Configurable Documents

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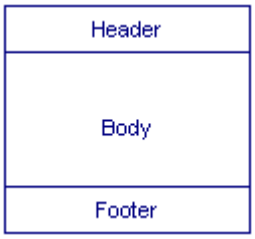
Contents

1 Configurable Documents

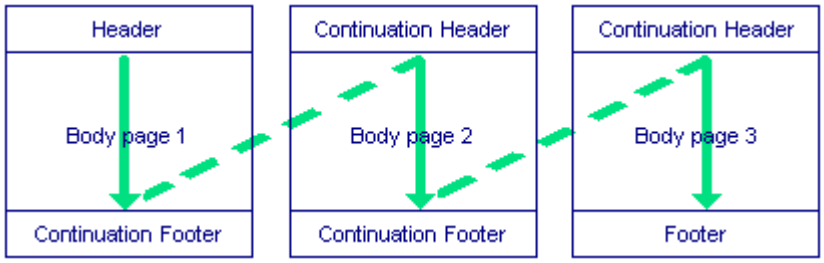
Because each COINS client has different requirements for the layout of documents such as statements or subcontractor certificates, COINS allows you to configure how these documents will be printed.

Configurable documents consist of a header, a body and a footer:



These are called forms. The body form of a document typically consists of a single line which is repeated; for example, a line showing the details of each invoice on a statement.

If the body runs to more than one page, the document needs continuation header and footer forms:



Note that continuation headers appear on all pages except the first, and continuation footers appear on all pages except the last; the header only appears on the first page, and the footer only appears on the last page. Continuation headers and footers can be different heights from headers and footers

For example, an invoice header might show the details of the supplier, delivery details, payment terms etc., while the continuation header might repeat only the invoice number and supplier name.

2 List of Configurable Documents

There is specific documentation available about the following configurable documents:

Commercial Manager	Variations
Cash Book	Cheques and Remittances
Contract Sales	Certificates
	Statements
	Applications
	Valuation Payment Stage Print
Facilities Management	FM Configurable Documents
	FM Application/Invoice
	FM Application
	FM Invoice
	FM Task Print
Human Resources	Accident Forms
House Sales	Quotations
	Extras/Options Print
	HS Receipts
	Statements
Purchase Ledger	Cheques and Remittances
Procurement	Purchase Orders
	Requisitions
Payroll	Cheques and Payslips
	P45 Documents
	PR Documents
	P60 Documents
Project Management	Meeting Minutes
	RFI Documents
	Submittals
	Drawing Set Cover Sheets
	Transmittal Cover Sheets
	Daily Reports
Subcontract Ledger	Certificates
	Cheques and Remittances
	Statements of Deduction
	SC Self-Billing Agreement
	Isle of Man C11
	Isle of Man C11A
	Isle of Man C14/C37
	Isle of Man C20
	Irish RCTDC Documents
VAT	How To Configure Dual-Currency VAT Invoices

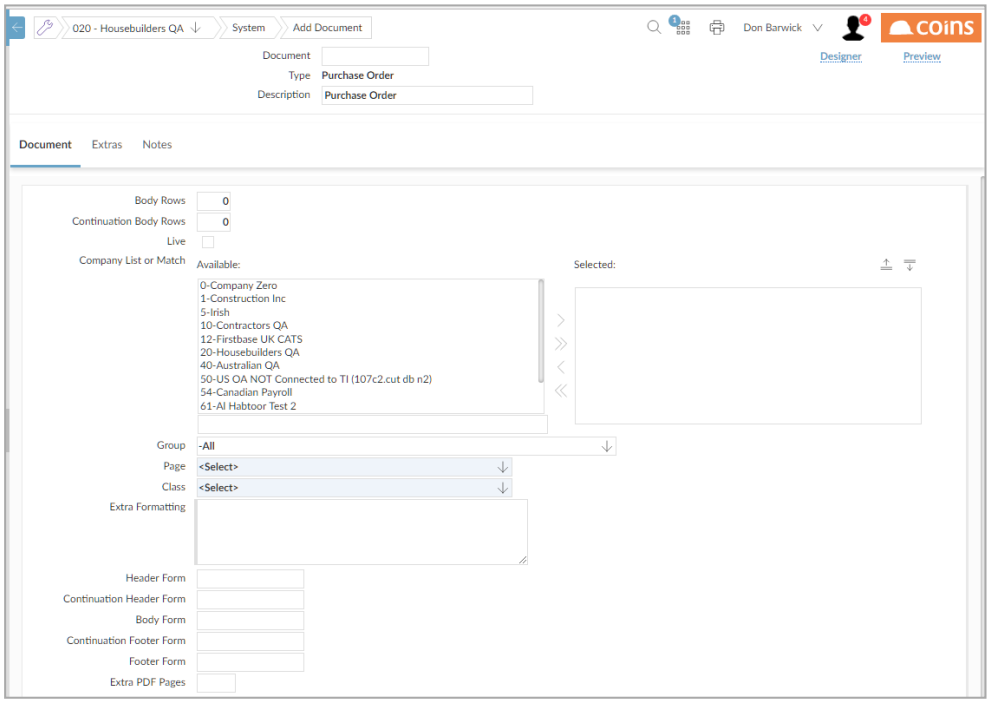
3 Creating a New Document

You may find it easier to copy an existing document and modify it, but if you want to create a new one, this is how to do it:

3.1 To create a new configurable document:

1. Go to ***Document Designer***.
2. Select the document type for the document you want to create, and click  .

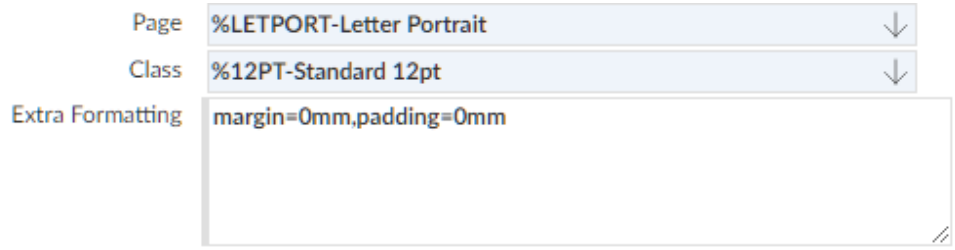
   It is important to set this to the correct document type first, as document types determine which forms COINS offers a user when printing a document. Some document types may have additional features, such as more than one type of repeating line.



3. Give the document a code and a description. COINS uses the code to identify the document; the description is used when giving the user a choice of which document to print. You can have different documents for the same document type, to allow you to print using different layouts.

4. Because continuation headers and footers can be different heights from headers and footers (typically first page headers could show more information than continuation headers), you need to specify the number of body (repeating) lines on first and continuation pages. The number of lines you can fit on the page will depend on the total heights specified for header and footer lines, and the height specified on the body lines.

5. Choose a page layout for the document.
6. Choose a default Class for the document. A Class is a combination of formatting features, such as font, size, colour and background
7. Add Extra Formatting if required; as a minimum enter the text 'margin=0mm,padding=0mm' to account for differing FOP versions.



8. For each form (header, continuation header, body, continuation footer, footer), give a name. You can call these whatever you like, but when you set up the fields to print on the document, you use these codes to specify which form they appear on. If you want the header and continuation header to be the same, give them the same names (similarly with the footer and continuation footer). Note that the form you nominate as the body form is used to specify the formatting (especially the line height) of blank lines at the end of the repeating body data. Each document must have a form called BODY.
9. Many documents use other form names that are specific to the type of document. For example, Contract Sales statements use additional forms for certificate lines, invoice lines, CS cash lines and SL cash lines within the

body of the document. Enter your names for these on the Extras tab. See the side-frame help or the documentation for each module for more details.

10. Documents can be stored against tables. The tables available will depend upon the document type you selected. If this option is selected, when the document print file is generated, COINS creates separate PDFs for each relevant record in the table, and stores the PDF against that record.

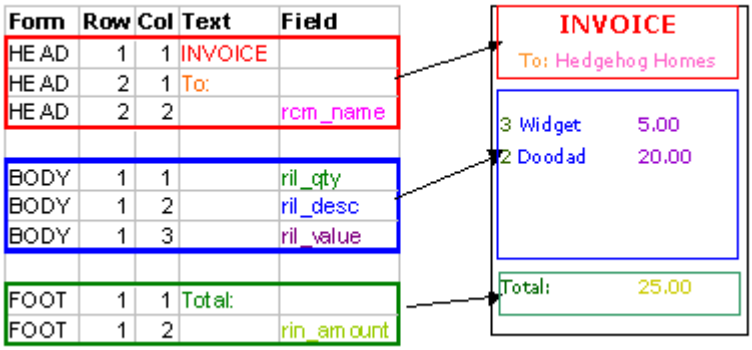
11. If you do not want users to be able to select the document for printing (for example, while you are still designing it) clear the **Live** tick box.
12. Save the document.
13. Then add field records (see Defining the Content of the Document).

NOTE

As you configure the document, you can preview the layout. Click the Preview link in the header to display a two-page PDF that contains dummy values for all the fields, but allows you to view the general layout of the document.

4 Defining the Content of the Document

The information that is displayed on the document can be either the value of a database field or fixed text.



Add a separate field record for each database field and each bit of text on the document.

Form	Row	Col	Text	Field	Include Form	Border	Width	Height
HEAD	1	1	To:				10mm	10mm
HEAD	1	2		rcm_name			150mm	10mm

Anything that is to be printed on the same line must have the same row number. The columns indicate the order of items in the row. Different rows can have a different number of columns, and the columns can be of different widths.

The **Text** field prints text on the form. You can embed database fields in the **Text** box by adding { } either side of the field.

The **Field** field allows you to reference fields in the database or add the path of an image, see *Images on Configurable Documents* in the online documentation.

The minimum height of a row is determined by the height of the first item on the row (other heights are ignored).

If you want column headings above the repeated (body) rows, include them at the bottom of the header section.

To show **page numbers**, use the tokens {page-number} and {page-count}. For example, enter a text record Page {page-number} of {page-count}.

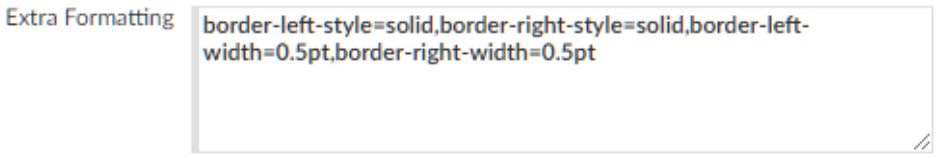
If you want a logo to appear on the document, specify it on one of the Background fields of the Report Page Layout. The image will be aligned with the left-hand margin, so if you want the logo to be right-aligned, you need to add white space to the image itself.

4.1 Adding Formatting to a Document Field

If you want to add formatting to text on the document, to highlight it or separate it from other parts of the document, you can do this in various ways.

- To put a border round the text, click the **Border** tick box.
- To use a different font class, select it using the **Class** selector. A class is a combination of formatting features, such as font, size, colour and background.
- To override the formatting for the class, enter formatting instructions in the **Extra Formatting** field. For example:
  - background-color=grey will give the text a grey background.
  - font-weight=bold will display the text in bold.
  - font-family=Courier will display the text using the Courier font.
  - border-left-style=solid,border-right-style=solid,border-left-width=0.5pt,border-right-width=0.5pt will put a border of 0.5pt at the left and right of the text (for example, to show a vertical line between fields on a body row).
  - padding-left=1mm will add a gap of 1mm between the text and the left border.
  - Upper will display the text in upper case **(**NOTE: This format is only used for Positive Pay documents)**.

  Enter combinations of formatting instructions separated by a comma. For example:



See FOP Formatting Instructions for more details.

4.2 FOP Formatting Instructions

Additional formatting for COINS configurable documents is based on the FOP (Formatting Objects Processor) standard. The full standard provides for a wide range of formatting options, many of which are not relevant to COINS configurable documents. You can read more about it at: http://xml.apache.org/fop/.

The following table shows some of the formatting instructions you are more likely to need.

Colour	color=<*colour*> background-color=<*colour*>	<*colour*> can be a colour name, like **blue**, or a red/green/blue code, like **#55AC9B**. See About Colours in HTML and FOP.	color=cyan color=#00FFFF background-color=gold background-color=#FFD700
Borders	border=<*style*> <*colour*> <*measure*> border-left-color=<*colour*> border-left-style=<*style*> border-left-width=<*measure*> (Similarly -right-, -top-, -bottom-)	<*style*> the border style; only **solid** works <*measure*> is usually in points; for example; **1.5pt**	border=solid green 1.5pt border-bottom-style=solid,border-bottom-color=red

Typeface	font-size=<*measure*> font-family=<*family-name*> font-variant=<*variant*>	<*family-name*> depends on the fonts installed on your system. By default, Helvetica, Times Roman, Courier, Dingbats and Symbol fonts are available. But it is possible to add any other licensed true-type font required (see How To Add Custom Fonts to FOP). <*variant*> can be **normal** or **small-caps**	font-family=Times Roman font-family=Helvetica, font-size=24pt font-variant=small-caps
Bold, italic, underline	font-weight=<*weight*>	<*weight*> can be **normal** or **bold**	font-weight=bold
	font-style=<*style*>	<*style*> can be **normal** or **italic**	font-style=normal
	text-decoration=<*decoration*>	<*decoration*> can be **none**, **underline**, **overline** or **line-through**	text-decoration=overline
Padding (gap between border and text)	padding-left=<*measure*> (Similarly -right-, -top-, -bottom-)	<*measure*> - see above	padding-left=2pt,padding-top=1pt

4.3 Wrapping and Truncating Data in a Configurable Document

Normally, data will wrap within the width you set for the field, so that the "cell" will expand vertically and push the following lines down. So for example if you configure a company name field to display in an area, say, 25mm wide, you might get the following output for two different companies:

A company with a very long name
The address

Short name
The address

But you might want to ensure that the address line is always printed in the same place (to go on pre-printed stationery, for example, or simply to prevent the header from expanding and pushing the body and footer lines down).

To do this, you can truncate the display of the company name; If you add:

```
overflow=hidden,wrap-option=no-wrap
```

to the extra formatting of the field, there will be no wrap and the field contents will be truncated at the field width:

A company with a very long name
The address

Short name
The address

> Unexpected wrapping is VERY BAD on documents that are split and sent to different recipients (e.g. payslips, remittances etc.) as it can throw out the page breaks which results in wrong document going to each recipient.

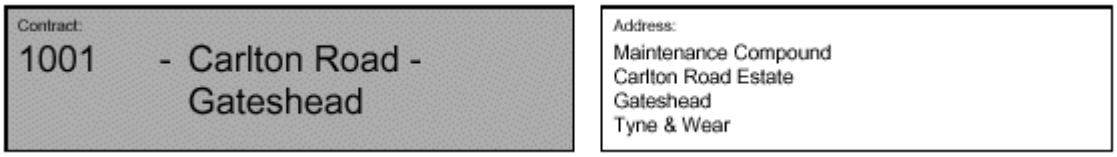
Please note that on BODY lines, COINS needs to keep track of the number of lines, so if you DO want a long description to wrap, use **View As** **Editor** and enter a **Format** - for example: **x(25)** - to specify where you want to wrap.

4.4 Nesting Configurable Document Forms

You can include one form in another. This allows you to:

- Apply formatting (for example, borders and shading) to several fields together.
- Define blocks of fields that you can arrange relative to each other.
- Define blocks of fields or text that you can use more than once (for example, on both a header and a continuation header).

For example, if you want to show the contract name and address in different boxes, like this:



You could set up a form for the contract name, and a form for the address:

CONTADD	1	1	Address:		90mm	12pt	Arial8pt
CONTADD	2	1		job_shipaddr__1	90mm	12pt	Arial10pt
CONTADD	3	1		job_shipaddr__2	90mm	12pt	Arial10pt
CONTADD	4	1		job_shipaddr__3	90mm	12pt	Arial10pt
CONTADD	5	1		job_shipaddr__4	90mm	12pt	Arial10pt
CONTRACT	1	1	Contract:		95mm	12pt	Arial8pt
CONTRACT	2	1		job_num	25mm	10mm	Arial18pt
CONTRACT	2	2	-		5mm	10mm	Arial18pt
CONTRACT	2	3		job_name	65mm	10mm	Arial18pt

Then include them on a line in the HEAD form, adding a border and extra formatting (see Adding Formatting to a Document Field):

```
HEAD 5   1   CONTRACT ✓      100mm 25mm background-color=#aaaaaa,
                                       padding=2mm
HEAD 5   2                    5mm   40mm
HEAD 5   3   CONTADD ✓        90mm  40mm padding=2mm
```

(Note the second line, which defines a blank space between the two boxes.)

4.5 Combining Configurable Document Fields

You can append one data field to another, using a calculation. For example, you might want to print all the address fields on a single line, or print the contract number and contract name as if they were a single field.

4.5.1 To enter a calculation:

1. Add a new line.
2. Leave the **Field** field blank.
3. Enter the calculation in the **Calculation** field. Put a $ before each part of a calculation that involves text strings; use the full table and fieldname.

   For example:

   $a=jc_job.job_num; $b=" (" + jc_job.job_name + ")"; $a + b

   will display the contract number, followed by the contract name in brackets.

4.6 Displaying Dates in Full on Configurable Documents

Most date fields that are available on configurable documents display the date as numbers; for example, 21/11/08. If you need to display the dates as text (for example, as 21 November 2008) you can do this using the RO_monthName field.

4.6.1 To configure dates on the document:

You can use the field **co_config.RO_monthName^{*field*}|*offset*|*style*** to display a date in various formats, where:

offset = a positive or negative number of months by which to offset the current month

style = **SHORT** displays the month in short form (Jan, Mar);

FULL displays the month in full (January, March);

MIXED displays short month plus the year (Mar 2008);

LONG displays the day, short month and year (27 Mar 2008);

LONGFULL displays the day, month in full and year (27 March 2008).

So to display the date from po_hdr.poh_odate as a date with the month in short form (21 Nov 2008), put the following in the **Field** field:

co_config.RO_monthName^{po_hdr.poh_odate}|0|LONG

To display the date using a format not covered above, use a calculation. The following calculations are useful:

dateString (string)	Converts a date string (such as from an input field or a database field) to an integer
day(a)	Returns the date in the month if 'a' is the integer value of a date.
year(a)	Returns the year (as a four-digit integer) if 'a' is the integer value of a date.

So if you want to display the month name followed by the date in the month, then the year (March 27, 2008), put the following in the **Calculation** field (remember to leave the **Field** field blank):

```
theDate=dateString("{po_hdr.poh_odate}");
theDay=day(theDate);
```

```
$theMonth= co_config.RO_monthName^{po_hdr.poh_odate}|0|FULL;
theYear=year(theDate);
$theMonth + ' ' + theDay + ', ' + theYear;
```

NOTE

theDate holds the value of po_hdr.poh_date as an integer (for example, 21/11/08 is stored as 2454793).
theDay and **theYear** hold the day and the year (as integers) calculated from **theDate**.
theMonth holds the month name and year from poh_date; the **$** at the start of the line means the line is a character 'calculation'.
theDate, **theDay**, **theMonth** and **theYear** are all user-defined variable names - you could use other names.
The final line appends **theMonth**, **theDay** and **theYear** (as a character string) with spaces between.

Note the sequence of brackets and quotation marks in the **dateString** calculation: **(" { field } ")**

4.7 Images on Configurable Documents

You may want to include images, such as a company logo, on the document.

To include an image called *filename.gif*:

1. In the **Field** field, enter:
   - **IMAGE^*filename*** (if the image file exists in the /images/ directory of the COINS installation).
   - **IMAGE^/*relative-path/filename*** (if the image exists in a different directory on the webserver; *relative-path* is the relative path on the webserver to the directory where the image is stored).

     NOTES

     1. The image files must be gif images, and the filenames of the image files must be in lowercase.
     2. Do not add the .gif extension after **IMAGE^*filename***
2. Specify the height and width of the image.
3. Select View As: **PICTURE**.

If you want an image that relates to the whole page of a document (for example: a watermark, or a logo that shows down the side of the page), set this up on the Report Page Layout used for the document.

4.8 About Colours in HTML and FOP

In HTML and FOP you can use either colour names or hexadecimal codes to identify colours.

Colour names are simply the usual names for colours, such as red, green, silver, brown. Other colour names include goldenrod and fuchsia. (There are several websites that list the colour names you can use; search for "HTML colour names". Some browsers may not support all the names.)

Hexadecimal codes are written using the format #aabbcc, where aa, bb and cc are hexadecimal (base 16; 0 to 255) values that represent the amount of red, green and blue in the colour. So for example:

- #00FF00 is pure green (0 red, 255 green, 0 blue)
- #808080 is a mid grey (128 red, 128 green, 128 blue)
- #310073 is a dark purple (49 red, 0 green, 115 blue)

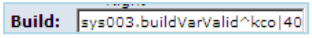
This allows you to specify colours much more precisely than using the colour names. Many graphics programs allow you to select a colour from a palette, and will tell you what the hexadecimal code for that colour is.

The colours used on the standard **COINS OA** screens are:

- The predominant light blue is "#DCE4EE"
- The mid blue (used for example on column headers and the selection areas at the left of a browse) is "#6699CC"
- The dark blue (used in the title bar) is "#3A3F8C".
- White is "#FFFFFF" and black is "#000000".

4.9 Conditional Formatting

Fields can be printed on documents based on conditions set in the Build field.



Fields can be conditionally printed based on the COINS Company you are printing from.

For example:

The following build would print the field when printing the document from COINS companies 001, 005 & 011. It would ignore the field if the document was printed in any other COINS company.

sys003.buildVarValid^kco|1,5,11

Fields can be conditionally printed based on the information contained within the record you are printing.

For example:

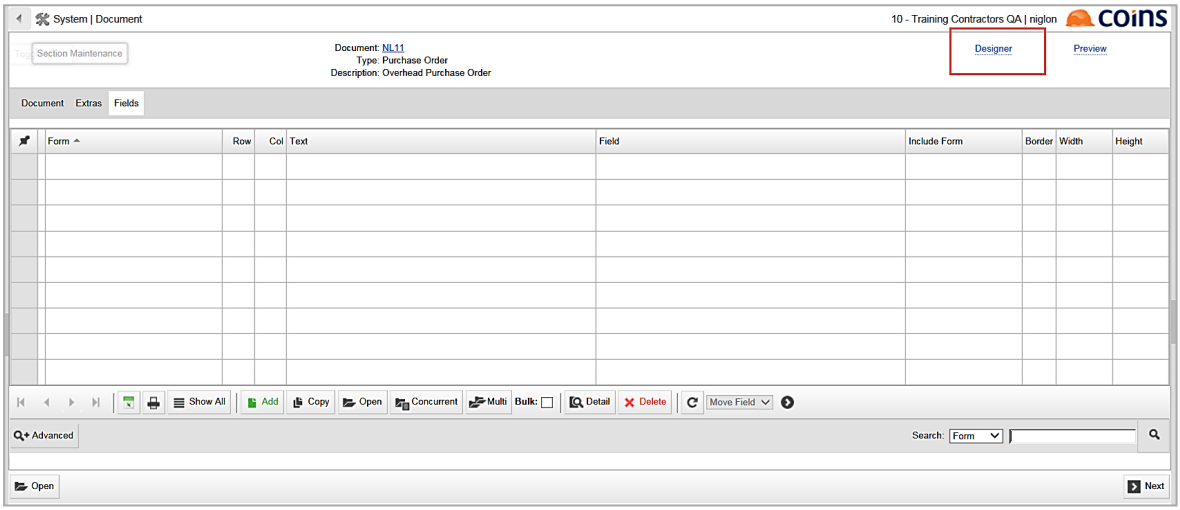
The following build would print the field when the record being selected to print is coded to General Ledger Sector 01. It would ignore the field if the record being printed related to any other Sector.

sys003.build^EQ||{gan_code}||01

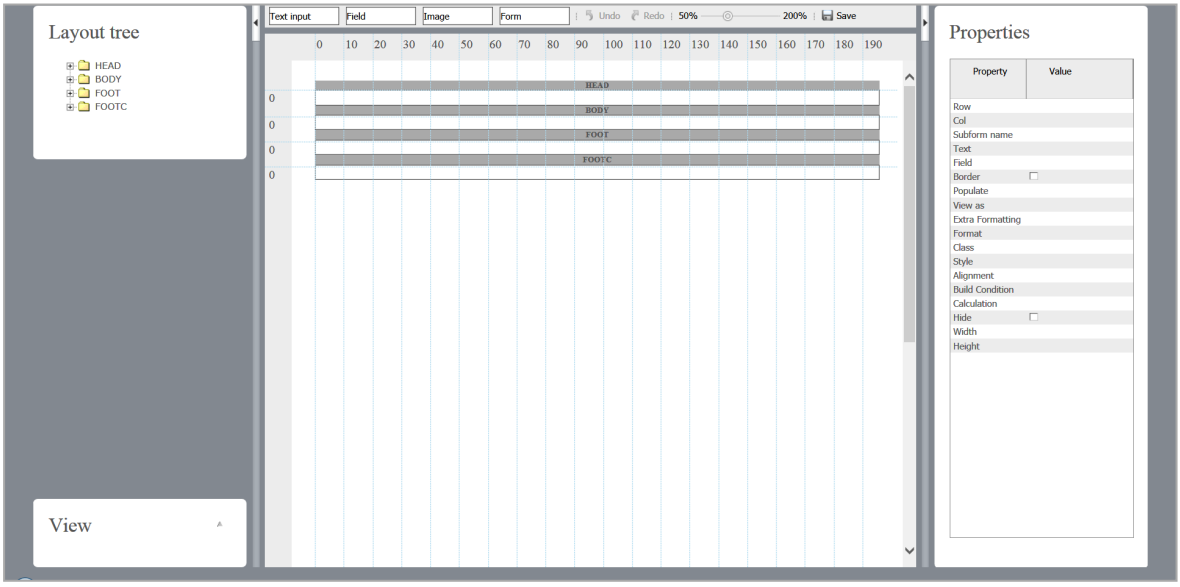
5 Drag and Drop Designer

COINS v11.02 introduced a drag and drop interface for defining the definition of fields on a Document.

Once the initial definition of the Document Type has been completed (3 - Creating a New Document), select the Designer Link at the top of the screen.



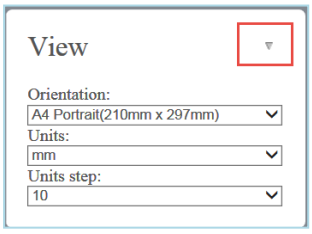
The drag and drop designer interface will be displayed.



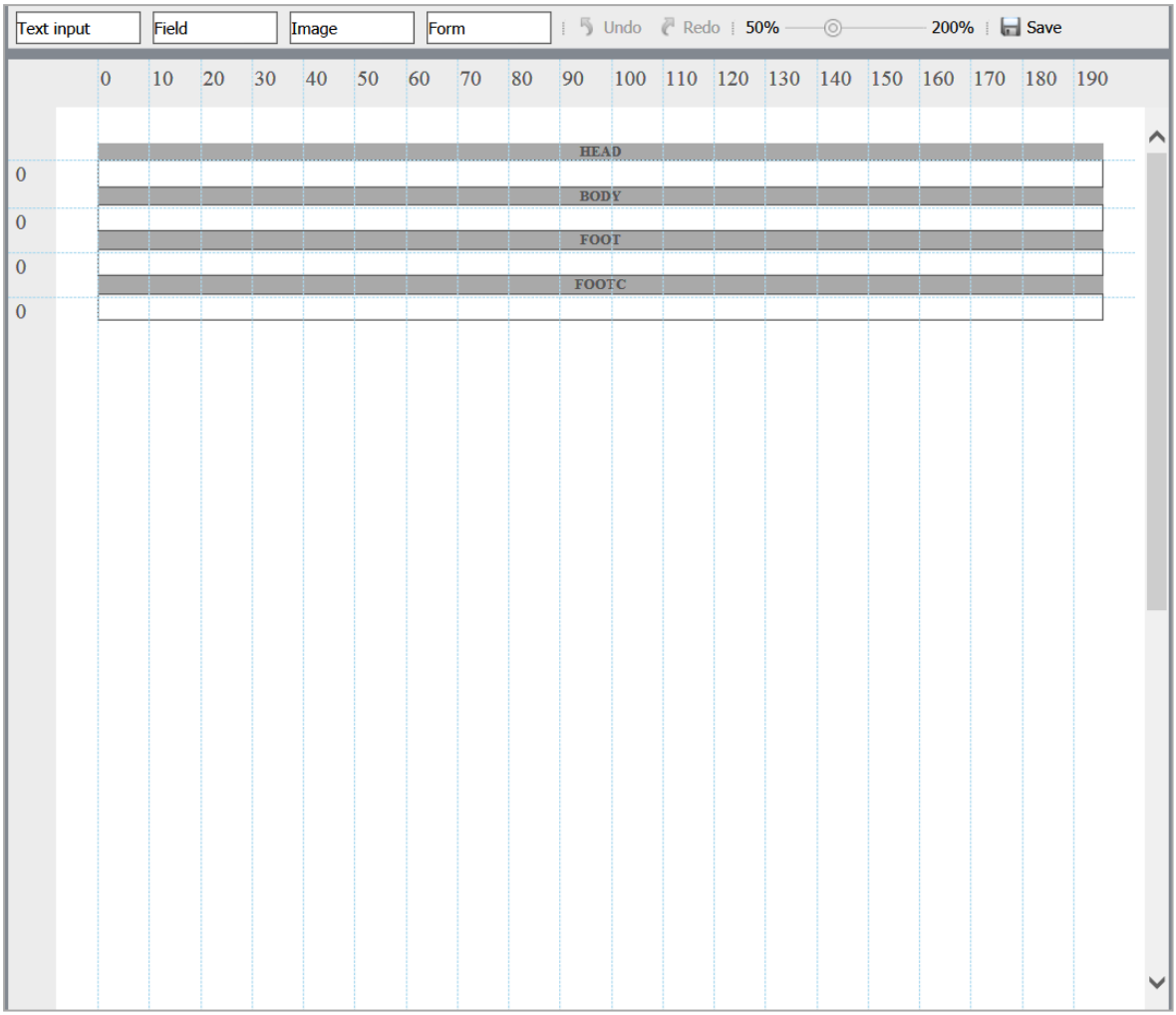
The interface window is split into three main sections.

The left hand pane contains the Document Layout Properties, split between the Document Layout Tree, which shows the document sections and the View Properties panel.

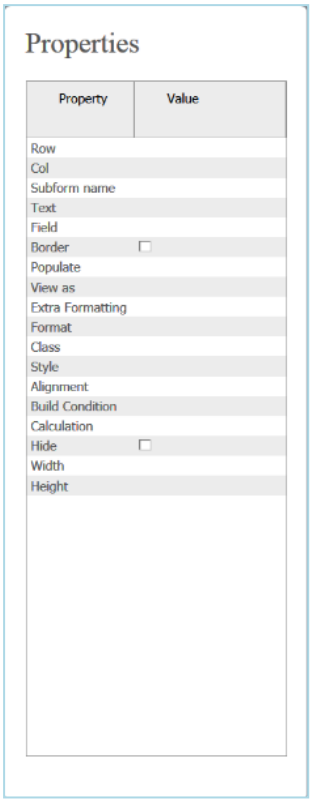
The View Properties can be shown or hidden by clicking the Triangle icon on the top right hand side.



The central pane shows the main document canvas, also split into sections and rows.

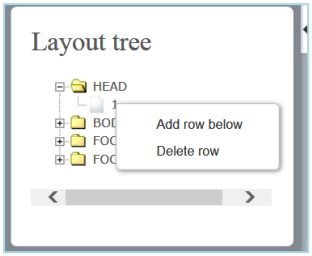


This is the area in which you will define the document content in a WYSIWYG format.



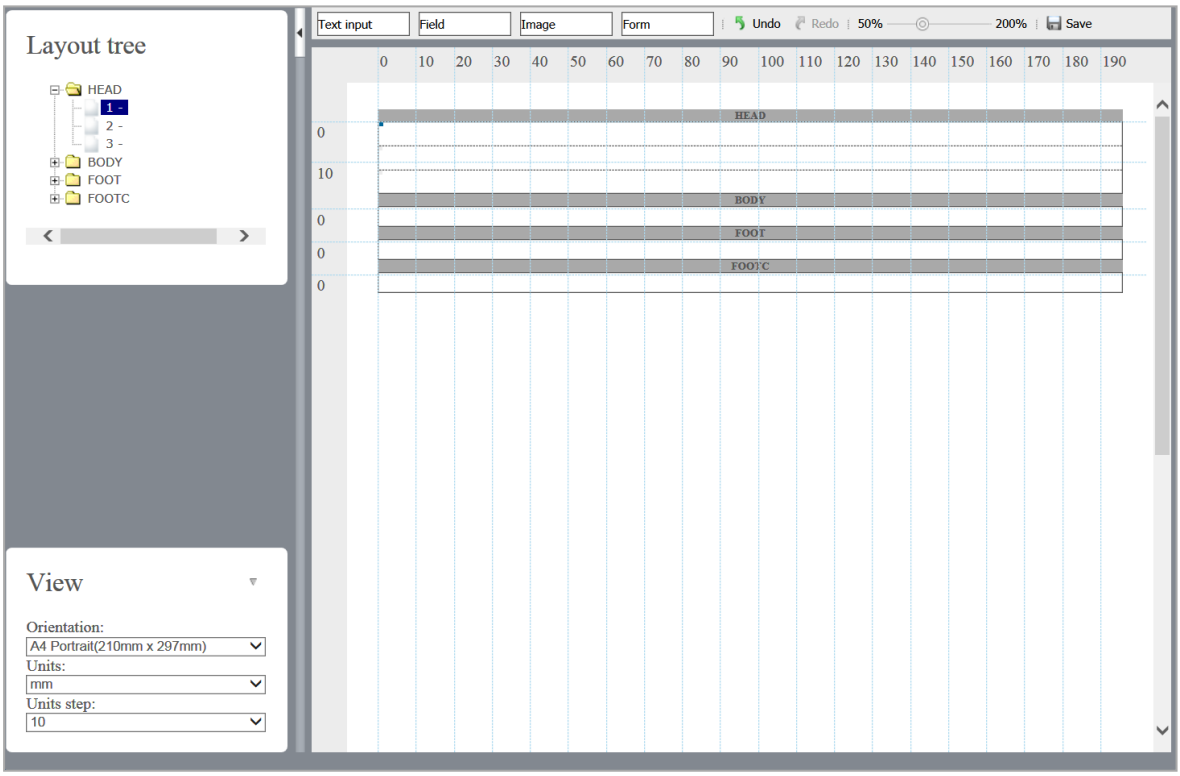
The third pane is the properties panel. When a field is selected, this panel will give access to most of the properties that would be available when defining a field through manual entry as detailed previously in this documentation.

5.1 Defining Content using Drag and Drop

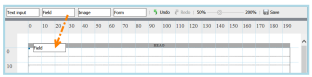


In the Layout Tree, expand the section to be worked on. Initially one row will be available in each section. Rows must exist before content can be added to them. Rows can be added or deleted by right clicking on an existing row to display the options menu.

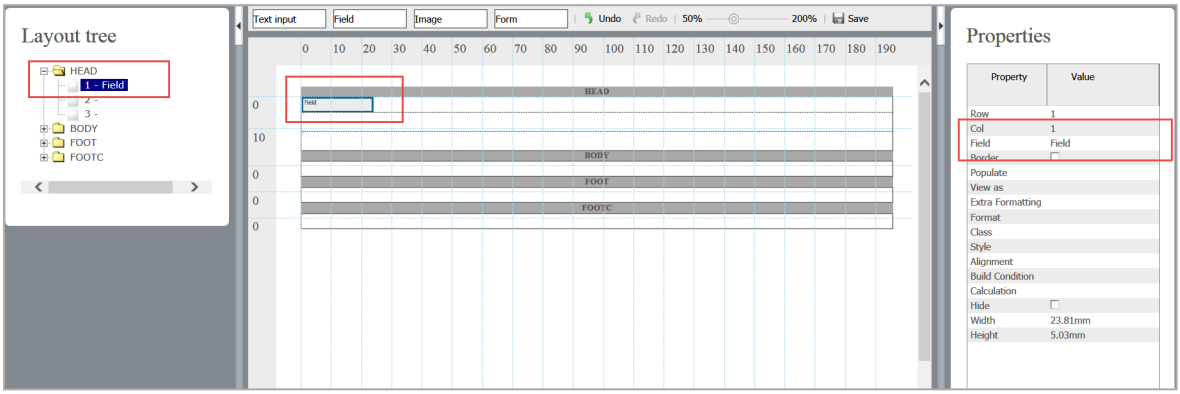
Create the number of rows required and these will appear in the Layout Tree and the Canvas.



Rows may contain text, database fields, images and Sub-Forms. All of which may be selected from the options at the top of the canvas and dragged into position.



With the element in place, the Layout Panel and Properties Panel will display the appropriate detail.



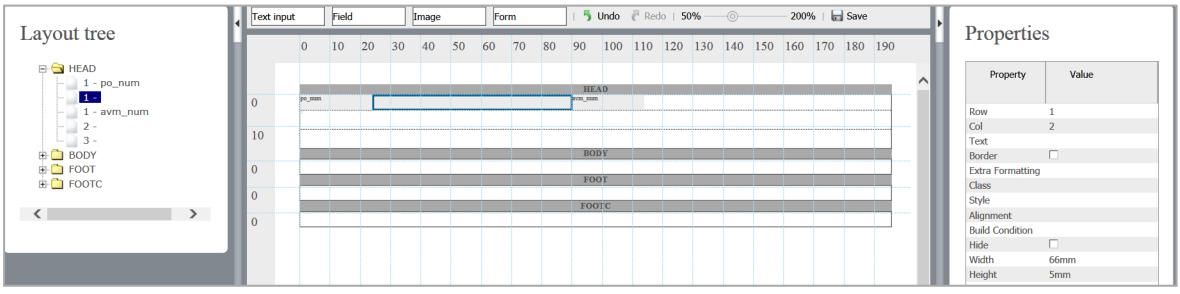
To set the properties of the selected element, use the properties panel to set up field names, formats and calculations etc. as required by double clicking on the item to change. Note that field names (eg. job_num) must be known before-hand as field lookup is not currently available in the Drag and Drop interface.

For simple changes to an element, double click on the field within the canvas to change its name or label. Widths and heights can also be changed in the canvas by dragging the borders of the field.

Continue to define your document as required.

To amend fields or view their properties, select the field in the Layout tree or double click the field on the canvas.

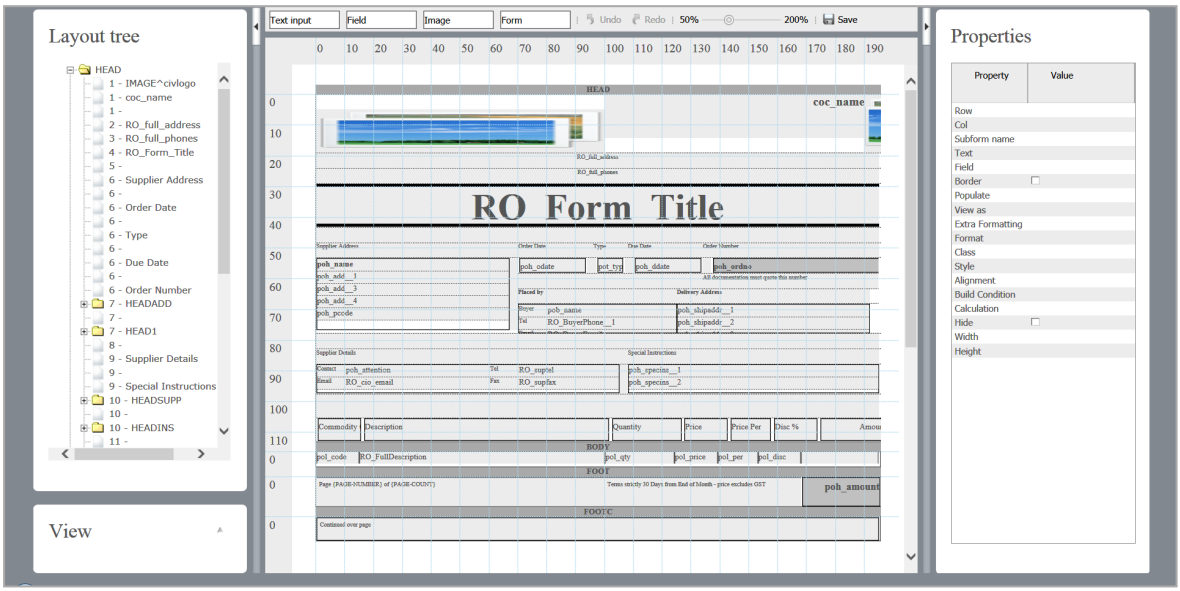
To add gaps between fields, add Text fields of an appropriate width and set the text field to blank.



The Undo and Re-do buttons will only undo/re-do the last change you made to the design

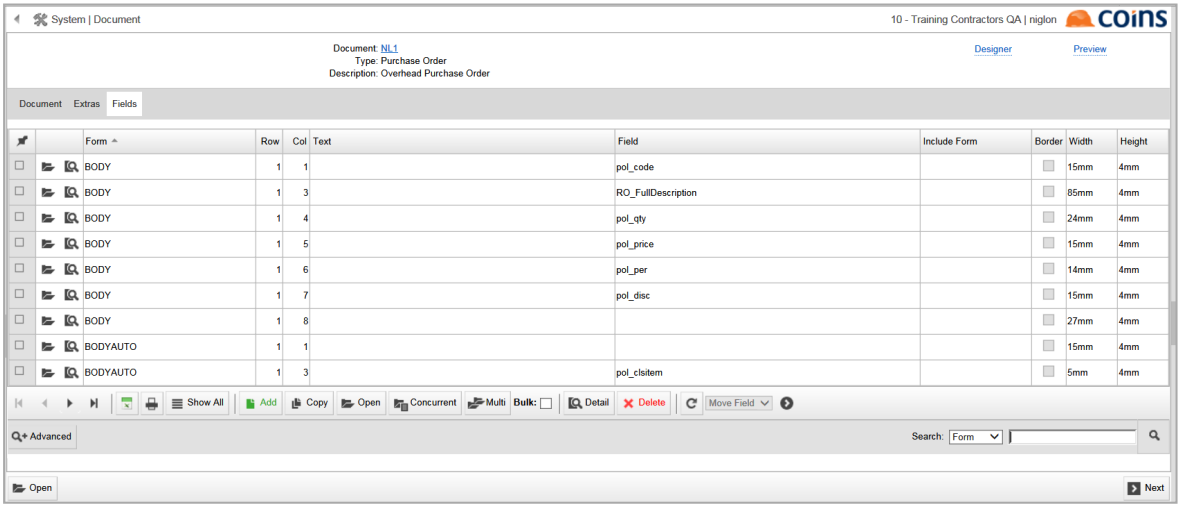
Use the Save button at the top of the canvas periodically to save your work and commit the design to the Document Designer. Your work will be lost if you fail to do this.

Once you have completed your design, as in the example below:



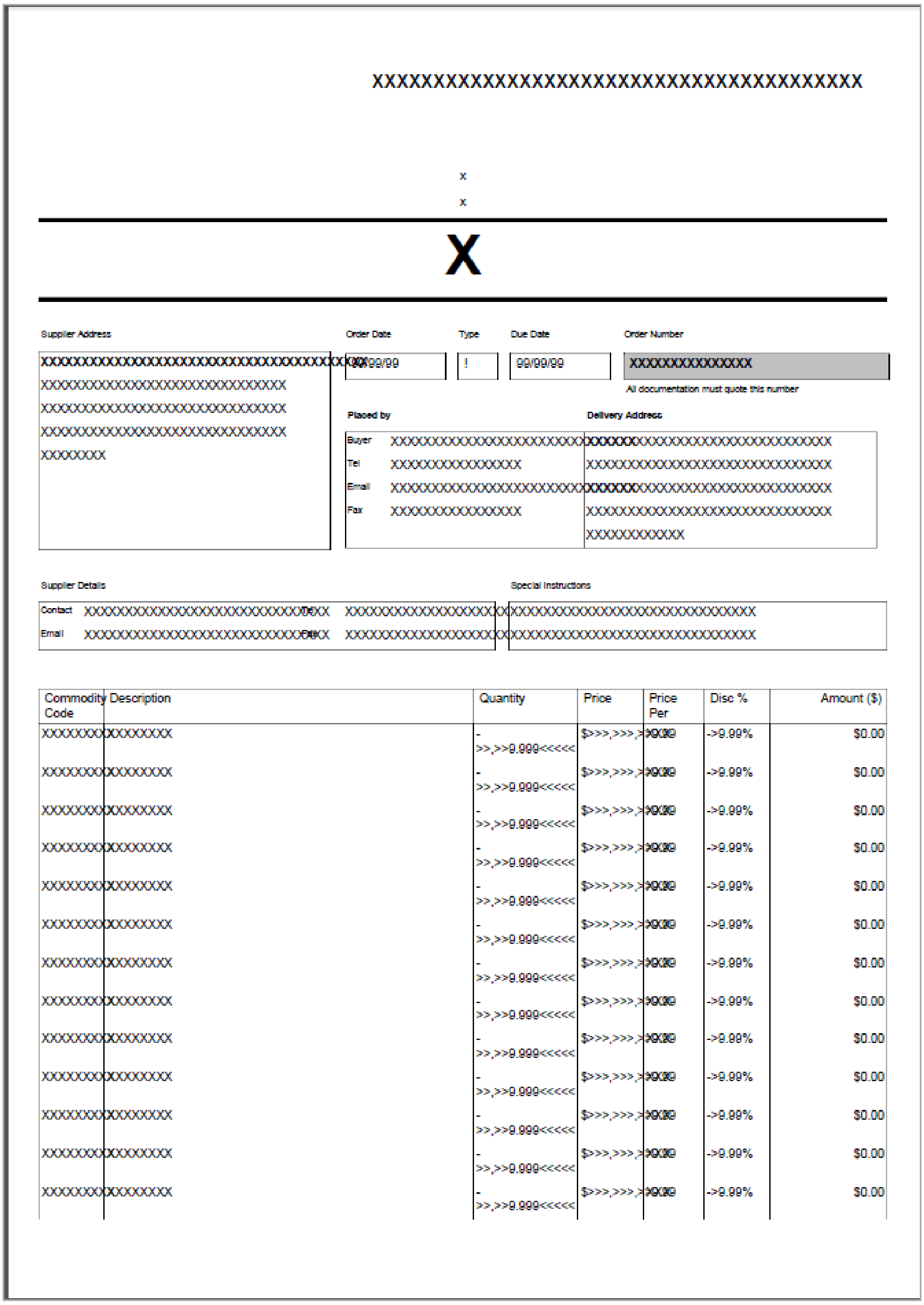
Ensure that you save before closing the interface window.

In Document Designer, all of the form design will appear in the fields tab for your form



You can now make any manual changes to the design or preview it using the Preview option at the top of the screen. You may return to the Drag and Drop interface at any time by clicking the Designer link at the top of the screen.

Figure 1: Example Preview output



XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

x

x

X

Supplier Address | Order Date | Type | Due Date | Order Number

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 99/99/99 | ! | 99/99/99 | XXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXX

All documentation must quote this number

Placed by

Buyer XXXXXXXXXXXXXXXXXXXXXXXX

Tel XXXXXXXXXXXXXXXX

Email XXXXXXXXXXXXXXXXXXXXXXXX

Fax XXXXXXXXXXXXXXXX

Delivery Address

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXX

Supplier Details

Contact XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX Tel XXXXXXXXXXXXXXXXXXXX

Email XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX Fax XXXXXXXXXXXXXXXXXXXX

Special Instructions

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Commodity Code	Description	Quantity	Price	Price Per	Disc %	Amount ($)
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00
XXXXXXX	XXXXXXXX	->>,>>9.999<<<<<	$>>>,>>>,>	XXXX	->9.99%	$0.00

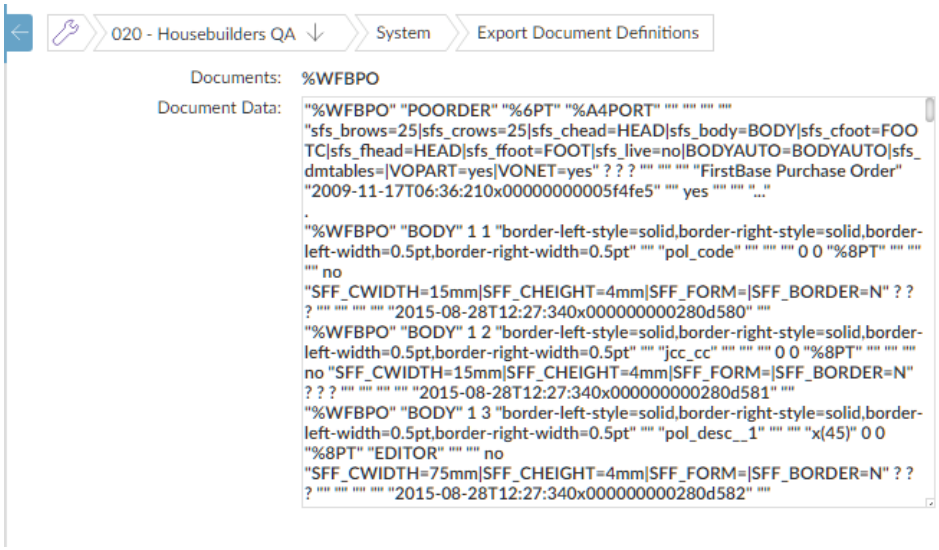
6 Importing and Exporting Configurable Documents

COINS provides procedures for importing and exporting document definitions (for example, to allow you to transfer definitions from a test environment to a live environment).

6.1 To export document definitions:

1. Go to ***Export Document Definitions***.
2. Specify the document definitions you want to export, and click  .

   COINS displays the document definition data in the **Document Data** field.



3. Select all the text in the field (click in the field and press **Ctrl**+A).
4. Copy the selected text and paste it into a file or an email message.

You can then transfer this data to a different environment.

6.2 To import document definitions:

1. Go to ***Import Document Definition***.
2. Paste the text in the **Report Data** field and click  .

   The imported document definitions will now be available in ***Document Designer***.