



Arco

Doma 6

Application administrator manual

08. Document Templates

A new era in document management.

Doma 6

Application administrator manual *08. Document Templates*

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Author: Arco Training Dept. - Kris Steenackers

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1 Introduction

The Arco Doma Suite can use files with bookmarks as templates for the creation of new documents. During creation, the bookmarks of the original file will be replaced by values that come from Doma properties.

The result of a document creation can be seen in the Doma WebInterface. The creation of documents can be done completely automatically, e.g. on save of a document or when a step is released in the workflow, or can be manually initiated by a user, e.g. by clicking on a button *Create document* in the Webinterface. Depending on configuration, the document will be generated immediately or the user will be guided by a kind of wizard, which will lead the user through a number of steps in order to generate file.

2 Template creation

Doma allows the use of the next file extension for use as a document template:

- Csv – comma delimited (*.csv)
- Excel (*.xdlm, *.xls, *.xlsm, *.xlsx, *.xlt, *.xltx)
- MS Project (*.mpp, *.mpt)
- Open Document spreadsheet (*.ods)
- Open Document Text (*.odt)
- Pdf (*.pdf)
- MS Powerpoint 97-2003 presentation (*.ppt), Show (*.pps), Template (*.pot)
- MS Powerpoint presentation (*.pptx), Show (*.ppsx), Template (*.potx)
- Rich Text Format (*.rtf)
- Text – tab delimited (*.txt)
- Visio (*.vsd, *.vst)
- Web page (*.html, *.mhtml)
- MS Word (*.doc, *.docm, *.docx, *.dot, *.dotm, *.dotx)

The document must be copied to the Doma server to be able to use it as a template in Doma. You can copy it to the folder **D:\Arco\Data\DocumentTemplates** or **D:\Arco\Data\Templates** on the Doma server.

In Word files, bookmarks can be used to transfer data to.

In Excel files, you can refer to cells to transfer data to.

A .pdf form can also be used to transfer data to.

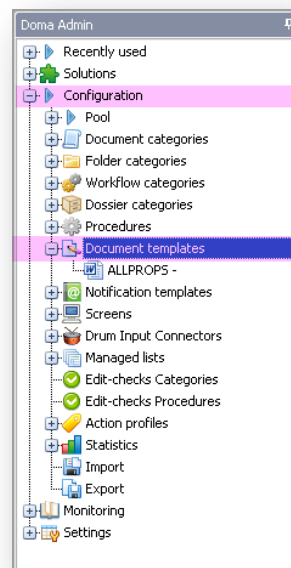
Most of the other extensions will only be used to create a document that is copied from the template – without inserting data in the file.

3 Template configuration in the Arco Doma admin module

Templates are identified and configured in the **Doma admin module**.

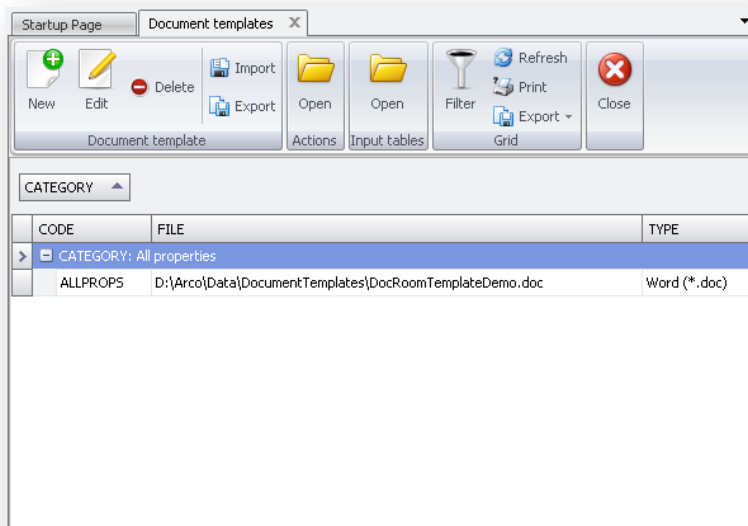
Open the module and select the item *Document templates* in the *configuration* part of the navigation tree.

- Double-click on the name of a document template in the navigation tree to edit it. The configuration tab of the template will appear.
- Double-click the item Document templates in the navigation tree to open a tab with an overview of all available document templates.
- Right-click on the item Document templates in the navigation tree to show a menu with the options New, Open and Refresh.

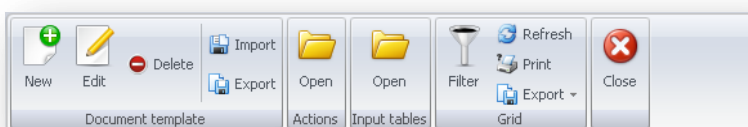


3.1 Tab document templates overview

The tab Document templates shows all available document templates.



The ribbon of the screen allows a number of actions:



Item	Description
New	Create a new document template. A configuration tab will appear when you click on this option.
Edit	Edit the document template selected in the overview. The configuration details of the selected document template will open in a new tab.
Delete	Delete the document template selected in the overview. A configuration window appears before the document template is really deleted.
Import	Starts the import wizard for document templates.
Export	Starts the export wizard for document templates.
Open Actions	Opens a window from where you can open an overview of the actions linked to a template.
Open Input tables	Opens a screen with an overview of available input tables and the possibility to add new input tables and edit and delete existing tables. Input tables are used to get extra data from external databases.
Filter	Activates a filter in the overview.
Refresh	Refreshes the overview of document templates.
Print	Will print the overview of document templates.
Export grid	Will export the overview of document templates to one of the pre-defined file extensions.
Close	Closes the document templates tab.

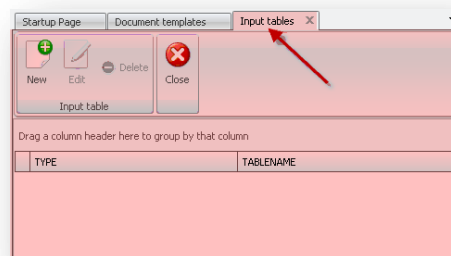
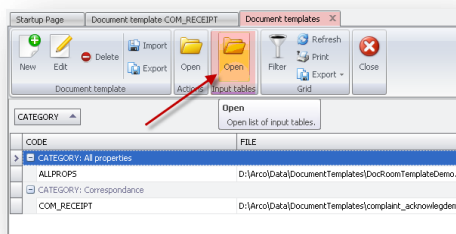
3.1.1 Input tables

Input tables get information for an external database. This information can be visualized in fields that are used for indexation.

Once configured, they can be found in the **Actions** screen: in the part *Get input from* you can select it in the option **Combobox with data from database**.

3.1.1.1 Overview

To see the overview of existing input tables, click on the button **Open Input tables** in the ribbon of the tab **Document templates**. A new tab with the name **Input tables** appears.



3.1.1.2 Create new input table

Click on the button **New** in the ribbon of the tab **Input Tables**.

A new configuration tab with the name **New Input table** appears.

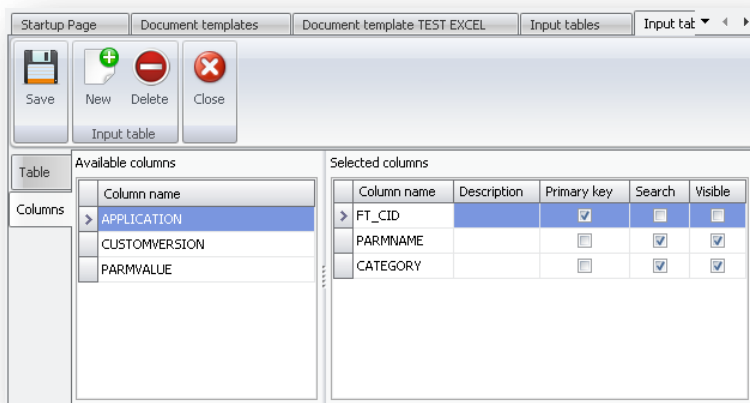
Item	Description
DB Connection string	Enter here the complete connection string to the database: Server=[servername]; uid=[userID]; pwd= [password]; database=[database]
DB type	Database type, e.g. SqlServer, Oracle, ...
Table	Name of the table of which you want to visualize the content.
Description – English	Description of the input table in English.
Description – Dutch	Description of the input table in Dutch.
Description – French	Description of the input table in French.
Description – German	Description of the input table in German.
Filter	Filter to limit the table view.

Enter the configuration data and click on the **Save** button in the ribbon.

A new tab **Columns** now appears. The tab shows the available columns of the selected table.

Select the items you want to use by dragging them from the list **Available columns** on the left to the list **Selected columns** on the right and configure them.

Item	Description
Column name	Name of the selected column.
Description	Description you can give to the column.
Primary key	<input checked="" type="checkbox"/> Use this column as a primary key. <input type="checkbox"/> Don't use this column as a primary key.
Search	<input checked="" type="checkbox"/> Use this column to search on. <input type="checkbox"/> Don't use this column to search on.
Visible	<input checked="" type="checkbox"/> Show this column. <input type="checkbox"/> Don't show this column.



Click on the **Save** button in the ribbon above to save the configuration.

3.1.1.3 Edit input table

Double click on the row of the input table you want to edit in the overview

OR

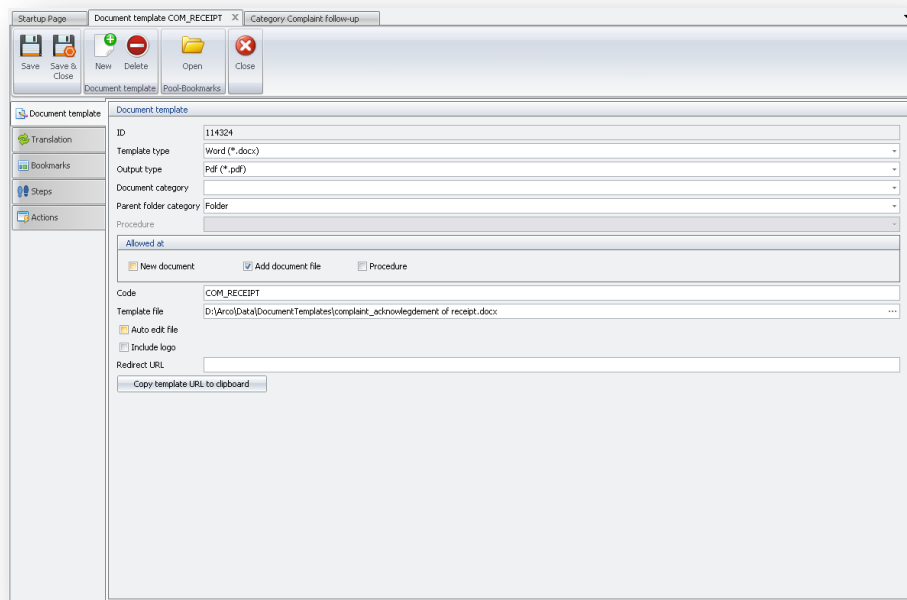
Select the input table you want to edit in the overview and click on the button **Edit** in the ribbon above.

3.1.1.4 Delete input table

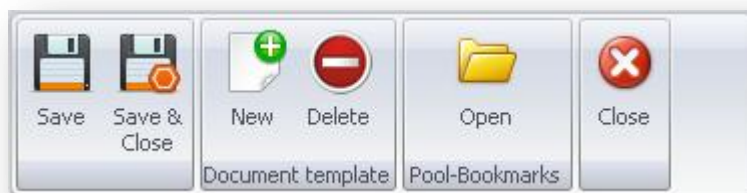
Select the input table you want to edit in the overview and click on the button **Delete** in the ribbon above.

A confirmation screen with the message *Are you sure you want to delete this input table?* appears. Confirm to delete.

3.2 Description of the document template configuration screens



3.2.1 Document template configuration tab ribbon



The ribbon above appears when the tab Document template is selected in the document template configuration tab.

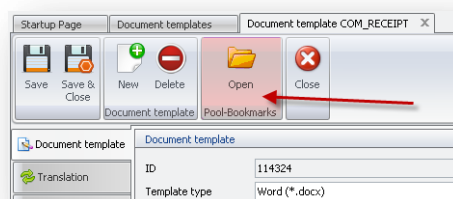
Button	Description
Save	Saves the configuration of the template.
Save & Close	Saves the configuration of the template and closes the configuration tab.
New Document template	Will replace the current tab with a clean document template configuration tab.
Delete Document template	Will delete the current document template. A message <i>Are you sure you want to delete this document template?</i> appears when you click on the button. Confirm to delete the document template.
Open Pool-Bookmarks	Will start a pop-up screen with an overview of all Pool-Bookmarks. From here you can also add new Pool-Bookmarks and edit or delete existing ones.
Close	Closes the configuration tab.

3.2.1.1 Pool bookmarks

Pool bookmarks can be used to avoid the repetitive creation of the same actions. To avoid that, you create a pool bookmark and define an action for it. Afterwards, you can link bookmarks to this pool bookmark so that you don't need to configure the bookmark action anymore.

3.2.1.1.1 Create a pool bookmark

Pool bookmarks can be defined from the pool bookmarks overview. Click on the button **Open Pool-Bookmarks** in the ribbon of the configuration screen of a document template.

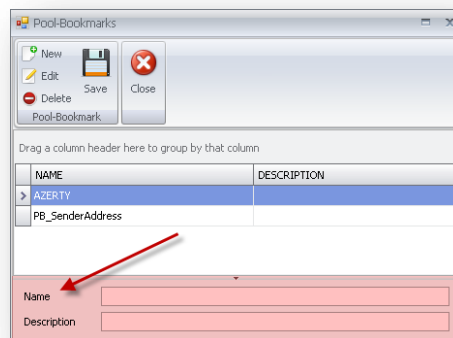


The Pool-Bookmarks window pops up; from here you can create a new pool bookmark or edit or delete existing ones.

Click on the button **New** in the ribbon above. An insert screen appears under the overview.

Enter a name and a description for the pool bookmark and click on the **Save** button in the ribbon above.

The new pool bookmark will appear in the list.



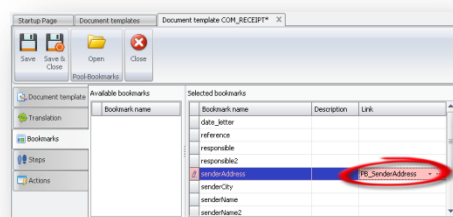
Now go to the **Actions** overview to define what has to happen when the pool bookmark is used:

- Click on the button **Open Actions** in the document templates overview
- OR
- Select the **tab Actions** in the configuration tab of a document template.

See chapter **3.2.6 Tab Actions** to see how to configure actions.

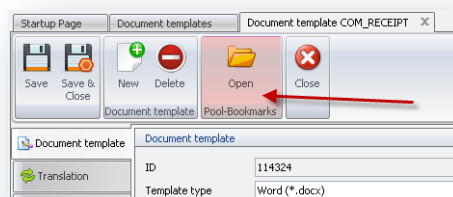
After configuration, pool bookmarks can be linked to other bookmarks in the tab **Bookmarks** of the document configuration tab:

Select the pool bookmark in the column **link** to link it to the bookmark.



3.2.1.1.2 Edit a pool bookmark

Click on the button **Open Pool-Bookmarks** in the ribbon of the configuration screen of a document template.



The Pool-Bookmarks window pops up;
from here you can create a new pool bookmark or edit or delete existing ones.

- Select the pool bookmark in the overview and click on the button Edit in the ribbon above.

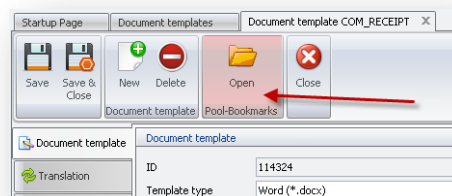
OR

- Double-click on the pool bookmark in the overview.

The bookmark configuration fields appear under the list. Make your changes and save.

3.2.1.1.3 Delete a pool bookmark

Click on the button **Open Pool-Bookmarks** in the ribbon of the configuration screen of a document template.



The Pool-Bookmarks window pops up;
from here you can create a new pool bookmark or edit or delete existing ones.

- Select the pool bookmark in the overview and click on the button Delete in the ribbon above.
- A confirmation message *Are you sure you want to delete this pool bookmark?* appears. Confirm to delete the pool bookmark.

3.2.2 Tab Document template

Item	Description
ID	ID of the document template. Automatically assigned by the application.
Template type	Extension of the source file of the document template. Only files of the selected extension will be shown when selecting files in the field <i>Template file</i> .
Output type	Extension of the file generated by the Doma document template module.
Document category	Document category where the template is linked to. <i>When a document category is linked to a template, you can easily transfer values from the category properties to the bookmark of the template.</i>
Parent folder category	Category of the folder where the template will be put. <i>When a folder category is linked to a template, you can easily transfer values from the category properties to the bookmark of the template.</i>
Procedure	Procedure where the active document template can be used. Only enabled when the option <i>Allowed at Procedure</i> has been selected.
Allowed at	<input checked="" type="checkbox"/> New document: The template can be used to create a new DocRoom document. The file that is the result of the creation will be added to the new document. <input type="checkbox"/> New document: The template cannot be used to create a new DocRoom document. <input checked="" type="checkbox"/> Add document file: The template can be used to create a new file for a DocRoom document. The file that is the result of the creation will be added to the document. <input type="checkbox"/> Add document file: The template cannot be used to create a new file for a DocRoom document. <input checked="" type="checkbox"/> Procedure: The template can be used to create a new file during the execution of a procedure. The file that is the result of the creation will be added to procedure. <input type="checkbox"/> Procedure: The template cannot be used to create a new file during the execution of a procedure.
Code	Code that is used to refer to the template. Appears in the navigation tree of Doma admin module.
Template file	File that will be used as a template to create a document. Only files with the extension selected in the field <i>Template type</i> will be shown in the selection list.
Auto edit file	<input checked="" type="checkbox"/> After creation of the file, it opens so it can immediately be edited by the user. <input type="checkbox"/> After creation of the file a message is shown whether or not the creation was successful.
Include logo	Only for MS Word. <input checked="" type="checkbox"/> When a file is created, the selected logo will be pasted into the file according to the predefined coordinates. (This is an automated action using the InsertImage functionality of Aspose.) <input type="checkbox"/> No external logo is included.
Redirect URL	After file creation the system is redirected to the URL mentioned here.
Copy template URL to clipboard	Copies the reference to the template configurator to the clipboard so you can paste it in the web browser. This allows the administrator to test/check after configuration.

3.2.3 Tab Translation

This tab allows you to enter a translation of the description of the document template. The language mentioned in the user profile will be shown when the user sees the description of the document template.

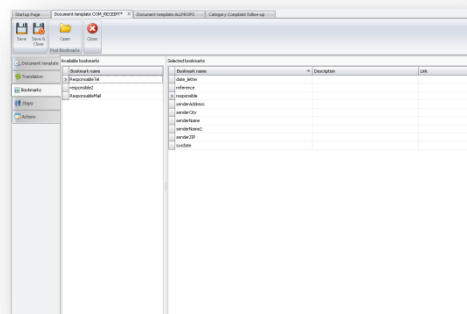
Item	Description
English	Document template description in English.
Dutch	Document template description in Dutch.
French	Document template description in French.
German	Document template description in German.

3.2.4 Tab Bookmarks

The tab bookmarks shows an overview of all bookmarks that are available in the template file. In the left column, all these bookmarks are shown.

Select the bookmarks you want to use with a double click or by dragging them to the column *Selected bookmarks*. Then save.

Only selected bookmarks can be used to transfer data to. (It is not possible to define an action for a bookmark when the bookmark has not been selected.)



3.2.5 Tab Steps

This tab shows the different steps which can be used as a kind of wizard that the user must run through when creating his/her document.

From here you can also create a new step or edit/delete existing steps.

Every action you define (in the Actions tab) can be linked to a step number. As a result, the field used in the action will appear in the selected step.

3.2.5.1 Create a new step

Click on the **New** icon in the ribbon of the tab.
A window with the name **New Step** pops up.

Item	Description
ID	Read-only field. Automatically create ID for the step.
Template	Read-only field. Name of the used template file.
Step	Number of the step.
Name	Name of the step.
Instructions	Instructions that appear on top of the step:
English	English version.
Dutch	Dutch version.
French	French version.
German	German version.

Configure the step and click on the **Save** button above to save your configuration.

3.2.5.2 Edit a step

Open the tab **Steps** to see the step overview; from here you can create a new step and edit or delete existing ones.

- Select the step in the overview and click on the button **Edit** in the ribbon above.

OR

- Double-click on the step in the overview.
- The step configuration window pops up. Make your changes and save.

3.2.5.3 Delete a step

Open the tab **Steps** to see the step overview; from here you can create a new step and edit or delete existing ones.

- Select the step in the overview and click on the button **Delete** in the ribbon above.
- A confirmation window with the message *Are you sure you want to delete this step?* appears. Confirm to delete. Then save your changes.

MIND!

When you delete a step, all actions linked to it are not shown anymore on document creation.

3.2.6 Tab Actions

3.2.6.1 Introduction

Actions define which data will be copied from a source to a target, e.g. you can copy the value of a workflow property and paste it into a bookmark in the template file.

Each action has to be defined. Per action you define where the data come from (**Get input from**) and where the data will be copied to (**Put output to**).

On this output we can define several options (**Options**).

When using steps, we can also indicate in which step the action will be used (**Show action on**).

3.2.6.2 Description of the Actions configuration screen

The screenshot shows the 'Actions' configuration window. At the top, there are buttons for 'New', 'Edit', 'Save', 'Delete', and 'Close'. Below these is a 'Select template' dropdown menu showing 'COM_RECEIPT'. Underneath is a table titled 'List of defined actions for this template' with columns: ACTION, STEP, INPUT, FIELD, OUTPUT, BOOKMARK, and PROPERTY. The 'Get input from' section has radio buttons for 'Combobox with data from database', 'Constant' (selected), 'Textbox', 'Document property', 'Parent folder property', 'Procedure property', and 'Function'. The 'Put output to' section has dropdowns for 'Bookmark' and 'Document property'. The 'Options' section has fields for 'Type', 'Mask', 'Culture', and 'Filter'. The 'Show action on' section has a 'Step' dropdown set to '0'.

Item	Description
Select template	Dropdown list with all available templates. By default, the template which is currently edited is selected.
List of defined actions for this template	All actions which are already defined for the selected template are mentioned in this list.

3.2.6.2.1 Get input from

Per action, you have to define where you get the data from. This is done in the part *Get input from*. Depending upon some other choices you made during configuration, certain options will be disabled.

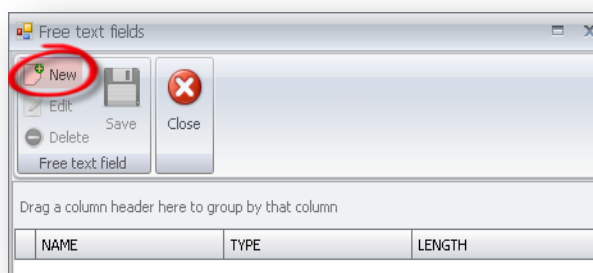
Get input from	Description																
Combobox with data from database	<i>This option is disabled when the option Allowed at <input checked="" type="checkbox"/> Procedure has been selected in the Document template tab.</i>																
Constant	<p>Dropdown list with the next constant values:</p> <table> <tr> <td>#user_login#</td><td>Login name of the actual user will be copied to the output field.</td></tr> <tr> <td>currentdate</td><td>The current date will be copied to the output field.</td></tr> <tr> <td>templateid</td><td>The ID of the used template will be copied to the output field.</td></tr> <tr> <td>image</td><td>An image is selected. Select the source for the image in the mask field below.</td></tr> <tr> <td>#case_name#</td><td>Name of the workflow.</td></tr> <tr> <td>#case_stepexecutor#</td><td>Name of the user to whom the actual workflow step is assigned.</td></tr> <tr> <td>#case_starter#</td><td>User who has started the workflow.</td></tr> <tr> <td>#case_laststepexecutor#</td><td>User who has treated the previous step of the workflow.</td></tr> </table>	#user_login#	Login name of the actual user will be copied to the output field.	currentdate	The current date will be copied to the output field.	templateid	The ID of the used template will be copied to the output field.	image	An image is selected. Select the source for the image in the mask field below.	#case_name#	Name of the workflow.	#case_stepexecutor#	Name of the user to whom the actual workflow step is assigned.	#case_starter#	User who has started the workflow.	#case_laststepexecutor#	User who has treated the previous step of the workflow.
#user_login#	Login name of the actual user will be copied to the output field.																
currentdate	The current date will be copied to the output field.																
templateid	The ID of the used template will be copied to the output field.																
image	An image is selected. Select the source for the image in the mask field below.																
#case_name#	Name of the workflow.																
#case_stepexecutor#	Name of the user to whom the actual workflow step is assigned.																
#case_starter#	User who has started the workflow.																
#case_laststepexecutor#	User who has treated the previous step of the workflow.																
Textbox	<p>Textbox that can be used to enter data to the bookmark. This textbox can be visualized in one of the steps. Also new textboxes can be defined from here.</p> <p><i>This option is disabled when the option Allowed at <input checked="" type="checkbox"/> Procedure has been selected in the Document template tab.</i></p>																
Document property	<p>Dropdown list of available properties of the parent folder category from where a value can be copied.</p> <p><i>This option is disabled when the option Allowed at <input checked="" type="checkbox"/> Procedure has been selected in the Document template tab.</i></p>																
Parent folder property	<p>Dropdown list of available properties of the parent folder category from where a value can be copied.</p> <p><i>This option is disabled when no value is selected in the Parent Folder Category field of the Document template tab.</i></p>																
Procedure property	<p>Dropdown list of available of the procedure or workflow category from where a value can be copied.</p> <p><i>This option is disabled when the option Allowed at <input type="checkbox"/> Procedure has not been selected in the Document template tab.</i></p>																
Function	Here you can select or add a function for this action. Functions invoke a custom handler, allowing you to use custom code that will influence the action.																
Required	<p>This option is only active when working with steps.</p> <p><input checked="" type="checkbox"/> When selected, the input field has to be copied to the output field before you can proceed to the next step.</p> <p><input type="checkbox"/> If not selected, the output field does not have to be completed before proceeding to the next step.</p>																

3.2.6.2.1.1 Textbox configuration

- If no textbox is available in the list, or you want to add another textbox, you can do this by clicking on the + icon next to the field:

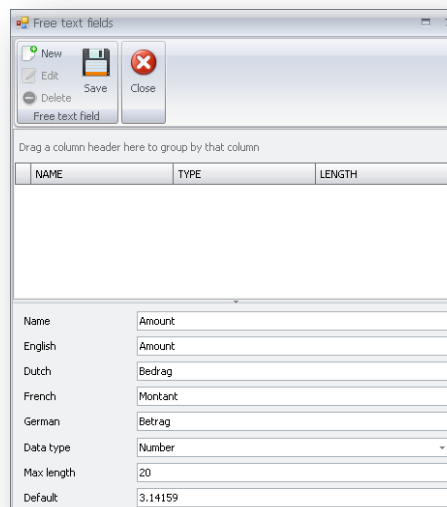


- A new window with the name **Free text fields** appears, click on the button **New**:

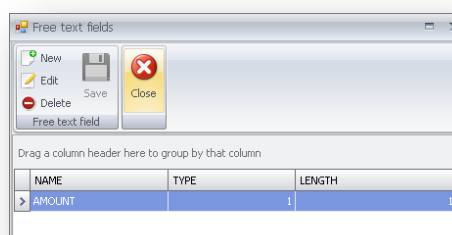


- The configuration fields for the new textfield appear below – complete them.

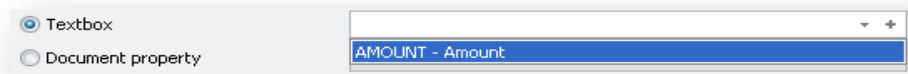
Item	Description
Name	name that appears in front of the field
English	English translation of the name.
Dutch	Dutch translation of the name.
French	French translation of the name.
German	German translation of the name.
Data type	Format: Text, number or date.
Max length	Max. number of allowed characters in the field.
Default	Value that is shown by default in the field.



- Then click on the **Save** button in the ribbon on top.
- The new textfield is now saved and mentioned in the list.



- In the overview, you can now select this new textbox:



3.2.6.2.1.2 Function configuration

Functions can be created to do extra actions that cannot be configured, e.g. to get extra data based upon the selection of a value in a field (You select a name and you want the address to be selected from the same database and pasted into the field address of the document.) or to add a paragraph to the template if a certain value is selected in a property.

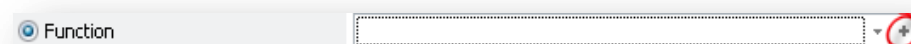
The functions are created as a .dll and are located on the server, normally in the bin directory. They can be a part of the same .dll file that contains the document handlers, workflow scripts, batchjobs, etc.

Example code to create a function:

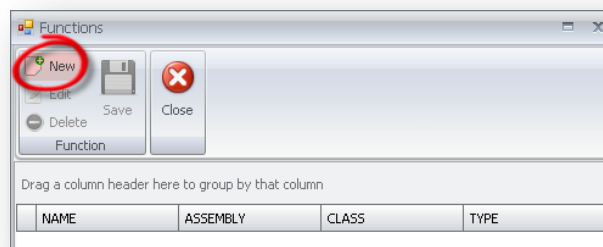
```
Public Class BW_ProspeditionPDF
    Implements DomaGenTemplateEngine.IObjectTemplateFunction

    Public Function GetTemplateFunction(ByVal voObject As
Arco.Doma.Library.baseObjects.DM_OBJECT, ByVal voStepAction As
DomaGenTemplateEngine.StepAction, ByVal voTemplate As
DomaGenTemplateEngine.baseObjects.TG_TEMPLATES) As String Implements
DomaGenTemplateEngine.IObjectTemplateFunction.GetTemplateFunction
End Function
```

- If no function is available in the list, or you want to add another one, you can do this by clicking on the + icon next to the field:



- A new window with the name **Free text fields** appears, click on the button **New**.



- The configuration fields for the new function appear below – complete them.

Item	Description
Name	name that appears in front of the field
Type	Document Procedure
Assembly class	Assembly class.
Class name	Class name.

Another example of a function

This function will check whether a medical dossier number (MedischDossierNummer) is available. If this is the case, the number is copied to the bookmark, if not, the term “lacking” (Ontbreekt) is copied to the bookmark.

```
class MedischDossierNummer : DomaGenTemplateEngine.ICaseTemplateFunction
{
    public string GetTemplateFunction(cCase voObject, StepAction
voStepAction, TG_TEMPLATES voTemplate)
    {
        CodaProcedure.CodaProp loProp = new CODA.CodaProcedure.CodaProp();
        if (voObject.GetProperty(loProp.nummer_medisch_dossier).ToString()
== "")
            return "ontbreekt";
        else
            return "is " +
voObject.GetProperty(loProp.nummer_medisch_dossier).ToString();
    }
}
```

3.2.6.2.2 Put output to

Once defined where the data come from, you also have to define where the data will be put. This is done in the part *Put output to*.

Put output to	Description
Bookmark	Dropdown list of all available bookmarks of the template file. The output will be put into the bookmark that is selected here.
<input type="checkbox"/> Empty bookmark on error	<input checked="" type="checkbox"/> If selected, the bookmark will be emptied when an error occurs. <input type="checkbox"/> If not selected, the bookmark will not be emptied when an error occurs.
Document property	Dropdown list of all available properties of the document where the newly created file will be linked to. The output will be put into the property that is selected here.

3.2.6.2.3 Options

The part *options* allows the user to configure extra options for the selected action.

Options	Description
Type	Text, number or date: input will be formatted as text, number or date in output.
Mask	The mask allows you to give a pre-defined format to the data. Select a mask in the list or add one to the list by clicking on the button ... next to the field.
Culture	Influences the date format: choose the format you want to use.
Filter	<p>If related information is kept in different tables, the filter allows you to filter the correct information.</p> <p><i>E.g. Continent and country are defined in two tables. Now when the continent is selected, only the countries of that continent have to be shown in the field country. Therefore, the ID of the Continent table has to be entered in the filter of the bookmark Country. This will assure that only those countries are shown (filtered) that are related to the selected continent.</i></p>

3.2.6.2.4 Show action on

As an administrator, you can create a wizard for the creation of a file based upon a template, allowing the user to run through a number of pre-defined steps to create the file.

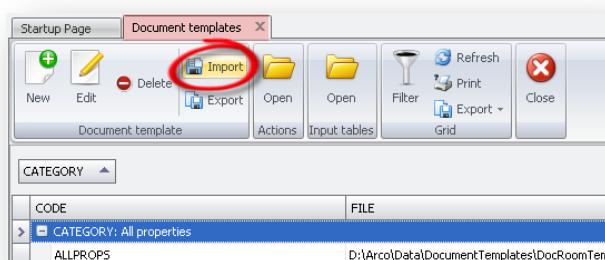
In that case, you have to link the action to one of the steps of the wizard: this is done in this section by selecting the right step for the action. (See chapter [3.2.5 Tab Steps](#) for more information about steps.)

4 Import / Export document templates

Document template configurations (and the linked template files) can be exported and/or imported. On export, the system will generate a .zip file containing all configurations (in xml files) and other necessary data such as the file that is used as a template.

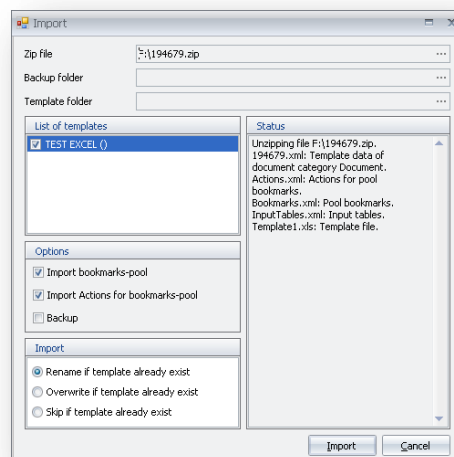
4.1 Import document template

Click on the button **Import** in the ribbon of the **Document templates** overview tab.



The **import** window will pop up; define which zip file you want to import and the import conditions – then click on the button **Import**.

The document template is immediately imported.

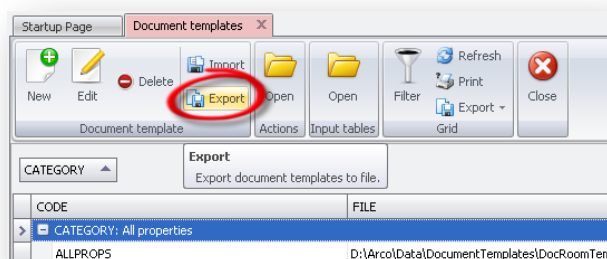


Item	Description
Zip file	Name and path to the zip file. Click on the button ... at the right of the field to browse to the file.
Backup folder	Backup folder.
Template folder	Folder on the server where the template file will be stored. Often D:\Arco\Data\DocumentTemplates or D:\Arco\Data\Templates but this can be defined by you.
List of templates	List of templates available in the zip file.
Options	
Import bookmarks-pool	<input checked="" type="checkbox"/> Bookmark pools are imported. <input type="checkbox"/> No bookmark pools are imported.
Import Actions for bookmarks-pool	<input checked="" type="checkbox"/> Actions for bookmark pools are imported. <input type="checkbox"/> No actions for bookmark pools are imported.

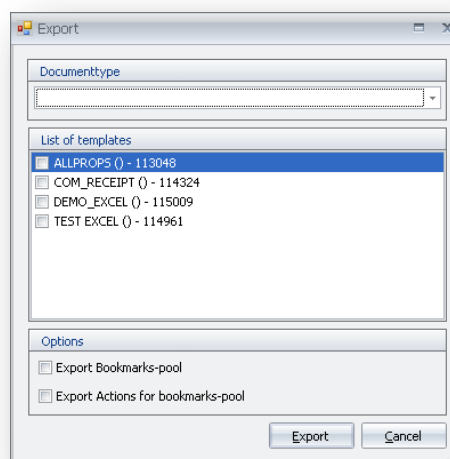
Backup	<input checked="" type="checkbox"/> The zip file used for import is copied to the back-up folder mentioned in the field Backup folder above. <input type="checkbox"/> The zip file used for import is not copied to the back-up folder.
Import	
Rename if template already exists	<input checked="" type="radio"/> The newly imported template will be renamed, thus avoiding that the existing configuration is replaced.
Overwrite if template already exists	<input checked="" type="radio"/> The newly imported template will replace the existing configuration.
Skip if template already exists	<input checked="" type="radio"/> Import is canceled because there is already a configuration with the same name as the one to be imported.
Status	Shows the import status of the zip file.

4.2 Export document template

Click on the button **Import** in the ribbon of the **Document templates** overview tab.



The **export** window will pop up; define which document template you want to export and the export options.



Item	Description
Documenttype	Name of the category where a document template is linked to. Will limit the view on the list of templates: it will only show the template that is linked to this category.
List of templates	List of document templates that are configured in the Doma admin module.
Export Bookmarks-pool	<input checked="" type="checkbox"/> Bookmark pools are also exported. <input type="checkbox"/> No bookmark pools are exported.

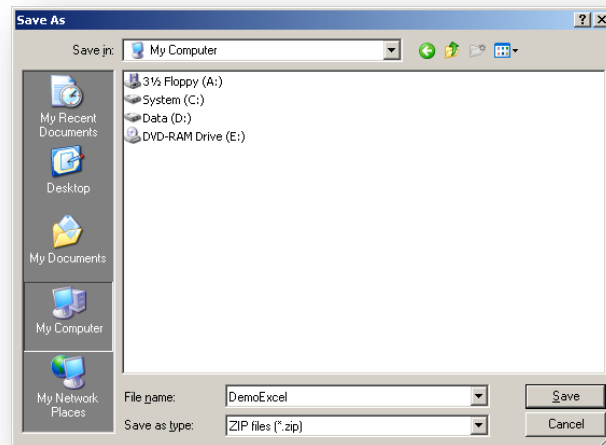
**Export Actions
for bookmarks-
pool**

- ☒ Actions for bookmark pools are also exported.
☐ No actions for bookmark pools are exported.

Click on the button **Export** after this configuration.

The **Save as** window appears:
select the path where you want to
save the exported configuration
and enter a name for the file.

Then click on the **Save** button to
start the export.



When the export has succeeded, the next message appears:



5 Configuration examples

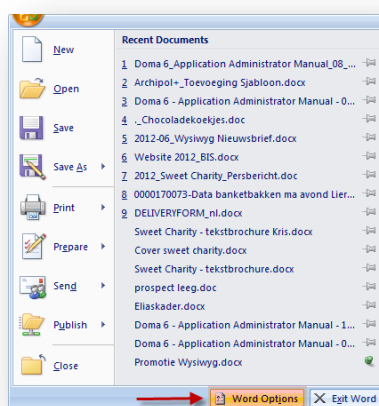
5.1 Example of the creation of a Word document with bookmarks (using Word 2007)

First create a new Word document.

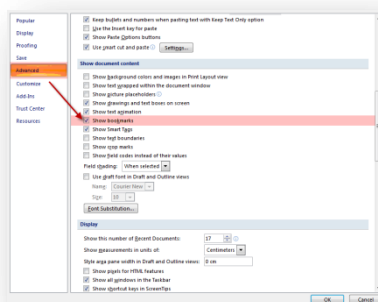
5.1.1 Visualize bookmarks

Before creating bookmarks, let's ensure that we can see the bookmarks that we create:

Click on the windows button in the left upper corner of the Word application.
A menu appears: click on the button **Word Options**.



The window **Word Options** appears. Select the item **Advanced** and browse to the part **Show document content**. Then select the option **Show bookmarks** and click on the **OK** button:



5.1.2 Add Bookmarks

Enter the names of the bookmarks where you want them to appear.

The screenshot shows a document template for 'Politie'. It includes a logo at the top left. Below the logo, there is a section for 'Lokale Politie-XXXXX' with a barcode. To the right of the barcode, there are fields for 'gd_BetrokkeneNaam', 'gd_BetrokkeneVoornaam', 'gd_BetrokkeneAdresStraat', and 'gd_AdresHuisnummer'. Below these fields, there is a section for 'Mechelen'. At the bottom, there is a section for 'Onderwerp' with a field for 'gd_Onderwerp'.

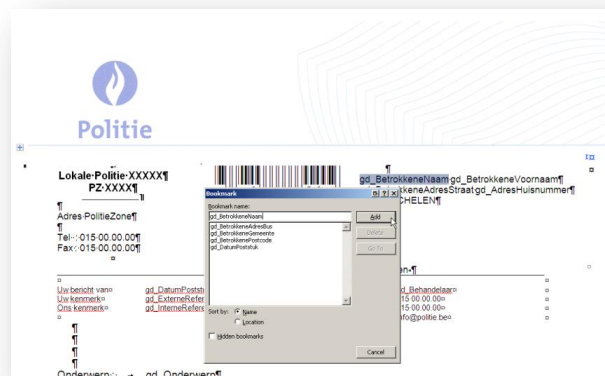
Select the name of a bookmark in your document:

This screenshot is identical to the previous one, but the field 'gd_BetrokkeneNaam' is highlighted with a blue selection box, indicating it has been selected as a bookmark.

Select the tab "Insert", then select "Bookmark" in the ribbon that appears:

This screenshot shows the document template within a Microsoft Word window. The 'Insert' tab is selected in the ribbon, and the 'Bookmark' option is visible in the 'Links' group. The document content is the same as the previous screenshots.

A pop-up window appears. Enter a name for the bookmark, then click on the button Add. The bookmark now appears in your text:




Repeat this action for all bookmarks in the document.

5.2 Example: using a Word (.docx) template for file creation in a workflow category – file creation is triggered by the WebInterface user – result = file

5.2.1 Introduction

In this example, we will configure a template for the generation of a file. This file will be created when the user clicks on a button in the step detail in the WebInterface. The result will be a file that is directly attached to the workflow object in DocRoom.

We will use a Word file with bookmarks as a template to create an acknowledgement of receipt of a complaint letter that looks like this:

<p>senderName senderAddress senderZIP senderCity</p> <p>Mechelen, sysdate</p> <p>Dear Ms/Mr. senderName</p> <p>We acknowledge receipt of your complaint received at our offices on date_letter. We have assigned the next reference to the complaint: reference. Please use this reference in any communication about the complaint.</p> <p>A review of your complaint has been entrusted to Mr/Ms responsible, the person in charge of complaint examination within our enterprise.</p> <p>If you wish, you may contact Mr/Ms responsible, as necessary, at the following address: complaints@arco.be or telephone number: +32 15 28 90 30.</p> <p>NOTICE</p> <p>In accordance with our complaint examination policy, we will inform you in writing of our final position concerning your complaint, within 20 days (<i>time period for the examination of complaints provided for in the regulated person's policy</i>). In the meantime, we may need to contact you in order to obtain additional information.</p> <p>With kind regards</p>  <p>Head Customer Service</p>

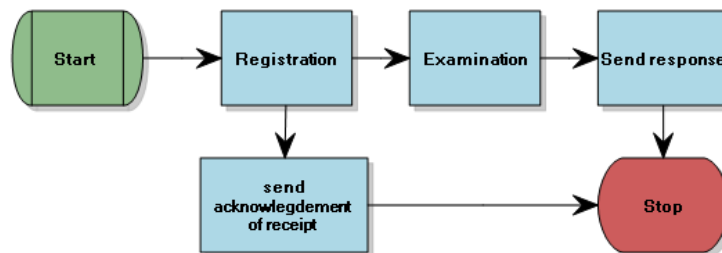
This file has been uploaded to the folder **D:\Arco\Data\DocumentTemplates** of the Doma server.

To register, assign and treat the complaint, we will build a workflow category, *Complaint follow-up*, which has a number of steps. Only the first step, *Registration*, is of importance for this example. In that step, we will add a button *Create receipt* to the screen toolbar that will automatically create a .pdf file that is based upon the word file of which the bookmarks are replaced by the property values of the workflow.

In this registration step, we will manually enter data like the date when the complaint was written, the date when it was received, the name and address of the person who wrote the complaint and what the complaint is about. All these data are entered in the first step of the workflow. It are these data that will be copied to the bookmarks of the acknowledgement of receipt.

Workflow category configuration

The flow of the workflow category with the name **Complaint follow-up** looks like this:



Properties on category level

Drag a column header here to group by that column

PROPERTIES					
NAME	TYPE	VIRTUAL	CATEGORY	PROCEDURE	
Complaint_date	Date	<input type="checkbox"/>	Complaint follow-up		
Complaint_date received	Date	<input type="checkbox"/>	Complaint follow-up		
Complaint_reference	String	<input type="checkbox"/>	Complaint follow-up		
Complaint_subject	String	<input type="checkbox"/>	Complaint follow-up		
Responsible	Assignee	<input type="checkbox"/>	Complaint follow-up		
Sender_address	String	<input type="checkbox"/>	Complaint follow-up		
Sender_city	String	<input type="checkbox"/>	Complaint follow-up		
Sender_name	String	<input type="checkbox"/>	Complaint follow-up		
Sender_ZIP	String	<input type="checkbox"/>	Complaint follow-up		

Step registration - configuration

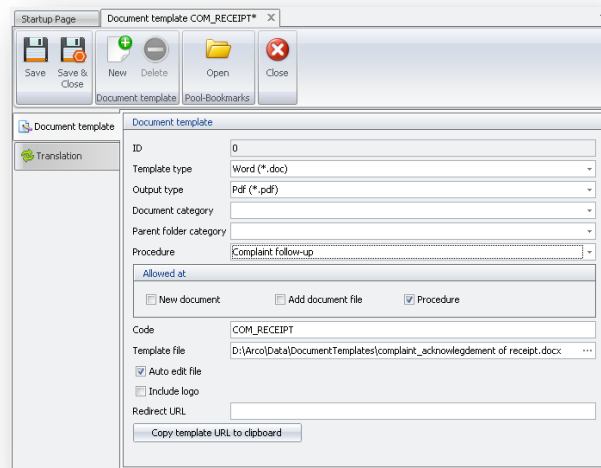
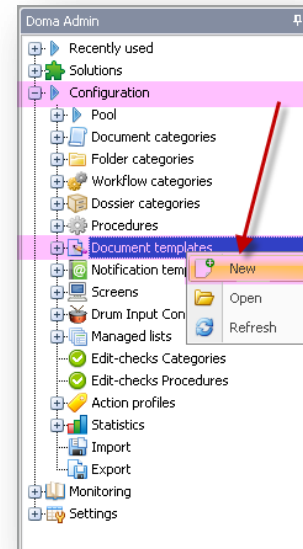
- **Step name:** Registration
- **Default executor:** case creator
- **Screen items:**

NAME	MODE	DEFAULT VALUE	IDENTIFIER	HALF LINE
Procedure	ReadOnly		Procedure	<input type="checkbox"/>
Case name	Writable		Case name	<input type="checkbox"/>
Step	ReadOnly		Step	<input type="checkbox"/>
Complaint_reference	Writable		Complaint_reference	<input type="checkbox"/>
Complaint_date received	Writable		Complaint_date received	<input type="checkbox"/>
StartGrouper	ReadOnly	Complaint info		<input type="checkbox"/>
Sender_name	Writable		Sender_name	<input type="checkbox"/>
Sender_address	Writable		Sender_address	<input type="checkbox"/>
Sender_ZIP	Writable		Sender_ZIP	<input checked="" type="checkbox"/>
Sender_city	Writable		Sender_city	<input checked="" type="checkbox"/>
Complaint_date	Writable		Complaint_date	<input type="checkbox"/>
Complaint_subject	Writable		Complaint_subject	<input type="checkbox"/>
EndGrouper	ReadOnly			<input type="checkbox"/>
Responsible	Writable		Responsible	<input type="checkbox"/>

Now let's see how we can configure this:

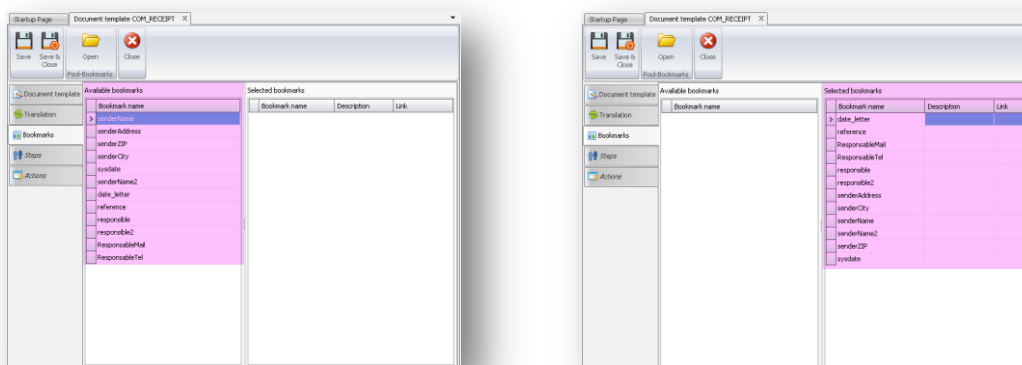
5.2.2 Template configuration

- Open the **Doma admin** module and select the item **Document Templates** in the **Configuration** part of the navigation tree.
- Click on the **right mouse button**.
- Select the option **New** in the menu that appears.
- A new tab *New document template* will appear; enter the next data:
 - Template type: Word (*.docx)
 - Output type: Pdf (*.Pdf)
 - Document category: *leave empty*
 - Parent folder category: *leave empty*
 - Procedure: Complaint follow-up
 - Allowed at: ☐ New document ☐ Add document file ☒ Procedure
 - Code: COM_RECEIPT
 - Template file:
D:\Arco\Data\DocumentTemplates\complaint_acknowledgement of receipt.docx



- Save this configuration.
- The name of the tab *New document template* has changed into *Document template COM_RECEIPT* and a number of extra configuration tabs now appear.
- Select the tab **Bookmarks**.
- Transfer the *available bookmarks* to *selected bookmarks* (double click or selection and drag & drop). Then save. A message *Bookmarks have been saved* appears.

It is important to select and save the bookmarks – otherwise you cannot define actions on them.



- Select the tab **Actions**. Here we will define which data we will get from where and where we will copy them to.
- Define the next action for the bookmarks of the template **COM_RECEIPT** - we will define no options and all actions are shown on step 0. (Which means that we define no steps for user interaction.)

Now define the next actions:

Get input from	Put output to
Constant - currentdate	Bookmark - sysdate
Procedure property – Complaint_date received	Bookmark - date_letter
Procedure property – Complaint_reference	Bookmark - Reference
Procedure property – Responsible	Bookmark - responsible
Procedure property – Sender_name	Bookmark –sender_name
Procedure property – Sender_address	Bookmark – sender_address
...	

Remark

To enable the procedure properties, checkboxes **Allowed at New document** and **Add document file** must be unchecked in the tab **Document template**. The option **Allowed at Procedure** must be selected.

- Save the settings.

5.2.3 User event configuration on procedure level

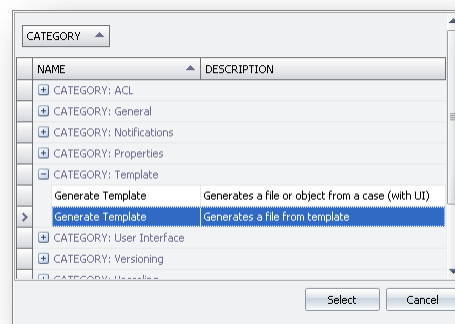
Now we will configure a **user event**. A user event is a pre-defined automated action that will be executed on user demand. That means that we will configure both the automated action (create a file based upon the template in which the bookmarks are replaced by data) and a button on which the user will have to click to start this action.

- Open the **procedure** of the workflow category *Complaint follow-up* in the Doma admin module: select it in the item **Workflow categories** in the **Configuration** part of the navigation tree.
- Select the tab **User events**.
- Click on the button **New Event** in the ribbon above. A new line appears in the overview, with the message **Enter text here** in the NAME column.

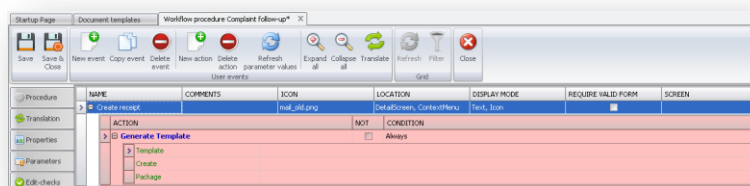
- Replace the message **Enter text here** with the name of the button: **Create receipt**.
Make a further configuration of the button:

Item	Value	Description
Name	Create receipt	Name that appears in the button or in the right click menu.
Comments	/	Comments about the item.
Icon	Mail.old.png	Icon that can be used in the button or next to the name of a button. Click in the field on the button ... to select one. The folder with DocRoom Web Images appears. Click on an icon to select.
Location	Detailscreen	DetailScreen: show a button in the toolbar of the step ContextMenu: show an item in the menu that appears when the users click on the right mouse button when he's pointing an item in the result list. Detailscreen, Contextmenu: Both options are available.
Display mode	Text, Icon	Text: Only text is shown. Icon: only an icon is shown. Text, Icon: both text and icon are shown.
Require valid form	/	<input checked="" type="checkbox"/> Event can only be used when all mandatory fields are completed. <input type="checkbox"/> Event can always be used.
Screen	/	Select the screen in which it has to be available. This makes it possible to limit the function to a select group of users.

- Keep the focus on the event and click on the button **New Action** in the ribbon above. A pop-up screen appears.
- Open the category **Template** by clicking on the + icon.
- Select **Generate Template – Generates a file from template**.
- Click on the **Select** button.



- The **Action configuration screen** appears in the overview:



- Configure the action as follows:

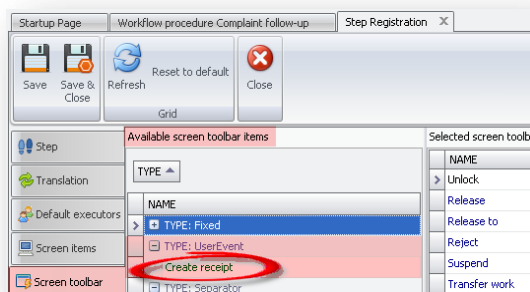
Item	Value	Description
Template	COM_RECEIPT	The template that is used.
Create	File	<p>Document: create a DocRoom document to which the file is linked. This document has to be put in the package mentioned below.</p> <ul style="list-style-type: none"> If no document category is selected in the document template configuration screen, the default document category will be used. When a document category has been selected in the document template configuration screen, the document will be a document of the selected category. <p>File: Create a file that will be linked to the workflow object.</p>
Package	/	Name of the package where the newly created document will be put. If no package is mentioned, make sure that you the option File is selected in the Create field.

- Save this configuration.

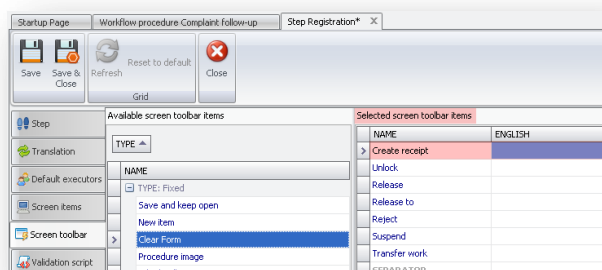
5.2.4 Add user event to the step

Once we have created the user event, it still has to be visualized in the right location(s).

- Select the tab **View**. The procedure overview appears. Double click on the step **Registration**. The detail of this step appears in a **new tab** with the name **Step Registration**.



- Drag & drop the item **Create receipt** to the column **Selected screen toolbar items**. The higher it stands in the list, the more it appears to the left in the toolbar.



- Save these settings.

5.2.5 Result in the Doma WebInterface:

- When a new workflow is started, the user will see the next step detail for the step **Registration**:

The screenshot shows the 'Administration' tab in the Doma WebInterface. The 'Procedure' is 'Complaint follow-up' and the 'Name' is 'Demo manual'. The 'Step' is 'Registration'. The 'Complaint_reference' is '123456' and the 'Complaint_date received' is '10-08-2012'. The 'Complaint info' section shows 'Sender_name' as 'Jane Roe'. The 'Create receipt' button is highlighted with a red circle.

- When all properties are completed, the user can click on the button **Create receipt**. A **wait screen** pops up:

The screenshot shows the 'Administration' tab in the Doma WebInterface. The 'Complaint info' section is expanded, showing 'Sender_name' as 'Jane Roe', 'Sender_address' as 'Wayenborgstraat 24', 'Sender_ZIP' as '2800', 'Complaint_date' as '07-08-2012', and 'Complaint_subject' as 'Infractie'. The 'Create receipt' button is highlighted with a red square, and a red square with a green circular arrow indicates a wait screen.

- When the wait screen disappears, the file is created. **However, this is not visible in the detail screen.** When you return to the result list, you will see that a file has been attached to the workflow.

The screenshot shows the 'Library' tab in the Doma WebInterface. The 'Category' is 'Complaint follow-up (1)'. The 'Title' is 'Demo manual'. The 'COM_RECEIPT' file is highlighted with a red circle. The 'Previous' and 'Next' buttons are visible, along with the text '(1 results found)'. The footer text reads 'Application developed by ARCO Information ©2000-2012. Loaded in 0.7694 seconds.'

5.3 Example: using a Word (.docx) template for file creation in a workflow category – file creation is triggered by the WebInterface user – result = document with file attached linked in the workflow package

5.3.1 Introduction

In this example, we will configure a template for the generation of a file. This file will be created when the user clicks on a button in the step detail in the WebInterface. The result will be a document that is put in a package. This package is visible in the step detail in the WebInterface. The newly created document will be put in the same folder as the workflow. The category of the document is the category mentioned in the document template configuration screen.

We will use the same Word file with bookmarks as a template to create an acknowledgement of receipt of a complaint letter as in the previous example.

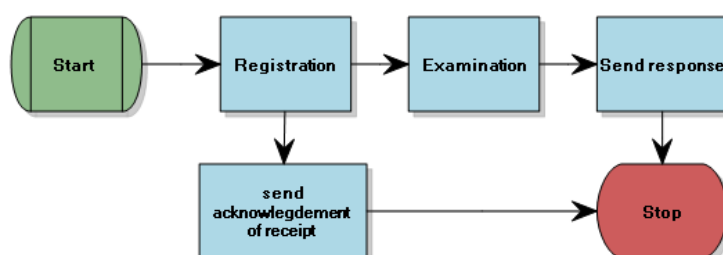
This file has been uploaded to the folder **D:\Arco\Data\DocumentTemplates** of the Doma server.

To register, assign and treat the complaint, we will build a workflow category, *Complaint follow-up*, which has a number of steps. Only the first step, *Registration*, is of importance for this example. In that step, we will add a button *Create receipt* to the screen toolbar that will automatically create a .pdf file that is based upon the word file of which the bookmarks are replaced by the property values of the workflow.

In this registration step, we will manually enter data like the date when the complaint was written, the date when it was received, the name and address of the person who wrote the complaint and what the complaint is about. All these data are entered in the first step of the workflow. It are these data that will be copied to the bookmarks of the acknowledgement of receipt.

Workflow category configuration

The flow of the workflow category with the name **Complaint follow-up** looks like this:

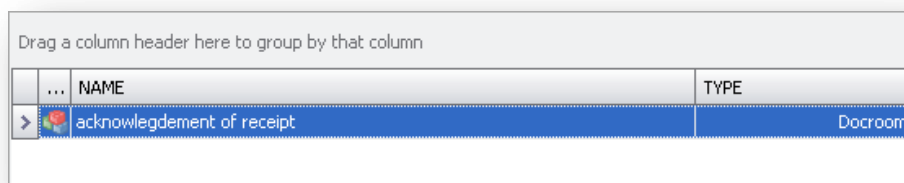


Properties on category level

Drag a column header here to group by that column

PROPERTIES					
NAME	TYPE	VIRTUAL	CATEGORY	PROCEDURE	
Complaint_date	Date	<input type="checkbox"/>	Complaint follow-up		
Complaint_date received	Date	<input type="checkbox"/>	Complaint follow-up		
Complaint_reference	String	<input type="checkbox"/>	Complaint follow-up		
Complaint_subject	String	<input type="checkbox"/>	Complaint follow-up		
Responsible	Assignee	<input type="checkbox"/>	Complaint follow-up		
Sender_address	String	<input type="checkbox"/>	Complaint follow-up		
Sender_city	String	<input type="checkbox"/>	Complaint follow-up		
Sender_name	String	<input type="checkbox"/>	Complaint follow-up		
Sender_ZIP	String	<input type="checkbox"/>	Complaint follow-up		

Packages on category level



Step registration - configuration

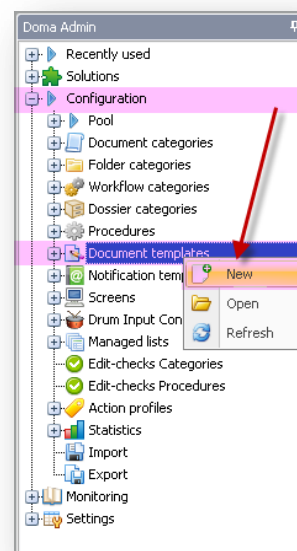
- **Step name:** Registration
- **Default executor:** case creator
- **Screen items:**

NAME	MODE	DEFAULT VALUE	IDENTIFIER	HALF LINE
Procedure	ReadOnly		Procedure	<input type="checkbox"/>
Case name	Writable		Case name	<input type="checkbox"/>
Step	ReadOnly		Step	<input type="checkbox"/>
Complaint_reference	Writable		Complaint_reference	<input type="checkbox"/>
Complaint_date received	Writable		Complaint_date received	<input type="checkbox"/>
StartGrouper	ReadOnly	Complaint info		<input type="checkbox"/>
Sender_name	Writable		Sender_name	<input type="checkbox"/>
Sender_address	Writable		Sender_address	<input type="checkbox"/>
Sender_ZIP	Writable		Sender_ZIP	<input checked="" type="checkbox"/>
Sender_city	Writable		Sender_city	<input checked="" type="checkbox"/>
Complaint_date	Writable		Complaint_date	<input type="checkbox"/>
Complaint_subject	Writable		Complaint_subject	<input type="checkbox"/>
EndGrouper	ReadOnly			<input type="checkbox"/>
Responsible	Writable		Responsible	<input type="checkbox"/>

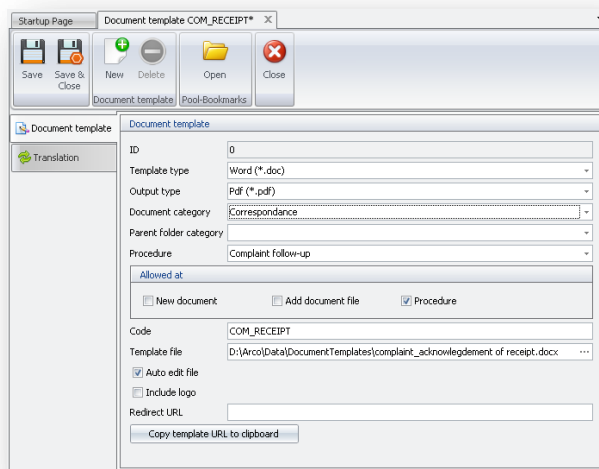
Now let's see how we can configure this:

5.3.2 Template configuration

- Open the **Doma admin** module and select the item **Document Templates** in the **Configuration** part of the navigation tree.
- Click on the **right mouse button**.
- Select the option **New** in the menu that appears.
- A new tab *New document template* will appear; enter the next data:
 - Template type: Word (*.docx)
 - Output type: Pdf (*.Pdf)
 - **Document category: Correspondance**
 - Parent folder category: *leave empty*
 - Procedure: Complaint follow-up
 - Allowed at: ☐ New document ☐ Add document file ☒ Procedure
 - Code: COM_RECEIPT
 - Template file:

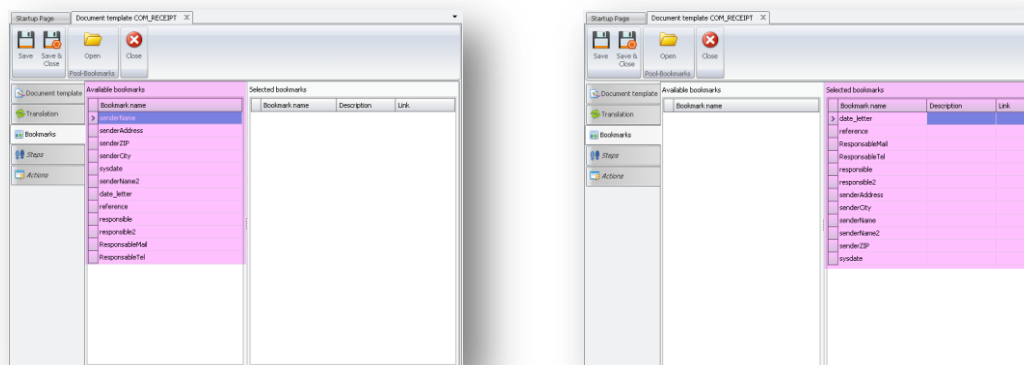


D:\Arco\Data\DocumentTemplates\complaint_acknowledgement of receipt.docx



- Save this configuration.
- The name of the tab *New document template* has changed into *Document template COM_RECEIPT* and a number of extra configuration tabs now appear.
- Select the tab **Bookmarks**.
- Transfer the *available bookmarks* to *selected bookmarks* (double click or selection and drag & drop). Then save. A message *Bookmarks have been saved* appears.

It is important to select and save the bookmarks – otherwise you cannot define actions on them.



- Select the tab **Actions**. Here we will define which data we will get from where and where we will copy them to.
- Define the next action for the bookmarks of the template **COM_RECEIPT** - we will define no options and all actions are shown on step 0. (This means that we define no steps for user interaction.)

Now define the next actions:

Get input from	Put output to
Constant - currentdate	Bookmark - sysdate
Procedure property – Complaint_date received	Bookmark - date_letter
Procedure property – Complaint_reference	Bookmark - Reference
Procedure property – Responsible	Bookmark - responsible
Procedure property – Sender_name	Bookmark –sender_name
Procedure property – Sender_address	Bookmark – sender_address
...	

Remark

To enable the procedure properties, checkboxes **Allowed at New document** and **Add document file** must be unchecked in the tab **Document template**. The option **Allowed at Procedure** must be selected.

- Save the settings.

5.3.3 User event configuration on procedure level

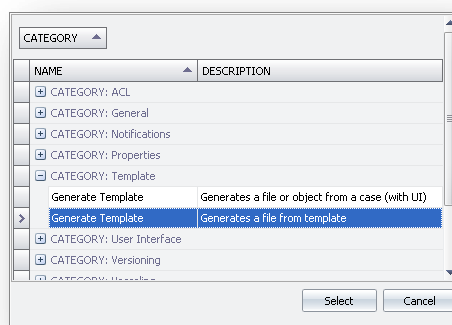
Now we will configure a **user event**. A user event is a pre-defined automated action that will be executed on user demand. That means that we will configure both the automated action (create a file based upon the template in which the bookmarks are replaced by data) and a button on which the user will have to click to start this action.

- Open the **procedure** of the workflow category *Complaint follow-up* in the Doma admin module: select it in the item **Workflow categories** in the **Configuration** part of the navigation tree.
- Select the tab **User events**.
- Click on the button **New Event** in the ribbon above. A new line appears in the overview, with the message **Enter text here** in the NAME column.
- Replace the message **Enter text here** with the name of the button: **Create receipt**. Make a further configuration of the button:

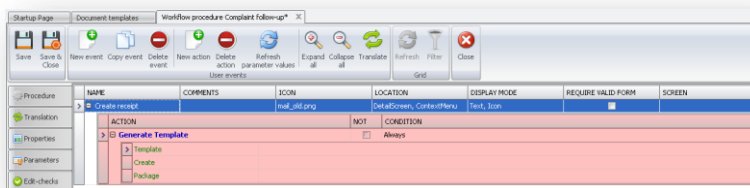
Item	Value	Description
Name	Create receipt	Name that appears in the button or in the right click menu.
Comments	/	Comments about the item.
Icon	Mail.old.png	Icon that can be used in the button or next to the name of a button. Click in the field on the button ... to select one. The folder with DocRoom Web Images appears. Click on an icon to select.
Location	Detailscreen	DetailScreen: show a button in the toolbar of the step ContextMenu: show an item in the menu that appears when the users click on the right mouse button when he's pointing an item in the result list. Detailscreen, Contextmenu: Both options are available.
Display mode	Text, Icon	Text: Only text is shown.

		Icon: only an icon is shown. Text, Icon: both text and icon are shown.
Require valid form	/	<input checked="" type="checkbox"/> Event can only be used when all mandatory fields are completed. <input type="checkbox"/> Event can always be used.
Screen	/	Select the screen in which it has to be available. This makes it possible to limit the function to a select group of users.

- Keep the focus on the event and click on the button **New Action** in the ribbon above. A pop-up screen appears.
- Open the category **Template** by clicking on the + icon.
- Select **Generate Template – Generates a file from template**.
- Click on the **Select** button.



- The **Action configuration screen** appears in the overview:



- Configure the action as follows:

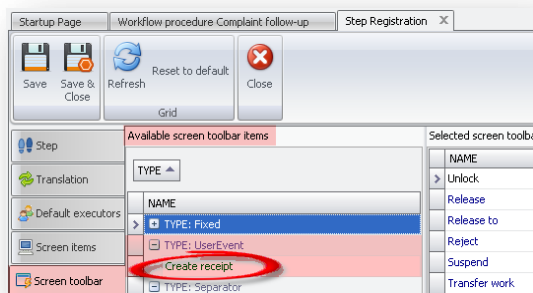
Item	Value	Description
Template	COM_RECEIPT	The template that is used.
Create	Document	<p>Document: create a DocRoom document to which the file is linked. This document has to be put in the package mentioned below.</p> <ul style="list-style-type: none"> • If no document category is selected in the document template configuration screen, the default document category will be used. • When a document category has been selected in the document template configuration screen, the document will be a document of the selected category. <p>File: Create a file that will be linked to the workflow object.</p>
Package	Acknowledgement of receipt	Name of the package where the newly created document will be put. If no package is mentioned, make sure that you the option File is selected in the Create field.

- Save this configuration.

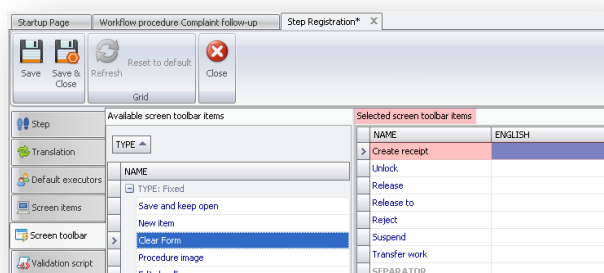
5.3.4 Add user event to the step

Once we have created the user event, it still has to be visualized in the right location(s).

- Select the tab **View**. The procedure overview appears. Double click on the step **Registration**. The detail of this step appears in a **new tab** with the name **Step Registration**.



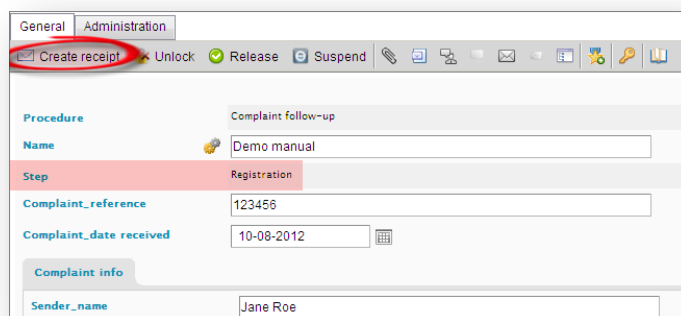
- Drag & drop the item **Create receipt** to the column **Selected screen toolbar items**. The higher it stands in the list, the more it appears to the left in the toolbar.



- Save these settings.

5.3.5 Result in the Doma WebInterface:

- When a new workflow is started, the user will see the next step detail for the step **Registration**:



- When all properties are completed, the user can click on the button **Create receipt**. A **wait screen** pops up:

- When the wait screen disappears, the document with file is created and put into the package. **However, this is not visible in the detail screen.** Refresh the screen to see the result.

5.4 Example: using an Excel (.xls) template for file creation in a document category with steps during creation – file creation is triggered automatically when document is saved – result = document with file attached

5.4.1 Introduction

In this example, we will configure a template for the generation of a file. This file will be created after the document is saved.

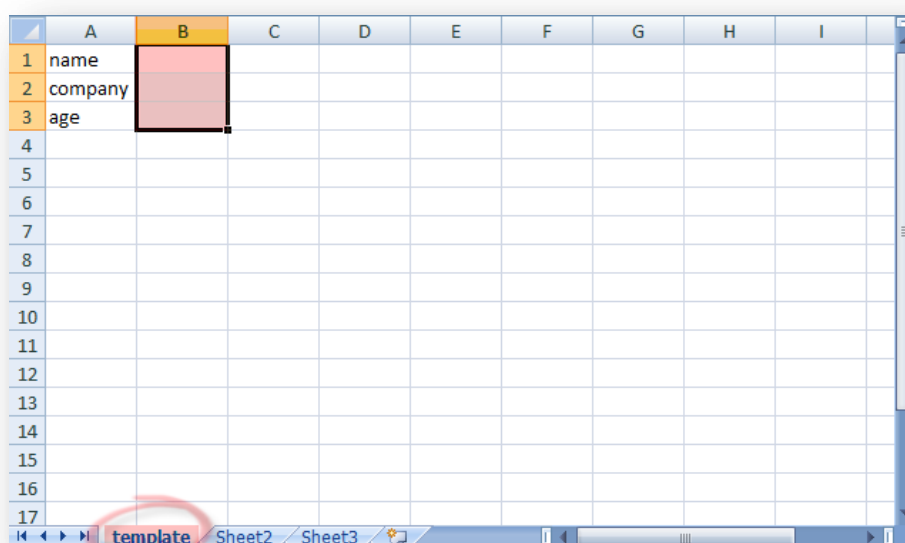
On document creation, the user will have to enter 3 data fields. These data will be copied to the excel sheet and will be copied to 3 properties of the document.

The result will be a document containing a file.

The data we have to enter are: name, company and age. These data will be entered in a text field in 2 steps. Afterwards they will be copied to the 3 properties of the document that carry the same name.

We will use an Excel file as a template to create a pdf in the result. This file has been uploaded to the folder **D:\Arco\Data\DocumentTemplates** of the Doma server.

The Excel file looks like this:



The data will be pasted in the cells **B1**, **B2** and **B3** of the tab **template**.

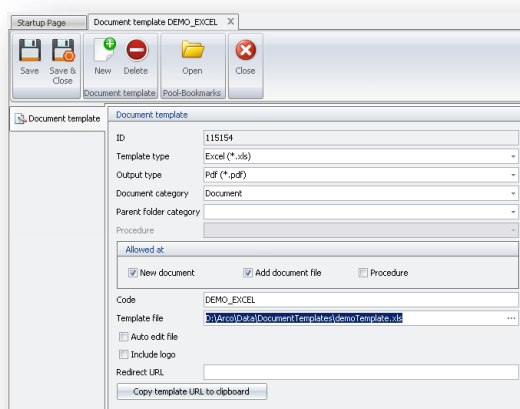
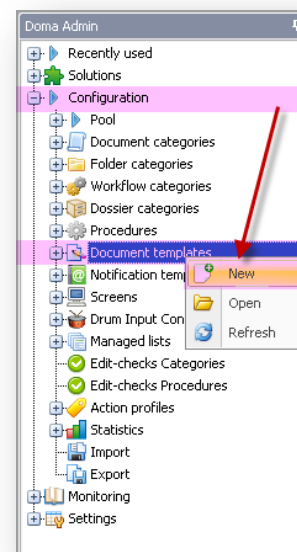
The result of the document creation will be a pdf file.

Precondition: create a document category **DocTempExcel** that has 3 properties: **name** (string), **company** (string) and **age** (number).

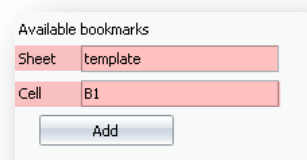
Now let's see how we can configure this:

5.4.2 Template configuration

- Open the **Doma admin** module and select the item **Document Templates** in the **Configuration** part of the navigation tree.
- Click on the **right mouse button**.
- Select the option **New** in the menu that appears.
- A new tab *New document template* will appear; enter the next data:
 - Template type: **Excel (*.xls)**
 - Output type: **Pdf (*.Pdf)**
 - Document category: **DocTempExcel**
 - Parent folder category: *leave empty*
 - Procedure: *leave empty*
 - Allowed at: ☒ New document ☒ Add document file ☐ Procedure
 - Code: **DEMO_EXCEL**
 - Template file:
D:\Arco\Data\DocumentTemplates\demoTemplate.xls



- Save this configuration.
- The name of the tab *New document template* has changed into *Document template DEMO_EXCEL* and a number of extra configuration tabs now appear.
- Select the tab **Bookmarks**.
- Enter in the part **Available bookmarks**, the **Sheet name** and the **cell coordinates** and click on the **Add** button below.
- Repeat this action for all necessary bookmarks in the sheet. Then save. A message *Bookmarks have been saved* appears.



It is important to select and save the bookmarks – otherwise you cannot define actions on them.

- Select the tab **Steps** and create the steps 1 and 2:

- Select the tab **Actions**. Here we will define which data we will get from where and where we will copy them to.
- Click on the icon **New** in the toolbar. The **Actions** window pops up.
- Select the item **Textbox** in the part **Get input from**. Select a textbox or add one. (See chapter [3.2.6.2.1.1 Textbox configuration](#))
- Define the next action for the bookmarks of the template **COM_RECEIPT** - we will define no options and the actions are shown in different steps:

Get input from	Put output to	Step
Textbox – NAME -	Bookmark - template B1 Document property - Name	1
Textbox – COMPANY -	Bookmark - template B2 Document property - Company	1
Textbox – AGE -	Bookmark - template B3 Document property - Age	2

- Save the settings.

5.4.3 Result in the Doma WebInterface:

- When a user creates a new document of the category **DocTempExcel**, he/she will have the choice between the upload of a file or a template creation – he/she chooses the template name (DEMO_EXCEL) in the list and **enters a Name** - then clicks on the **Add** option in the right lower corner:

- The next window appears – the user clicks on **Proceed**:

- The first step appears, containing the two text fields Name and Company. *The value entered in these textboxes will be copied to the cells in the Excel file and to the properties of our document.* The user enters the data and clicks on **Proceed**:

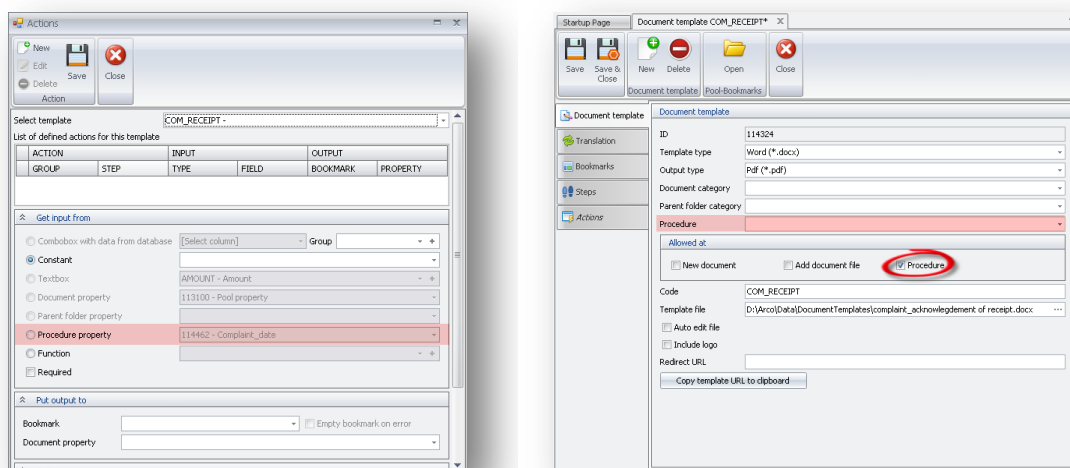
- The second step appears, containing the third text field Age. *The value entered in this textbox will also be copied to the cells in the Excel file and to the properties of our document.* The user enters the data and clicks on **Proceed**:

- A new document appears.
 - It has the name that was entered at the start of the document creation.
 - The document properties contain the values added during insert.
 - Also the Excel file contains the same data in the bookmarks.

6 Troubleshooting

6.1 Procedure properties are disabled in Actions configuration screen

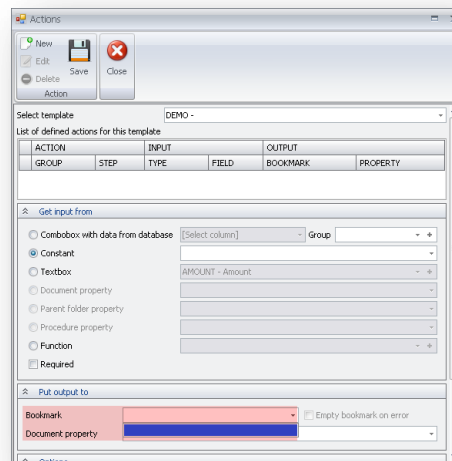
I have selected the option *Allowed at Procedure* in the Document template tab, but the field *Procedure property* remains disabled in the Actions configuration window.



*Check whether you selected a procedure in the field Procedure of the Document template tab:
If no procedure has been selected, not procedure properties can be shown.*

6.2 No bookmarks available in the field Bookmarks of the part Put output to in the Actions configuration screen

I have configured a document template, but when I create a new action, there are no bookmarks available, though I'm sure that the template file contains bookmarks.



Check whether you have saved your selected bookmarks in the bookmark tab. If they are not saved, you will see an empty selected bookmarks column. Select your bookmarks again and click on the **Save** button afterwards.

