

**Oracle® Insurance**

**Tagcommander**

**User guide**

Version 6.3.1.15

January 2015

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## Chapter 1

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### Introduction

Tagcommander is the Docucreate workstation software component that you use to create, manage, and insert

- BPSDs (Boiler Plate Space Definitions)
- DGSDs (Docugraph Space Definitions), a.k.a. “Docugraph Charts”
- Docuflex Tags, similar to BPSD tag objects, that derive their contents from Reserved Tags, Schema fields, or Rules within a Docuflex Studio project

The various forms of Space Definitions discussed in this guide are commonly referred to as *tags*.

### OVERVIEW

A tag represents placeholder characters (“replacement characters”) that are later replaced with variable data when a document is processed, as part of a larger Document Package, Documaker ws, or Docuflex.

You use Tagcommander to insert tags into documents that are commonly composed in a word processing application, such as Microsoft Word. For example, you could use Tagcommander to create a form letter. When composing the form letter, you type

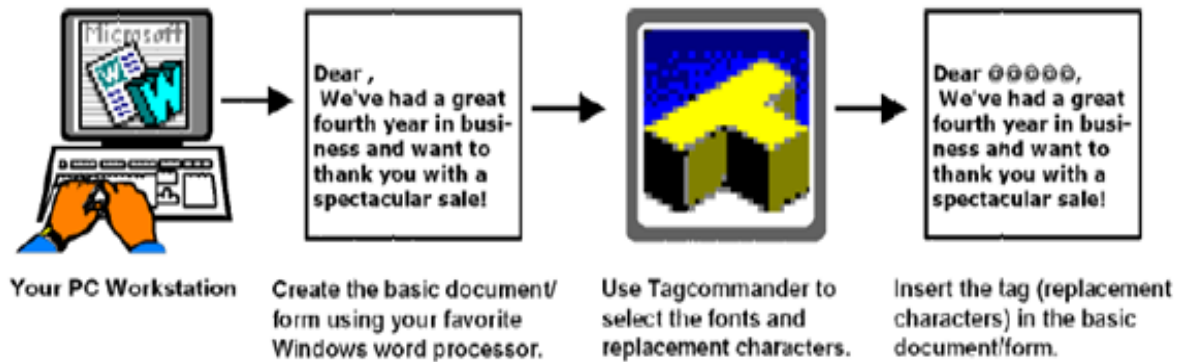
Dear,

with a space separating the two items. Then, you insert a tag immediately before the comma. As you insert the tag, it resembles the following:

Dear @@@@,@@@,@@@,@@@,

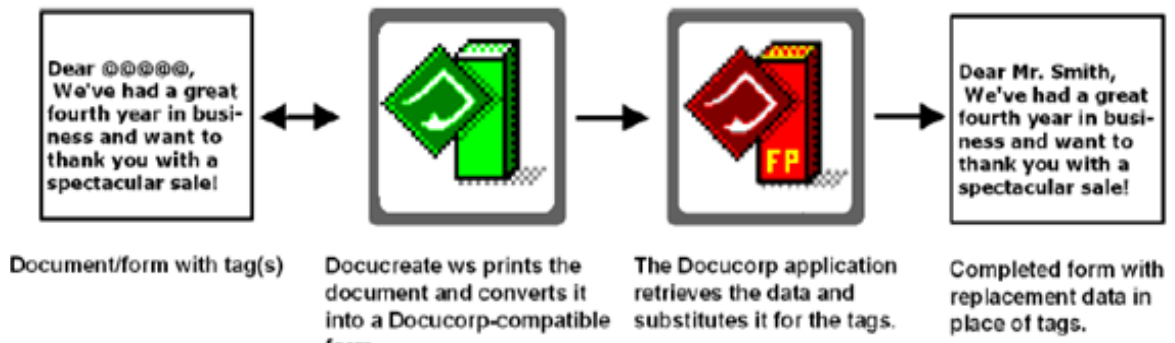
Later, the target application replaces the tag with variable data and it achieves its final appearance:

Dear Mr. Smith,



You can use Tagcommander to insert tags into any document created with a Microsoft Windows-compatible composition tool, such as Microsoft Word, Corel Word Pro, or WordPerfect.

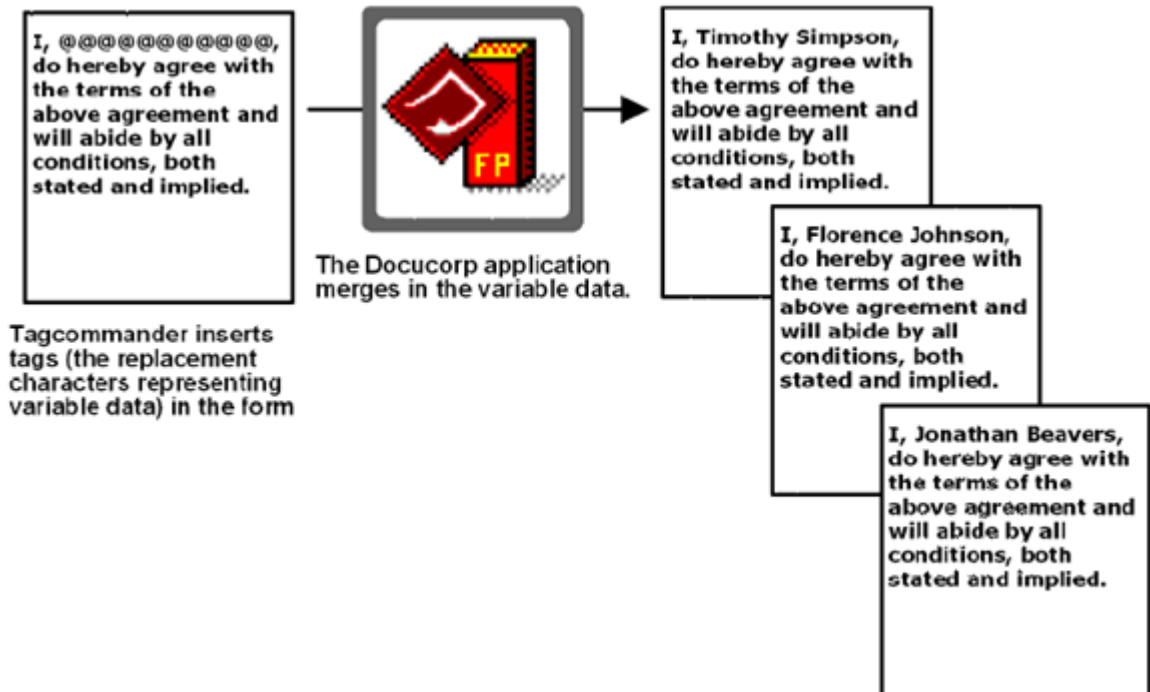
When you've completed the document, you must print it with Docucreate ws, which makes the output compatible with Documaker fp and Docuflex. As your documents are processed, the application retrieves the data for the tags from a data file and substitutes the correct variable data for the replacement characters in the tag.



## BENEFITS AND FEATURES OF TAGCOMMANDER

### REUSABLE BOILERPLATE DOCUMENTS

Tagcommander, along with the other components in the document production cycle, provides the means for you to use the same fixed (constant) text names over and over again while substituting an ever-changing array of variable data.

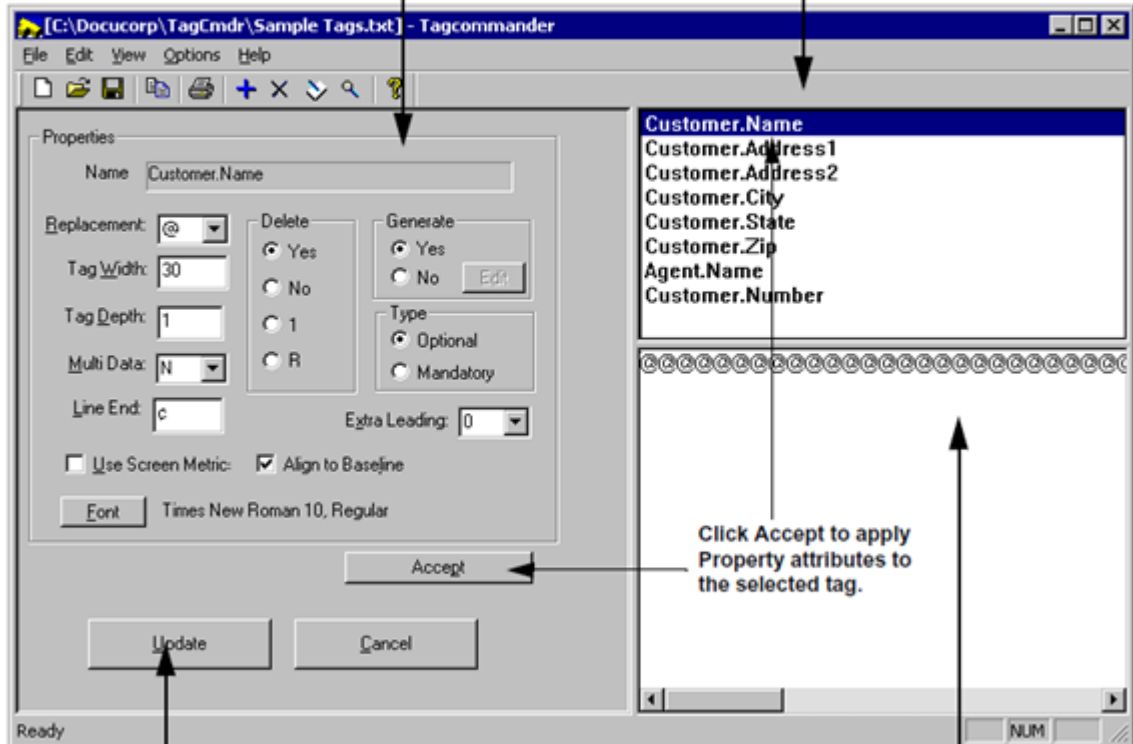


## INFORMATIVE FEATURES FOR SETTING UP TAGS

Tagcommander offers several features that make the effort of identifying and preparing tags much easier. The following illustration shows the features that help you set up and prepare tags.

You can choose several options for your tags, including the replacement character, width, and font; whether Tagcommander should generate the replacement character, and whether it's optional and re-usable.

You can view the list of tag names in the current file.



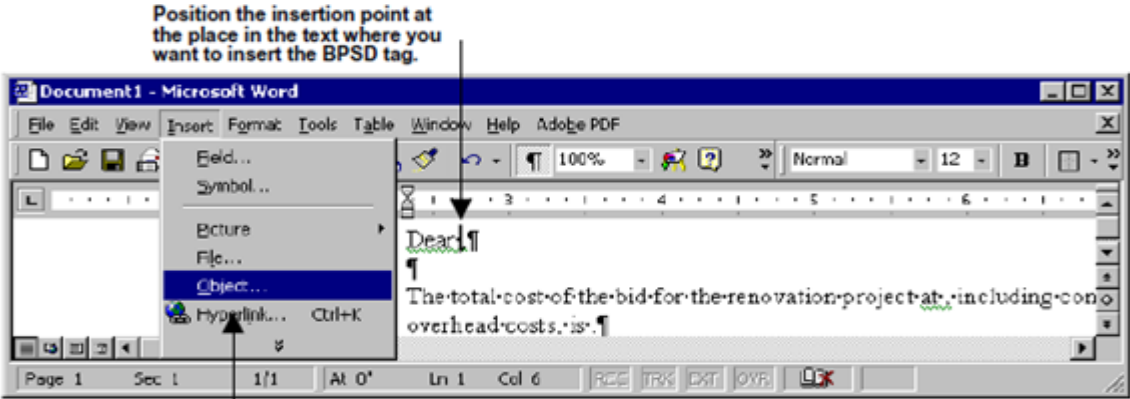
Click Accept to apply Property attributes to the selected tag.

You can automatically update the tag attributes through your object-embedding word processor.

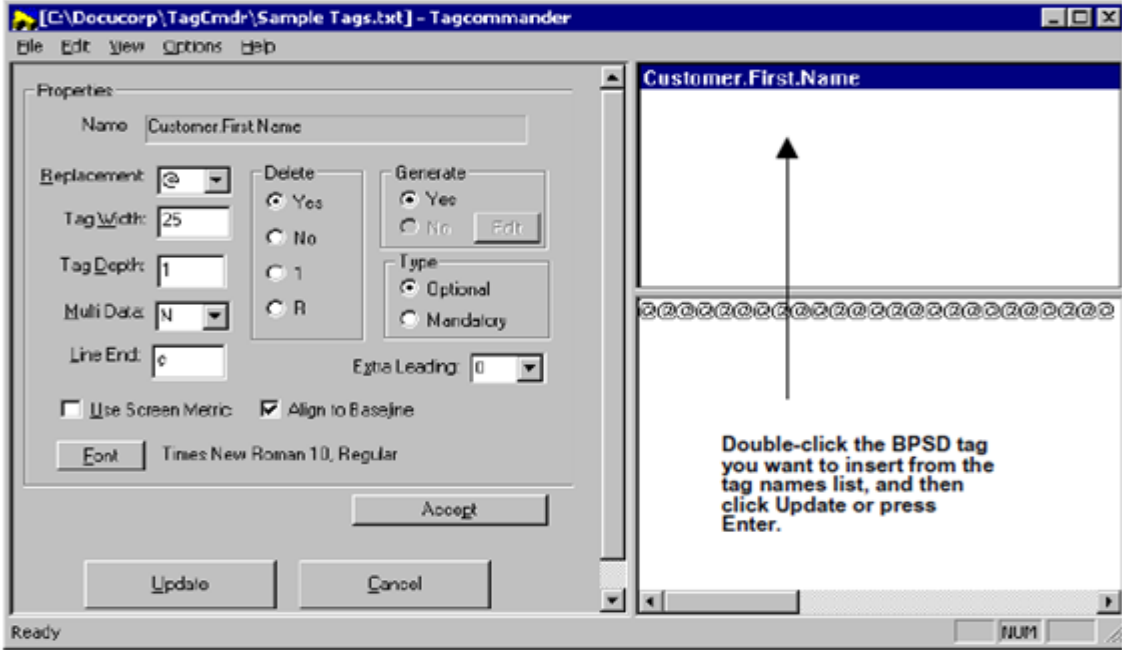
You can preview the tag as it will display in your document.

# EASY INTERACTIVE INSERTION OF TAGS

Tagcommander is a tag-insertion application that easily integrates with other Windows based document composition applications. This means you can use the interactive and graphical user interface features of Windows to compose the fixed text for a document and insert tags into the same without having to leave the composition application. The following illustration shows how easy it is to insert a tag into your document from within Microsoft Word for Windows.



Then, select Insert>Object>BPSD Tag\_W32 and the main TagCommander window displays.



## WHAT YOU NEED TO KNOW

### Types of Oracle Tags and Tag Processing Limitations

You must have a Oracle Merge Engine to process tags created by and inserted with Oracle products. The following table lists the required products for processing all types of Oracle tags.

Oracle Tag	Tag Insertion Method	You must license the following Merge Engine to process tags:
Boilerplate Space Definition (BPSD)	Supported composition system or Tagcommander	Documaker fp
Docuword Space Definition (DWSD)	Documaker ws	Documaker ws
Variable Space Definition (VSD)	Docuword or Dynacomp	Docuword or Dynacomp
Docugraph Space Definition (DGSD)	Tagcommander	Documaker fp with the Docugraph Engine
Docuflex tags	Tagcommander	Docuflex

Although you can insert BPSD, DGSD, and Docuflex tags with Tagcommander; DWSD tags with Docusolve; and VSD tags with Docuword; you must license the appropriate Merge Engines listed above to process the tags. For example, you can insert DGSD tags with Tagcommander and view Docugraph Chart samples in Tagcommander, but you must license and install Documaker fp with Docugraph to create the Docugraph charts within your documents.

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**Note** If you use Docucreate ws to update a document containing tags created with Tagcommander 1.4.6 or earlier, you must select each tag and convert it using. Tags created with Tagcommander 1.5 and later are automatically recognized and processed.

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### TAGCOMMANDER SUPPORTED PRINTING ENVIRONMENTS

If you'll be printing documents after you create and place tags, you'll need knowledge of, or access to, information about any of the following printer-related areas that are relevant for your printing environment.

**Xerox Printer Software**—If you'll be using Tagcommander and Docucreate ws with a Metacode printer, you must know the Xerox software parameter values for your location's JDL, JDE, and DJDE and be familiar with JSL. Consult your printer specialist or your Xerox documentation if you need assistance.

**Xerox Printer Hardware**—If you'll be using Tagcommander and Docucreate ws with a Metacode printer, your printer may require additional software. Verify that your printer is equipped with GHO (Graphics Handling Option) or GVG (Graphics Video Generation) for producing graphics.



**Metacode Print Files**—If you'll be using Tagcommander and Docucreate ws with a Metacode printer, you'll need to know how print files from Docucreate ws are routed from your system to the printer. Consult with your network systems administrator for the necessary setup.

**Hewlett-Packard (HP) Hardware, Software, and Print Files**—If you'll be proof-printing your documents to an HP LaserJet, you should set your default printer as Metacode or AFP and insert all your tags *before* printing your output to the HP. *Because line and page breaks* are different for different printer drivers, your output to the HP may not be exactly the same as the output on your production printer.

**IBM Printer Software**—If you'll be using Tagcommander and Docucreate ws with an AFP printer, the AFP data stream will be processed by PSF (Print Services Facility). Your application may require particular AFP resources. Consult your printer specialist or your IBM documentation if you need assistance.

**IBM Printer Hardware**—If you'll be using Tagcommander and Docucreate ws with an AFP printer, PSF takes into account any hardware differences between various AFP printers you're using as it processes your data stream and automatically resolves those differences.

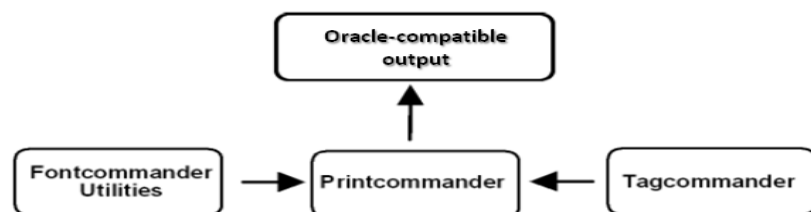
You can refer to the IBM publication, *Advanced Function Presentation: Printer Information* (G544-3290), for more information.

**AFP Print Files**—If you'll be using Tagcommander and Docucreate ws with an AFP printer, you'll need to know how print files from Docucreate ws are routed from your system to the printer. Consult with your network systems administrator for the necessary setup.

## COMPANION PROGRAMS TO TAGCOMMANDER

Other products which complement Tagcommander include:

- **Docucreate ws**—use with Tagcommander and your document composition system to produce documents compatible with AFP and Metacode printers. You



can then store these documents in a repository for later inclusion in your Document Packages.

For more information about the companion programs, refer to the Printcommander documentation.

## ABOUT THIS GUIDE

This guide describes the daily use and general operation of Tagcommander 6.3. It's designed to be a reference tool as well as a framework in your daily operation.

**Installing Tagcommander** lists the minimum hardware and software requirements necessary for Tagcommander, plus a step-by-step procedure to install the program. See *Installing Tagcommander* on page 19.

**Using Tagcommander** explains the process by which you insert BPSD tags into your word processing program and includes an in-depth discussion of the tag properties. See *Using Tagcommander* on page 24.

**Using Docugraph Charts** explains the process by which you insert DGSD tags (Docugraph charts) into your word processing program and includes a discussion on assigning and choosing colors for your charts. See *Using Docugraph Charts* on page 57.

**Using Docuflex Tags** explains the process by which you insert Docuflex Tags into your word processing program and includes an in-depth discussion of the tag properties. See *Using Docuflex Tag Manager* on page 70. The **Appendix** at the end discussed some helpful tips in operating Tagcommander.

## Chapter 2

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# Installing Tagcommander

## SYSTEM REQUIREMENTS

The following hardware requirements are necessary to install and run Tagcommander:

- 100%-compatible PC with a Intel® Core™ 2 CPU.2.13GHz (Pentium III processor or faster recommended)
- 1.99 GB of memory
- A hard disk with 400 MB of free space

The following software requirements are necessary to install and run Tagcommander:

- Microsoft Windows
- Docucreate Workstation for producing print files

## INSTALLING TAGCOMMANDER

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**IMPORTANT!** You must ensure that Oracle Common Objects has been installed for your system *before using Tagcommander with Docucreate ws.*

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The following installation procedure assumes that you have no other active applications running on your computer.

Oracle Tagcommander application is available for download from the Oracle Software Delivery Cloud web site. The process includes:

- Logging in and agreeing to the terms and restrictions
- Searching for the applications you want to download
- Downloading those applications

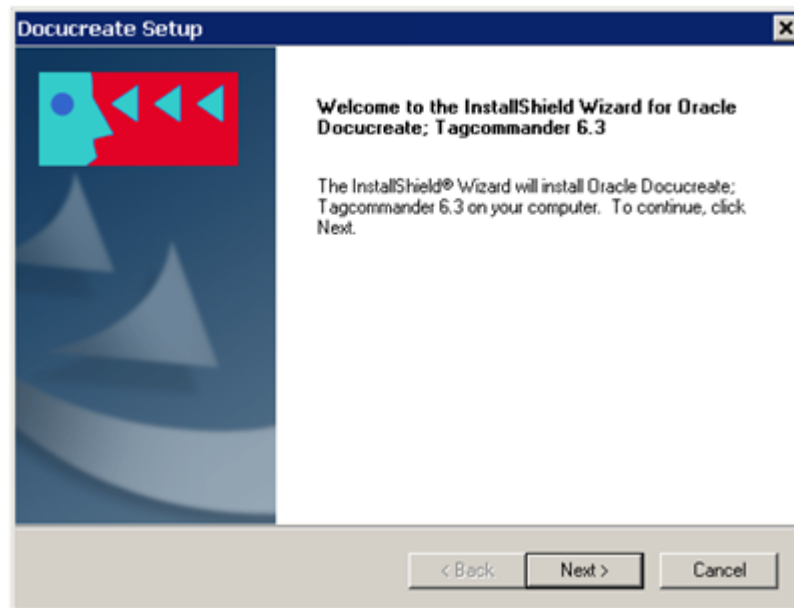
Go to the Oracle Software Delivery Cloud website to download the application:

<https://edelivery.oracle.com>

### To Install Tagcommander

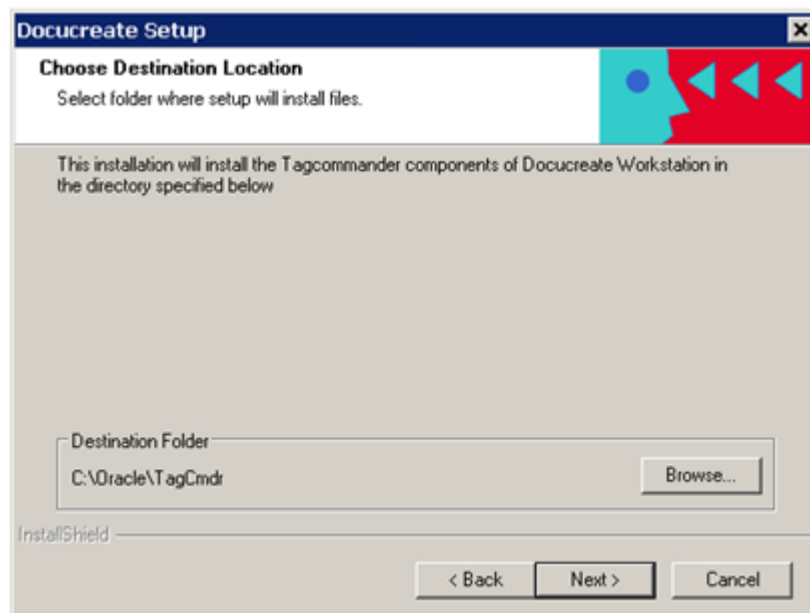
1. From the directory into which you downloaded the media pack, unzip the mediapack. Click on the setup.exe located in Tagcommanders' Disk1 directory.

After InstallShield prepares the installation, the Tagcommander title screen and Setup dialog display.



2. Click **Next>** to continue with the installation or **Cancel** to quit the program.

The install displays the Choose Destination Location dialog box, prompting you for the directory path for the program installation.

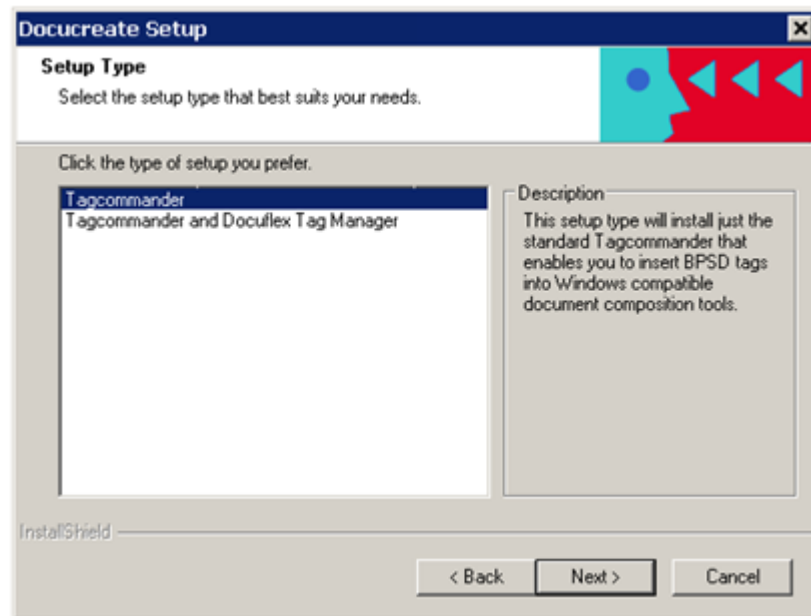


3. Do one of the following:

To	Perform this Action
Accept the default path the installation routine proposes	Click <b>Next&gt;</b> .
Select another path for the installation	Click <b>Browse</b> , select a new <b>path</b> , and then click <b>Next&gt;</b> .

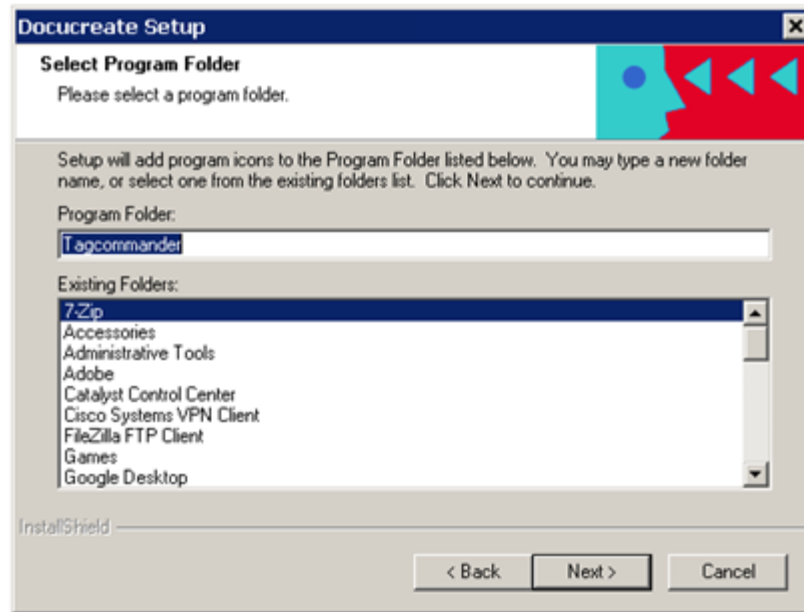
4. Click **Next>** to continue with the installation if you haven't already done so. You can also click **<Back** to return to the previous screen or **Cancel** to abort the routine.

You'll next see the Setup Type dialog box offering different setup options.



5. Choose the Setup type you prefer, according to the Description on the right, and then click **Next>**.

The Select Program Folder dialog box displays the program folder in which it proposes to place the program icons.

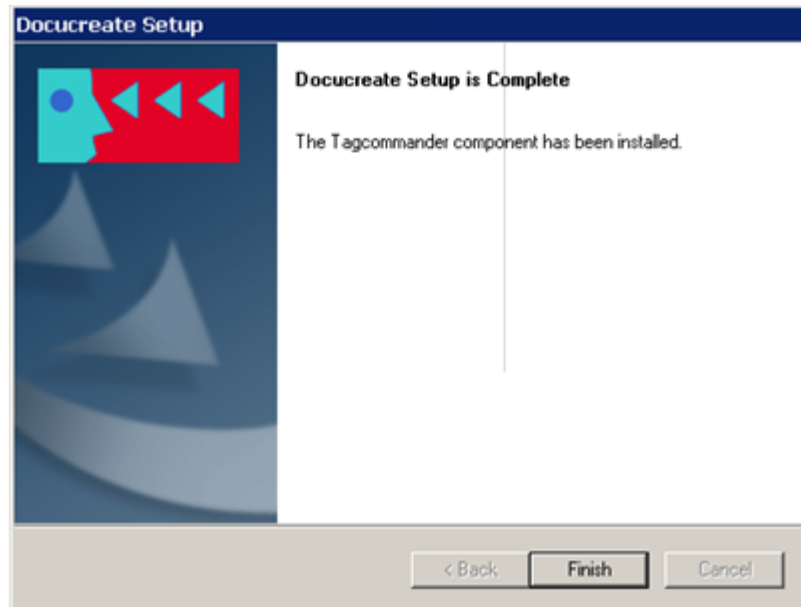


6. Do one of the following:

To	Perform this Action
Accept the proposed folder to hold the program icons	Click <b>Next&gt;</b> .
Choose another folder for the program icons	Use the scroll bar to select another folder; then click <b>Next&gt;</b> .

A dialog box indicating the setup program's progress displays until all the files have been copied to your PC.

When the installation is 100% complete, the program displays the Docucreate Setup is Complete dialog box.



7. Click **Finish** to complete installation of Tagcommander.

## Chapter 3

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# Using Tagcommander

## BEFORE YOU START

### WORKING WITH DOCUMENTS

Before you start inserting tags into documents, here is a quick primer on the general steps you take to compose, tag, and prepare a document for Documaker fp or Docuflex processing.

#### To Create a Document

1. Plan the layout and format of your document, including the names, lengths, and placement of the tags that hold the items of variable data to be merged.
2. Start Tagcommander and create a tag file that lists the names of the variable data tags for the document.
3. Create the document in your word processing application.
4. Start Tagcommander from within your word processor and insert tags from the tag file as necessary.
5. Print the document using Printcommander. Be sure to enable the Normalization function in Printcommander and choose it as your current print driver.
6. Add the newly-created document to the appropriate Electronic Document Library (EDL).

### USING TAGCOMMANDER WITH YOUR COMPOSITION SYSTEM

Tagcommander works with Windows applications supporting object linking and embedding (OLE), a program interface that lets you easily update objects within an application.

If you choose not to directly embed tags, you can still use Tagcommander, but you'll be required to use additional steps to insert a tag. You can either copy the tag to the Windows Clipboard and then paste it into the document or use the mouse to drag the tag from Tagcommander into your document.

Although Tagcommander supports the Copy/Paste and drag functions, the manually-inserted Tags can't be directly updated; you must delete the tag and insert a new, updated tag.



## GETTING STARTED WITH TAGCOMMANDER

After you've installed Tagcommander on your system, you can launch it or its companion applications from the Programs sub-menu of the Windows taskbar.

### To Start Tagcommander

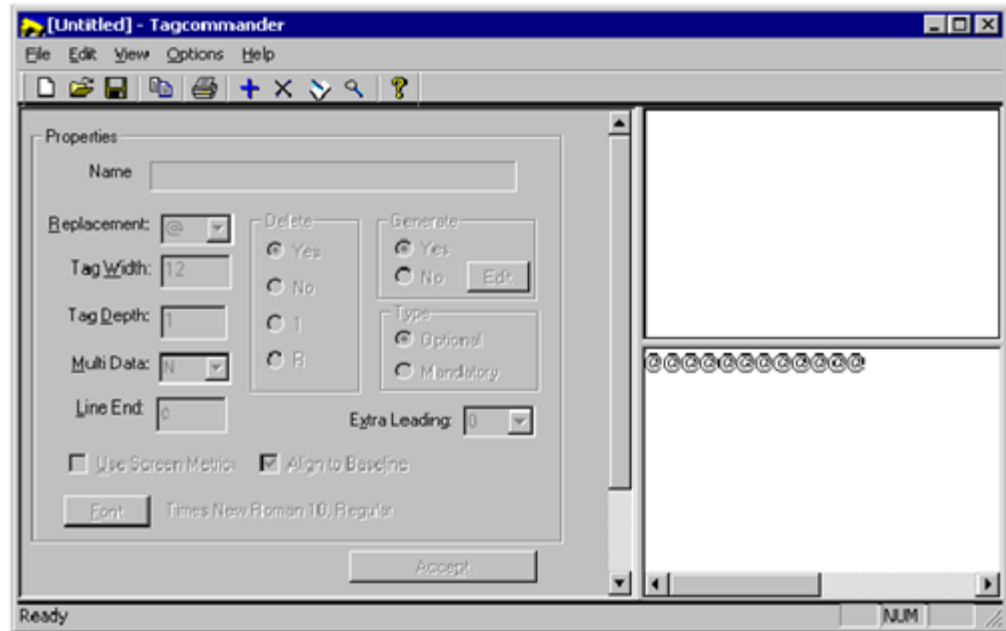
After you install Tagcommander in your Windows system, the Programs sub-menu displays the Docucreate folder.

- Click the Docucreate icon.

For more information about Tagcommander DGSD, see Starting Tagcommander DGSD on page 58.

For more information about Logical Color Definition, see Starting Logical Color Definition on page 64.

Tagcommander displays its main program window.



When you open Tagcommander for the first time, [Untitled] is displayed in the title bar. A new tag file is already opened for you, waiting to receive tags. You can now begin entering tags, or perform other operations as described in the next topic.

## To Use Tagcommander

Because there are several tasks you can perform with Tagcommander, this guide provides a separate topic for each task. Use the following table to locate the section that contains the task that you need to perform.

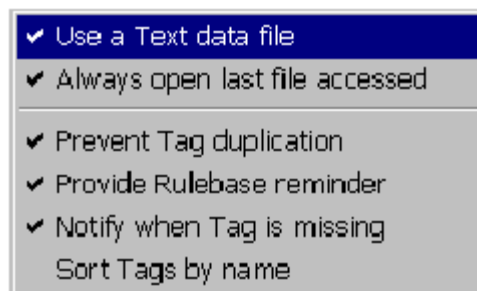
To	Go to this section:
Set up your Tagcommander working environment	Configuring Tagcommander on page 26
Insert, configure, move, replace, delete, or rename a tag in a document	Inserting and Updating Tags on page 28
Create/Add, view the properties of, search for, sort, or delete a tag (in a tag list)	Working with the Tag List on page 48
Create, open, append, remove appended, or print (a tag file)	Working With Tag Files on page 52
Assemble the Document Package and merge the data	Assembling the Documents and Merging the Data on page 53
View the various menu options	Menu Options on page 53

## To End Tagcommander

- Choose File>Exit & Return to doc\_name.doc.
- or-
- Click Close on the Tagcommander window.

## CONFIGURING TAGCOMMANDER

This section addresses the global settings you can make to configure Tagcommander to your working preferences.



### Use a Text Data File

Use a Text data file determines which tag file format Tagcommander uses. When this option is set, and you choose File>Open, Tagcommander automatically searches for tag files with a TXT file name extension. If you disable this option by clearing (un-checking) the Options>Use a Text data file menu item, Tagcommander will search for tag files with a .TGA file name extension when you choose File>Open. For more information about tag file formats, see Opening a Tag File on page 53.

## Always Open Last File Accessed

When you open Tagcommander for the first time, [Untitled] displays in the title bar. A new tag file is already opened for you, waiting to receive tags.

Always open last file accessed instructs Tagcommander to open the tag file in use the last time you accessed Tagcommander. Tagcommander searches for the previously-opened tag file and automatically opens it when you start the program, whether you choose the program icon or start it through an application. If Tagcommander can't find the previous tag file, you're prompted for the name of another tag file.

To set this option, choose Options>Always open last file accessed. If you clear (uncheck) this option, you must start a new tag file, or open a tag file each time you enter Tagcommander.

## Prevent Tag Duplication

Prevent Tag duplication instructs Tagcommander to prevent you from entering two tags with the same name. Tagcommander verifies the name of any new tags, as well as the tags loaded from a tag file. Because Tagcommander must check each tag in the file, this process can slow your processing time.

To disable this option, choose Options>Prevent Tag duplication to uncheck the option. Then, Tagcommander won't prevent you from entering two tags with the same name -- it's your responsibility.

## Provide Rulebase Reminder

Provide Rulebase reminder instructs Tagcommander to prompt you with a message after you create a tag. As each tag is added to the current tag file, a message displays to remind you to update the Documaker fp Rulebase. To disable this option, choose Options>Provide Rulebase reminder to uncheck the option. Then, Tagcommander won't display the message.

## Notify When Tag is Missing

Notify when Tag is missing is only available when you're embedding a tag into a word processing document. This option prompts you to add the tag to the Tag Attribute file if it isn't found. To disable this option, choose Options>Notify when Tag is missing to uncheck the option. Then, Tagcommander won't display the message and automatically updates the attribute file.

## Sort Tags By Name

Sort Tags by name instructs Tagcommander to place the tags in alphabetical order. As you add tags to the list, Tagcommander sorts the tags into the appropriate order. To enable this option, choose Options>Sort Tags by name to check the option. Then, Tagcommander simply places the tags in the order in which you entered them.

## INSERTING AND UPDATING TAGS

Tagcommander lets you insert tags either directly or pasted from the Windows Clipboard.

---

**Note** Nearly all word processing programs support object linking and embedding (OLE). Throughout the manual, you'll encounter examples illustrating the steps necessary to insert and update tags (all steps are based on the Microsoft Word for Windows interface).

---

This section contains information about the daily operations of Tagcommander. You'll find step-by-step instructions for inserting tags in your document, and performing other types of updates on tags. You can:

- Insert a tag as an embedded object. For instructions, read [Inserting a Tag as an Embedded Object](#).
- Update an embedded tag. For instructions, read [Updating an Embedded Tag](#).
- Insert a tag using the Windows clipboard. For instructions, read [Copying or Moving a Tag to Another Location](#).
- Update a tag inserted with the clipboard. For instructions, read [Updating a Manually-inserted Tag](#).
- Change the formatting and display settings for a tag. For instructions, read [Changing Tag Properties](#).
- Copy or move a tag to another location. For instructions, read [Copying or Moving a Tag to Another Location](#).
- Replace a tag in a document. For instructions, read [Replacing a Tag](#).
- Delete a tag in a document. For instructions, read [Deleting a Tag](#).
- Rename a tag. For instructions, read [Working with the Tag List](#).

## Inserting a Tag as an Embedded Object

All Windows applications supporting object linking and embedding (OLE) contain a menu item for inserting objects. The Insert option is usually found either on the main menu or as a sub menu item in the Edit menu. When you choose Insert>Object, the application displays a window containing a list of the objects you can insert. You can then choose to insert a tag (e.g., Insert>Object>BPSD Tag\_W32).

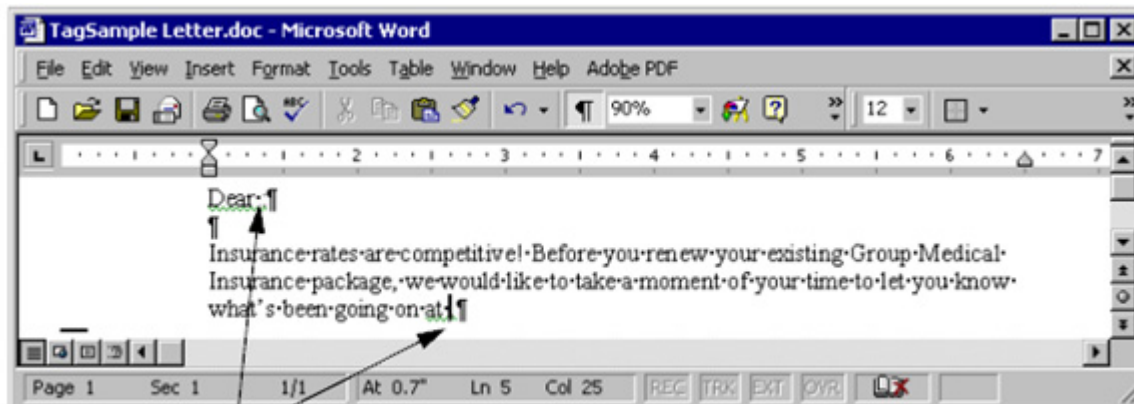
- Tip** In order to properly insert tags, you should:
1. Go into your word processor, open the document, and begin entering the text.
  2. Position your cursor at the place where you want to insert a tag.
  3. Select Insert>Object>BPSD Tag\_W32 (from within your word processor) to insert a tag.
  4. Double-click the tag you want to insert.
- or-
- Highlight the tag in the tag list and press ENTER.
5. Click Update.

If you want to paste the tags into your application, please see Manually Inserting a Tag on page 35.

### To Insert a Tag as an Embedded Object

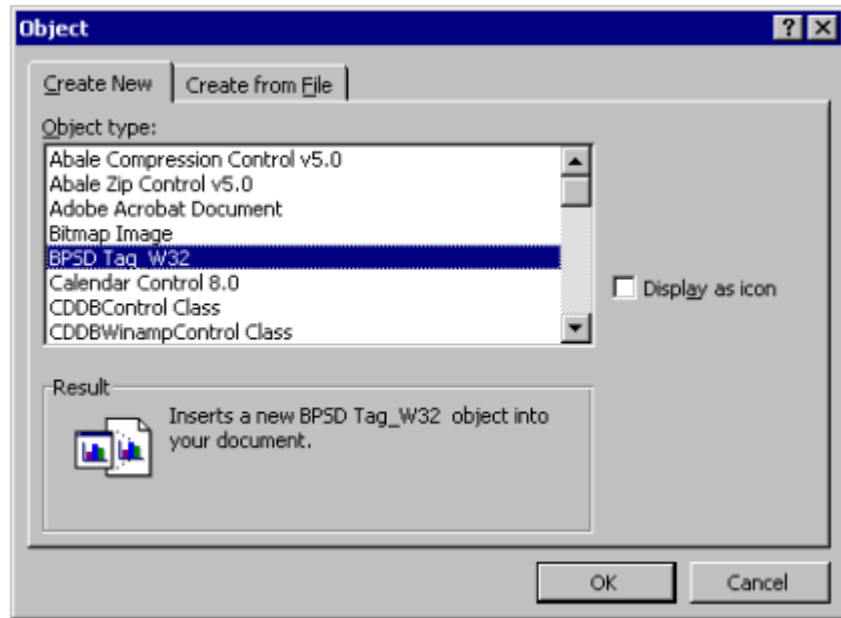
When you're inserting tags as embedded objects, use the following procedures for inserting and updating tags:

1. Position the cursor at the place in your document where you want to insert the tag.



Target areas for inserting tags

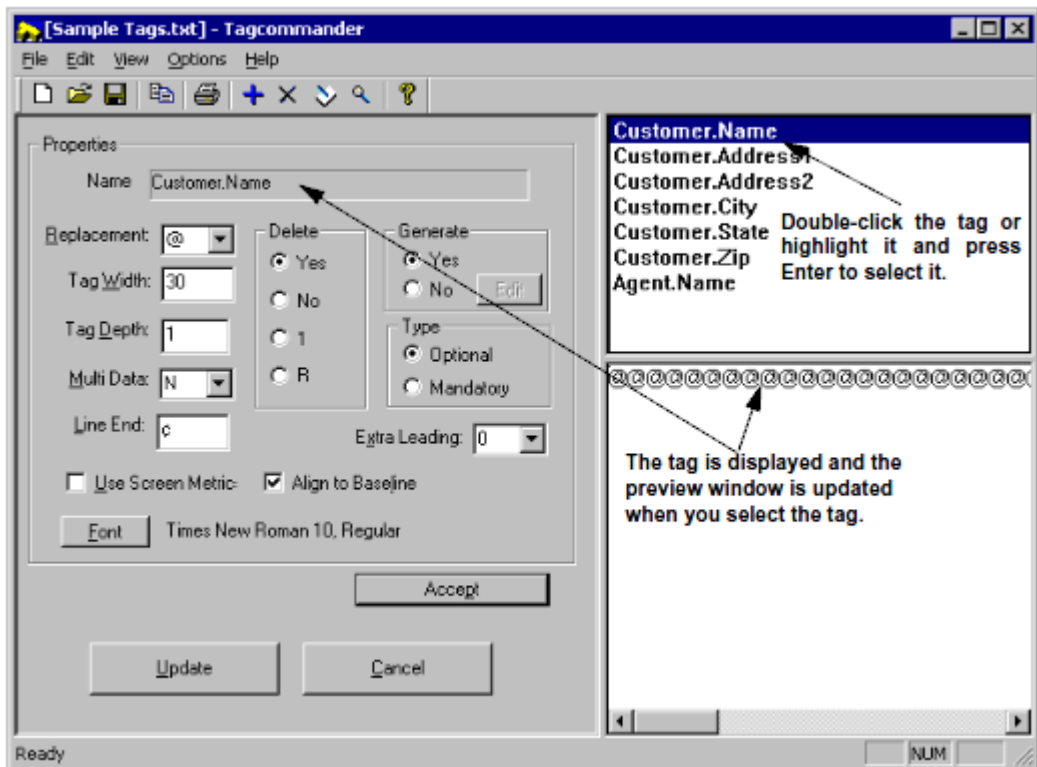
- Choose Insert>Object from the main word processor menu, then choose BPSD Tag\_W32 from the Object Type list box. This action automatically invokes Tagcommander.



- Choose a tag by double-clicking a tag in the list box.

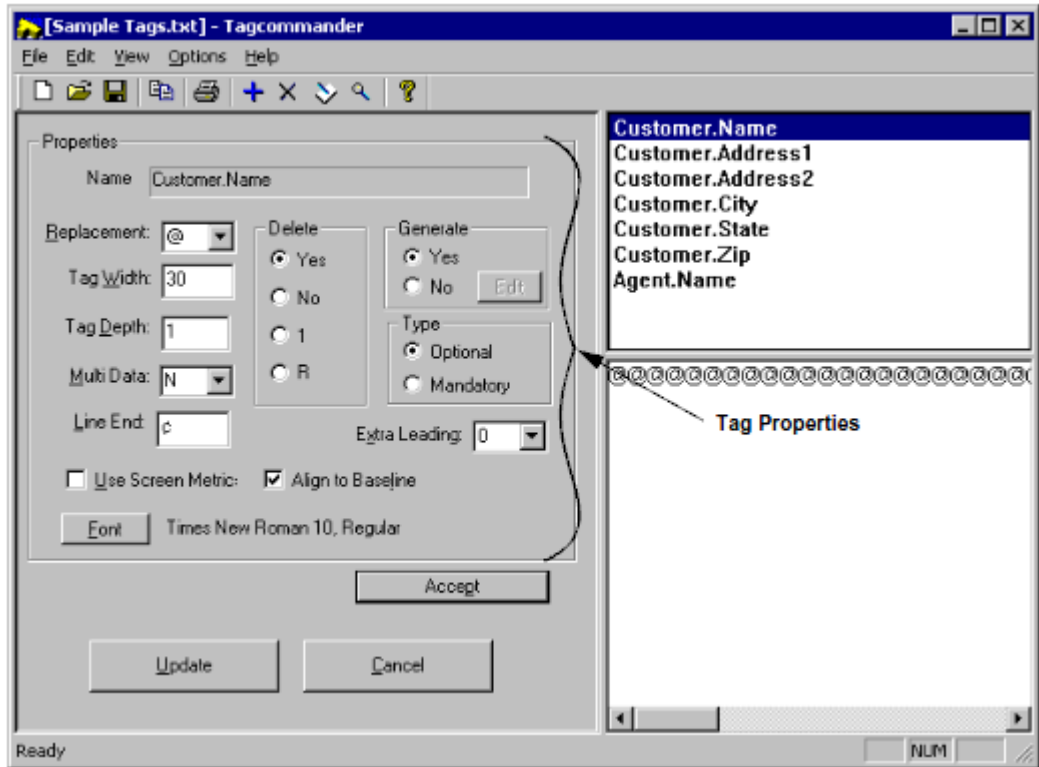
-or-

Highlight a tag and press ENTER. If necessary, you can create a tag.



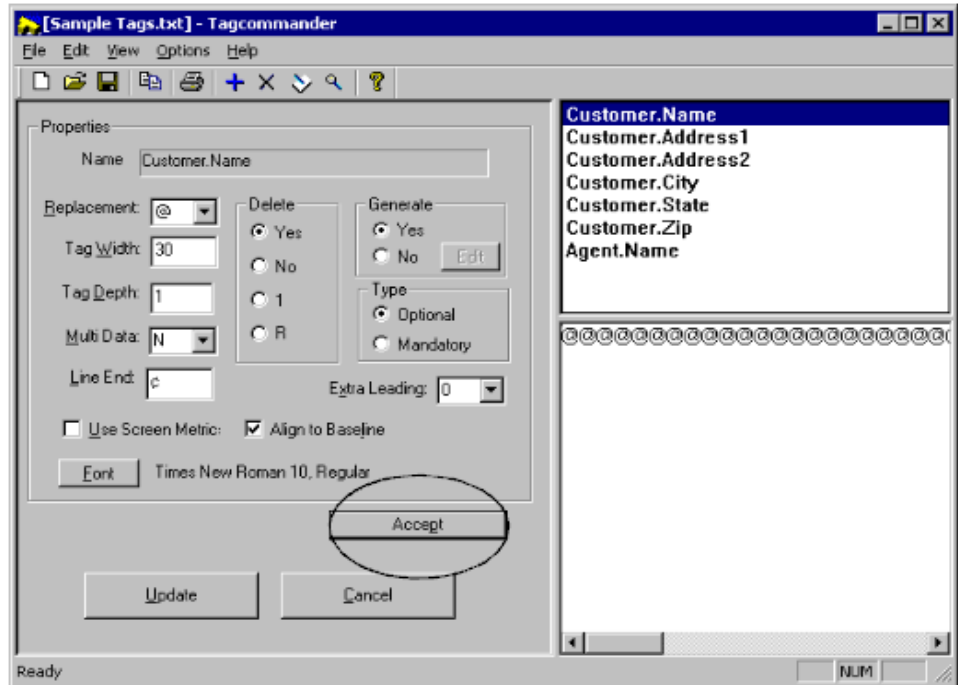
You'll know you've correctly selected the tag when its name displays in the Name field.

4. Make any changes to the default settings for the tag by selecting your preferences in the Properties portion of the screen (located on the left half of the main window).

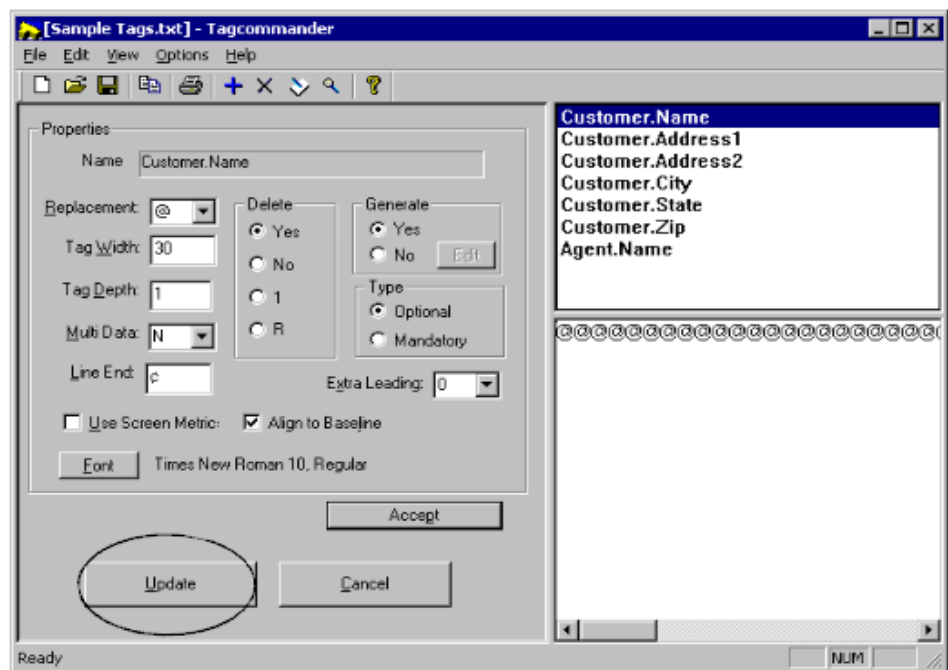


For instructions and short descriptions about tag formatting and display properties, read [To Change the Properties for a Tag](#) on page 38.

5. Click Accept to apply your changes to the Properties.

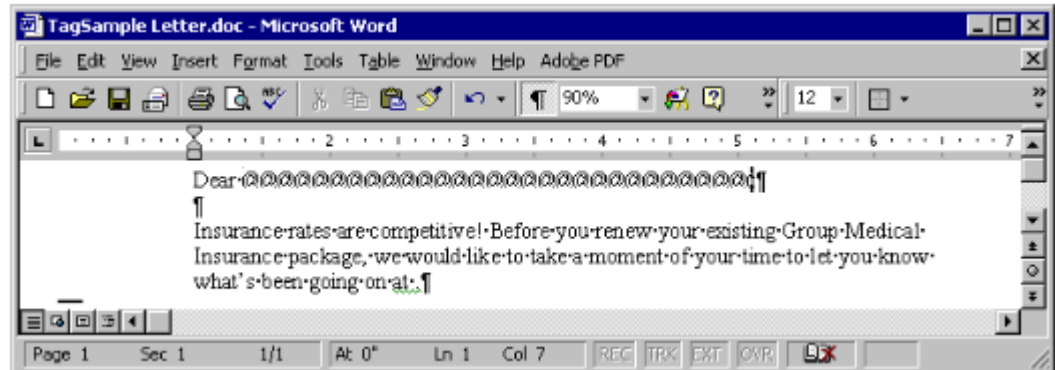


6. After reviewing the preview box to verify the format of the tag, click Update on the bottom of the Tagcommander window to insert the tag in your document.





The updated tag is inserted at the current cursor position in the document (unless you double-clicked an existing tag to launch the preceding process).



## Updating an Embedded Tag

After you've inserted tags in your document, you might need to change some option about the tag. The steps are almost identical to inserting a tag.

### To Update an Embedded Tag

1. Double-click the tag (replacement characters). Windows automatically executes Tagcommander, where you can change any of the optional settings for the tag.

For instructions and short descriptions about tag formatting and display properties, read *To Change the Properties for a Tag* on page 38.

2. Click **Accept** after you make the changes.
3. Click **Update** to update the tag.

## Copying or Moving a Tag to Another Location

You can use your word processing program **Cut** or **Copy** commands to copy or move a tag just like you copy or move text or pictures.

### To Copy or Move a Tag to Another Location

1. In the document that contains the tag, click the tag to select it.
2. Choose either **Edit>Copy** or **Edit>Cut** to either copy or move the selected tag to the Windows Clipboard.
3. Click an insertion point at the location in document where you want to place the tag.
4. Choose **Edit>Paste** to insert the tag.

## Replacing a Tag

You can easily replace one tag with another, with or without updating the properties for the tag.

### To Replace a Tag

1. Delete the current tag from the document. For instructions, read the next topic.
2. Do one of the following:

#### To replace the deleted tag with

#### Do this

Another tag that's already been inserted in a document	Read the instructions for "Copying or Moving a Tag to Another Location"
A new embedded tag	Read the instructions for Inserting a Tag as an Embedded Object
A tag copied to the clipboard	Read the instructions for "Manually Inserting a Tag".

3. If you need to change the properties for the inserted tag, do one of the following:

#### To update

#### Do this

An embedded tag	Read the instructions for Updating an Embedded Tag.
A tag inserted from the clipboard	Read the instructions for Updating a Manually-inserted Tag.

## Deleting a Tag

You can delete a tag just like you would delete a picture.

### To Delete a Tag

1. In the document, click the tag to select it.
2. Press DELETE.

## MANUALLY INSERTING A TAG

Instead of directly inserting tags into your document, you can paste a copy of the tag using the Windows Clipboard.

The following tip lists the short version of the procedure necessary to paste tags into your document. A full explanation follows in To Insert a Tag with the Clipboard on page 35.

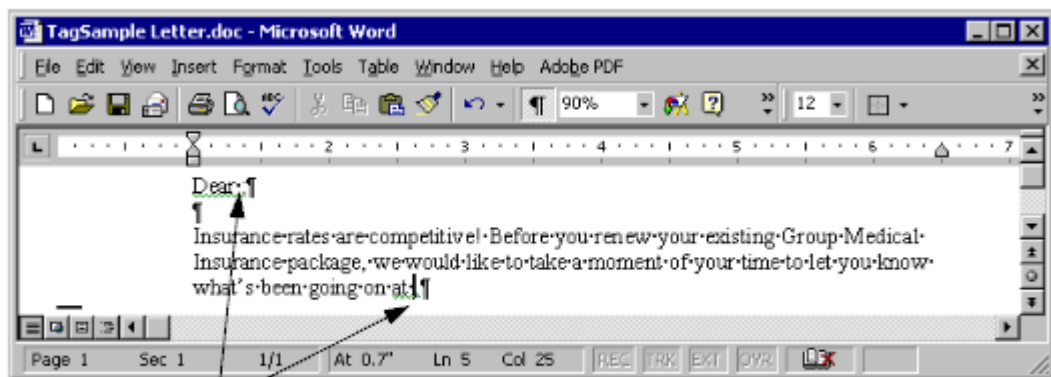
- Tip** If you don't see BPSD Tag\_W32 listed in the Insert>Object dialog, you should:
1. Go into your word processor, open the document, and begin entering the text.
  2. Position your cursor at the place where you want to insert a tag.
  3. Choose Start, then Programs, then Docucreate.
  4. Click the Tagcommander icon.
  5. Double-click the tag you want to insert.
- or-
6. Highlight the tag and press ENTER.
  7. Go to your word processor.
  8. Choose Edit>Paste.

You can also use the mouse to drag the tag directly into your document and save a few steps.

### To Insert a Tag with the Clipboard

When you're inserting tags through the Clipboard, use the following procedures to insert and update a tag:

1. Open your word processor application and begin creating your document.
2. Position the cursor at the place where you want to insert the tag.



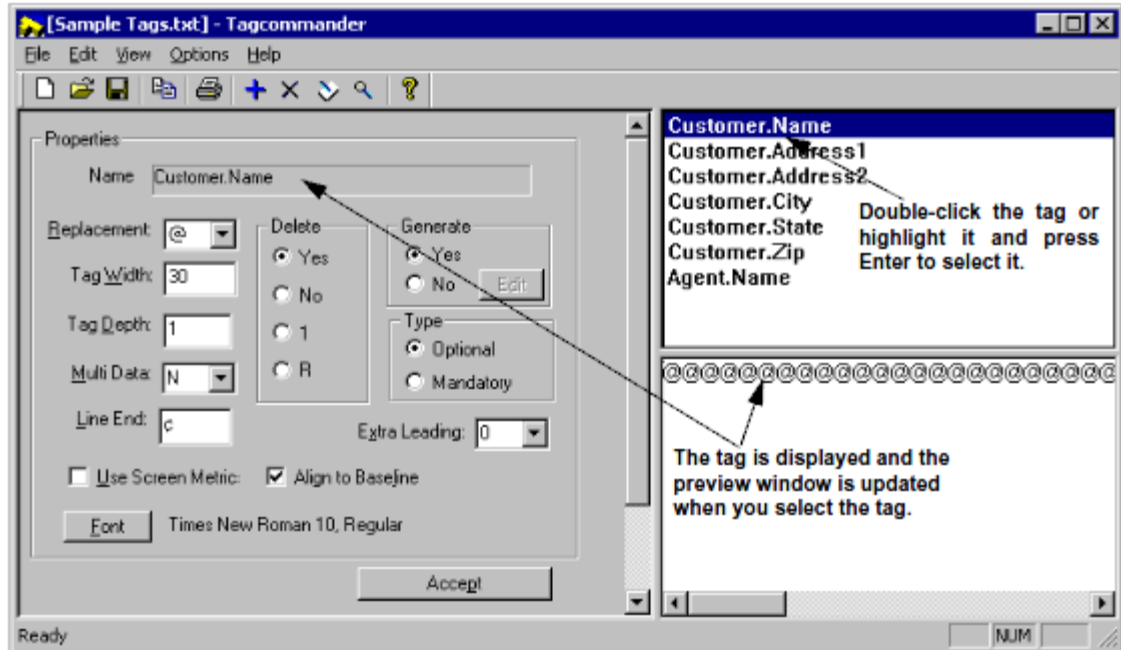
Target areas for inserting tags

3. Choose Start, then Programs, then Docucreate.
4. Click the Tagcommander icon.

- Choose a tag by double-clicking a tag in the list box.

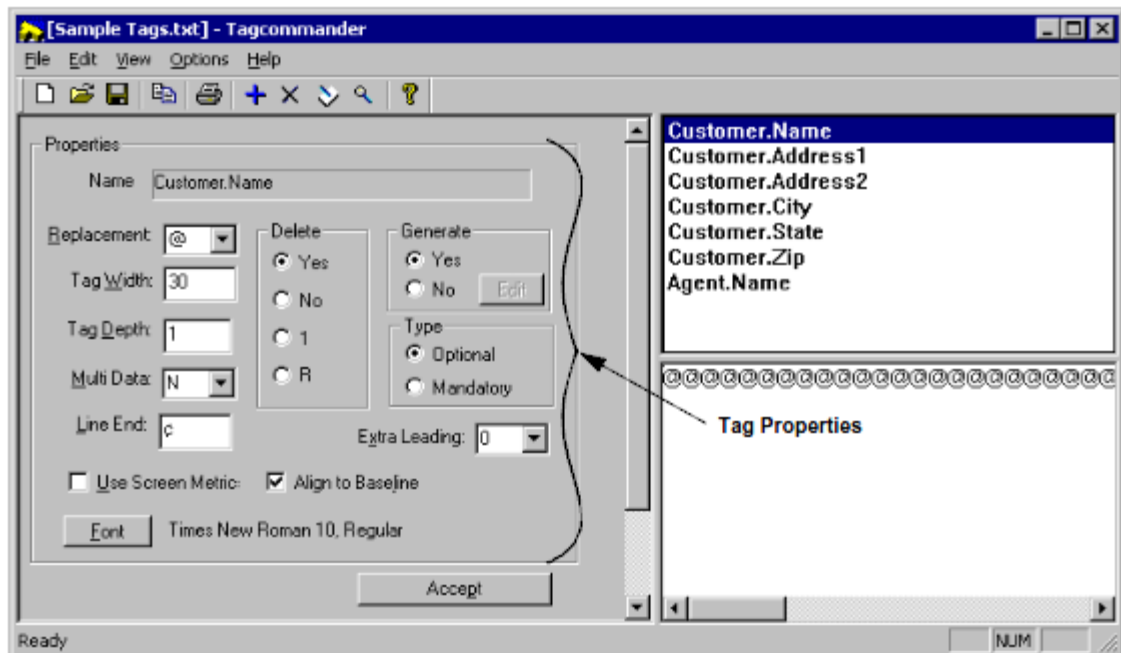
-or-

Highlight a tag and press ENTER. If necessary, you can create a tag.



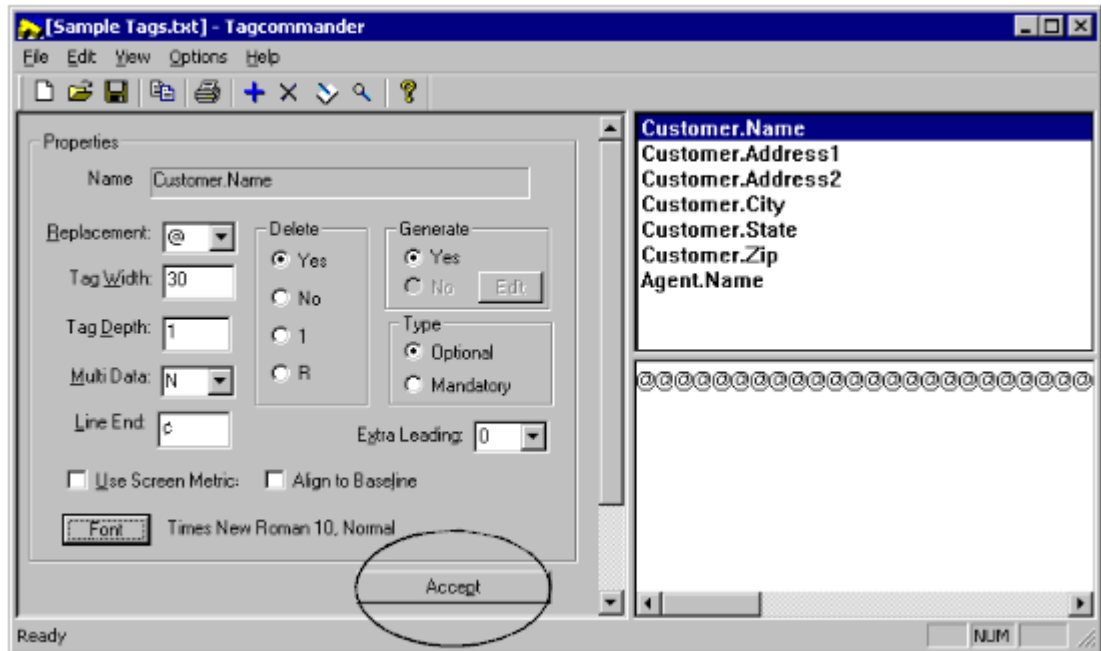
You'll know you've correctly selected the tag when its name displays in the Name field.

- Make any changes to the tag by selecting your preferences in the Properties portion of the screen (located on the right half of the main window).



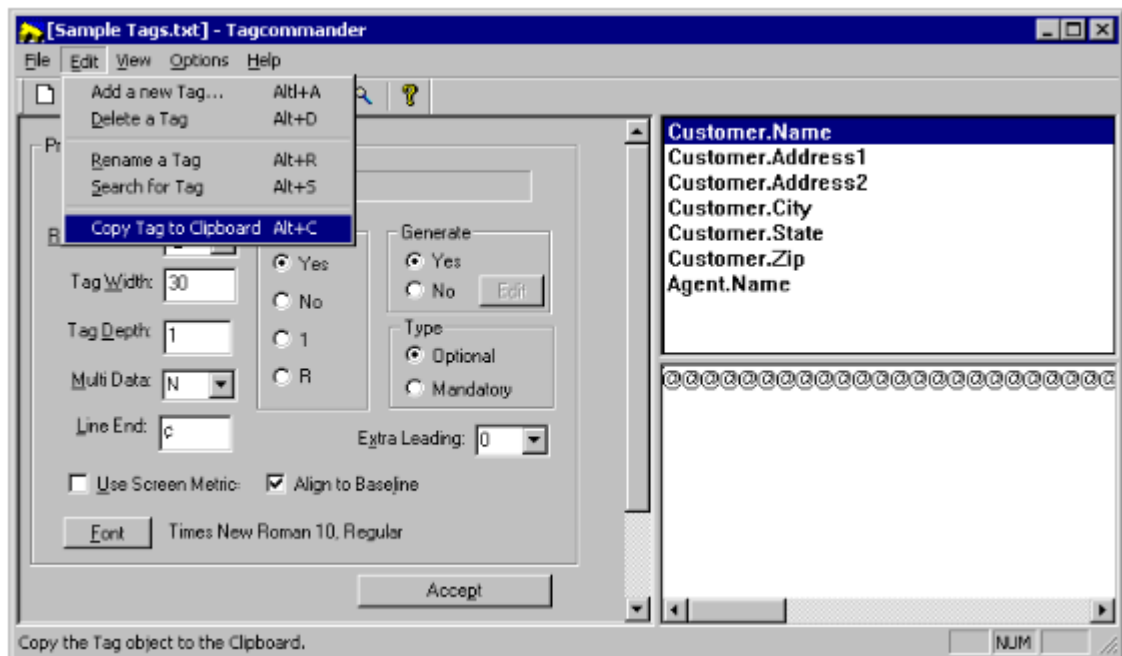
For instructions and short descriptions about tag formatting and display properties, read [To Change the Properties for a Tag](#) on page 38.

- Click Accept to apply your changes to the Properties.

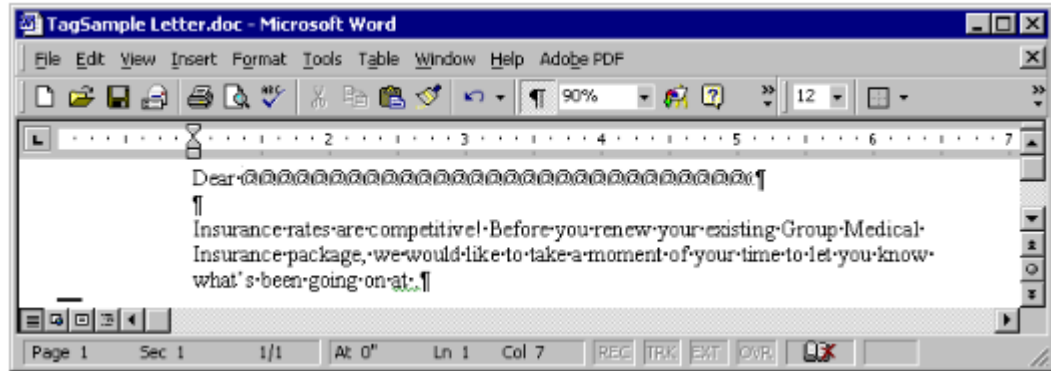


At this point, you can skip these last steps by dragging the tag from the preview box directly into your document.

- After reviewing the preview box to verify the format of the tag, choose Edit>Copy Tag to Clipboard to copy the tag to the Windows Clipboard.



9. Switch to your word processor. Make sure the cursor is still at the location where you want to insert the tag.
10. Choose Edit>Paste to insert a copy of the tag.



## Updating a Manually-inserted Tag

The application should allow you to move the tag within the document. If you want to make any changes to the tag, such as changing the name or the length, you'll need to perform the following steps.

### To Update a Pasted Tag

1. In the document, click the tag to select it.
2. Press DELETE.
3. Repeat the preceding procedure to paste in a new, updated tag.

## CHANGING TAG PROPERTIES

Tagcommander automatically supplies some default properties for each of the tags you add. If you need to change the properties for a tag, proceed with the following instructions.

### To Change the Properties for a Tag

1. Double-click the tag in the tag list box to select it.

-or-

Highlight a tag and press ENTER.

You'll know when you've correctly selected the tag because its name is displayed in the Name field in the Properties group.

2. Choose any of the properties and then the desired setting:

Option	Explanation
Replacement	Replacement characters are strings of characters which represent the approximate width and length of actual data. Tagcommander supplies you with the default characters @, #, !, and ". For more information, see Replacement on page 40.

Option	Explanation
Tag Width	You can edit the width (length) value for the current tag by clicking on the Width field. For more information, see <a href="#">Tag Width</a> .
Tag Depth	You can edit the depth (number of lines) value for the current tag by clicking on the Depth field. For more information, see <a href="#">Tag Depth</a> .
Multi Data	The Multi Data function controls the number of line feeds between the lines of variable data. For more information, see <a href="#">Multi Data</a> .
Line End	The Line End is mostly encountered in block tags and it acts as a delimiter, or separator, between lines of variable data. You can use the keyboard keys to enter your Line End selection. However, you shouldn't use a common character, such as a letter of the alphabet, as your Line End. For more information, see <a href="#">Line End</a> .
Delete	You can indicate whether Documaker fp should delete the tag value after it's used. When you create a tag that serves multiple purposes, you can direct Documaker fp to re-use the same tag for different values. For more information, see <a href="#">Delete</a> .
Generate	You can indicate whether Tagcommander should automatically supply replacement characters based on the tag's width and depth. For more information, see <a href="#">Generate</a> .
Type	You can indicate whether supplying data for the tag is optional or mandatory. For more information, see <a href="#">Type</a> .
Extra Leading	Your composition system may insert the tag at a position that isn't level with the adjacent text. If this happens, use an Extra Leading value to shift the vertical position of the replacement characters. For more information, see <a href="#">Extra Leading</a> .
Use Screen Metric	Indicates whether Tagcommander uses font metrics from Windows or device-specific PFMs to determine font characteristics. For more information, see <a href="#">Use Screen Metric</a> .
Align To Baseline	This setting adjusts the height of an embedded tag to align with the baseline of the surrounding text. For more information, see <a href="#">Align to Baseline</a> .
Font	Click Font to display a dialog box of fonts and choose the font for the tag. For more information, see <a href="#">Font</a> .
Accept	Accept instructs Tagcommander to update the tag list and refresh the preview based upon current properties. For more information, see <a href="#">Accept</a> .
Update	Update displays when you're embedding a tag directly into your composition system. For more information, see <a href="#">Update (Embed only)</a> .
Cancel	Cancel displays when you're embedding a tag directly into your composition system. For more information, see <a href="#">Cancel (Embed only)</a> .
Tag List	The tag list displays the names of all tags in the current file. For more information, see <a href="#">Tag List</a> .
Tag Preview	The preview displays the replacement characters for the given width, depth, and font properties. For more information, see <a href="#">Tag Preview</a> .

3. Click **Accept** to apply the settings you made to the tag list and update the preview.
4. Repeat the preceding steps for all your tags.

## Replacement

The replacement characters are strings of characters which represent the approximate width and depth of actual data. Tagcommander automatically cycles through the four default replacement characters. You can edit the replacement character at any time.

### To Select the Replacement Character

- Choose a replacement character from the available list by clicking on the drop-down arrow beside the list.

-or-

Type your own replacement character.

Tagcommander displays a list of default replacement characters ?, #, !, and " from which you can make your choice or enter your own replacement character.

---

**CAUTION!** If you choose to enter your own replacement character, you should NOT choose a common letter, numeral, or symbol, such as A-Z or 0-9. In other words, if you choose the percent (%) symbol as your replacement character, for example, Documaker fp would supply a piece of data whenever it encounters that symbol.

---

## Tag Width

You can edit the width (length) value for the current tag by clicking on the Width field.

If you don't specify a tag width when you're setting up a tag, Tagcommander uses a default value of 1. Whichever width setting you choose, it should be long enough to accommodate the longest instance of that variable. For example, you might choose a width of 30 to accommodate lengthy names.

### To Set the Tag Width

- Use the keyboard or number pad keys to enter your selection.

## Tag Depth

You can edit the depth (number of lines) value for the current tag by clicking on the Depth field.

If you don't specify a tag depth when you're setting up a tag, Tagcommander uses a default value of 1. If the variable data you're replacing exceeds a single line of text, you can increase the necessary number of lines of replacement characters.

Depending on your needs, you can set the depth to 2 for a two-line tag, set the depth to 3 for a three-line tag, and so on.

### To Set the Tag Depth

- Use the keyboard or number pad keys to enter your selection.



## Multi Data

You'll use the Multi Data setting mostly with block tags (tags containing more than one line of data), such as an address. The Multi Data function controls the number of line feeds between the lines of variable data.

### To Select the Number of Line Feeds Between Multiple Lines of Variable Data

1. Choose a Multi Data setting from the available list by clicking on the drop-down arrow beside the list box. Tagcommander displays a list of multi data settings from which you can make your choice.

Option	Result
N	Documaker fp only chooses one data item.
0	no line feeds between data items
1	single-spaced lines between data items
2-9	double-spaced lines, and so on through 9.

2. Select the desired Multi Data setting.

## Line End

The Line End character is mostly encountered in block tags, and it acts as a delimiter, or separator, between lines of variable data.

The input source data probably includes a particular delimiter: you should also enter the same delimiter in this field. In other words, this field identifies the character that will be encountered in the data the Documaker fp VDR creates. (You shouldn't use a common character, such as a letter of the alphabet, as your Line End character.)

---

**Tip** You should check with the person coding the Documaker fp VDR, or your Documaker fp team leader, for the necessary Line End character.

---

### To Set the Delimiter Character for Line Ends

1. Enter or edit the Line End character by clicking on the field.
2. Use the keyboard keys to enter your Line End character selection. If you need to enter a Line End character that isn't located on the standard keyboard, you can use ALT plus the number key pad to enter extended ASCII characters (e.g. the cent sign (¢) is entered by holding down ALT and entering the number string 0162).

## Delete

You can indicate whether Documaker fp should delete the tag value after it's used. When you create a tag that serves multiple purposes, you can direct Documaker fp to re-use the same tag for different values.

## To Specify the Delete Option

- Click the appropriate radio button to make your selection:

Option	Result
No	Keep the first occurrence of a particular data value. That same data value “flows through” to all other occurrences of that tag with the No setting (such as the customer name or policy number).
Yes	Include different data for the same tag such as a generic AMOUNT field for both the down-payment amount and the outstanding amount.
1	(Documaker fp only) DMGMERGE reverts to the first VRF tag occurrence that matches the name, inserts the data thus re-using the same value and does not delete the tag data.
R	(Documaker fp only) DMGMERGE reverts to the first VRF tag occurrence that matches the name, inserts the data thus re-using the same value and deletes the tag data.

## Generate

You can indicate whether Tagcommander should supply the replacement characters, based on width and depth of the tag.

## To Specify the Generation Option

- Click the appropriate radio button to make your selection:

Option	Result
Yes	Tagcommander generates replacement characters of the specified width and depth.
No	Tagcommander allows the user to type in special formatting characters, along with the replacement characters, such as slashes in a date field.

If your document includes tags with special requirements (such as a date field with slashes or a Social Security number with hyphens), for example, choose No and you'll be required to enter the format in the User Supplied Replacement Characters dialog box.

Tagcommander creates the tag exactly as it's displayed in this window.

Clicking Default displays the replacement text based on your initial input for the replacement character, tag width, and tag depth. This representation is useful when editing the format.

## Type

You can specify whether supplying data for this tag is Optional or Mandatory.

## To Specify the Tag Type

- Click the appropriate radio button to make your selection:

Option	Result
Mandatory	<p>If you indicate that entering data is mandatory, and no data is found during the Documaker fp merging process:</p> <p>The tag is filled with blanks</p> <p>You'll receive a Documaker fp error message</p> <p>The output is routed to a Documaker fp error print stack</p>
Optional	<p>If you indicate that entering data is optional, and no data is found during the Documaker fp merging process, the tag is filled with blanks and processing continues.</p>

## Extra Leading

Your composition system may insert the tag at a position that isn't level with the adjacent text. If this happens, experiment with Extra Leading values to shift the vertical position of the replacement characters.

On your monitor, the shifting may cause the lower portion of the replacement characters to disappear from view. If so, you can align the tops of the replacement characters to match the tops of the adjacent text. Complete replacement characters are printed, even though their lower portions may not be displayed on your monitor.

### To Select Extra Leading (Vertical Spacing) for Replacement Characters

- Double-click the tag.

-or-

Highlight the tag and press ENTER.

- Click the drop-down arrow next to the Extra Leading list box to adjust the leading value. Tagcommander displays a list of choices from which to make your selection. If necessary, you can enter negative numbers to raise the level of the replacement characters. For more information on adjusting your tags, refer to Working With Tag Files on page 52.

For example, the following illustrates the replacement character leading (change in baseline height) you would see with Extra Leading values of -9 points, 0 (none), and 9 points:

@@ Extra Leading =-6 points

@@ Extra Leading = 0 points

@@ Extra Leading = 6 points

## Use Screen Metric

This option determines whether Tagcommander uses font metrics from the Windows font list or device-specific PFMs to determine font characteristics such as point size, stroke weight, and character width.

### To Specify Font Metrics

- If you want to use Windows font metrics, enable (check) the option. The default is for Tagcommander to use device-specific PFMs.

## Align to Baseline

To eliminate the problem of uneven vertical-line spacing (leading) for a tag inserted in fixed text, use this option to adjust the height of the embedded tag so that its baseline aligns with the baseline of the surrounding fixed text.

Tagcommander decreases the height of the rectangle with handles that surrounds the tag by the amount of the descender portion of the font or the Extra Leading value, and moves the replacement characters to the top of the rectangle.

Use of this option might affect the point size of the font for the tag because it attempts to control baseline alignment and line spacing by decreasing the height of the frame around the tag.

For some fonts, it might not be possible to get both the correct point size and get the correct line spacing. In those cases, you might have to force the proper line spacing with options provided by the word processing program.

### To Specify Tag Alignment

- If you want Tagcommander to align the baseline of the tag with the adjacent text, enable (check) the option. The default is not to align the tag.

## Font

While you're editing tags in Tagcommander, you can choose the font with which you want the tag (and its subsequent variable data) printed. Tagcommander works with IBM AFP, Xerox Metacode, and Windows-based laser printers.

The current font name, point size, and other attributes are displayed to the right of the Font button. By clicking Font, you can display a font dialog box and choose a different font for the tag.

There are two font selection dialogs for Tagcommander: one for AFP and Metacode Printer Definitions and one for all others.

Before you start creating tags and specifying the fonts for those tags, you should decide which type of font metrics you want to use to determine the point size and other display and print characteristics of the font.

The tag image is created by using the font that is selected for it with these dialogs. Metacode and AFP users should use the PFMs pointing to device fonts that reside on your printer so the tag image placed in the document exactly matches the printer's output.

For details about the types of font metrics Tagcommander can use, read one or both of the following topics:

**For printing on this printer type    See:**

IBM AFP or Xerox Metacode	AFP and Metacode Printer Definitions on page 45
DCD and Windows	DCD and Windows Printer Definitions on page 45

### **AFP and Metacode Printer Definitions**

The AFP and Metacode Font selection dialog is entitled Available Fonts and displays all the viable PFMs identified in the current Printer Definition selected in Printcommander 6.0.

The dialog actually reads the physical device font from the disk as indicated by the PFM. If the physical PFM can't be located, the font isn't displayed.

The Printer Definition Font Section is read by Tagcommander and each PFM entry is searched for the physical PFM. When a PFM is found on disk, Tagcommander reads it and extracts the font metrics (Case 1).

With Font Sections that contain references to Font Matching tables, Tagcommander reads the table and searches for the PFM on disk; once again, Tagcommander extracts the metrics from the PFM (Case 2).

Printer Definitions that Generate PFMs don't point to physical PFMs, so none are required.

In this case, Tagcommander reads the Font Matching table, generates the PFMs, and then extracts the font metrics (Case 3).

If Tagcommander encounters a situation where font references point to non-existent fonts, a warning dialog box displays the first five expected fonts that are missing (only for Cases 1 and 2).

For instructions on selecting fonts for the tags, see To Specify the Font for a Tag on page 46.

### **DCD and Windows Printer Definitions**

---

**Note** If you choose a Oracle Compound Document (DCD) or Windows Printer Definition, the font dialog box displays a complete list of all the TrueType or Adobe fonts installed for your Windows environment. However, it does not use, nor does it display, any device fonts.

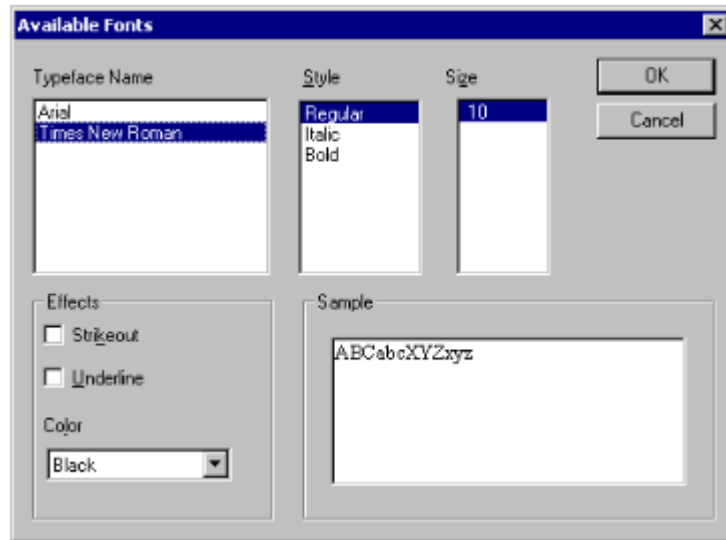
---

The other font selection dialog is simply entitled fonts. It's a standard dialog box provided by Windows for selecting fonts and, thus, requires no specialization.

For instructions on selecting font for the tags, see To Specify the Font for a Tag.

## To Specify the Font for a Tag

1. Click Font to display the current font settings for the tag. Tagcommander displays the Available Fonts dialog.




---

**Note** If you choose a DCD Printer Definition in Docucreate ws, Tagcommander displays the Windows Font dialog instead of the normal device-specific Available Fonts dialog.

---

2. Choose the appropriate font typeface, font style, and point size by clicking on the corresponding options in the respective list boxes.
3. In the Effects group box, select any special effects you want to apply to the tag.
4. In the Effects group box, choose the color of your tag by clicking on the Color drop-down arrow. Tagcommander displays the available choices of Black, Red, Green, and Blue.

The results of your choices are displayed in the Sample display area in the Sample group box.

5. Click OK to save your changes or Cancel to exit without saving.

## Accept

Accept instructs Tagcommander to update the tag list and refresh the preview based upon current properties.

## To Apply Property Changes

- Click Accept to apply the changes to the tag.

## Update (Embed only)

Update is only available when you are in interactive mode, where you're directly inserting a tag into your document.

### To Update and Insert a Tag

- Choose Update and Tagcommander inserts the tag into your document.

---

**Tip** If you've made changes to your tag properties and have yet to save them, you'll be prompted to save the changes when you choose Update. The Properties settings are saved only if you have chosen to save the tags in a TGA file format. For more information about tag file formats, see Tag File Format.

---

## Cancel (Embed only)

Cancel is only available when you're in interactive mode, where you're directly inserting a tag into your document.

### To Cancel Changes to a Tag

- Choose Cancel. Tagcommander shuts down and returns to your document without making any changes to the tag object.

## Tag List

Tagcommander displays a listing of the tags in the top portion of the right side of the window. The tags are listed either in the order you entered them or sorted by name, depending on your choice (see Sort Tags By Name on page 27).

### To View the Tag List

- Double-click a tag in the list box.

-or-

Highlight the tag and press ENTER.

Tagcommander displays the properties of and preview for the tag.

## Tag Preview

The preview box displays a preview of the tag. The length of the tag is represented by the selected replacement character; the width and depth of the tag are displayed in the respective fields to the left of the preview box.

---

**Tip** Pressing the CTRL key while clicking the right mouse button on the Preview pane displays the PFM metrics as text.

---

Let's use a client named Russell Johnson as a replacement-character example. The client's name is 15 characters in length, including the space. If you choose to use a pound sign (#) to reserve space for the characters in the name, you'll see 15 pound signs in the preview box when you select the Name tag.

## WORKING WITH THE TAG LIST

When you start new tag file or open an existing tag file, Tagcommander displays the contents of the file in the tag list box. Tagcommander provides several commands that let you operate on this list. You can:

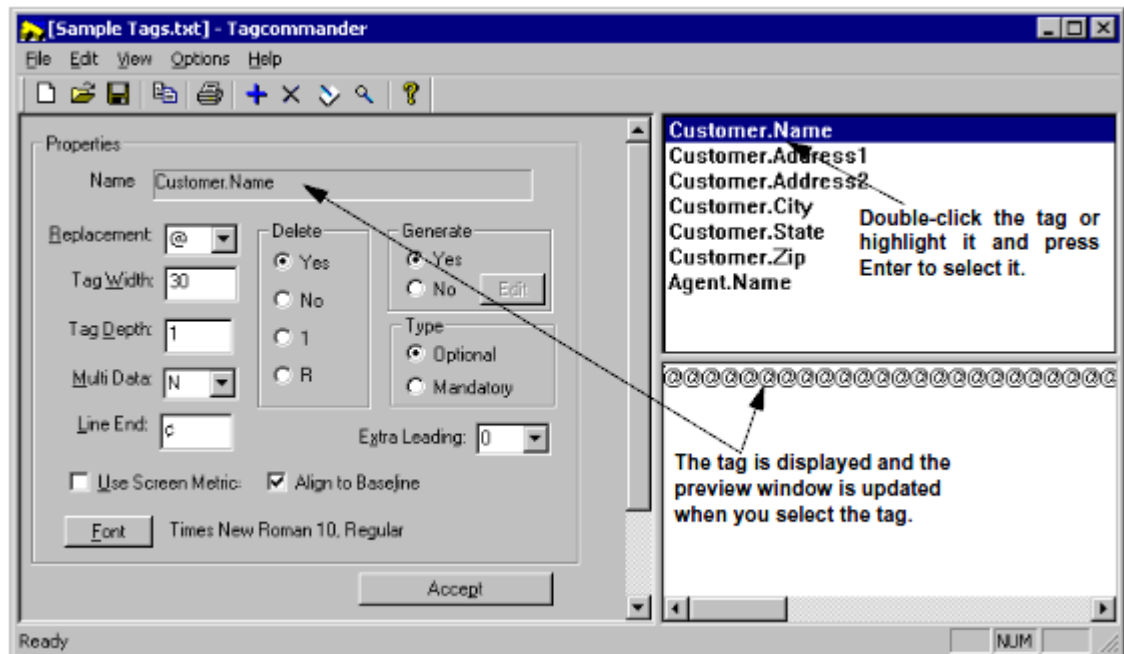
- View detailed information about a tag in the list. For instructions, read Viewing Detailed Tag Information.
- Add a tag to the list. For instructions, read Adding a Tag to a Tag File or Tag List.
- Delete a tag from the list. For instructions, read Deleting Tags.
- Rename a tag. For instructions, read Renaming a Tag.
- Search for a particular tag in the list. For instructions, read Searching for Tags.
- Sort the tags in the list. For instructions, read Sorting Tags.

### Viewing Detailed Tag Information

You can view detailed tag information of any tag, as that information is displayed in the Properties area of the Tagcommander dialog box for the currently-selected tag.

#### To View Detailed Information for a Tag

1. Use the mouse to highlight your selection.



2. Double-click the tag or highlight it and press Enter to select it.
3. The detailed information is shown in the Properties area of the Tagcommander dialog box.



## Adding a Tag to a Tag File or Tag List

When you need to insert tags in a document, you must first name each tag, and then add it to the tag list.

Occasionally, you might need to create one or more tags for data item(s) that have recently been added to your application, but not complete the process of inserting the tag(s). You can create a tag and add it to a tag file without having to initially insert the tag, or update a Rulebase Tag table, or define other tags that will eventually be included in a tag file.

### To Create and Save a Tag to a Tag List

1. Start Tagcommander.
2. Do one of the following, if required:

To	Do this
Store the tag in a new tag file	If [Untitled] isn't displayed in the title bar, choose File>New.
Store the tag in the tag file that was last used	If the name of the tag file last used isn't displayed in the title bar, select the File menu and choose the tag file from the list of previously-used files.
Store the tag in a previously-created tag file, other than the one that was last used.	Choose File>Open, and then select the file to load using the Open dialog.

3. Choose Edit>Add a Tag, and Tagcommander displays the Add a Tag dialog box.
4. Enter the name, width (number of characters in the field), and depth (number of lines-enter more than one line for a block tag, such as a insurance rate table), and then choose OK.

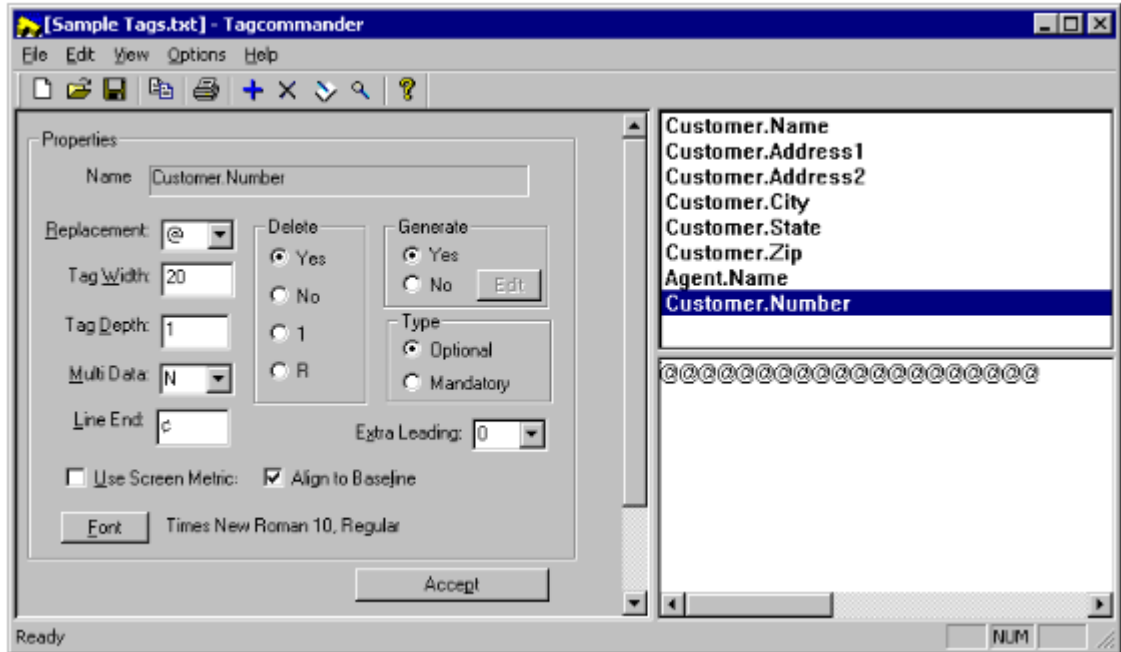
---

**Note** The maximum Name length is 30 characters.

---

After adding a tag to the tag list, Tagcommander displays a reminder dialog box and prompts you to add this tag to a Rulebase Tag table (if you have enabled the option).

- Click OK to return to the main Tagcommander screen.



The tag is displayed in the tag list box, its preview (based on the default replacement character settings) is displayed in the tag preview box, and its current Properties settings are displayed on the left side of the window.

- At this point, you'll probably need to adjust some of the Properties settings to suit your document requirements.

For details about changing Properties settings for a tag, see [Changing Tag Properties](#) on page 38.

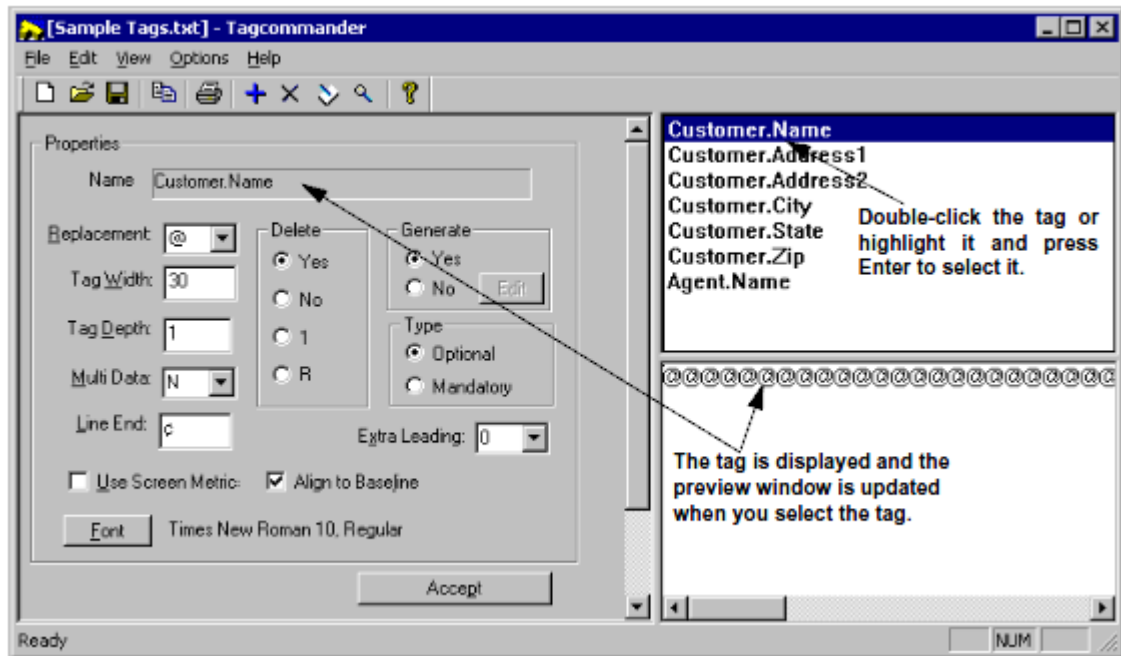
- To save the tag file, choose File>Save. If the tag file is new, specify a path and name for the file, and then choose OK.

## Deleting Tags

You can use the Delete a Tag command to delete the currently-selected tag from the list.

## To Delete a Tag

1. Use the mouse to highlight your selection.



2. Choose Edit>Delete a Tag and Tagcommander displays the Delete a Tag dialog box.
3. Click OK to delete the tag or Cancel to exit without deleting.

## Renaming a Tag

When a variable data item for one of your documents changes and you want to preserve the old tag but give it a more meaningful name, you can use the Edit>Rename a Tag command to give the old a new tag name.

### To Rename a Tag

1. In the tag list box, double-click to select the tag to rename.  
-or-  
Highlight the tag and press ENTER.
2. Choose Edit>Rename a Tag. The Rename a Tag dialog displays.
3. Type a new name for the tag, and then choose OK. Tagcommander updates the selected tag with the new name.

## Searching for Tags

You can use the Search command to search the tag list for a specific tag.

### To Search for a Tag

1. Choose Edit>Search for Tag and Tagcommander displays the Search for Tag dialog box.
2. Enter the tag you want to locate.
3. Click OK to begin the search or Cancel to exit without searching.
4. If the search is successful, the tag will be highlighted; if not, a Not Found dialog box displays telling you the tag was not found.

## Sorting Tags

You can use the Sort command to display the tags in alphabetical or entry order.

### To Sort Tags

- Choose Options>Sort Tags by name.

Tagcommander displays the tag list in either alphabetical order or the order in which they were entered.

## WORKING WITH TAG FILES

Generally, you should build a separate tag file for each application you'll process using Tagcommander. By doing so, you'll keep all your tag formats consistent and easier to find. Tagcommander provides several commands that let you operate on tag files. You can:

- create a tag file. For instructions, read [Creating a Tag File](#).
- open a tag file. For instructions, read [Opening a Tag File](#).
- print the contents of a tag file. For instructions, read [Printing a Tag File](#).

## Creating a Tag File

You can use the New command to clear the current tags list and open a new one.

### To Create a Tag File

1. Choose File>New and Tagcommander displays a screen with no tags in the list and [Untitled] in the title bar. If you've made changes since the last New or Open action, you're prompted to save the current list before it's cleared.
2. Begin entering tags. See [To Create and Save a Tag to a Tag List](#).

## Opening a Tag File

You can use the Open command to load a tag list from an existing tag file.

### To Open a Tag File

1. Choose File>Open and Tagcommander displays the Open dialog box.

If you've made changes since the last New or Open action, you're prompted to save the current list before it's cleared and tags are loaded from the file.

---

**Tip** If you want to use the basic tag file that contains Documaker fp reserved tags, you should open RSVTAGNM.TXT and immediately save it as RSVTAGNM.TGA.

---

2. Type the name of the desired tag file in the File Name text box or use the mouse to highlight your selection.
3. Click Open to open a tag file or Cancel to exit without opening.

## Printing a Tag File

You can use the Print command to print the tag list to the default printer.

### To Print a Tag File

- Choose File>Print and Tagcommander prints the tag file.

## DATA

## ASSEMBLING THE DOCUMENTS AND MERGING THE

After you've inserted tags into your documents and generated the print streams with Printcommander, see the Rulecommander documentation for instructions on combining the documents into a Document Package. Then, see the Documaker fp Server documentation for details about merging the data and printing the Document Package.

## MENU OPTIONS

Docuflex Studio comprises the following menus:

- File Menu
- Edit Menu on page 54
- View Menu on page 55
- Options Menu on page 55
- Help Menu on page 55

## File Menu

The File menu contains the tools necessary to open, save, and print the tag list(s).

Sub menu Item	Function
New	New clears the current tag list and opens a new one. If you've made changes since the last New or Open action, you're prompted to save the current list before it's cleared. For more information, see <a href="#">Creating a Tag File</a> .
Open	Open loads the tag list from an existing tag file. If you've made changes since the last New or Open action, you're prompted to save the current list before it's cleared and tags are loaded from the file. For more information, see <a href="#">Opening a Tag File</a> .
Save	Save saves the contents of the tag list to the file from which it was loaded. If the list is derived from more than one file, you're prompted to enter a new tag file name.
Save As	Save As is the same as Save, except you'll always be prompted for the tag file name.
Print	Print prints the tag list to the default printer. Before printing the tag list, you should choose <a href="#">Control Panel&gt;Printers</a> and verify the current printer. For more information, see <a href="#">Printing a Tag File</a> .
Exit	Exit exits Tagcommander and returns you to your application or Windows Desktop.

## Edit Menu

The Edit menu contains the functions whereby you can manipulate the individual tags.

Sub menu Item	Function
Add a Tag	Add a Tag prompts you to add a tag (including width and depth) that isn't in the tag list. For more information, see <a href="#">Adding a Tag to a Tag File or Tag List</a> .
Delete a Tag	Delete a Tag deletes the currently selected tag from the tag list. For more information, see <a href="#">Deleting Tags</a> .
Rename a Tag	Rename a Tag allows for the renaming of the selected tag from the tag list. For more information, see <a href="#">Renaming a Tag</a> .
Search for Tag	Search for Tag searches the tag list for a user-specified tag. For more information, see <a href="#">Searching for Tags</a> .
Copy Tag to Clipboard	Copy Tag to Clipboard copies the current tag object to the Windows Clipboard. You can then paste the object into other Windows applications. For more information, see <a href="#">Manually Inserting a Tag</a> .

## View Menu

The View menu lets you sort the tag list or display the tag detail information.

Sub menu Item	Function
Toolbar	Toolbar toggles a display of a toolbar that allows for doing the same functions that are displayed on the Menu Bar.
Status Bar	Status Bar toggles a display a bar under the Tagcommander dialog box that gives you information as the status of Tagcommander.
Settings	Settings displays an Environmental Settings dialog box listing highlights of the active Printer Definition.
Refresh	Refresh to update the currently displayed Tagcommander dialog box with new data.

## Options Menu

The Options menu lets you specify the following settings.

Sub menu Item	Function
Use a Text Data File	When checked, the Open command searches for tag files with a TXT extension. If this item isn't checked, Open searches for tag files with a TGA extension. For more information, see Use a Text Data File.
Always Open Last File Accessed	When checked and Tagcommander is started, it will open the last file that was accessed by Tagcommander, before Tagcommander was shut down. For more information, see Always Open Last File Accessed.
Prevent Tag Duplication	When checked, this selection will not allow you to create any new tag or rename a tag that already exists in the opened file. For more information, see Prevent Tag Duplication.
Provide Rulebase Reminders	When checked, this message opens a dialog that reminds you to update the Documaker fp Rulebase after each tag is added. For more information, see Provide Rulebase Reminder.
Sort Tags By Name	When checked, this options alphabetizes the tags. If left unchecked, the tags are listed in the order in which they were added. For more information, see Sort Tags By Name.

## Help Menu

The Help menu contains helpful hints about the use and maintenance of Tagcommander.

### Tagcommander Help

Tagcommander provides extensive on-line help for its basic procedures, operations, and menu commands.

- To access help, use any of the following methods.

To	Perform this action
Navigate the help file with the Table of Contents	<ol style="list-style-type: none"> <li>1 Choose Help&gt;Tagcommander Help. Tagcommander displays its help window.</li> <li>2 Click the Contents tab in the panel on the left side.</li> <li>3 Use the mouse to expand the various topics in the table of contents.</li> <li>4 Select the desired topic and the contents is displayed in the panel on the right.</li> </ol>
Access and/or browse a comprehensive listing of index entries	<ol style="list-style-type: none"> <li>1 Choose Help&gt;Tagcommander Help. Tagcommander displays its help window.</li> <li>2 Click the Index tab in the panel on the left side.</li> <li>3 Type the keyword you want to find, and then choose the closest index entry.</li> </ol> <p>-or-</p> <p>Browse the list of index entries and select the one you want.</p> <ol style="list-style-type: none"> <li>4 Click Display and the contents is displayed in the panel on the right.</li> </ol>
Use the help Search feature to directly access a help topic	<ol style="list-style-type: none"> <li>1 Choose Help&gt;Tagcommander Help. Tagcommander displays its help window.</li> <li>2 Click the Search tab in the panel on the left side.</li> <li>3 Type a search keyword for which you want help, and then choose List Topics. Related help topics display in the lower list box.</li> <li>4 Choose the help topic you want to view, and then choose Display. Tagcommander displays help for the topic you chose.</li> </ol>

## About

- Choose Help>About Tagcommander to get the version number, product type, and copyright date for your current version of Tagcommander.



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## Chapter 4

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# Using Docugraph Charts

## OVERVIEW

Docugraph, a productivity tool, inserts business graphics as charts. Docugraph charts include a full range of business applications, such as pie, bar, stacked bar, line, histogram, and others. Docugraph dynamically generates two- and three-dimensional charts that can be printed on Windows- and OS/2-compatible desktop printers, and highspeed Xerox Metacode and IBM Advanced Function Presentation (AFP) laser printers.

Docugraph is a powerful tool that can incorporate charts, generated from your variable data, into new or existing documents. Docugraph also improves the informational display of any business document that requires a visual representation of statistical or numerical data, such as customer statements, bills, and portfolios. Among other features, Docugraph:

- converts your variable data into charts “on-the-fly”
- incorporates and prints charts to your high-speed Xerox and IBM laser printers
- integrates seamlessly with your Documaker fp applications
- integrates charts into your own applications

Docugraph also provides real-time charting: Both the X-axis and Y-axis support manual or automatic scaling for positive and negative data. Within a chart, you can specify chart text such as titles, footnotes, margins, and data legends. You can control font sizing or allow fonts to re-size automatically in the chart areas.

With Documaker fp, the flagship product used by hundreds of companies worldwide for document assembly, the implementation of Docugraph is extremely easy. Using Docucreate ws and Tagcommander/DGSD, Documaker fp users simply add Docugraph Space Definition (DGSD) tags that, during processing, will call Docugraph fp to generate and merge the selected graphs into the document being printed.

## COMPATIBILITY WITH ORACLE TAGS

You must have a Oracle Merge Engine to process tags created by and inserted with Oracle products. For a complete listing of the necessary Merge Engines, see Types of Oracle Tags and Tag Processing Limitations on page 16.

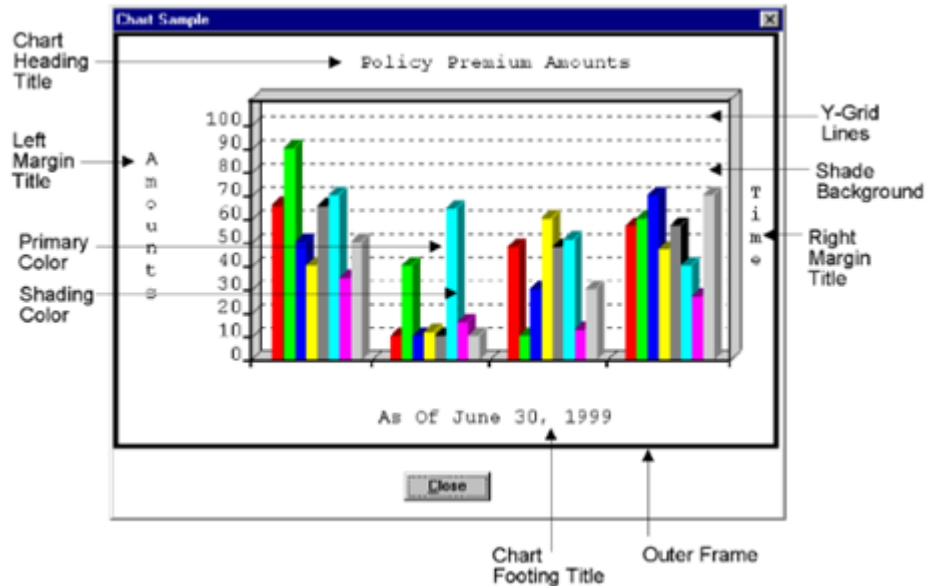
## PROGRAM COMPONENTS

**Tagcommander/DGSD** contains an extended set of functions. These functions specify the parameters necessary to define charts to be included in your documents. The **Logical Color Definition** application facilitates the set up and storage of logical device colors.

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## CHARTING CONVENTIONS

At any time during the set up of a chart, you can view a sample of the chart by clicking **Sample** in the Tagcommander/DGSD window.



## TAGCOMMANDER/DGSD

You can use Tagcommander/DGSD to define various parameters of the DGSD tag, which you will then insert in your document. These parameters control the appearance and size of the chart. For more information, see *Inserting a Tag as an Embedded Object* on page 29.

### Starting Tagcommander DGSD

After you've installed Tagcommander on your system, you can launch its applications from the **Start>Programs** sub-menu.

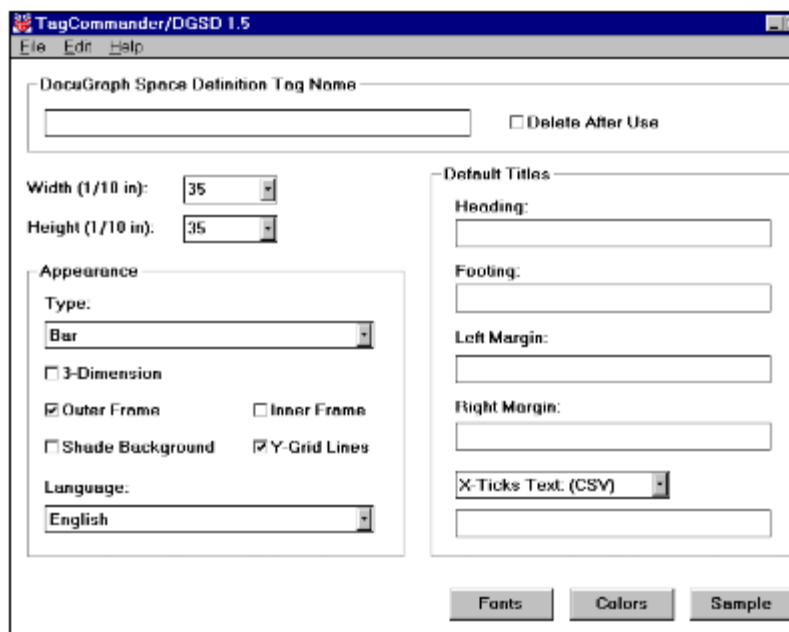
#### To Start Tagcommander DGSD

1. Select **Start>Programs** and Windows displays the Docucreate folder.
2. Click the **Docucreate DGSD** icon:

For more information about Logical Color Definition, see *Starting Logical Color Definition*.

---

Tagcommander DGSD displays its main window.



## Ending Tagcommander DGSD

You can use the Exit command to close Tagcommander DGSD and return to the Windows Desktop.

### To End Tagcommander DGSD

- Select **File>Exit**.

-or-

Click **Close**.

Tagcommander DGSD closes and returns control to the Windows Desktop.

## Inserting DGSD Tags

When you reach the location in your document where you want to include a chart, click **Insert>Object>DGSD Tag** and Tagcommander/DGSD displays its main window.

### To Insert DGSD Tags

1. Position the cursor at the place in your document where you want to insert the chart tag.
2. Click **Insert>Object** from the main word processor menu, then select **DGSD Tag** from the Object Type list box. This action automatically invokes Tagcommander/DGSD.

3. Use the following table for information about defining the chart parameters.

Field	Explanation
Docugraph Space Definition Tag Name	Enter the name of the DGSD tag. This name should correspond with the tag in the Documaker fp VRF that contains the actual data for the chart.
Delete After Use	You can indicate whether Documaker fp should delete the tag value after it's used. When you create a tag that serves multiple purposes, you can direct Documaker fp to re-use the same tag for different values. Click the check box for <b>Yes</b> ; leave it blank for <b>No</b> .
No	No keeps the first occurrence of a particular data value. That same data value "flows through" to all other occurrences of that tag with the <b>No</b> setting.
Yes	Yes includes different data for each successive tag.
Width	Use the selection box to choose the width of the space reserved for printing the chart. The width is expressed in increments of 1/10th of an inch, from 1 to 110 (1/10th of an inch to 11 inches).
Height	Use the selection box to choose the height of the space reserved for printing the chart. The height is expressed in increments of 1/10th of an inch, from 1 to 110 (1/10th of an inch to 11 inches).
Type	Click the check box to display your chart in three dimensions. On most charts, you have a choice between two dimensions and three; however, some charts are only 2D and others are only 3D. For an illustration and explanation of the following parameters, see <i>Charting Conventions</i> on page 58.
Outer Frame	Click the check box to display a frame around the outer perimeter of the chart.
Inner Frame	Click the check box to create a frame out of the X- and Y-axes.
Shade Background	Click the check box to shade the background of the chart.
Y-Grid Line	Click the check box to display Y-axis (horizontal) grid lines.
Language	Click the drop-down arrow to choose the language in which you'd like to display certain labels on the chart. The areas affected by the Language selection include the X-Tick labels (e.g., Months and Days) and numeric values on the Y-axis (e.g., £1.600,00 instead of \$1,600.00).
Heading	Enter the text to display as the chart heading.
Footing	Enter the text to display as the chart footing.
Left Margin	Enter the text to display as the left margin of the chart.
Right Margin	Enter the text to display as the right margin of the chart.

Field	Explanation
X-Ticks	<p>The X-Ticks option controls the labels at each data point along the X-axis, such as the months of the year or the days of the week. Click the drop-down arrow to choose between the following choices:</p> <ul style="list-style-type: none"> <li>• <b>X-Ticks Text (CSV):</b> If you choose this option, you can override the available labels and enter custom text labels by selecting this option. Enter your custom text in the corresponding text box. Your labels must be in comma Separated Value (CSV) format (e.g., Bob, Fred, Charles).</li> <li>• <b>X-Ticks Type:</b> If you choose this option, you should then click the accompanying drop-down arrow to display the available choices. After choosing your X-Ticks Type label, you can specify the starting point of the sequence. For example, if your choice is Months and you choose to <b>Start With:</b> 12, your X-Ticks labels will begin with December.</li> </ul>

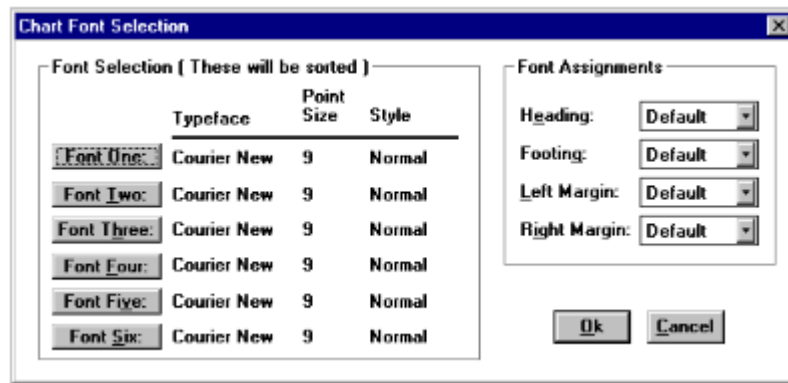
4. Click **Update** to insert the DGSD tag.

## Choosing Fonts

You can choose a range of fonts that Tagcommander/DGSD uses to display the various labels on your chart. You should choose a variety of font typefaces, point sizes, and styles, because Tagcommander/DGSD determines which font to use depending on the available space.

### To Choose Fonts

1. Click **Fonts** and Tagcommander/DGSD displays the Chart Font Selection dialog box.



As mentioned earlier, you should choose a variety of fonts. Any one of these fonts could be used for the chart titles, depending on the amount of available space. For example, if your chart consumes most of the amount of reserved space, a very small font will be used, if at all. On the other hand, if your chart doesn't use up much of the reserved space, a large font will suffice.

2. Click **Font One:** to edit the typeface, point size, or style. Tagcommander/DGSD displays the Available Converted Fonts dialog.
3. Choose the appropriate font typeface, font style, and point size by clicking on the corresponding options in the respective list boxes. As an alternative, you can simply choose the desired device font and the other attributes are automatically adjusted.

4. Click **OK** to save your changes or **Cancel** to exit without saving.
5. Repeat Steps 2 through 4 for the remaining fonts.
6. Click the drop-down arrow beside the Heading, Footing, Left Margin, and Right Margin chart titles to choose the exclusive font for those titles. The drawback to choosing an exclusive font is that the title might not display if there isn't enough room for that particular font.  
  
You can leave the titles set to the Default font and Tagcommander/DGSD chooses the most appropriate font based on the amount of available space.
7. Click **OK** to save your changes or **Cancel** to exit without saving.

### Choosing Chart Colors

Tagcommander/DGSD can display and print charts in color for full-color devices, such as the screen display, a color inkjet or color laser printer, or a plotter. For those charts that are destined for a highlight-color device, such as an IBM AFP or Xerox Metacode high-speed laser printer, the charts are represented in shades which are a combination of black and a highlight color.

Most charts offer both two-dimensional and three-dimensional views. When you view or print a two- or three-dimensional chart, Tagcommander/DGSD represents the foreground color of the group in the Primary Color. On a three-dimensional chart, the color which creates the shadow (or “depth”) is the Shading Color.



Tagcommander/DGSD includes default colors for each of eight color Groups. The following list contains the default colors for full color devices:

Group	Primary Color	Shading Color
1	Red	Dark Red
2	Green	Dark Green
3	Blue	Dark Blue
4	Yellow	Brown
5	Dark Gray	Black
6	Cyan	Dark Cyan
7	Pink	Dark Pink
8	Pale Gray	Dark Gray

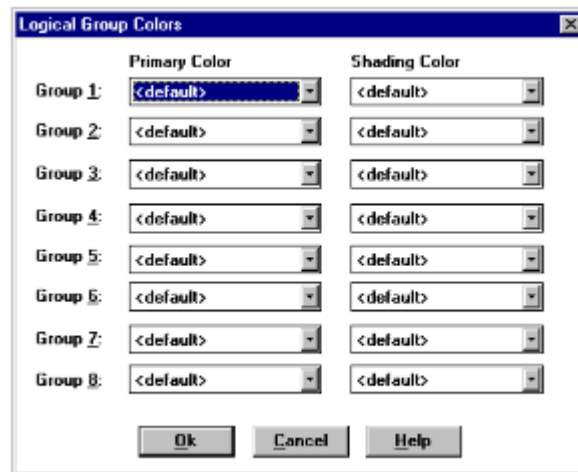
---

The following list contains the default colors for highlight color devices:

Group	Primary Color	Shading Color
1	Shade16	Black52
2	Shade09	Black80
3	Shade11	Black59
4	Shade10	Black63
5	Shade17	Black100
6	Shade12	Black47
7	Shade06	Black84
8	Shade23	Shade17

### To Choose Chart Colors

1. Click **Colors** and Tagcommander/DGSD displays the Logical Group Colors dialog box.



2. Click the drop-down arrow next to the particular Group to choose the color for that Group.

By not choosing a specific color, your output is displayed and printed in the default color. For more information on the default colors for full color and highlight color devices, see Choosing Chart Colors.

---

The Logical Group Color dialog displays the color choices for eight color Groups; however, Docugraph supports up to 12 Groups as can be supplied by the variable data. The Primary colors you choose for Groups 1 through 4 are re-used as the Shading Colors for Groups 9 through 12. Likewise, the Shading colors you choose for Groups 1 through 4 are re-used as the Primary Colors for Groups 9 through 12.

---

**IMPORTANT!** To choose colors other than the default Group colors, or for highlight-color devices, you must set up logical group colors through the Logical Color Definition routine (see Logical Color Definition on page 64).

---

3. Click **OK** to save your changes or **Cancel** to exit without saving.

## LOGICAL COLOR DEFINITION

Use the Logical Color Definition executable program that accompanies Tagcommander DGSD to create custom colors for your output device. Tagcommander DGSD contains default colors for each of the color Groups, but your enterprise will probably use preset or company colors for any business charts.

---

**Tip** After you've created logical group colors in the Logical Color Definition executable, they are available for use on the Logical Group Colors dialog in Tagcommander DGSD.

---

## Starting Logical Color Definition

After you've installed Tagcommander on your system, you can launch its applications from the **Start>Programs** sub-menu.

### To Start Logical Color Definition

Select **Start>Programs** sub-menu and Windows displays the Docucreate folder.

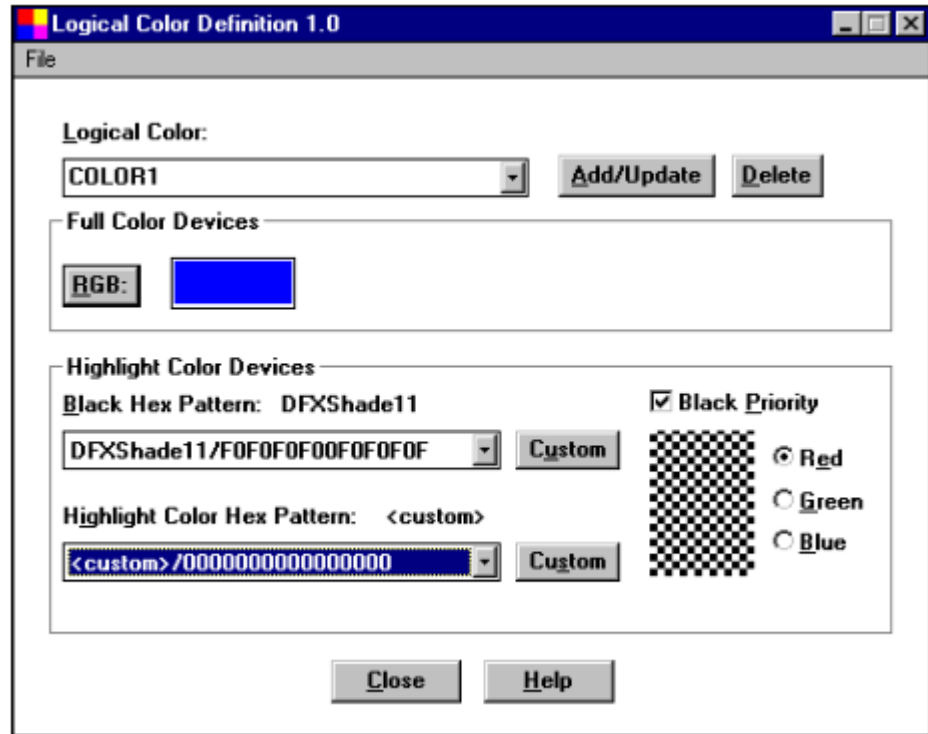
- Click the **DGSD Logical Color Definition** icon:

For more information about Tagcommander DGSD, see Starting Tagcommander DGSD on page 58.



---

Logical Color Definition displays its main window.



## Ending Logical Color Definition

You can use the Exit command to close Logical Color Definition and return to the Windows Desktop.

### To End Logical Color Definition

- Select **File>Exit**.

-or-

Click **Close**.

Logical Color Definition closes and returns control to the Windows Desktop.

### To Add Logical Colors (Full Color Printer)

1. Enter the name of the logical color you're creating (e.g., pink, orange, purple).
2. Click **RGB:** to choose the color for this logical color name and Tagcommander/DGSD displays the Color dialog box.

When you choose a color for Full Color Devices, the color displays during the screen display of a chart. The same color is also used for printing the chart to a color inkjet, color laser, or plotter printer.

3. Click the desired color. For more information about selecting colors, see the Microsoft Windows documentation.

- 
4. Click **OK** to save your changes or **Cancel** to exit without saving. Tagcommander/DGSD returns you to the Logical Color Definition dialog box.
  5. Select **Add>Update** to add this color to the list of available logical colors

### To Add Logical Colors (Highlight Color Printer)

1. Enter the name of the logical color you're creating. This name describes the percentages of highlight color and black present in the desired "color" (e.g., for a shade that is 44% color and 11% black, you could enter the name C44K11).
2. Click **RGB:** to choose the color for this logical color name and Tagcommander/DGSD displays the Color dialog box.

---

**Tip** Even when you're using a Highlight Color Device, you can still choose a Full Color Device color to use when sampling the chart on the screen display.

---

3. Click the desired color. For more information about selecting colors, see the Microsoft Windows documentation.
4. Click **OK** to save your changes or **Cancel** to exit without saving. Tagcommander/DGSD returns you to the Logical Color Definition dialog box.
5. Choose your Hex Pattern choices for your Highlight Color Device.

When you choose a color for Highlight Color Devices, you're actually selecting a shade composed of a mixture of black and a highlight color. For example, let's say that the highlight color in your printer is red. By mixing certain percentages of black and red, you can represent upwards of 5000 shades of red, including solid red and solid black.

Tagcommander/DGSD includes Xerox standard percentages of black (Black Hex Patterns) and the highlight color (Highlight Color Hex Pattern). These percentages range from 0% to 100% and are listed by the labels "DFXBlackxx" and "DFXColorxx". You can use these percentages to "mix" your particular shade, from 100% Black and 0% Color to 0% Black and 100% Color.

---

**Tip** The Black and Highlight Color Hex Patterns correspond to the samples listed in the Xerox "4850 Highlight Color Printer Palette" sheets. (Please see your Xerox printer specialist representative for more information.)

---

---

**Example** Using one of the palette sheets as an example, you can accurately re-create a particular shade by choosing the correct mix of black and the highlight color. If you choose a shade of green, for example, that is labeled **G48K12**, this shade contains 48% Green and 12% Black. You should choose a Black Hex Pattern of **DFXBlack12** and a Highlight Color Pattern of **DFXColor48**.

---

Field	Explanation
Black Hex Pattern	<p>Click the drop-down arrow to choose the desired percentage of Black to be included in the color shade. For a shade that contains 22% Black, for example, you should scroll through the list and choose <b>DFXBlack22</b>.</p> <p>After you choose a Black Hex Pattern, the area on the right displays your choice. The display isn't exactly what will print, because the screen resolution is approximately 96 dots per inch (DPI) and your printer's resolution is 300 DPI.</p>
Custom	<p>Click <b>CUSTOM</b> to see an enlarged view of your Hex Pattern. For more information about editing Hex Patterns, see To Customize Logical Colors on page 68.</p>
Highlight Color Hex Pattern	<p>Click the drop-down arrow to choose the desired percentage of the highlight color to be included in the color shade. For a shade that contains 17% color, for example, you should scroll through the list and choose <b>DFXColor17</b>.</p> <p>The Highlight Color Hex Patterns are purposely left generic because of the variety of colors that can be used for your highlight color.</p> <p>After you choose a Highlight Color Hex Pattern, the area on the right displays your choice. The display isn't exactly what will print, because the screen resolution is approximately 96 dots per inch (DPI) and your printer's resolution is 300 DPI.</p>
Custom	<p>Click <b>CUSTOM</b> to see an enlarged view of your Hex Pattern. For more information about editing Hex Patterns, see To Customize Logical Colors on page 68.</p>
Black Priority	<p>Click the check box to give black print priority over color print, or leave it unchecked to give color print priority over black print. To understand "black priority", you must realize that, with highlight color printing, there are two layers of print for every shade—black and the highlight color.</p> <p>The printer will only print one color per pel, so you must give either the black or the highlight color priority.</p>

### To Add Logical Colors (Black-and-White Printer)

1. Enter the name of the logical color you're creating. For black-and-white printers, this name describes the shading pattern you want to use.
2. Click **RGB:** to choose the color for this logical color name and Tagcommander/DGSD displays the Color dialog box.

---

**Tip** Even when you're using a black-and-white printer, you can still choose a Full Color Device color to use when sampling the chart on the screen display.

---

3. Click the desired color. For more information about selecting colors, see the Microsoft Windows documentation.
4. Click **OK** to save your changes or **Cancel** to exit without saving. Tagcommander/DGSD returns you to the Logical Color Definition dialog box.

- Choose the Hex Pattern choices for your black-and-white printer. You'll choose a black-and-white shading pattern for your printer.

Field	Explanation
Black Hex Pattern	Click the drop-down arrow to choose the desired:  Note: The DFXShade choices in the Black Hex Pattern list are Oracle-supplied gradient patterns.  After you choose a Black Hex Pattern, the area on the right displays your choice. The display isn't exactly what will print, because the screen resolution is approximately 96 dots per inch (DPI) and your printer's resolution is 300 DPI.
Custom	Click <b>CUSTOM</b> to see an enlarged view of your Hex Pattern. For more information about editing Hex Patterns, see To Customize Logical Colors on page 68.
Highlight Color Hex Pattern	For black-and-white printers, the Highlight Color Hex Pattern <i>option doesn't apply</i> . Click the drop-down arrow and choose the <b>&lt;Default&gt;</b> option.
Black Priority	For black-and-white printers, the Black Priority option doesn't apply.

### To Customize Logical Colors

- Click the drop-down arrow next to the Black Hex Pattern and Highlight Color Hex Pattern and choose <custom>/0000000000000000.
- Click **Custom** and Tagcommander/DGSD displays the Hex Pattern Editor dialog box.

---

**CAUTION!** Although you can edit the Hex Pattern for any of the established DFXBlack, DFXShade, and DFXColor patterns, you should choose the <custom> choice instead.

---

The Hex Pattern Editor dialog initially displays zeros at the top, indicating that no choices have been made. As you click individual boxes, however, the numbers change to indicate the hexadecimal pattern you're creating.

- Click the desired pixel boxes to create a shading pattern. The area on the right displays the pattern as you create it. The Hex Pattern Editor displays an 8 pixel by 8 pixel block on the left and a more accurate depiction on the right.
- Click **All** to highlight all boxes or **Clear** to clear the pattern and start creating a pattern again.
- Click **OK** to save your changes or **Cancel** to exit without saving.

### To Update Logical Colors

- Click the drop-down arrow next to the Logical Color text box and choose the color you want to edit (update).
- Make the desired changes to your logical color's settings.

- 
3. Select **Add>Update** to update this color/shading pattern in the list of available logical colors.

**To Delete Logical Colors**

1. Click the drop-down arrow next to the Logical Color text box and choose the color you want to delete.
2. Click **Delete** to delete this color/shading pattern from the list of available logical colors.

# Using Docuflex Tag Manager

## OVERVIEW

Docuflex Tag Manager is the Docucreate workstation software component that you use to manage and insert Docuflex Tags, temporary placeholders that derive their contents from Reserved Tags, Schema fields, or Rules within a Docuflex data project (\*.ddp) file.

By using Docuflex Tag Manager, Docucreate Workstation, and a word processor, you can create documents that directly access components included in a Docuflex Studio project, and then insert those documents into your project.

Docuflex Tag Manager works with Windows applications supporting object linking and embedding (OLE), a program interface that lets you easily update objects within an application.

## CREATING DOCUMENTS

Before you start inserting tags into documents, here's a quick primer on the general steps you take to compose, tag, and prepare a document for Docuflex processing.

### To Create a Document

1. Plan the layout and format of your document, including the names, lengths, and placement of the tags that hold the items of variable data to be merged.
2. Create the document in your word processing application.
3. Start Docuflex Tag Manager from *within* your word processor and insert tags from the Docuflex data project (\*.ddp) file as necessary. For more information, see [Inserting and Updating Tags](#) on page 78.
4. Print the document in DCD format using Printcommander (see the [Printcommander User Guide](#)).

Be sure to enable the Normalization function in Printcommander and choose Printcommander as the current printer in your composition system.

---

## INCLUDING DOCUMENTS IN DOCUFLEX STUDIO

Now that the documents are in a Oracle-compatible format, you can add them to your current Docuflex Studio data project (\*.ddp).

### To Include Documents in Docuflex Studio

1. Start Docuflex Studio and open the project into which you want to insert documents containing Docuflex Tags (see the *Docuflex User Guide*).
2. Add the document into your project as a Pre-Composed Document member (see the *Docuflex User Guide*).
3. Review the contents of the Docuflex Tag(s) by viewing the Additional Properties panel in the Source Pane (see the *Docuflex User Guide*).

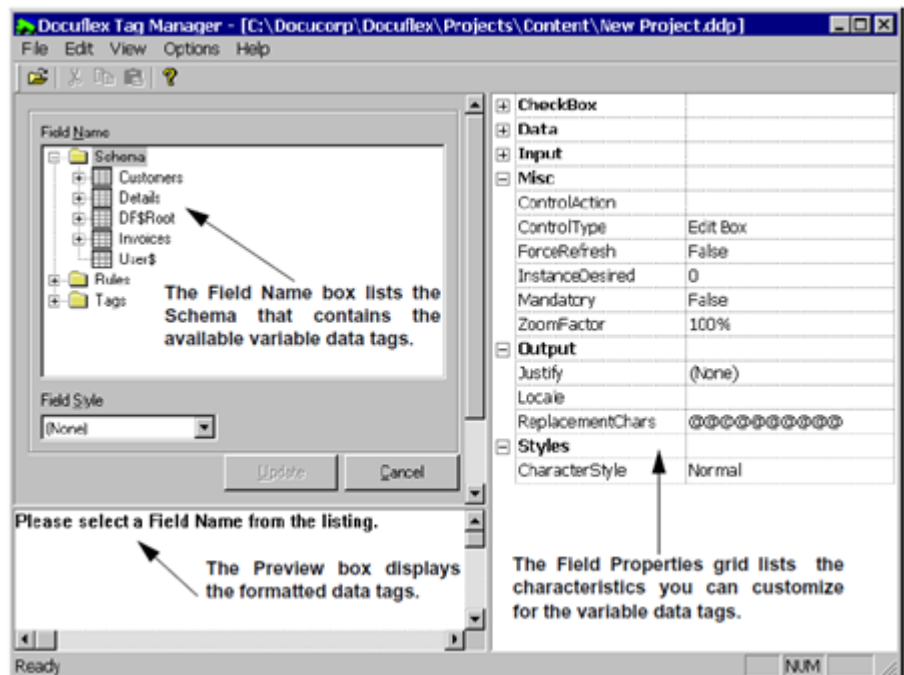
## GETTING STARTED WITH DOCUFLEX TAG MANAGER

After you've installed Docuflex Tag Manager on your system, you can launch it or its companion applications from the Programs sub-menu of the Windows taskbar.

### To Start Docuflex Tag Manager

1. Select **Start>Programs** and Windows displays the **Docucreate** folder.
2. Click the **Docuflex Tag Manager** icon:

Docuflex Tag Manager displays its main program window.



Because there are several tasks you can perform with Docuflex Tag Manager, this guide provides a separate topic for each task. To End Docuflex Tag Manager

- Select **File>Exit**.

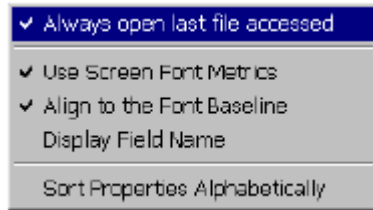
---

-or-

Click **Close** on the Docuflex Tag Manager window.

## CONFIGURING DOCUFLEX TAG MANAGER

This section addresses the global settings you can make to configure Docuflex Tag Manager to your working preferences.



These settings are located on the Options menu. You can enable an option by selecting it from the menu—this action placed a check mark next to the option. By selecting the option again, you remove the check mark and disable it.

### Always Open Last File Accessed

When you open Docuflex Tag Manager for the first time, **[Untitled]** displays in the title bar.

This option instructs Docuflex Tag Manager to open the last project file in use from a previous session. Docuflex Tag Manager searches for the previously-opened project file and automatically opens it, whether you choose the program icon or start it through a wordprocessing application. If Docuflex Tag Manager can't find the previous project file, you're prompted for the name of another one.

If you clear (uncheck) this option, you must open a project file each time you enter Docuflex Tag Manager.

### Use Screen Font Metrics

This option determines whether Docuflex Tag Manager uses font metrics from the Windows font list or device-specific PFMs to determine font characteristics such as point size, stroke weight, and character width.

If you don't want to use Windows font metrics, disable (uncheck) the option. The default is for Docuflex Tag Manager to use Windows fonts.

---

**Tip** If the Preview box displays the following message, you'll need to verify which font metrics you should use:

"The list of PFMs is empty. If your PrintDef does not reference PFMs then the screen metrics option should be used."

---



---

## Align to the Font Baseline

To eliminate the problem of uneven vertical-line spacing (leading) for a tag inserted in fixed text, use this option to adjust the height of the embedded tag so that its baseline aligns with the baseline of the surrounding fixed text.

Docuflex Tag Manager decreases the height of the rectangle that surrounds the tag by the amount of the descender portion of the font and moves the replacement characters to the top of the rectangle.

---

**WARNING!** Use of this option might affect the point size of the font for the tag because it attempts to control baseline alignment and line spacing by decreasing the height of the frame around the tag.

---

For some fonts, it might not be possible to get both the correct point size and line spacing. In those cases, you might have to force the proper line spacing with options provided by the word processing program.

## Display Field Name

This option determines whether Docuflex Tag Manager should display the field name instead of the replacement characters for the selected field, with some conditions:

- a **Rule** or **Tag**—the full name is displayed up to the number of replacement characters
- a **Schema** item—the column name is displayed up to the number of replacement characters.

---

**Example** If you enable this feature and the number of replacement characters you specify is 10, then the following results are encountered:

- a Rule called **CustomerRule** is displayed as “CustomerRu”
  - a Tag called **DCP.MEMBER.NAME** is displayed as “DCP.MEMBER”
  - a Schema item called **Customer.CityStateZip** is displayed as “CityStateZ”
- 

These conditions do *not* change the way the field is viewed in Docuflex Studio, only in Microsoft Word and Docuflex Tag Manager.

## Sort Properties Alphabetically

When you click anywhere on the Field Properties grid, on the right side of the main window, you can view the grid in organizational categories or alphabetically by property name. The default is for Docuflex Tag Manager to sort the list of field properties alphabetically.

---

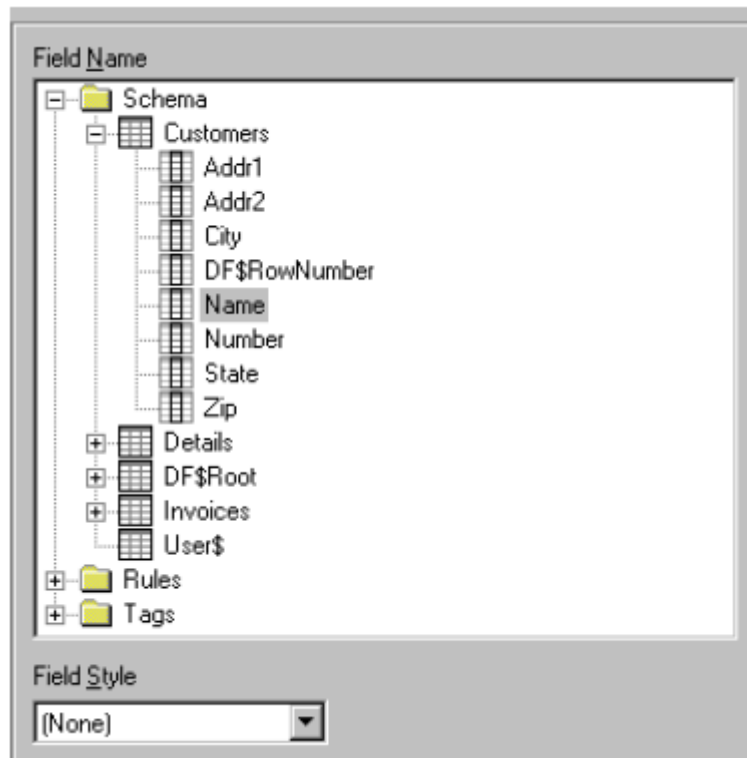
## Navigating the Main Window

The main Docuflex Tag Manager window is split into several panes, the explanation of which follows:

Option	Explanation
Field Name	The name of the schema field, business rule, or reserved tag that provides data for this tag. For more information, see Field Name.
Field Style	Predefined property attributes for a field; designed in a Docuflex Studio project. For more information, see Field Style.
Update	<b>Update</b> displays when you're embedding a tag directly into your composition system. For more information, see Update.
Cancel	<b>Cancel</b> displays when you're embedding a tag directly into your composition system. For more information, see Cancel.
Preview box	The preview displays the replacement characters formatted with the Character Style properties. For more information, see Tag Preview.
Field Properties grid	Individual property attributes that control formatting and content characteristics. This grid mirrors the one present in Docuflex Studio.

### Field Name

The tag you choose from this tree view box is contained in the Docuflex Studio data project (\*.ddp) file:



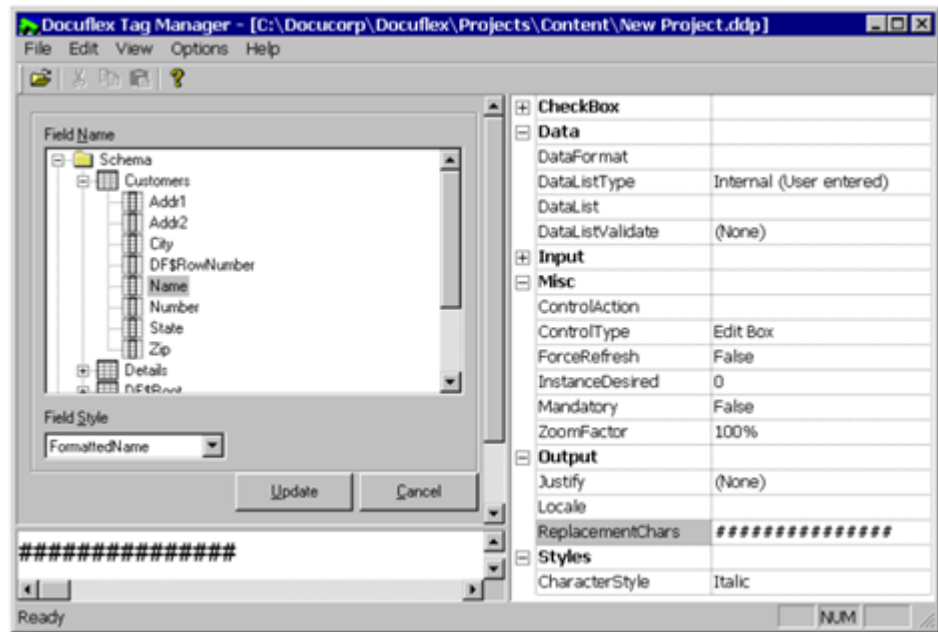
---

The Schema, Rules, and Tags represent the layout of the data file, processing rules, and reserved tag names, respectively.

### To Select a Field Name

1. Use the mouse to expand the category in which you want to select a tag.
2. After locating the tag, select it with the mouse.

If you select a Schema data field to which a Docuflex Field Style has been assigned, the Field Properties reflect these stored settings and the preview box displays a representation of the tag.



You can override any of the properties specified by the Field Style. For more information about assigning field styles to schema data fields, see the [Docuflex User Guide](#).

### Field Style

Field Styles are created in Docuflex Studio and specify such property characteristics as size, font, and formatting for variable data fields in a Docuflex Studio project.

### To Apply a Field Style

---

**Note** You can apply Field Styles to Rules and Reserved tags, as well as Schema data fields.

---

- In the Field Style drop-down list box, select a field style.

---

All property values specified by the Field Style are automatically updated; however, if the Field Style doesn't specify a value then the current property remains unchanged.

---

**Tip** If you make changes to a field that doesn't use a Field Style, and then you select a different field that uses a Field Style, Docuflex Tag Manager displays a message asking if you want to use the Field Style values.

---

### **To Change or Remove a Field Style**

- You can change the field style by selecting a different style.

---

**Note** If you decide to remove the field style, you'll receive a warning dialog.

---

### **Update**

Update is only available when you're in interactive mode—where you've accessed Docuflex Tag Manager via your word processing application and you're inserting a tag into your document.

#### **To Update and Insert a Tag**

- Click **Update** and Docuflex Tag Manager inserts the tag into your document.

### **Cancel**

Cancel is only available when you're in interactive mode, where you're directly inserting a tag into your document.

#### **To Cancel Changes to a Tag**

- Click **Cancel** and Docuflex Tag Manager shuts down without making any changes to the tag object.

### **Tag Preview**

The preview box displays a preview of the tag in the font and point size you've chosen. The length of the tag is represented by the selected replacement character; the number of replacement characters is displayed in the Length field (to the right of the preview box in the properties grid).

Let's use a client named Russell Johnson as a replacement character example. The client's name is 15 characters in length, including the space. If you choose to use a pound sign (#) to reserve space for the characters in the name, you'll see 15 pound signs in the preview box when you select the name tag.

## **OPENING A PROJECT FILE**

You can use the Open command to load a Docuflex Data Project (\*.ddp) file created by Docuflex Studio. Docuflex Tag Manager works exclusively with Docuflex Studio to create documents that include tags representing reserved tag names, data fields defined by the schema, and custom business processing rules.

---

## To Open a Project File

1. Select **File>Open** and Docuflex Tag Manager displays the Open dialog box.
2. Navigate to the folder containing your Docuflex projects.
3. Type the name of the desired project file in the File Name text box or use the mouse to highlight your selection.
4. Click **Open** to open the file or **Cancel** to exit without opening.

## INSERTING AND UPDATING TAGS

Docuflex Tag Manager lets you insert tags directly into a Windows-compatible word processing program.

---

**Note** Nearly all word processing programs support object linking and embedding (OLE). Throughout the manual, you'll encounter examples illustrating the steps necessary to insert and update tags (all steps are based on the Microsoft Word for Windows interface).

---

This section contains information about the operations of Docuflex Tag Manager. You'll find step-by-step instructions for inserting tags in your document, and performing other types of updates on tags.

### Inserting a Tag as an Embedded Object

All Windows applications supporting object linking and embedding (OLE) contain a menu item for inserting objects. The Insert option is usually found either on the main menu or as a sub menu item in the Edit menu. When you choose **Insert>Object**, the application displays a window containing a list of the objects you can insert. You can then choose to insert a tag (e.g., **Insert>Object>Docuflex Tag**).

---

**Tip** In order to properly insert tags, you should

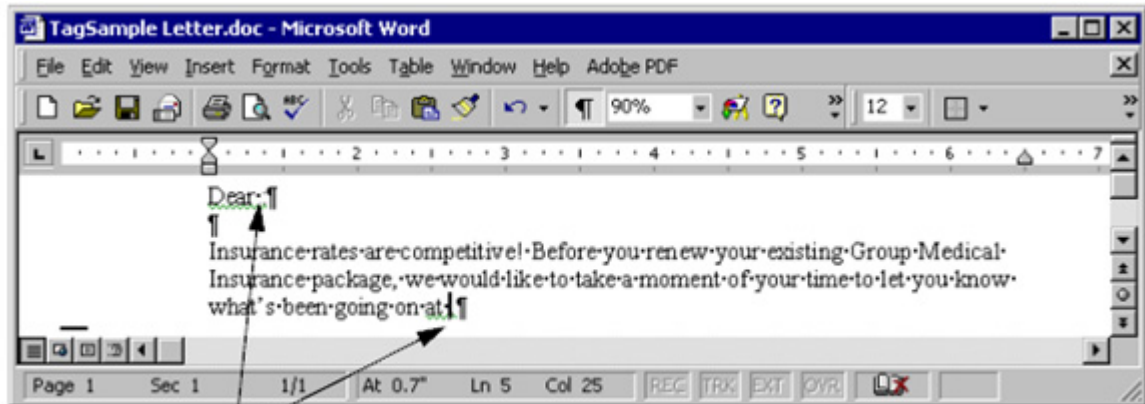
1. Go into your word processor, open the document, and begin entering the text.
2. Position your cursor at the place where you want to insert a tag.
3. Select **Insert>Object>Docuflex Tag** (from *within your word processor*).
4. Select the tag you want to insert from Docuflex Tag Manager's Field Name list.
5. Click **Update**.

---

### To Insert a Tag as an Embedded Object

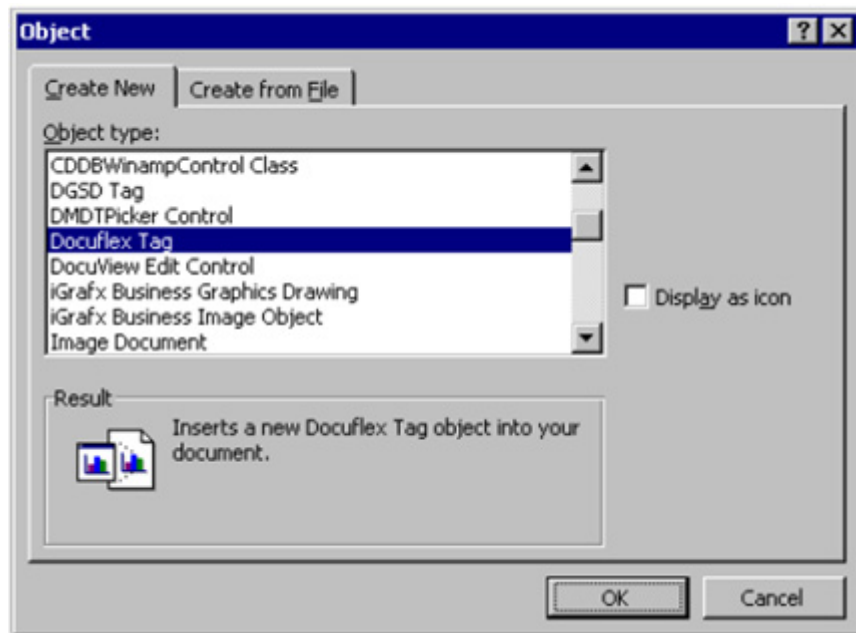
When you're inserting tags as embedded objects, use the following procedures for inserting and updating tags:

1. Position the cursor at the place in your document where you want to insert the tag.



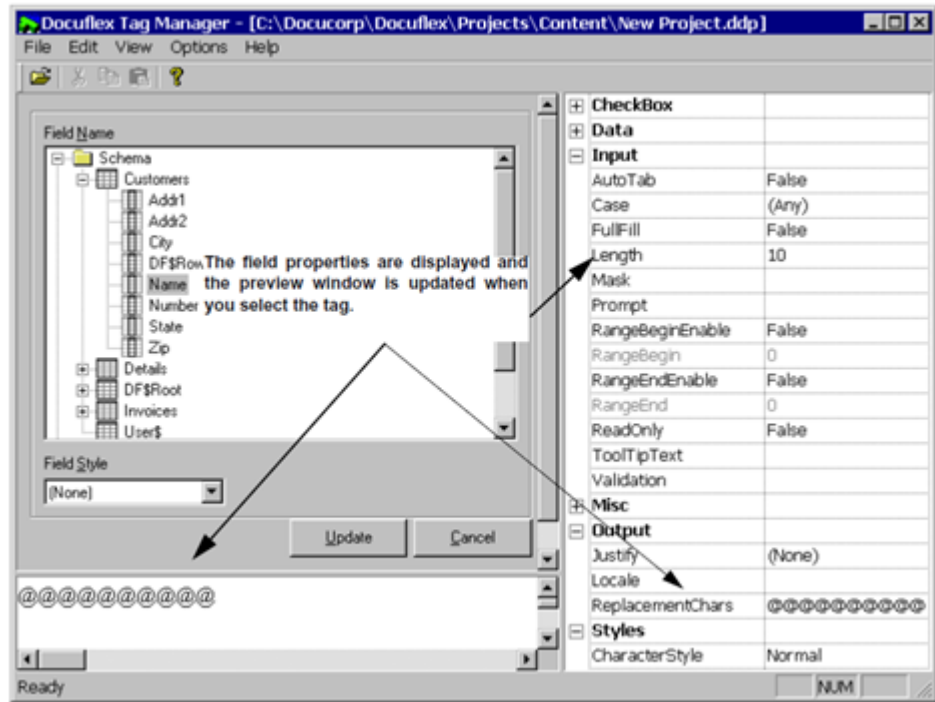
Target areas for inserting tags

2. Select **Insert>Object** from the main word processor menu, then select **Docuflex Tag** from the Object Type list box.



This action automatically invokes Docuflex Tag Manager.

- Choose a Docuflex Tag from the Field Name tree view box. If necessary, you can open a project file.



**Tip** If you select a Docuflex schema data field as the source for the Docuflex Tag, see Field Style on page 76.

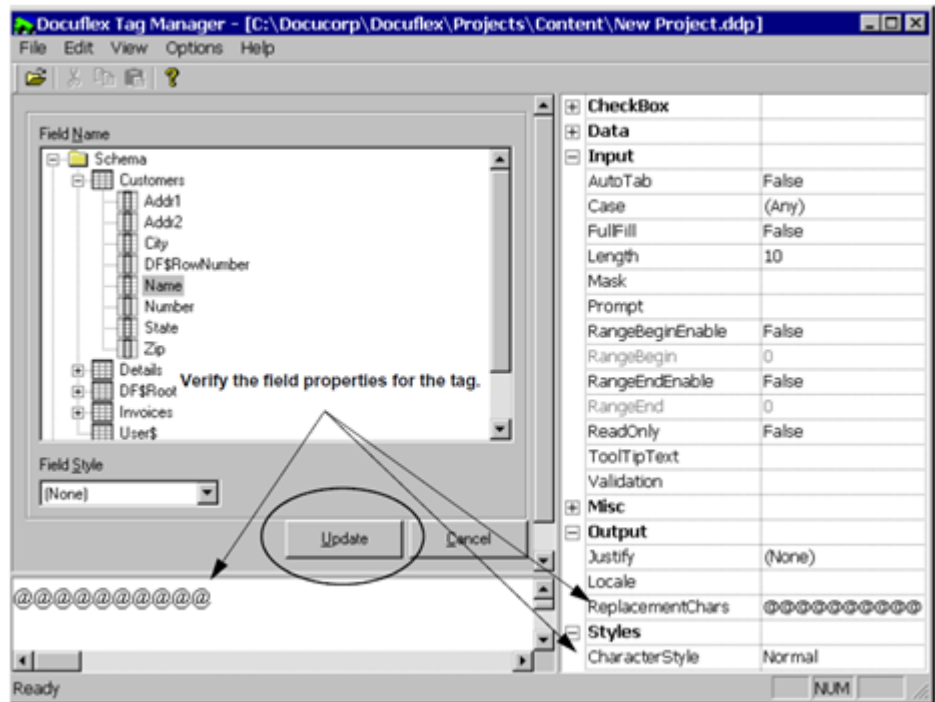
- Make any changes to the Field Properties of the tag by selecting and editing the properties in the grid.

**Tip** Docuflex Tag Manager automatically chooses the Normal Character Style and 10 @, “at” symbols, as the Replacement Characters for the tag. You can substitute a different replacement character, as long as all the characters are the same (i.e., you can’t mix replacement characters).

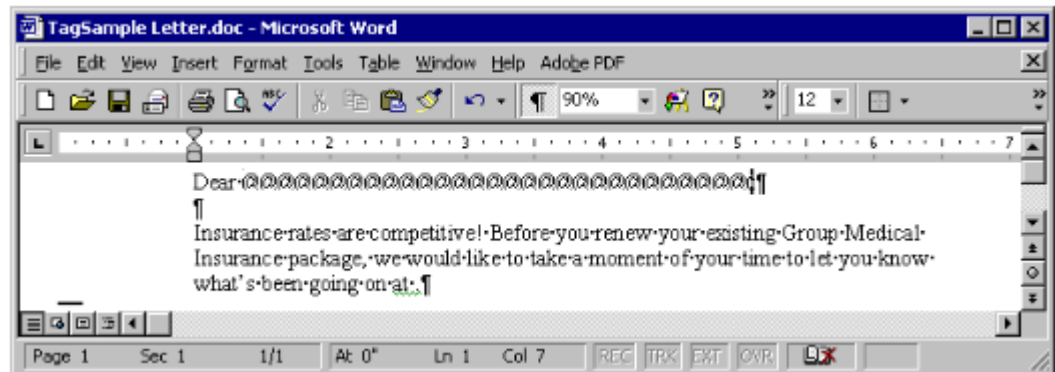
The Length and ReplacementChars fields update each other—if you change the number of symbols or type in a different Length, the corresponding field is updated.

For instructions and short descriptions about tag formatting and display properties, read To Change the Properties for a Tag.

- After reviewing the preview box to verify the format of the tag, click **Update** on the bottom of the Docuflex Tag Manager window to insert the tag into your document.



The updated tag is inserted at the current cursor position in the document (unless you double-clicked an existing tag to launch the preceding process).



## Updating an Embedded Tag

After you've inserted tags in your document, you might need to change some option about the tag. The steps are almost identical to inserting a tag.

### To Update an Embedded Tag

- Double-click the tag (replacement characters).

-or-



---

Highlight the tag and press **ENTER**.

Windows automatically executes Docuflex Tag Manager.

2. Make the necessary changes to any of the field properties for the tag.  
For instructions and short descriptions about tag formatting and display properties, read *To Change the Properties for a Tag* on page 82.
3. Click **Update** to update the tag.

## **Copying or Moving a Tag to Another Location**

You can use your word processing program's Cut or Copy commands to copy or move a tag just like you copy or move text or pictures.

### **To Copy or Move a Tag to Another Location**

1. In the document that contains the tag, click the tag to select it.
2. Click **Edit>Copy** or **Edit>Cut** to either copy or move the selected tag to the Windows Clipboard.
3. Click an insertion point at the location in document where you want to place the tag.
4. Click **Edit>Paste** to insert the tag.

## **Replacing a Tag**

You can easily replace one tag with another, with or without updating the properties for the tag.

### **To Replace a Tag**

1. Delete the current tag from the document. For instructions, read the next topic.
2. If you need to change the properties for the inserted tag, see *Updating an Embedded Tag*.

## **Deleting a Tag**

You can delete a tag just like you would delete a picture.

### **To Delete a Tag**

1. In the document, click the tag to select it.
2. Press **DELETE**.

## **Changing Tag Properties**

Docuflex Tag Manager automatically supplies some default properties for each of the tags you add. If you need to change the properties for a tag, proceed with the following instructions.

---

## To Change the Properties for a Tag

1. Select the desired tag from the Name drop-down list.
2. Choose a property in the grid and then type the desired setting. Repeat as necessary for all properties you want to change.

## MENU OPTIONS

Docuflex Tag Manager comprises the following menus:

- File Menu
- Edit Menu
- View Menu
- Options Menu
- Help Menu

### File Menu

The File menu contains the tools necessary to open a data project file or select from a list of previous projects.

Sub menu Item	Function
Open	Open lets you choose a current Docuflex data project (*.ddp) file. For more information, see Opening a Project File.
Exit	Exit closes Docuflex Tag Manager and returns you to your application or Windows Desktop.

### Edit Menu

The Edit menu contains the functions whereby you can manipulate the individual tags.

Sub menu Item	Function
Cut	Moves the text you've selected onto the Windows Clipboard.
Copy	Places a copy of text you've selected onto the Windows Clipboard.
Paste	Copies text from the Clipboard to a location where you have clicked an insertion point.
Reset	Reset cancels any value change to the currently-selected property. You can also right-click in the property grid and select <b>Reset</b> from the context menu.
Reset All	Reset All cancels any changes you've made in the property grid. You can also right-click in the property grid and select <b>Reset All</b> from the context menu.

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## View Menu

The View menu lets you sort the tag list or display the tag detail information.

Sub menu Item	Function
Toolbar	Toolbar toggles a display of a toolbar that allows for doing the same functions that are displayed on the Menu Bar.
Status Bar	Status Bar toggles a bar under the Docuflex Tag Manager dialog box that gives you information as the status of Docuflex Tag Manager.
Settings	Settings displays the Environment Settings dialog that contains information about the location of the Docuflex project and the printer specifications you're currently using.

## Options Menu

The Options menu lets you specify the following settings.

Sub menu Item	Function
Always Open Last File Accessed	When checked and Docuflex Tag Manager is started, it will open the last file that was accessed by Docuflex Tag Manager before it was shut down. For more information, see Always Open Last File Accessed.
Use Screen Font Metrics	Toggle this option to indicate whether Docuflex Tag Manager should use Windows fonts or device-specific PFMs to determine font characteristics. For more information, see Use Screen Font Metrics.
Align to the Font Baseline	Enable this option to adjust the height of an embedded tag to align with the baseline of the surrounding text. For more information, see Align to the Font Baseline.
Sort Properties Alphabetically	Toggle this option when you want to display the properties grid in alphabetical order by field property name. For more information, see Sort Properties Alphabetically.

## Help Menu

The Help menu contains helpful hints about the use and maintenance of Docuflex Tag Manager.

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## Docuflex Tag Manager Help

Docuflex Tag Manager provides extensive on-line help for its basic procedures, operations, and menu commands.

To	Perform this Action
Navigate the helpfile with the Table of Contents	<ol style="list-style-type: none"><li>1. Choose <b>Help&gt;Docuflex Tag Manager Help</b>. Docuflex Tag Manager displays its help window.</li><li>2. Click the <b>Contents</b> tab in the panel on the left side.</li><li>3. Use the mouse to expand the various topics in the table of contents.</li><li>4. Select the desired topic and the contents is displayed in the panel on the right.</li></ol>
Access and/or browse a comprehensive listing of index entries	<ol style="list-style-type: none"><li>1. Choose <b>Help&gt;Docuflex Tag Manager Help</b>. Docuflex Tag Manager displays its help window.</li><li>2. Click the <b>Index</b> tab in the panel on the left side.</li><li>3. Type the keyword you want to find, and then choose the closest index entry. -or- Browse the list of index entries and select the one you want.</li><li>4. Click <b>Display</b> and the contents is displayed in the panel on the right.</li></ol>
Use the help Search feature to directly access a help topic	<ol style="list-style-type: none"><li>1. Choose <b>Help&gt;Docuflex Tag Manager Help</b>. Docuflex Tag Manager displays its help window.</li><li>2. Click the <b>Search</b> tab in the panel on the left side.</li><li>3. Type a search keyword for which you want help, and then choose <b>List Topics</b>. Related help topics display in the lower list box.</li><li>4. Choose the help topic you want to view, and then choose <b>Display</b>. Docuflex Tag Manager displays help for the topic you chose</li></ol>

- To access help, use any of the following methods.

### About Docuflex Tag Manager

- Choose **Help>About Docuflex Tag Manager** to get the version number, product type, and copyright date for your current version of Docuflex Tag Manager.