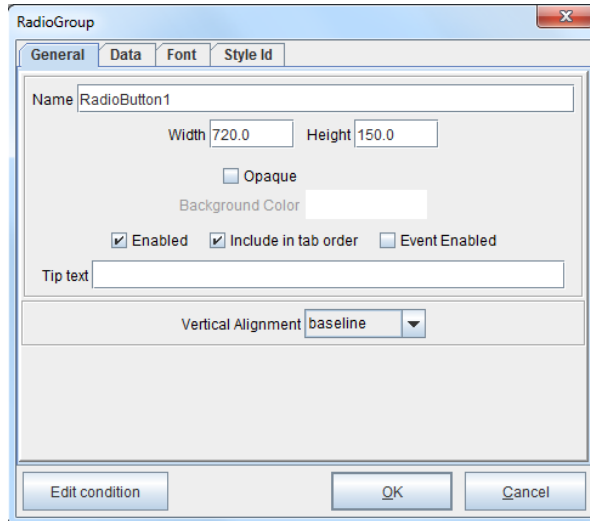
Option to align the label fields (left, right, or center).

Mnemonic key

Value associated with a drop down list of pre-defined instructions.

RadioGroup

General Tab



Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the “Background Color” property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Data Tab

The screenshot shows a dialog box titled "RadioGroup" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Data", "Font", and "Style Id". The "Data" tab is selected. Inside the dialog, there are two columns: "Labels" and "Values". The "Labels" column contains a text box with the text "WA", "CA", and "OR" listed vertically. The "Values" column contains an empty text box. Below these columns, there is a "Value" section with two radio buttons: "Constant" (selected) and "Variable". Below the radio buttons is a dropdown menu with "WA" selected. Below the dropdown menu is an "Orientation" dropdown menu with "Vertical" selected. At the bottom of the dialog, there are three buttons: "Edit condition", "OK", and "Cancel".

Labels

List of data items by which the user can select from.

Values

Representation of the data items corresponding to the choice(s) selected.

Value

Select a value from the Value list that will be the default selected item.

Orientation

Displays choices vertically or horizontally across the form.

Text Area

General Tab

The screenshot shows a dialog box titled 'TextArea' with a close button (X) in the top right corner. The dialog has four tabs: 'General', 'Data', 'Font', and 'Style Id', with 'General' selected. The 'General' tab contains the following controls:

- Name:** A text field containing 'TextArea1'.
- Width:** A text field containing '720.0'.
- Height:** A text field containing '150.0'.
- Opaque:** A checked checkbox.
- Background Color:** A color selection field.
- Enabled:** A checked checkbox.
- Include in tab order:** A checked checkbox.
- Event Enabled:** An unchecked checkbox.
- Tip text:** An empty text field.
- Vertical Alignment:** A dropdown menu set to 'baseline'.

At the bottom of the dialog are three buttons: 'Edit condition', 'OK', and 'Cancel'.

Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Data Tab

Value

Text can be entered in this field which will be displayed when the form is first opened.

Select on focus

Causes the text in the field to be selected (highlighted) when a field gets the focus.

Display with border

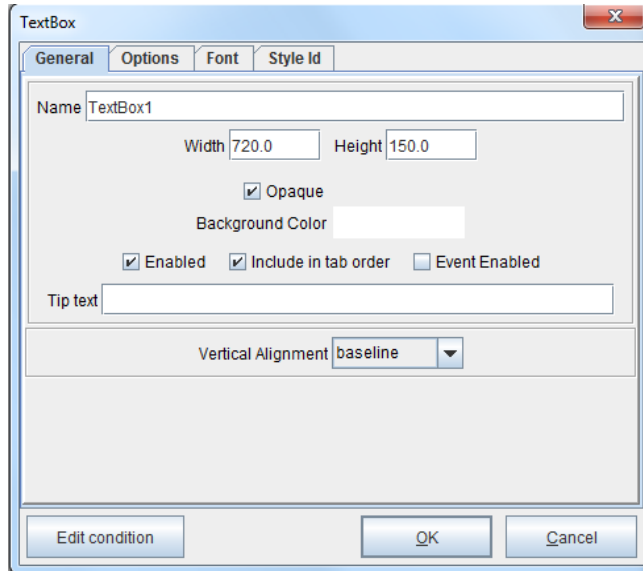
Includes a border around the input field.

Max. Output Line

Set the number of lines the value of the input field will take when in .efd format and used as a data file.

Text Box

General Tab



The image shows a dialog box titled "TextBox" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Options", "Font", and "Style Id". The "General" tab is selected. Inside the dialog, there is a "Name" field containing "TextBox1". Below it are "Width" and "Height" fields, both containing "720.0" and "150.0" respectively. There is a checked checkbox for "Opaque" and a "Background Color" field with a white color swatch. Below these are three checkboxes: "Enabled" (checked), "Include in tab order" (checked), and "Event Enabled" (unchecked). There is a "Tip text" field. At the bottom, there is a "Vertical Alignment" dropdown menu set to "baseline". At the very bottom of the dialog are three buttons: "Edit condition", "OK", and "Cancel".

Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Options Tab

The screenshot shows the 'Options' tab of a 'TextBox' dialog. The 'Value' field is set to 'Constant'. The 'Input length' and 'Size' are both set to 0. The 'Mode' is set to 'Normal'. The 'Display with border' checkbox is checked, while 'Auto tab when full' and 'Select on focus' are unchecked. The 'Edit condition', 'OK', and 'Cancel' buttons are visible at the bottom.

Value

Enter a value that will appear in the input field when it is viewed in eReader.

Input Length

Character length of the input field text box.

SECTION 3

Mode

(Default Normal) Options available are:

Normal - Allows you to enter any character into the value field when a eFORMz document file is produced.

Secure - Characters entered into the text box will appear as asterisks (****).

Display Only - Displays only the value entered in the Value field.

Auto Tab when full

When a TextBox is full with the number of characters specified in the Input Length field an auto tab will be issued to the next input field.

Select on Focus

Causes the text in the field to be selected (highlighted) when a field gets the focus.

Display with Border

Includes a border around the text box fields.

State Button

General Tab

The screenshot shows a dialog box titled "StateInput" with a close button in the top right corner. It has four tabs: "General", "Options", "Font", and "Style Id". The "General" tab is selected. Inside the dialog, there is a "Name" field containing "StateInput1". Below it are "Width" and "Height" fields with values "720.0" and "150.0" respectively. There is an "Opaque" checkbox which is unchecked. Below that is a "Background Color" field which is empty. There are three checkboxes: "Enabled" (checked), "Include in tab order" (checked), and "Event Enabled" (unchecked). Below these is a "Tip text" field which is empty. At the bottom of the dialog area is a "Vertical Alignment" dropdown menu set to "baseline". At the very bottom of the dialog are three buttons: "Edit condition", "OK", and "Cancel".

Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

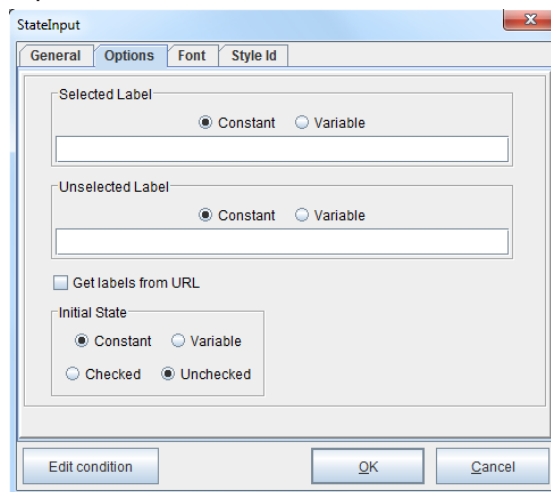
Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Options Tab



Selected Label

The text that will be displayed as the selected label.

Unselected Label

The text that will be displayed as the unselected label.

Get Labels from URL

(Default unchecked) When checked, retrieves labels from a URL.

Initial State

Indicates whether the check box is to appear checked or unchecked.

Selection Button

General Tab

The screenshot shows a dialog box titled "SelectedInput" with a close button (X) in the top right corner. It has four tabs: "General", "Options", "Font", and "Style Id". The "General" tab is selected. Inside the dialog, there are several input fields and checkboxes:

- Name:** A text box containing "SelectInput1".
- Width:** A text box containing "720.0".
- Height:** A text box containing "150.0".
- Opaque:** A checkbox that is unchecked.
- Background Color:** A color selection box that is currently empty.
- Enabled:** A checked checkbox.
- Include in tab order:** A checked checkbox.
- Event Enabled:** An unchecked checkbox.
- Tip text:** A text box that is empty.
- Vertical Alignment:** A dropdown menu set to "baseline".

At the bottom of the dialog, there are three buttons: "Edit condition", "OK", and "Cancel".

Name

Input data field name.

Width

Text box width in decipoints.

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the "Background Color" property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

SECTION 3

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

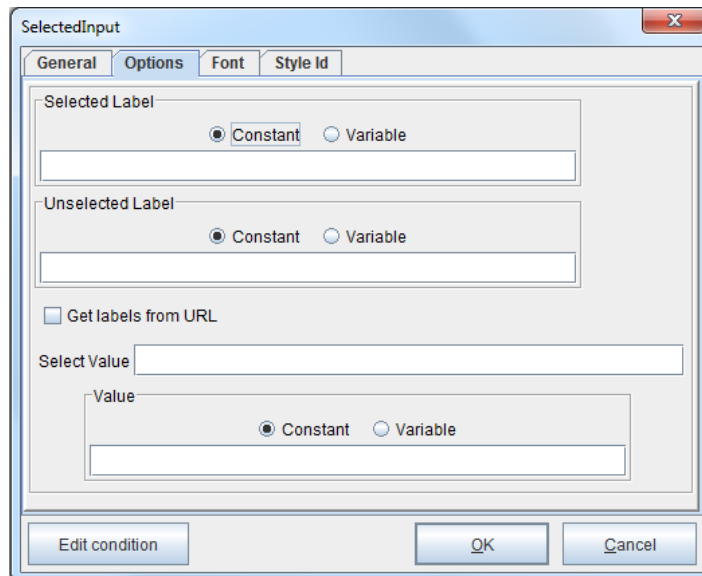
Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Options Tab



The screenshot shows a dialog box titled "SelectedInput" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Options", "Font", and "Style Id". The "Options" tab is selected. Inside the dialog, there are three main sections:

- Selected Label:** A text input field with two radio buttons: "Constant" (selected) and "Variable".
- Unselected Label:** A text input field with two radio buttons: "Constant" (selected) and "Variable".
- Get labels from URL:** A checkbox that is currently unchecked.

Below these sections, there is a "Select Value" text input field and a "Value" section with two radio buttons: "Constant" (selected) and "Variable". At the bottom of the dialog, there are three buttons: "Edit condition", "OK", and "Cancel".

Selected Label

The text that will be displayed as the selected label.

Unselected Label

The text that will be displayed as the unselected label.

Get Labels from URL

(Default unchecked) When checked, retrieves labels from a URL.

Initial State

Indicates whether the check box is to appear checked or unchecked.

Select Value

The visible value for the label.

Value

The value for the label.

Hidden Field

General Tab

The screenshot shows a dialog box titled "HiddenField" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Options", "Font", and "Style Id". The "General" tab is selected. Inside the dialog, there is a text field for "Name" containing "HiddenField1". Below it are two text boxes for "Width" (720.0) and "Height" (150.0). There is a checked checkbox for "Opaque" and a "Background Color" selection box. Below these are three checkboxes: "Enabled" (checked), "Include in tab order" (checked), and "Event Enabled" (unchecked). There is a "Tip text" text box. At the bottom of the dialog area is a "Vertical Alignment" dropdown menu set to "baseline". At the bottom of the dialog are three buttons: "Edit condition", "OK", and "Cancel".

Name

Input data field name.

Width

Text box width in decipoints.

SECTION 3

Height

Text box height in decipoints.

Opaque

If set, the control will have an opaque background the color of the “Background Color” property, otherwise, the control will be transparent.

Background Color

Text box background color.

Enable

(Default checked) When unchecked the text box input field will become shaded.

Include in tab order

Check this option to include the text box in a tab order determined by the order the fields are defined in the project file.

Event Enabled

(Default unchecked) If checked, the field is enabled for the creation of change-based rules.

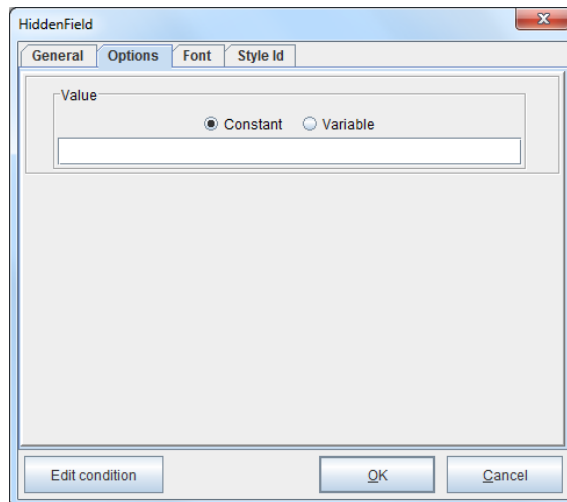
Tip Text

Include a text tip when the mouse scroll over the text box input field.

Vertical Alignment

Options include baseline, top, middle, and bottom.

Options Tab



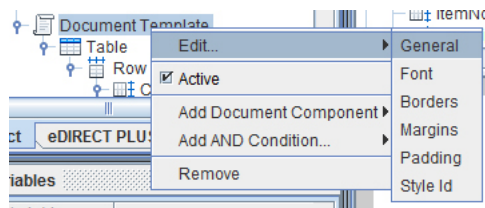
Value

Select a value from the Value list that will be the default selected item.

Cascading Style Sheets (CSS)

Often, transactional emails make use of Cascading Style Sheets (CSS), which define how to display HTML elements. This ensures brand consistency, as the look of any event-triggered message will reflect the company identity associated with the website. eDIRECT PLUS lets businesses create documents fully furnished with their style sheets by referencing them in the Document Template.

1. To reference a style sheet, right click the Document Template, highlight Edit and choose the General option.

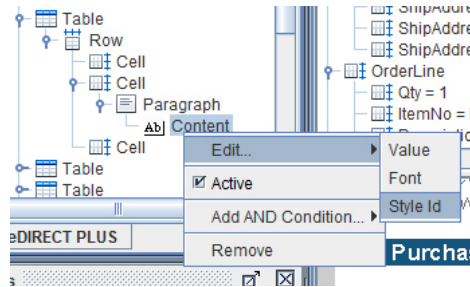


2. From the General tab, enter the URL for the desired style sheet in the CSS URL field. Click OK to proceed.

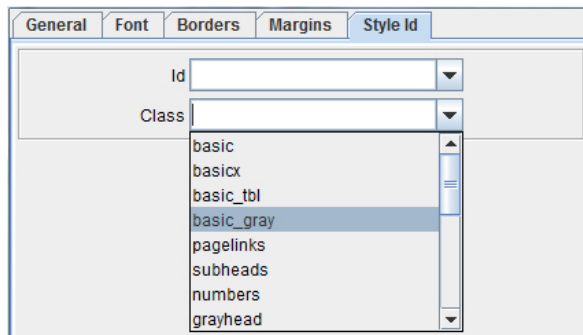


NOTE: The Output Style drop-down field contains two options: Implicit and Explicit. The Implicit option allows a style to be applied to all elements of matching type, while the Explicit option restricts a style only to individually specified types.

- Right click a component or element and select Edit > Style ID.



- Select the appropriate Id or Class from their respective drop-down menus. Click OK to continue.



- The changes will display in the Form and Data Viewer.

Before:

Purchasing Information

After:

Purchasing Information

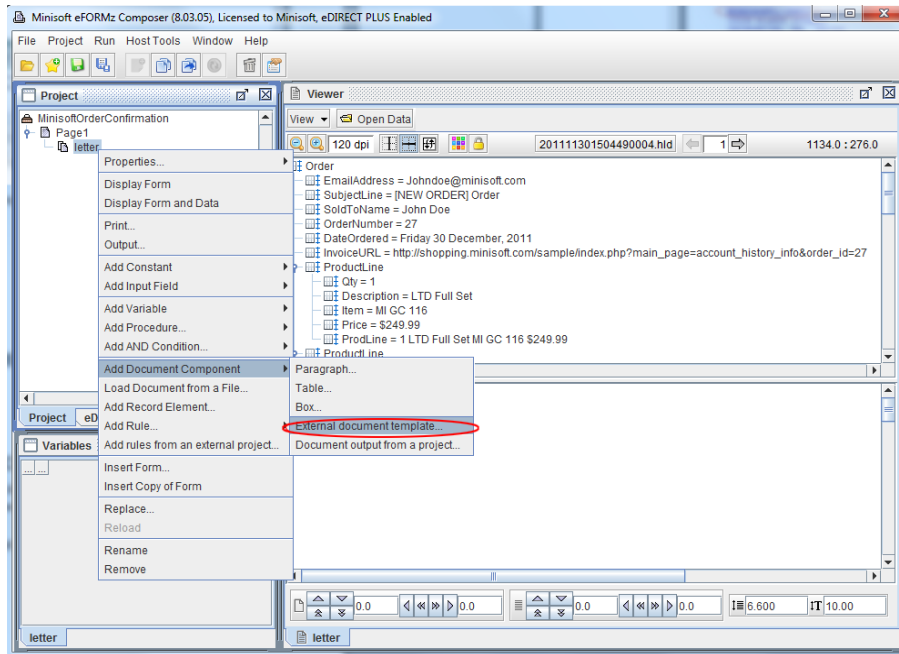
CSS `basic_gray` class being referenced:

```
.basic_gray { color: #999999; font-size: 10pt; line-height: 12pt; font-family: Arial, Helvetica, Geneva, Swiss, SunSans-Regular; text-align: center }
```

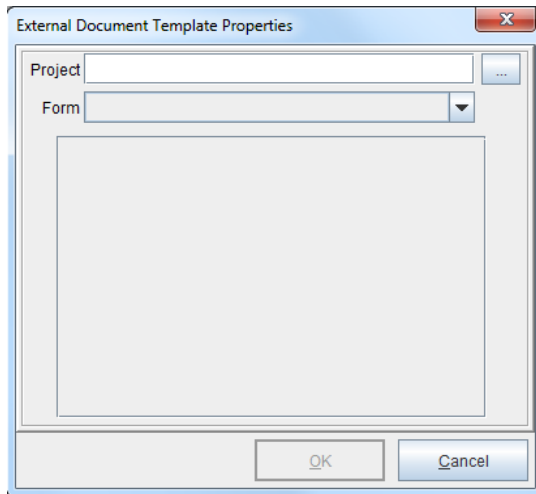
External Document Template

The eFORMz user may add a document template from an existing project file. The steps for creating a new project do not vary, but building the project requires less time.

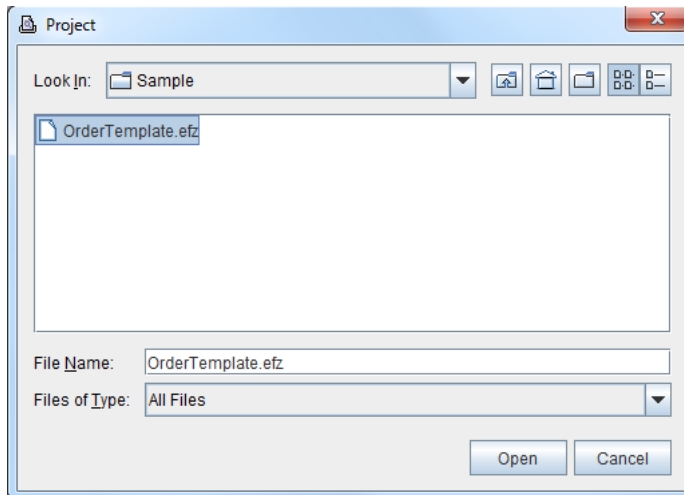
Once the form and data have been merged into an eFORMz Project, right click the form and select Add Document Component > External document template.



1. The External Document Template Properties dialog box will display. Select the browse button in the project field to call an external document template from an eFORMz project file.

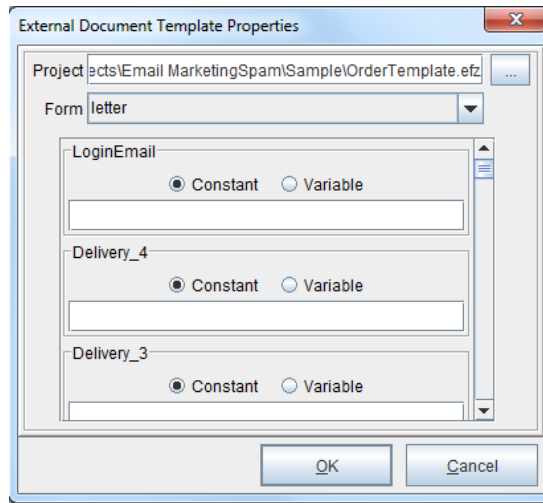


2. Locate and open the appropriate project.

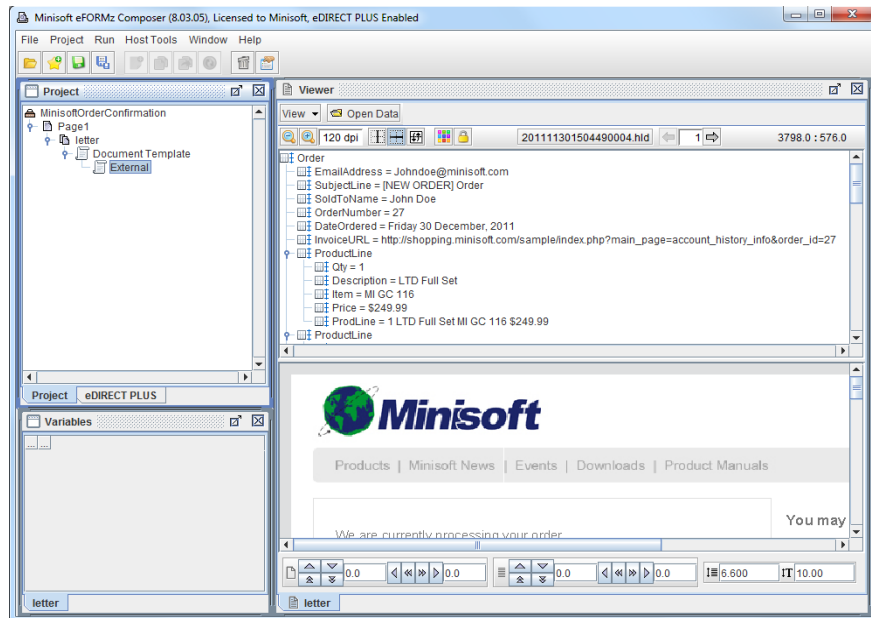


SECTION 3

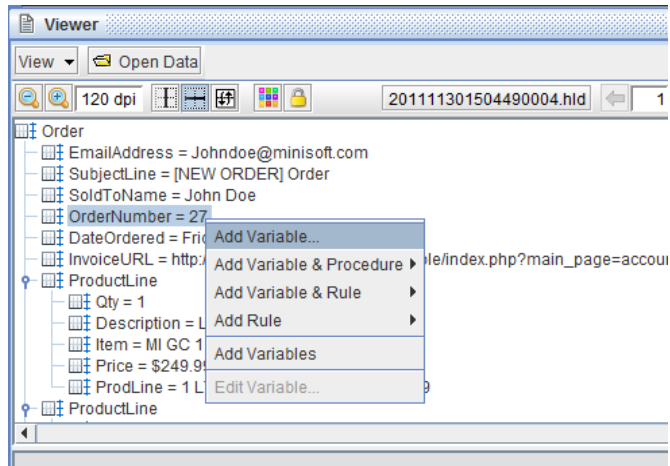
3. The project file and corresponding form(s) will display. Click OK to continue.



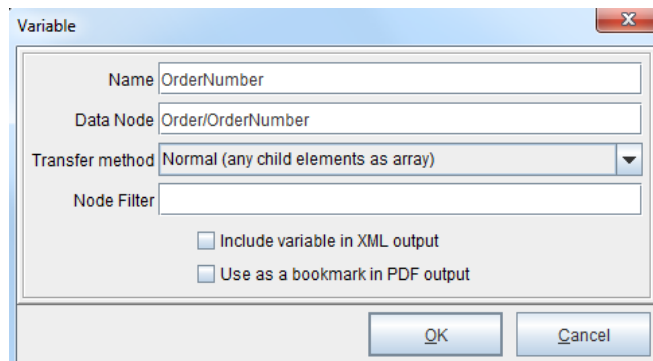
4. The external document template will have been successfully referenced.



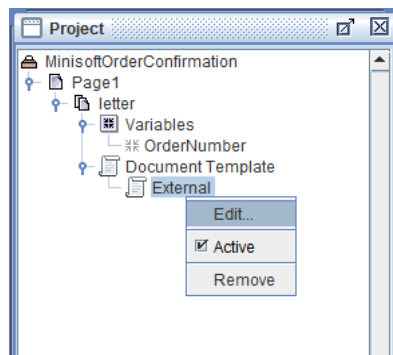
- To add variable values to the external document template, create a variable by right clicking a string of characters and selecting Add variable.



- Click OK.

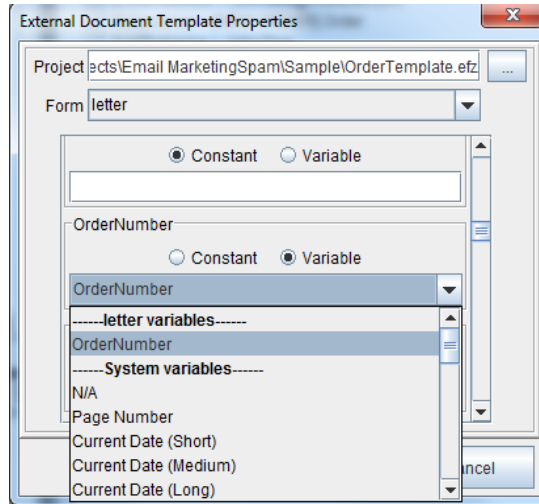


- Right click the External Document Template and select the Edit option.

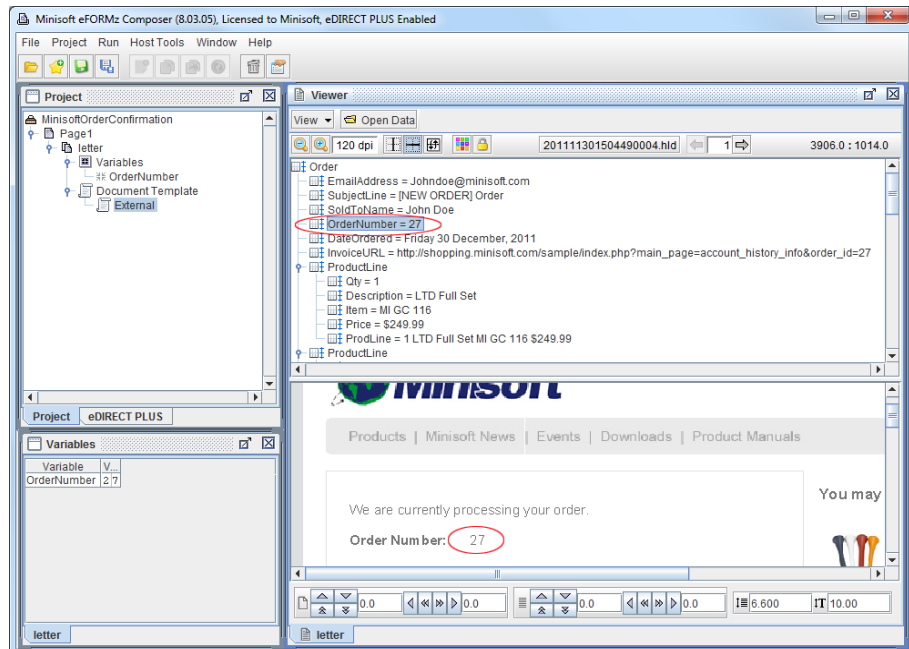


SECTION 3

- Match the particular variable value.



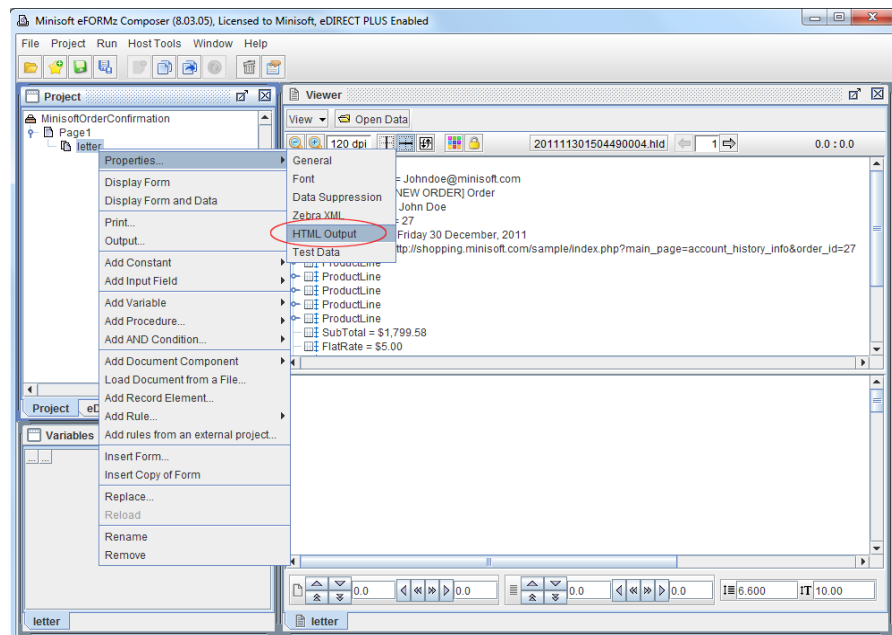
- The variable will display based upon its placement in the external document template being referenced.



External HTML File

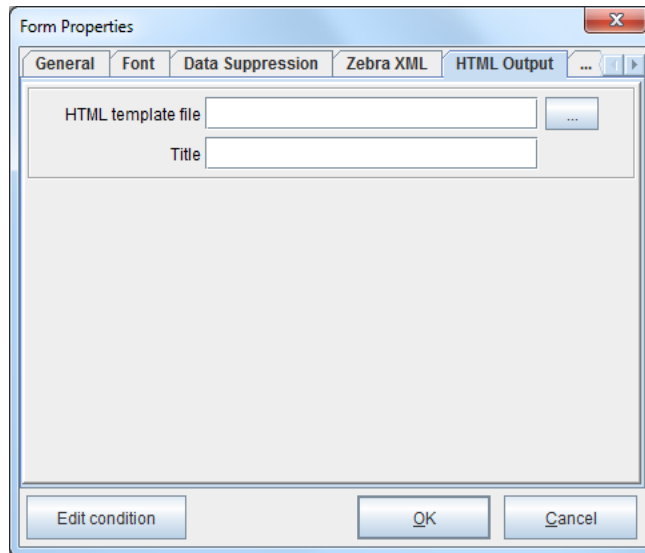
eFORMz users are able to reference HTML files as templates for HTML output. The HTML template file is configured with the HTML Output tab in the Form Properties. Document components from the top level of a document template are merged with the HTML template by "Id," matching the "ID=" parameter on a "<TABLE>," "<P>," or "<DIV>," tag in the HTML template file. The template provides fixed information such as logos, while the document components in a document template fill in the dynamic information.

To reference an external HTML template, navigate to the HTML Output tab in the Form Properties.

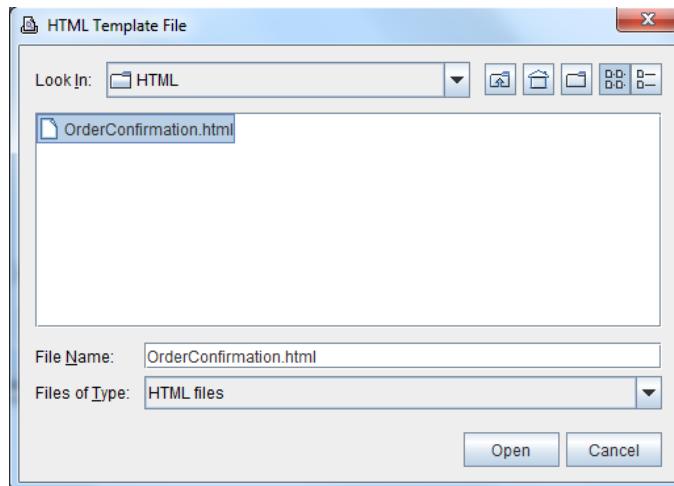


SECTION 3

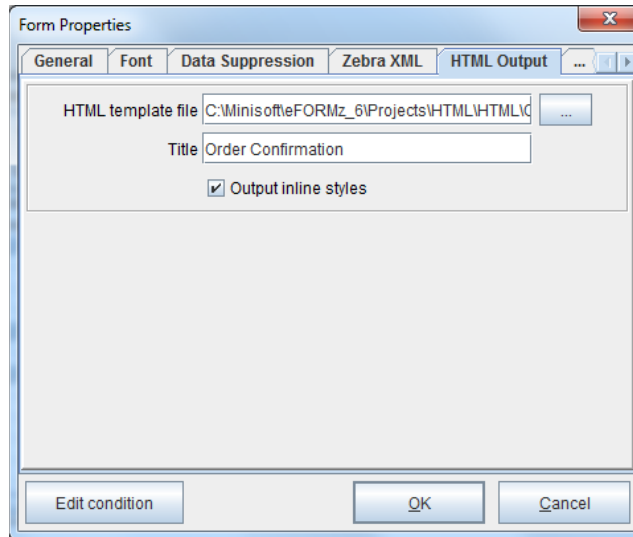
1. Select the browse button for the HTML template file field.



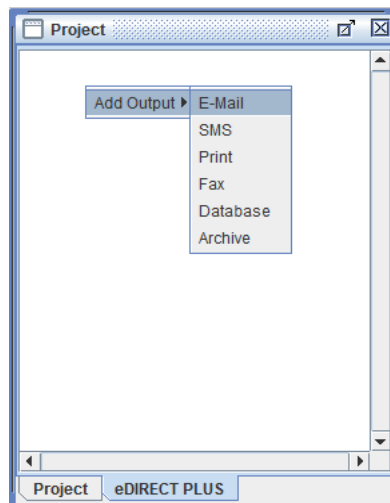
2. Locate and open the HTML file to import.



3. Enter a value in the Title field and click OK to proceed. If the Output inline styles box is unchecked, inline styles will not be outputted.

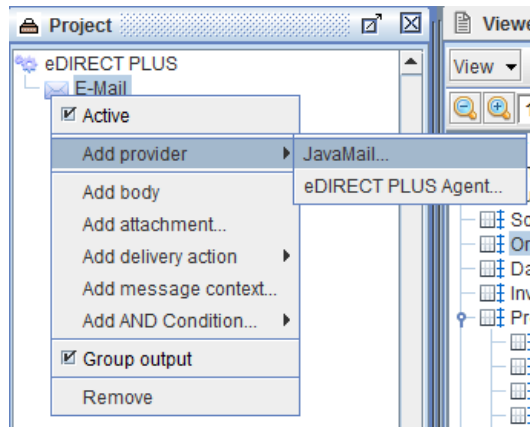


4. To test the file, switch to the eDIRECT (or eDIRECT PLUS) tab. Right click in the Project window and select Add Output > E-Mail.

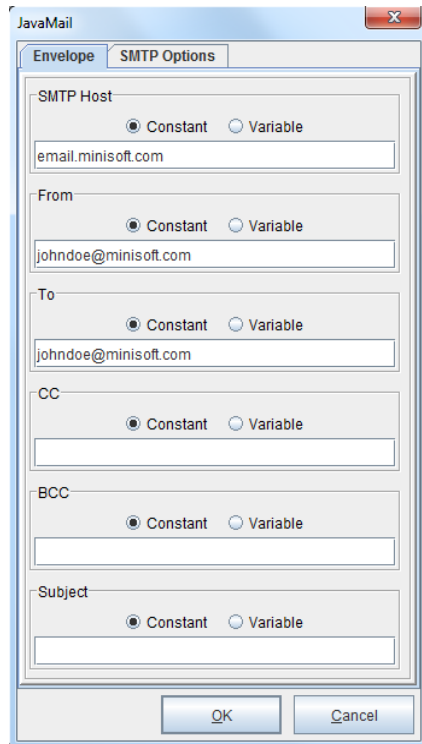


SECTION 3

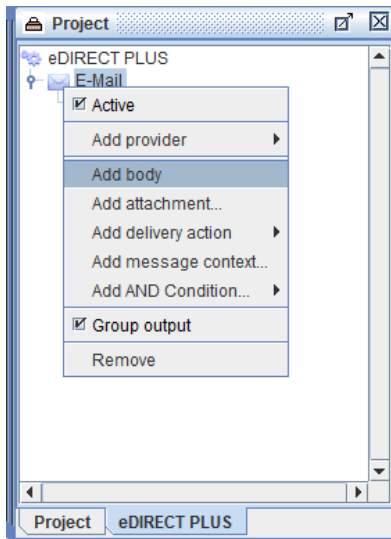
5. Right click the E-Mail and select Add provider > JavaMail.



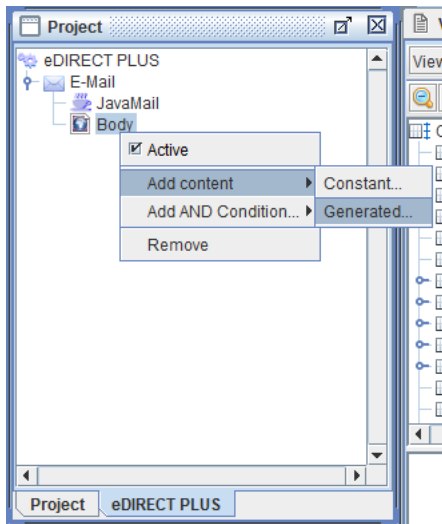
6. Enter the appropriate values for the relevant fields.



7. Right click the E-Mail and choose the Add body option.

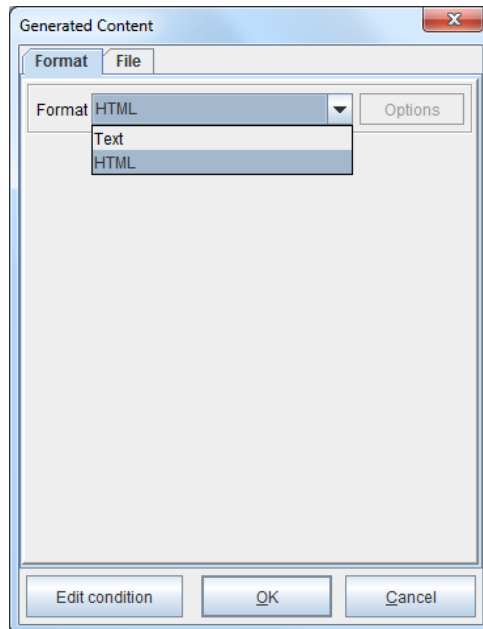


8. Right click the Body and select Add content > Generated.

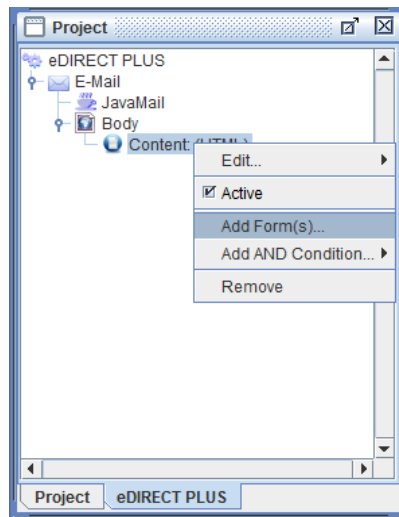


SECTION 3

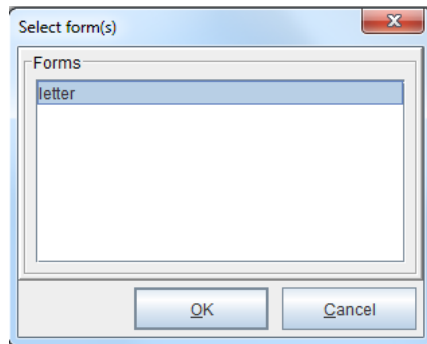
9. Choose the HTML format option.



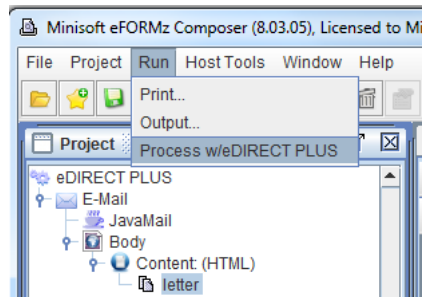
10. Right click the Content and select Add Form(s).



11. Pick the form that will be sent.

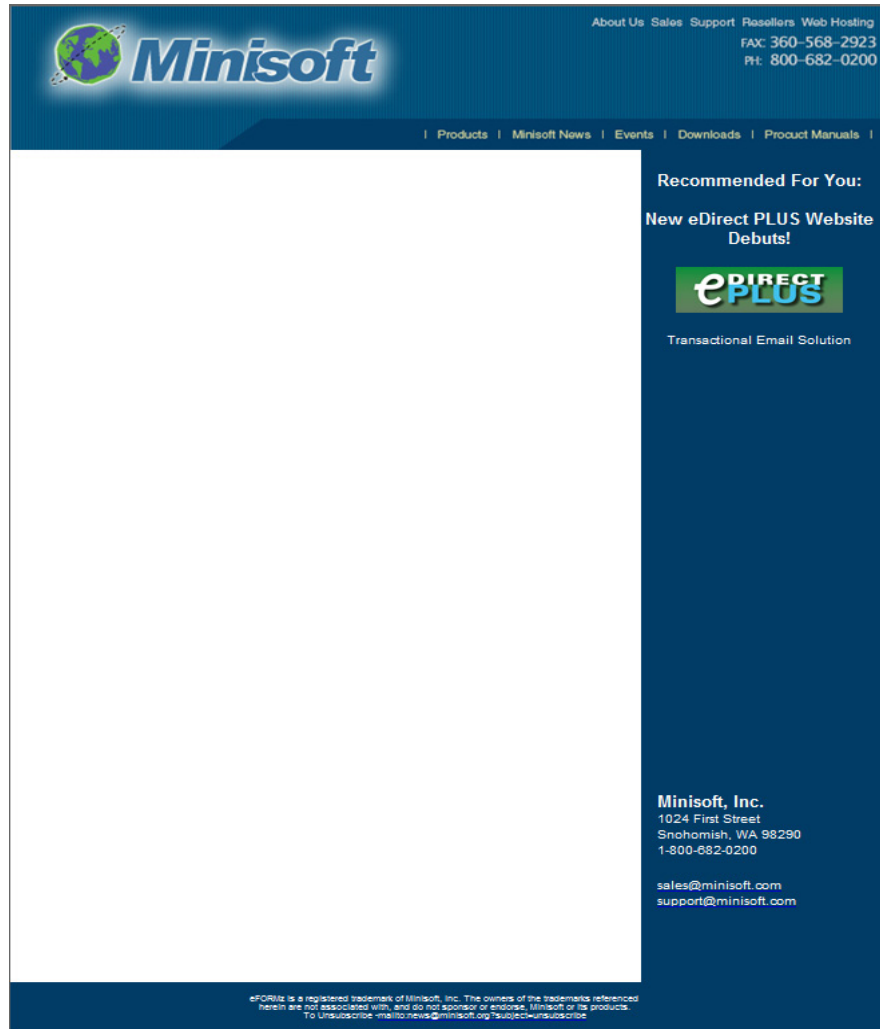


12. Navigate to the eFORMz Main Menu and select Run > Process w/eDIRECT (or eDIRECT PLUS).



SECTION 3

- The HTML template file will be sent to the specified email address as an HTML email. With the external template reference, the document template in eFORMz can now be used to build the dynamic form elements.



Language Substitution

Within a Document Template, a single report can be utilized for multiple languages. Using Declared Constants and Keyed Declared Constants, different languages can be substituted automatically in document components.

Use eFORMzCfg_Translations.xml and update the values accordingly. A sample configuration is shown below:

```
<?xml version="1.0" encoding="UTF-8"?>
<eFORMzConfiguration>
  <Constant Name="OrderNbr_EN">
    <![CDATA[Order Number]]>
  </Constant>
  <Constant Name="OrderNbr_FR">
    <![CDATA[French Order Nbr]]>
  </Constant>
  <Constant Name="OrderNbr_GE">
    <![CDATA[German Order Number]]>
  </Constant>
  <KeyedConstant Name="OrderNbrLabels">
    <Entry Key="EN">
      <![CDATA[Order Number]]>
    </Entry>
    <Entry Key="FR">
      <![CDATA[French Order Nbr]]>
    </Entry>
    <Entry Key="GE">
      <![CDATA[German Order Number]]>
    </Entry>
  </KeyedConstant>
</eFORMzConfiguration>
```

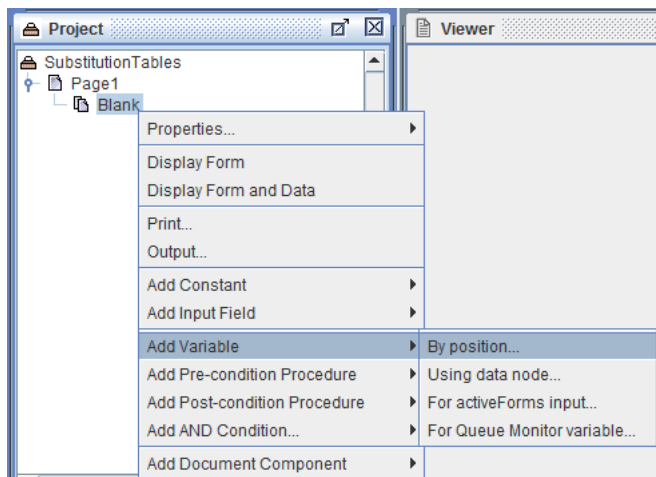
SECTION 3

In the eFORMzCfg_User.xml file, enter the eFORMzCfg_Translations.xml file name and its directory:

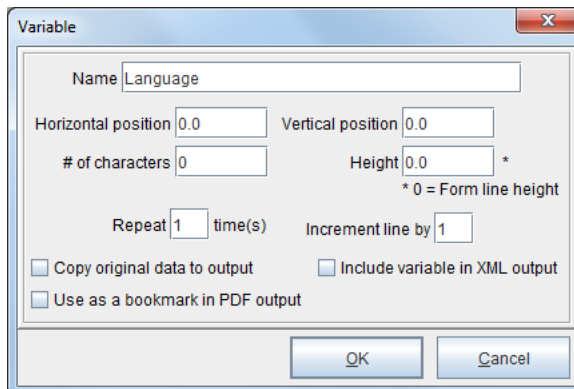
```
<File Name="\Projects\Documentation\eFORMzCfg_Translations.xml"/>
```

From there, a report built with the Document Template can be configured for language substitution. A sample report is shown below using three different methods.

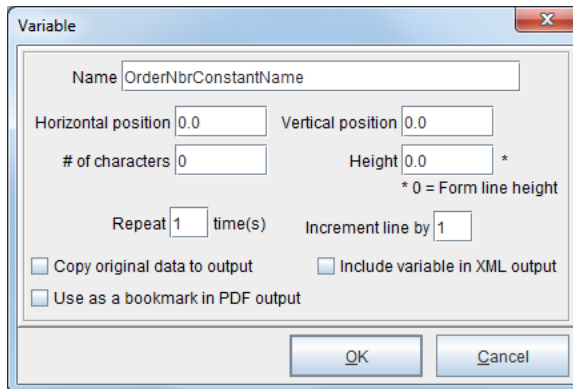
1. First, create a Variable by right-clicking the Form and selecting Add Variable > By position.



2. Enter 'Language' in the Name field and select OK.



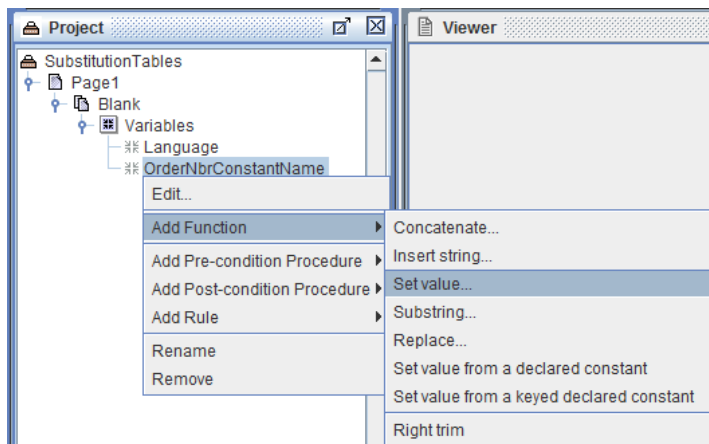
3. Add another Variable by position. Enter 'OrderNbrConstantName' in the Name field.



The image shows a 'Variable' dialog box with the following fields and options:

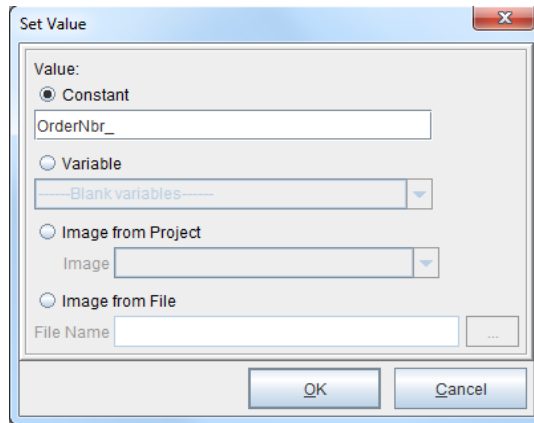
- Name: OrderNbrConstantName
- Horizontal position: 0.0
- Vertical position: 0.0
- # of characters: 0
- Height: 0.0 * (with a note: * 0 = Form line height)
- Repeat: 1 time(s)
- Increment line by: 1
- Copy original data to output
- Include variable in XML output
- Use as a bookmark in PDF output
- Buttons: OK, Cancel

4. Right click the Variable and select Add Function > Set Value.

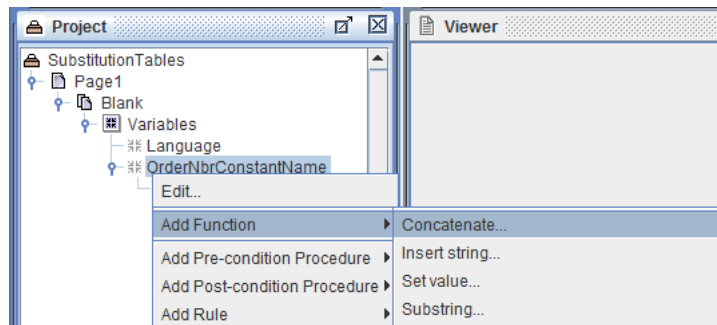


SECTION 3

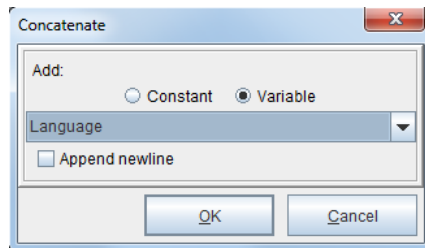
5. Enter a Constant value of 'OrderNbr_' and select OK.



6. Right click the Variable and select Add Function > Concatenate.



7. Select the Language Variable.



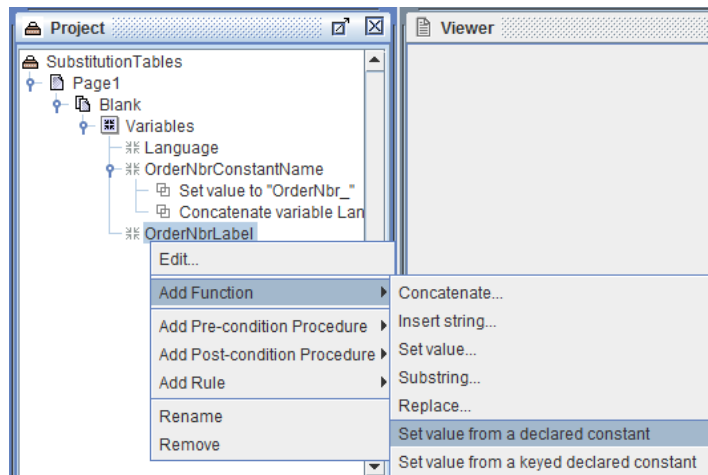
Language Substitution Using a Set Value from a Declared Constant Function

1. Add another Variable by position and enter the name 'OrderNbrLabel.'

The 'Variable' dialog box is shown with the following settings:

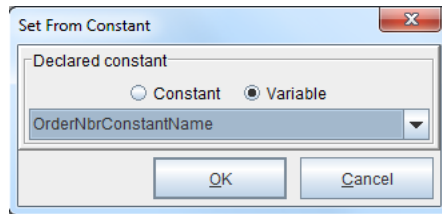
- Name: OrderNbrLabel
- Horizontal position: 0.0
- Vertical position: 0.0
- # of characters: 0
- Height: 0.0 *
- Repeat: 1 time(s)
- Increment line by: 1
- Copy original data to output:
- Include variable in XML output:
- Use as a bookmark in PDF output:

2. Right click the Variable and select Add Function > Set value from a declared constant.



SECTION 3

3. Select the 'OrderNbrConstantName' Variable.



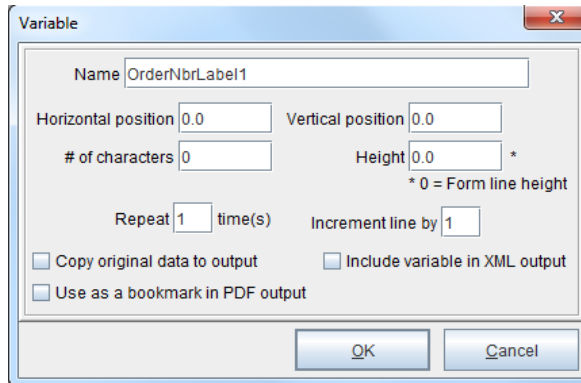
The 'OrderNbrConstantName' Variable has been set to 'OrderNbr_' and the concatenated value of the 'Language' Variable. This Variable is picking up the two-letter language code from the incoming data file. This corresponds to the format of the Declared Constants in the eFORMzCfg_Translations.xml file:

```
<Constant Name="OrderNbr_EN">
  <![CDATA[Order Number]]>
</Constant>
<Constant Name="OrderNbr_FR">
  <![CDATA[French Order Nbr]]>
</Constant>
<Constant Name="OrderNbr_GE">
  <![CDATA[German Order Number]]>
</Constant>
```

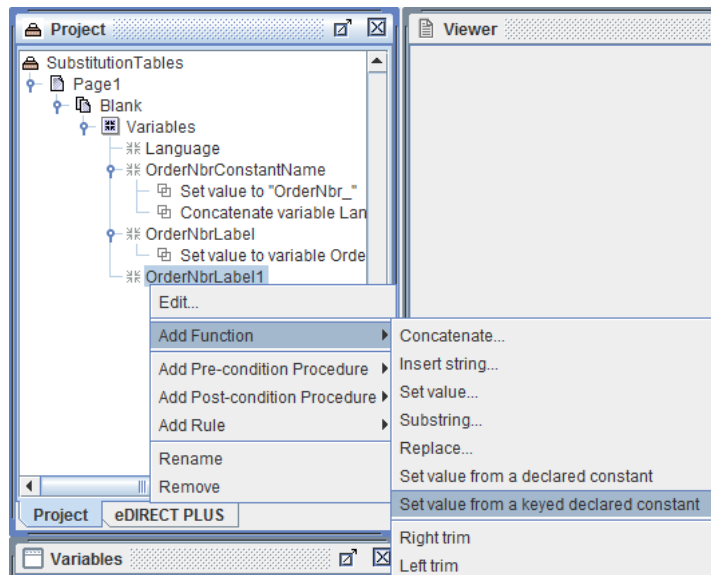
For example, if the language code is 'FR' then the value of 'OrderNbrConstantName' will be 'OrderNbr_FR' and the value of the 'OrderNbrLabel' Variable will be the French Order Number.

Language Substitution Using a Set Value from a Keyed Declared Constant Function

1. Add another Variable by position and enter 'OrderNbrLabel1' in the Name field.

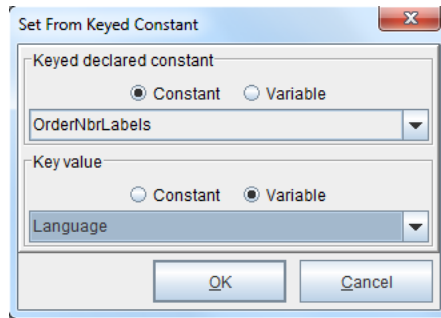


2. Right click the Variable and select Add Function > Set value from a keyed declared constant.



SECTION 3

3. Select the 'OrderNbrLabels' Keyed Declared Constant which was declared in the eFORMzCfg_Translations.xml. The Key Value should be the Language Variable.



The Keyed Constant is as follows:

```
<KeyedConstant Name="OrderNbrLabels">
  <Entry Key="EN">
    <![CDATA[Order Number]]>
  </Entry>
  <Entry Key="FR">
    <![CDATA[French Order Nbr]]>
  </Entry>
  <Entry Key="GE">
    <![CDATA[German Order Number]]>
  </Entry>
</KeyedConstant>
```

The two-letter language code from the incoming data file will be picked up by the Language Variable. This is the Key Value, or the 'Entry Key.' For example, if the language code is 'FR' then the value of the 'OrderNbrLabels' Variable will be the French Order Number.

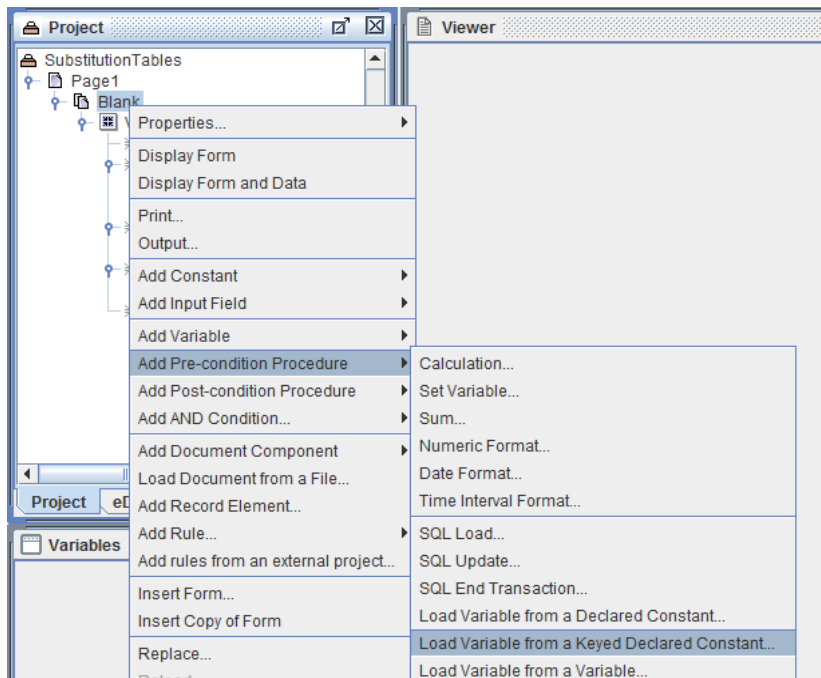
Language Substitution Using a Load Variable From a Keyed Declared Constant Pre-condition Procedure

1. Add another Variable by position and enter 'OrderNbrLabel2' in the Name field.

The 'Variable' dialog box is shown with the following settings:

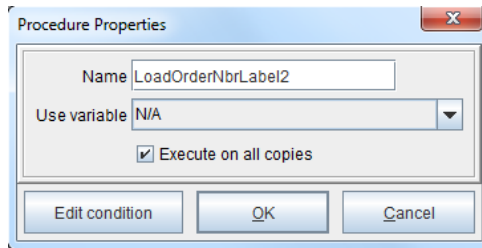
- Name: OrderNbrLabel2
- Horizontal position: 0.0
- Vertical position: 0.0
- # of characters: 0
- Height: 0.0 * (where * = Form line height)
- Repeat: 1 time(s)
- Increment line by: 1
- Copy original data to output:
- Include variable in XML output:
- Use as a bookmark in PDF output:

2. Right click the Form and select Add Pre-condition Procedure > Load Variable from a Keyed Declared Constant.

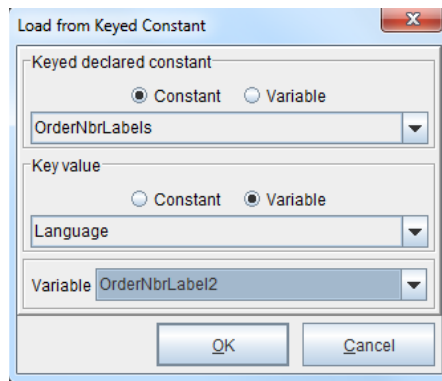


SECTION 3

3. Enter a value for the Name field and select the System Variable 'N/A' from the Use variable drop-down menu.



4. Select the 'OrderNbrLabels' Keyed Declared Constant which was declared in the eFORMzCfg_Translations.xml. The Key Value should be the Language Variable. The Variable should be the 'OrderNbrLabel2' Variable.



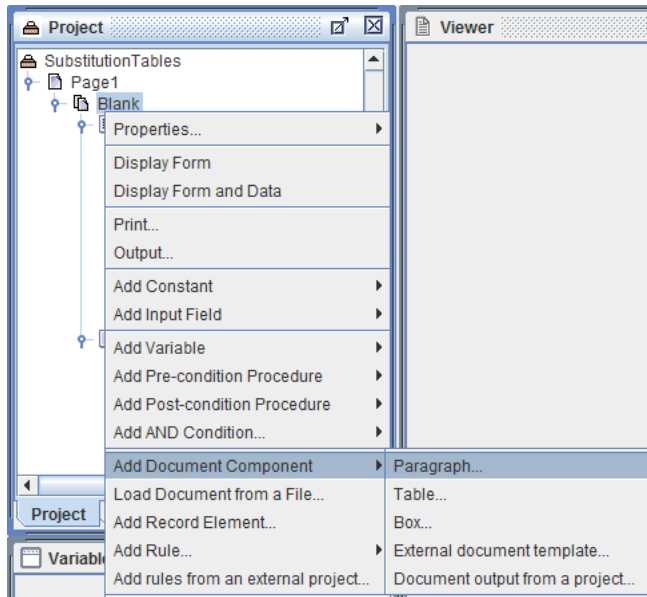
The Keyed Constant is as follows:

```
<KeyedConstant Name="OrderNbrLabels">
  <Entry Key="EN">
    <![CDATA[Order Number]]>
  </Entry>
  <Entry Key="FR">
    <![CDATA[French Order Nbr]]>
  </Entry>
  <Entry Key="GE">
    <![CDATA[German Order Number]]>
  </Entry>
</KeyedConstant>
```

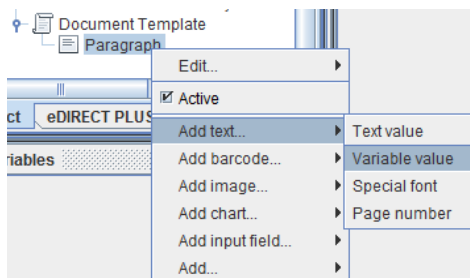
The two-letter language code from the incoming data file will be picked up by the Language Variable. This is the Key Value, or the 'Entry Key.' For example, if the language code is 'FR' then the value of the 'OrderNbrLabel2' Variable will be the French Order Number.

Testing the Report

1. Right click the Form and select Add Document Component > Paragraph.

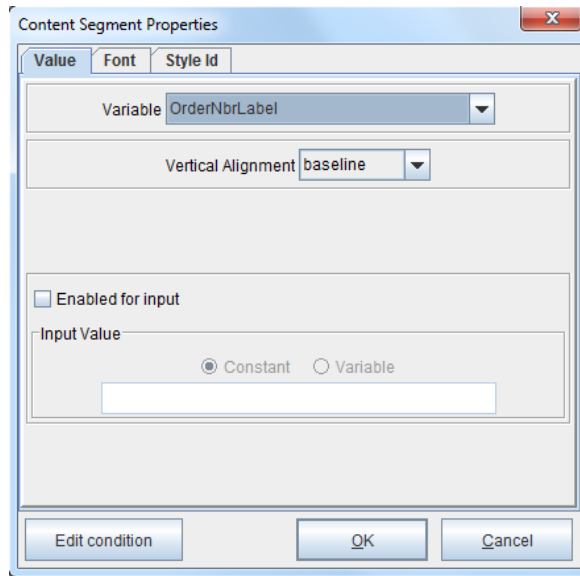


2. Right click the Paragraph and select Add text > Variable value.

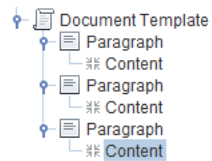


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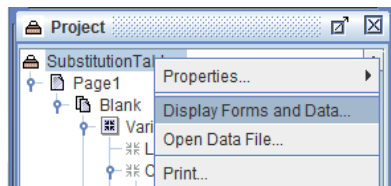
3. Select the 'OrderNbrLabel' Variable from the drop-down menu.



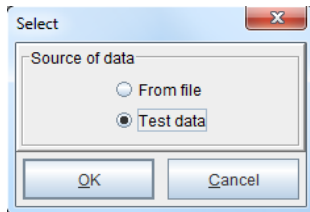
4. Add Paragraphs for the 'OrderNbrLabel1' and 'OrderNbrLabel2' Variables.



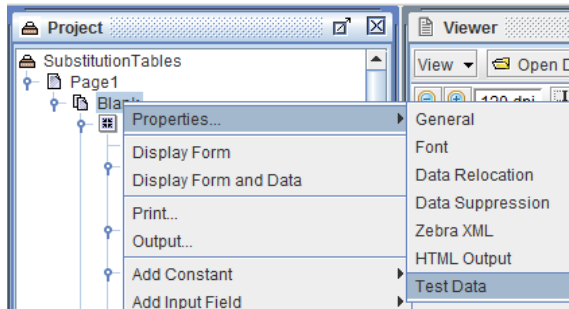
5. Right click the Project and select Display Forms and Data.



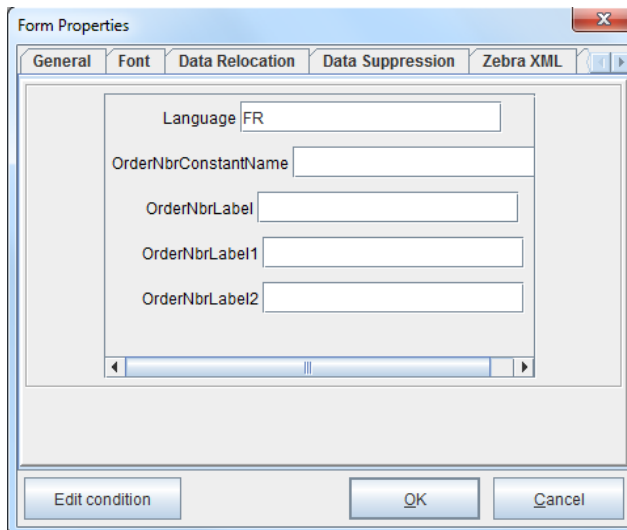
- Right click the Project and select Display Forms and Data.



- From there, right click the Form and select Properties > Test Data.



- For testing purposes, enter the 'FR' language code in the Language field.



SECTION 3

9. The French order number will display.

```
French Order Nbr  
French Order Nbr  
French Order Nbr
```

NOTE: Using a Load Variable From a Keyed Declared Constant Pre-condition Procedure is the preferred method for language substitution, especially when 3 or more languages are going to be used for the same report.

Index

Variable Options

Variable options include:

Name

Variable name as displayed in the project layout.

Horizontal/Vertical Position

The Variable location in decipoints (180 decipoints = 1/4 inch).

of characters

The number of characters included in a Variable.

Height

Variable height. Customizes the Variable line height.

Repeat

The number of data lines that a Variable will pick up.

Increment line by

Enables the skipping of lines. A value of one (1) applies a Rule or a Function to every line selected, a value of two (2) applies a Rule or a Function to every other line, and so on.

Copy original data to output

(Default is unchecked) When checked leaves the selected characters in their original position in the eFORMz Viewer.

Include variable in XML output

For use with eDIRECT output. The default is unchecked. If checked, Variable names cannot include special characters such as !, @, \$, *.

Use as a bookmark in PDF output

Variable will be bookmarked for PDF file output.

Variables Data Node Options

Variable options include:

Name

Variable name as displayed in the project layout.

Data Node

The node location of the Variable in relation to parent or child elements in the data node tree.

Transfer method:*Normal (any child elements as array)*

(Default) Will display any child elements as their own array, or indexed row of data within the parent element.

Count of child elements

Provides a count of the child elements contained within the parent element.

Sum of child elements' data

Calculates the sum of the child elements's data contained within the parent element.

Concatenation of child elements' data (comma delimited)

Concatenates all of the child elements's data contained within the parent element.

SECTION 4

Each element's value is delimited by a comma.

Concatenation of child elements' data (new line delimited)

Concatenates all of the child elements's data contained within the parent element.

Each element's value is delimited by a new line.

Include variable in XML output

For use with eDIRECT output. The default is unchecked. If checked, Variable names cannot include special characters such as !, @, \$, *.

Use as a bookmark in PDF output

Variable will be bookmarked for PDF file output.

Node Filter

The Node Filter filters for an element's descendants. It allows grandchildren and great-grandchildren to be parsed out.

General References

Alignment

The alignment of the Paragraph. Options include Left, Centered, Right, Justified and None (Default).

Background Color

The Automatic box, when checked, will adopt the color designated as the default color configuration. If unchecked, the color can be altered.

Borders

Single Border

Style

The drop-down menu has Solid, Double, Dotted and Dashed options.

Thickness

Adjust the thickness level in decipoints. 1 pixel is the equivalent of 7.5 decipoints. 720 decipoints is the equivalent of 1 inch.

Color

Left click the color bar to modify the border color.

Separate borders

Top style

The drop-down menu that contains style options related to the top border.

Bottom style

The drop-down menu that contains style options related to the bottom border.

Left style

The drop-down menu that contains style options related to the left border.

Right style

The drop-down menu that contains style options related to the right border.

Box Properties (General)

Positioning

Within Document

(Default) When checked, the position is set within the document.

Absolute Positioning

When checked, the position is defined by horizontal and vertical position, by page.

Horizontal/Vertical position

Sets the horizontal and vertical positioning. Values are in decipoints.

Page

Options include First Page, Last Page, nth page, Every Page, First through nth page, nth through last page, First through nth to last page, and nth to last through last page followed by the specified page number.

For example:

- ◆ "First through nth page" where $nth = 5$, the box will display on the first five pages.
- ◆ "nth through last page" where $nth = 5$, all pages except the first 4 will display the box.
- ◆ "First through nth to last page" where $nth = 5$, all pages except the last 5 will display the box.
- ◆ "nth to last through last page", where $nth = 5$, the box will display on the last 6 pages.

Size

Height

The Automatic option will retain the default setting for Box height. The Fixed option will adjust the Box height to the value entered into the adjacent field.

Width

The Automatic option will retain the default setting for Box width. the Fixed option will adjust the Box width to the value entered into the adjacent field. The Ratio option will adjust the Box width to be at least the value entered into the adjacent field while varying with other elements.

Background Color

The Automatic box, when checked, will adopt the color designated as the default color configuration. If unchecked, the color can be altered by left clicking the color bar next to the Automatic box.

Cell Properties (General)

Cell Width

The Automatic option will retain the default setting for Cell width. The Fixed option will adjust the Cell width to the value entered into the adjacent field. The Ratio option will adjust the Cell width to be at least the value entered into the adjacent field while varying with other Cells.

Background Color

The Automatic box, when checked, will adopt the color designated as the default color configuration. If unchecked, the color can be altered by left clicking the color bar next to the Automatic box.

Vertical Alignment

Options include baseline, top, middle, and bottom.

First line indent

The indentation of the first line in decipoints. 1 pixel is the equivalent of 7.5 decipoints. 720 decipoints is the equivalent of 1 inch.

Font

The Font field contains the following options:

Automatic

(Default checked) Applies the default text configuration.

Character Set

Applies the selected character set from the drop-down menu for text values.

Font

Applies the selected font from the drop-down menu for text values.

Chars per inch

Specifies the characters per inch of the text values.

Height

Specifies the height of the text values.

Bold

When checked, the text values are bolded.

Italic

When checked, the text values are italicized.

Text Color

The Automatic box, when checked, will adopt the color designated as the default color configuration. If unchecked, the color can be altered.

Margins

Automatic Margins

(Default) When checked, the configured settings will be implemented. When unchecked, individual Margins can be modified.

Top

Defines the top space between a border and other outer elements.

Left

Defines the left space between a border and other outer elements.

Bottom

Defines the bottom space between a border and other outer elements.

Right

Defines the right space between a border and other outer elements.

Padding

Automatic Padding

(Default) When checked, the configured settings will be implemented. When unchecked, Padding can be modified.

Top

Defines the top space between border and element content.

Left

Defines the left space between border and element content.

Bottom

Defines the bottom space between border and element content.

Right

Defines the right space between border and element content.

NOTE: When elements need space between them, it is better to use Margins. When an inner element, such as text, needs space between the parent element and itself, utilization of Padding is advised.

Row Properties (General)

*Use as**Normal row*

(Default checked) The Row is to be used in its declared position in the table.

Page header

When checked, acts as the first Row on the page when a table is split because of pagination.

SECTION 4

Page footer

When checked, acts as the last Row on the page when a table is split because of pagination.

Repeat using

No repeat

(Default) This setting will not repeat any instance of a Row in relation to a specified Variable or Constant value.

Constant

When checked, any instance of a Row will repeat in accordance with the given Constant value.

Repeat of variable

When checked, any instance of a Row will repeat in relation to the given Variable value.

Row Height

The Automatic option will retain the default setting for Row height. The Fixed option will adjust the Row height to the value entered into the adjacent field. The Minimum option will adjust the Row height to be at least the value entered into the adjacent field.

Background Color

The Automatic box, when checked, will adopt the color designated as the default color configuration. If unchecked, the color can be altered by left clicking the color bar next to the Automatic box.



1024 First Street
Snohomish, WA 98290
U.S.A.

800-682-0200
360-568-6602
Fax: 360-568-2923

sales@minisoft.com
support@minisoft.com
www.minisoft.com



Papiermühleweg 1
Postfach 107
Ch-6048 Horw
Switzerland

+41.41.340.23 20

info@minisoft.ch
www.minisoft.ch

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